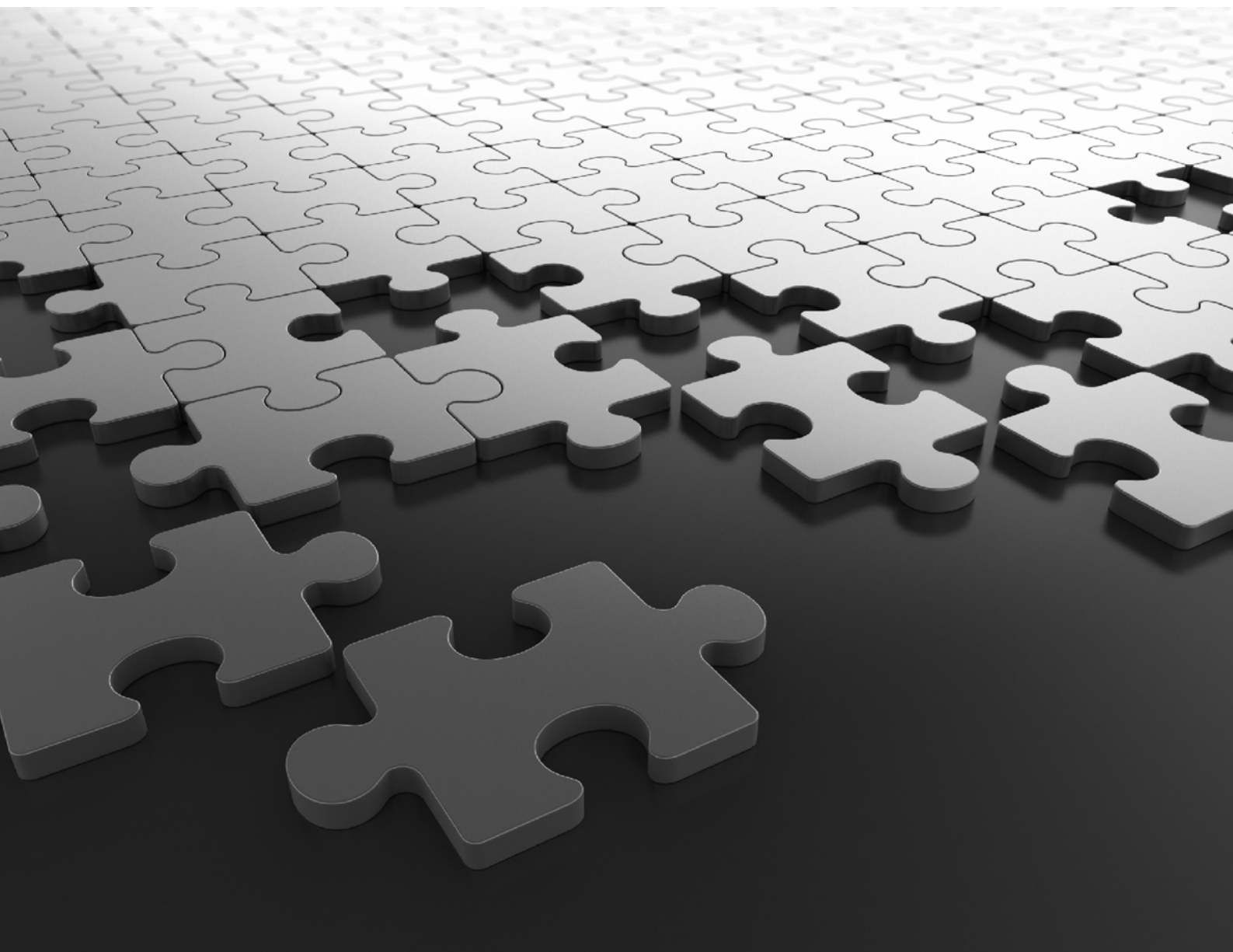


# **COSEC**

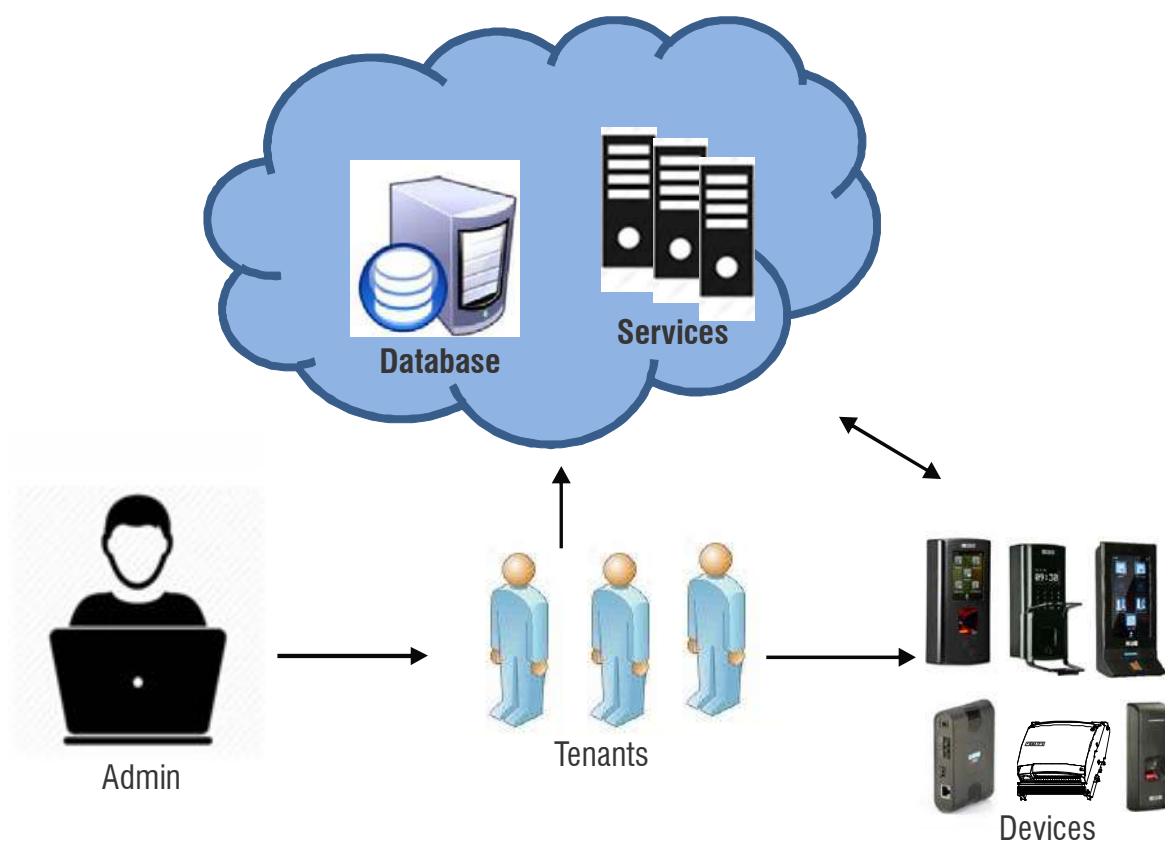
## **System Manual**



## COSEC CENTRA and COSEC VYOM

Right People in Right Place at Right Time

### System Manual





# Documentation Disclaimer

Matrix Comsec reserves the right to make changes in the design or components of the product as engineering and manufacturing may warrant. Specifications are subject to change without notice.

This is a general documentation for all variants of the product. The product may not support all the features and facilities described in the documentation.

Information in this documentation may change from time to time. Matrix Comsec reserves the right to revise information in this publication for any reason without prior notice. Matrix Comsec makes no warranties with respect to this documentation and disclaims any implied warranties. While every precaution has been taken in the preparation of this system manual, Matrix Comsec assumes no responsibility for errors or omissions. Neither is any liability assumed for damages resulting from the use of the information contained herein.

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## Warranty

For product registration and warranty related details visit us at:

<https://www.matrixcomsec.com/warranty/#access-control-time-attendance>

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*Version 37*

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## Welcome

Thank you for choosing the Matrix COSEC Multi-door Access Control System! We are sure you will be able to make optimum use of this feature rich, Integrated Access Control and Time and Attendance system. Please read this document carefully to get acquainted with the product before installing and operating it.

## About this System Manual

This is a common document providing detailed information and instructions for installing and configuring the **COSEC CENTRA** i.e. COSEC on Premise solution and **COSEC VYOM** i.e. COSEC on Cloud Solution. It includes COSEC Access Control System hardware components as well as the software installation and configuration of the COSEC application. This manual includes sufficient information to install and configure all the components of the Matrix COSEC Access Control System.

The COSEC application is a powerful web based multi-user Access Control cum Time and Attendance system that provides all the features required for medium to large size enterprises. A host of modules are available making the COSEC application a comprehensive, menu-driven software application.

This system manual is a common documentation for all variants of COSEC Controllers - PANEL, DOOR Controllers and their variants. This manual also includes sufficient information to install and interconnect the controllers on various network topologies. This manual must be read, and its contents clearly understood, before proceeding with any work relating to the COSEC Web Application.

## Intended Audience

**This System Manual is aimed at:**

- **System Engineers**, who will install, maintain and support the COSEC system. System Engineers are persons who are responsible for configuring the COSEC system to meet the requirements of the organization/users. It is assumed that they are experienced in installing an Access Control System and are familiar with the cabling of such systems. They are expected to be aware of how it works, and the various technical terms and functions associated with it. The SE must have undergone training in the installation and configuration of the COSEC system. No one, other than the System Engineer is permitted to make any alterations to the configuration of the COSEC system.
- **System Administrators**, who are persons who will monitor and control the COSEC system after installation. Generally, an employee of the IT/HR designation in an organization or establishment is selected as the System Administrator. It is assumed that the System Administrator has some previous experience in configuring and deploying a security cum Time and Attendance system. The System Administrators are not expected to setup and install the system hardware, but only the configuration of the

system including its functionalities and features, defining the access levels for various users and the extraction of various reports.

- **Users**, persons/organizations who will use the COSEC system. They may be executives, include personnel of small and medium businesses, large enterprises, front desk and service staff of Hotels/Motels, hospitals, and other commercial and public organizations/institutions.

## Organization of this Document

This system manual contains the following topics:

- **Introduction** - gives an overview of this document, its purpose, intended audience, organization, terms and conventions used to present information and instructions.
- **Know Your COSEC** - describes the system and its design, different network topologies, system architecture, and the interfaces with COSEC web application.
- **Pre-Installing COSEC Devices** - gives step-by-step instructions for pre- installing information for the COSEC devices, selection of installation location, the safety measures for protecting the system and persons handling the installation and maintenance, and packaging contents.
- **Getting Started with COSEC** - provides information about Panel/Panel lite/Panel200 and Door terminals, describes the COSEC modules and provides license information.
- **Launching the COSEC application** - provides a step by step instruction for installing the various components required to run the COSEC application as well as the various components. This section also includes instructions for launching the desktop and the web modules of the COSEC application.
- **Appendix** - Contains additional information related to the document. These include Technical Specifications of the Product, Glossary of terms, Product Warranty Statement, and Contact details.

## How to Read this System Manual

This document is organized in a manner to help you get familiar with the COSEC system, learn how to install it, connect it in various network topologies, connect the external devices, and power up the hardware systems. The manual also covers the installation and configuration of the COSEC application and its dependent components.

This System Manual is presented in a manner that will help you find the information you need easily and quickly.

You may use the table of contents and the Index to navigate through this document to the relevant topic or information you want to look up.

- **Instructions**

The instructions in this document are written in a step-by-step format, as follows. Each step, its outcome and indication/notification, wherever applicable, have been described.

- **Notices**

The following symbols have been used for notices to draw your attention to important items.



**Important:** to indicate something that requires your special attention or to remind you of something you might need to do when you are using the system.





**Caution:** to indicate an action or condition that is likely to result in malfunction or damage to the system or your property.



**Warning:** to indicate a hazard or an action that will cause damage to the system and or cause bodily harm to the user.



**Tip:** to indicate a helpful hint giving you an alternative way to operate the system or carry out a procedure, or use a feature more efficiently.

## Terminology used in this System Manual

The technical terms and Acronyms used in this Manual are standard terms, commonly used in the access control and Time and Attendance industry. However, considering the broad group of intended users of this manual, wherever possible, use of jargon has been avoided.

- **COSEC VYOM** is referred as **COSEC on Cloud**. **COSEC CENTRA** is referred as **COSEC on Premise**. The features which are common to COSEC CENTRA as well as COSEC VYOM are explained in generic way pointing to COSEC CENTRA or COSEC Server. The features which are explicitly available or not available in CENTRA or VYOM; are notified respectively.
- **COSEC Panel**, **COSEC Panel lite** (Vega Panel -Lite) and **COSEC Panel200** (Standalone Panel lite) are all master controllers. The term Panel or Panel lite is used interchangeably. COSEC Panel is supported in COSEC Centra only.



*If you are accessing the COSEC Server GUI, Device Module> Device Configuration > Click Add Button, there are three options related to Panel, namely Panel, Panel Lite and Panel200.*

*The term Panel refers to COSEC Panel200/Panel Lite. The feature access may differ as per the Panel variant.*

*Panel Lite V2 has been renamed as Panel200, hence the screens for Panel Lite V2/Panel200 represent the same.*

- **PANEL DOOR** (Door controller connected through Panel/ Panel lite/ Panel200) and **DIRECT DOOR** (Door controller connected to server directly) are used to refer the **COSEC DOOR** (including their variants) respectively.

The term **device** is a general term referring collectively to any or all of the above controllers.

Using this Manual in conjunction with the **COSEC PANEL Lite** and **Doors** Quick start, we hope, you will be able to set up, configure and make optimum use of this feature packed COSEC access control system.

## Getting Help

Our online help will provide you with immediate and context-related help. Click on the **Help** button, found in all the system windows. A help file will open up which enables the user to navigate to the relevant topic of interest. To get a more focused and context sensitive help click on the “?” symbol located on the upper right half of the web page.

## Technical Support

If you cannot find the answer to your question in this manual or in the Help files, we recommend you to contact your system installer. Your installer is familiar with your system configuration and should be able to answer any of your questions.

If you need additional information or technical assistance with the COSEC system and other Matrix products, contact our Technical Support Help desk, Monday to Saturday 9:00 AM to 6:00 PM (GMT +5:30) except company holidays.

<b>Phone</b>	(+91)18002587747
<b>Internet</b>	<a href="http://www.MatrixComSec.com">www.MatrixComSec.com</a>
<b>E-mail</b>	<a href="mailto:Tech.Support@MatrixComSec.com">Tech.Support@MatrixComSec.com</a>

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Time-Attendance defines the productivity of an organization and Access Control defines security of the valuable assets. These two areas are inherently human-oriented, complex and challenging to automate. Productivity of any organization depends on its effectiveness in putting the right people in the right place at the right time.

For this, Matrix COSEC provides a comprehensive, end-to-end Time-Attendance and Access Control Solution with an adaptive, modular, scalable and function-rich Time-Attendance and Access Control solution designed for Small Office Home Office (SOHO), Small and Medium Businesses (SMB), Small and Medium Enterprises (SME) and Large Enterprises (LE).

**Key features of COSEC Application Software are:**

- Layered Architecture
- Real-Time Processing of Events
- Latest Status View and Reports
- Web-based, Multi-User Application
- Live Monitoring and Supervision
- Remote Views and Reports
- Calender-Based Views
- Automatic Finger Template Distribution
- Past Adjustments of User Records

**The Matrix COSEC is designed to deliver high level of flexibility at various levels such as**

- Physical Interfaces- RS485 and Ethernet
- Door Controller Connectivity with Application Server- Direct or through Panel
- Readers- Card, Finger and PIN in any combination

**Variants of COSEC DOORS**

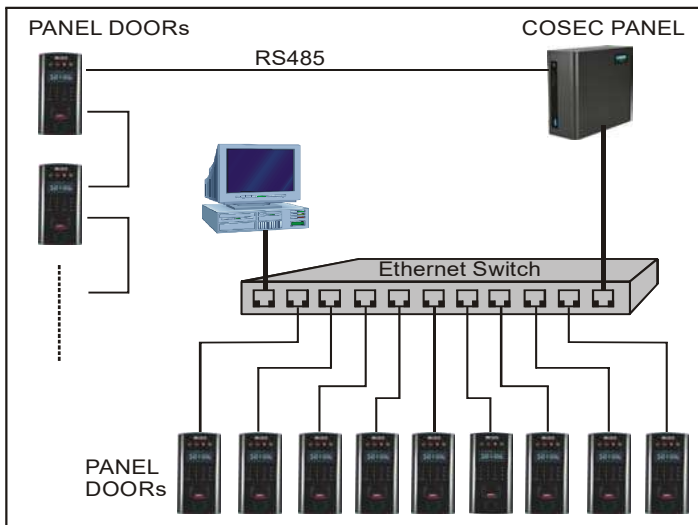
The Matrix COSEC Door is available with the following configurations depending on the firmware resident on the DOORS.

- **PANEL DOOR**
- **DIRECT DOOR**

All COSEC Doors are by default shipped with the DIRECT Door configuration. However, based on the mode set while configuring the COSEC application the appropriate modes will be enabled on the Doors. In the event of the Door being set in Panel mode the COSEC Panel downloads the Panel Door firmware to all the Doors on the network whose MAC addresses have been defined in the Door Controller settings of the COSEC application as explained later in this manual.

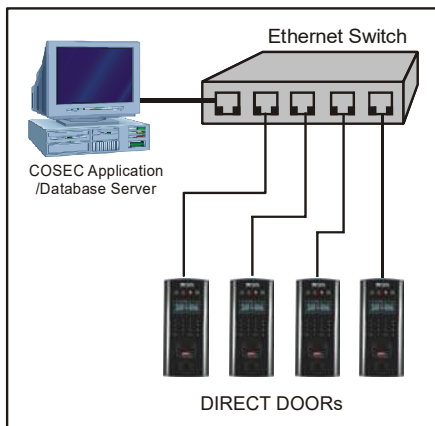
**PANEL DOOR**

The PANEL DOOR, as the name suggests connects to the COSEC PANEL which in turn connects to the COSEC Monitor application. A typical setup looks as follows.



### DIRECT DOOR

The DIRECT DOOR, as the name suggests connects directly to the COSEC Monitor application. A typical setup looks as follows.



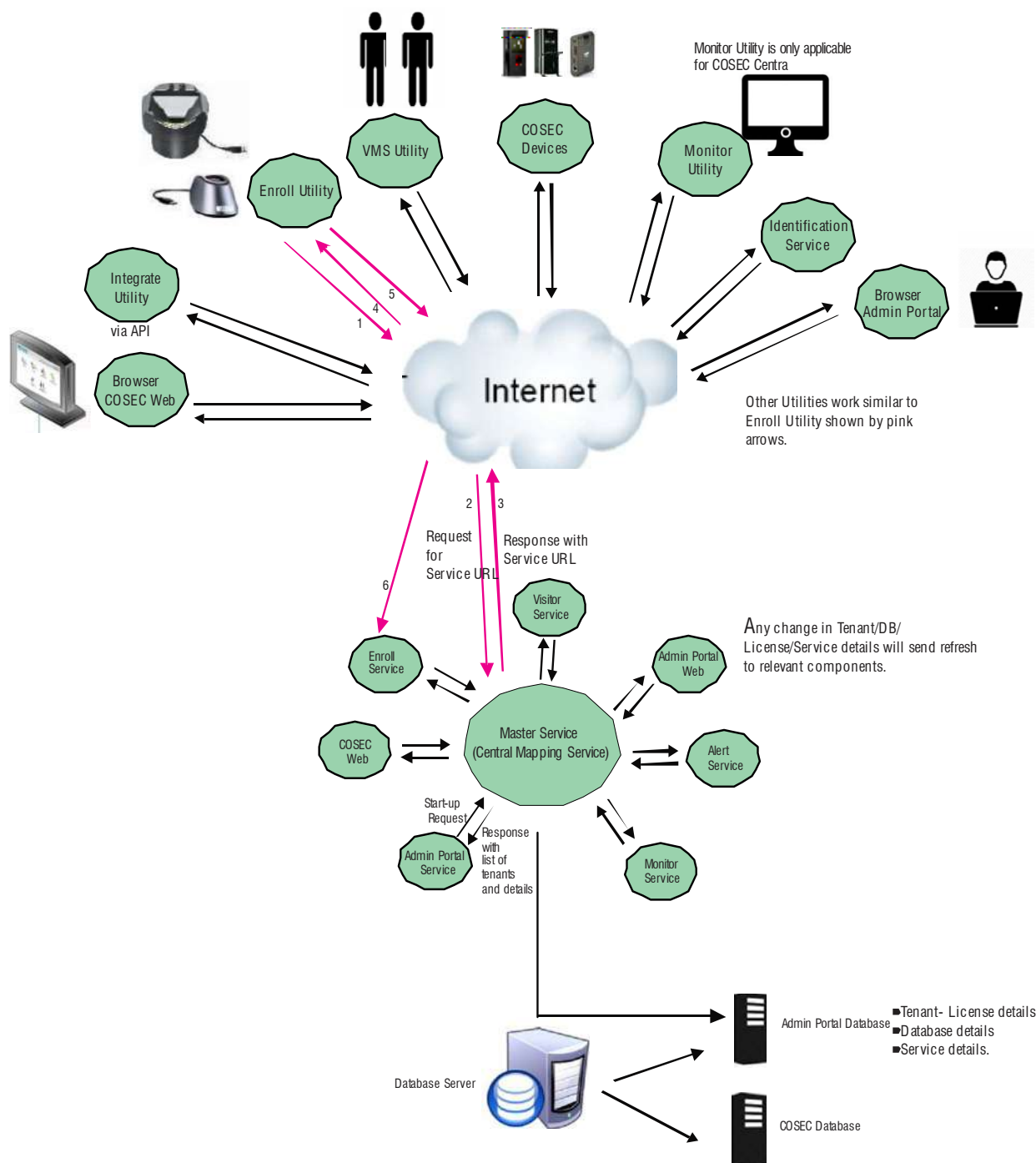
Also DIRECT DOORS have limited functionality as compared to the PANEL DOORS. For a functionality-based comparison of all COSEC devices, [See "Device Features" on page 91.](#)

For installation details on COSEC Doors, refer to COSEC Door Quick Start guides.

# System Architecture CENTRA & VYOM

The COSEC access control system has a layered architecture with intelligent components at each level.

At the top is the **COSEC Utilities** at the user end, **COSEC Services** along with central Master Service and the Database servers hosting **Admin Portal database** and **COSEC database**. This gives the flexibility to install these components at one location or separate locations.



For COSEC on Premise solution; the complete system shown above has to be installed. For COSEC on Cloud solution; only the utilities has to be installed at the client side.

## Database

The **Database Server Layer** involves the installation and management of Admin Portal database and COSEC database.

The **Admin Portal database** consist of:

- Tenants details
- License details
- Services Assignment
- Database backup/Upgrade- maintain records.

For Premise solution, there will be only 1 tenant in Admin Portal.

The **COSEC database** is the client specific database. For COSEC on Cloud solution; the database will be available at the cloud server and managed by the Tenant portal administrator. For COSEC on Premise solution; the database will be locally configured by the client.

## COSEC Services

### Master Service

- Handles request from all other components.
- Provides updated Tenant/DB/license details to all services.
- On Premise- Responsible for license Management for the modes- Dongle on Server, Dongle on Device as well as Virtual License.
- On Premise- Responsible for COSEC DB upgrade as well.
- Responsible for Admin Portal DB Upgrade.

**Monitor Service** is required for communicating with COSEC devices.

**Admin Portal Service** is required for following functions:

- Database upgrade (COSEC DBs)
- Post, Retrieve and Remove records.



*The Admin Portal Web has no dependency on the status of Admin Portal Service. The Admin Portal Web can be accessed even if Admin Portal Service is not running. This service must be running for above mentioned functions.*

**Alert Service** is required for sending notification alert.

**Enroll Service** and **Visitor Service** handles the request of the Enroll Utility and Visitor Utility respectively.

To know about the installation of the above Services, refer the ServicesUserGuide..

## COSEC Utilities

The COSEC Utilities include — COSEC Enroll, COSEC VMS, COSEC Monitor, COSEC Integrate, COSEC Tracker.

To know more about these Utilities refer their respective manuals:

Utilities	User Manuals
COSEC Enroll	EnrollUserGuide



Utilities	User Manuals
COSEC VMS	VisitorUserGuide
COSEC Monitor	MonitorUserGuide
COSEC Integrate	IntegrateUserGuide
COSEC Tracker	Tracker User Guide



*COSEC Monitor and COSEC Tracker are applicable only for Premise solution.*

## COSEC Devices

COSEC Panel/ Panel-lite/Vega Panel-lite manages multiple door controllers and is a local bridge between the door controllers and the COSEC application software.

*See Devices Section for supported devices.*

Door Controllers and their readers are front end terminals, guarding and monitoring the entry and exit points. However, for time-attendance applications, Door Controllers can be connected directly with COSEC application software.

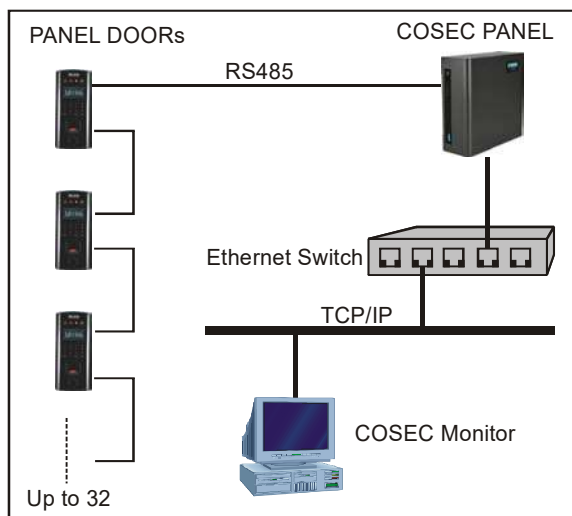
The COSEC Access Control System is based on the **Master-Slave architecture**.

The COSEC Panel/Panel Lite/Vega Panel Lite (Panel200) is the central processing unit which acts as **Master** and Door controllers act as **Slave**.

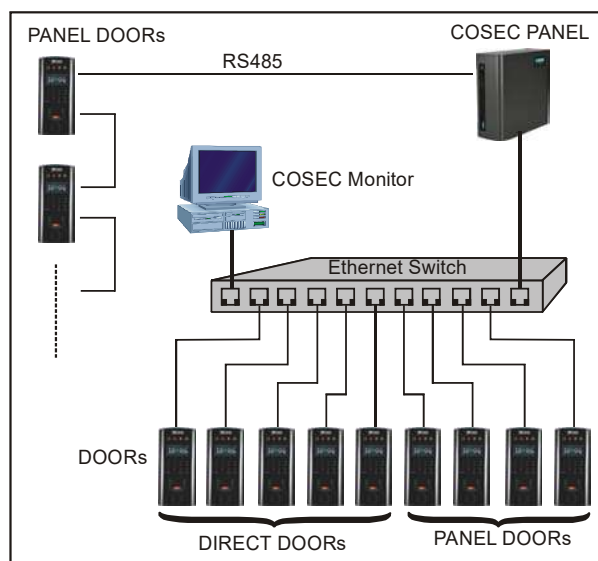
The Panel/Panel Lite/Panel200 stores complete user information, access policies, user events, door controller software and all the connected door controller's configuration settings. The Panel lite is programmed to apply certain access policies on users accessing the facility where the Access Control System (ACS) is installed.

## Various Network Topologies

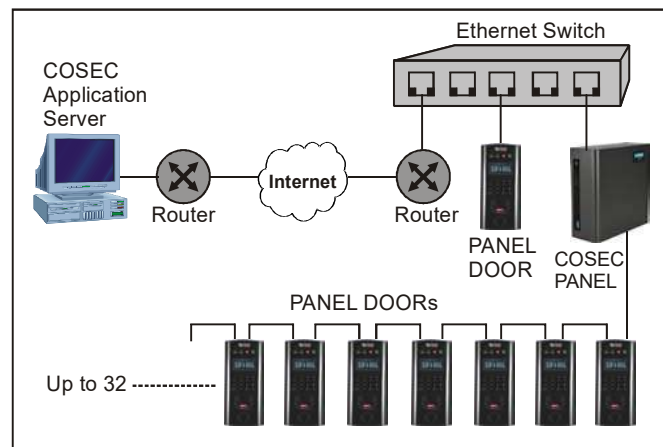
All PANEL Doors (up to 32) connected to PANEL on a RS-485 Loop



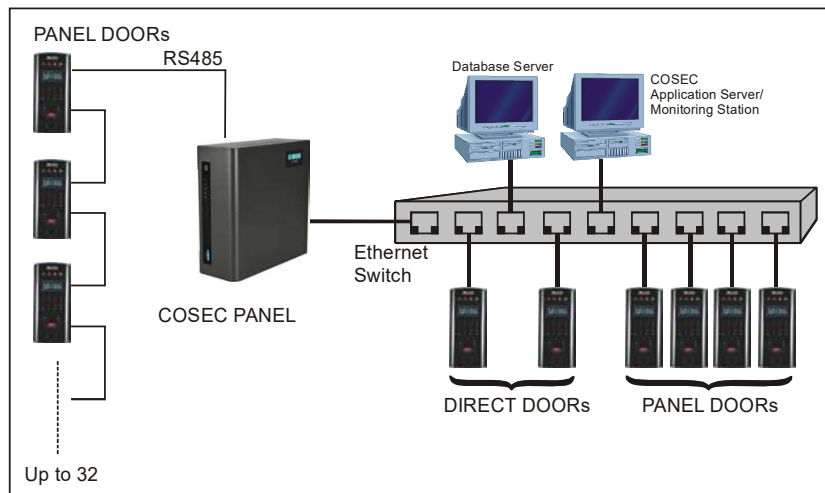
Some PANEL DOORS & DIRECT DOORS connected to the PANEL on the Ethernet and all other PANEL DOORS on the RS-485 loop.



## Connecting remote sites



## Typical Heterogeneous Network Topology



*A maximum of 255 COSEC PANEL DOORS can be connected to a single PANEL in any combination. The MSSQL Database can be installed on the same computer as the application and the monitoring software.*

# Configuring and Using COSEC

---

Follow the below steps to configure new user in COSEC and assign devices and policies to him.

*“Step1”: Create a user from User module.*

*“Step2”: Connect COSEC Device and add to the COSEC Web Server.*

*“Step3”: Assign Devices to User.*

*“Step4”: Enroll Credentials of the user.*

*“Step5”: Create and Assign Shift Schedule to the user.*

*“Step6”: Create and Configure Time Attendance Policies*

*“Step7”: Assigning Groups (Reporting, Leave, Week-Off) to the user.*

## Step1

From “User” module of Web server, add a user and select the type as T&A. Mention the Joining date and other details of the user.

## Step2

Apply Power and Ethernet connection to the COSEC door.

Give available IP address to the door and set Server address and Port as the IP and Port of your computer where COSEC Monitor is installed. You can get the IP and Port from COSEC Monitor Properties.

Eg: 192.168.104.122 is the IP address of your Device and 192.168.104.23 is the Server address and 11000 is the Port.

### Manual Addition

From “Devices” module in Web server, add the desired device by specifying its MAC address. Once the door is connected, it will come Online and IP address will be automatically displayed.

The status of door connection can be viewed from COSEC Monitor and also from Device Status page of Devices Module in Web Server.

### Auto Addition

Enable “Auto add New Devices” from Global Policy of Admin Module. If you have set the server IP address in your device then the device will be automatically added in the server.

## Step3

### **Method1: To a Device Group, assign user/ users**

Create Device Group from Devices> Masters> Device Group. Add devices to the group. Then assign the user to the device group.

If “ Auto Assign new device to Device Group” is enabled from Global Policy then new devices added to the COSEC Server will be added automatically to the device group. And hence the user will be assigned to that device group.

### **Method2: To a Device, assign user**

From Device Configuration> Additional> Assigned Users tab. Select the device from the device list to which the user is to be assigned. Then select the particular user from the picklist and Save.

### **Method3: To a User, assign device or Device Group**

Create User. From User Configuration> Devices, assign Device group or individual device.

## Step4

**Enrolling when new user is created:** Go to User Module> After creating the user, Select Credentials tab. Click Enroll Credentials and select the door on which credential is to be enrolled. From here you can enroll the credential directly on the door which will be later synced with other devices.

**Enrollment of Multiple Users:** When you have a device with you and want to enroll multiple users then go to Users module> Credential Management> Enrollment. Select a Door on which you want to enroll one by one user credential. Now select the user and perform enroll operation on device after selecting the type of enrollment.

Once the credentials are enrolled at one door, it gets automatically synced to other doors of the group. So the user can access other devices installed at the premises.

Depending on the device/door available you can enroll the finger template, palm template or card for the user/employee.

### Finger Enrollment



### Palm Enrollment



### Card Enrollment



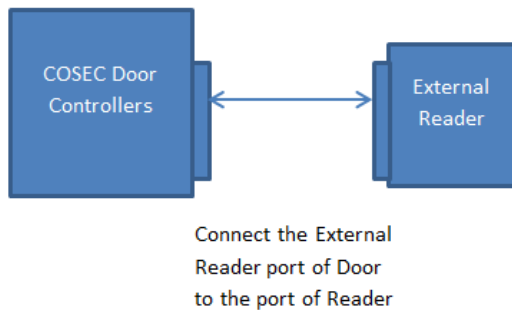
**Using COSEC Enroll:** When a person(say Receptionist or HRD person) is assigned the role of enrolling credential of new employees. Then the credentials can be enrolled using COSEC Enroll as the desktop application. Using

desktop application, you can easily enroll the finger/palm/card from the respective enrollment station. See COSEC Enroll Manual for details.



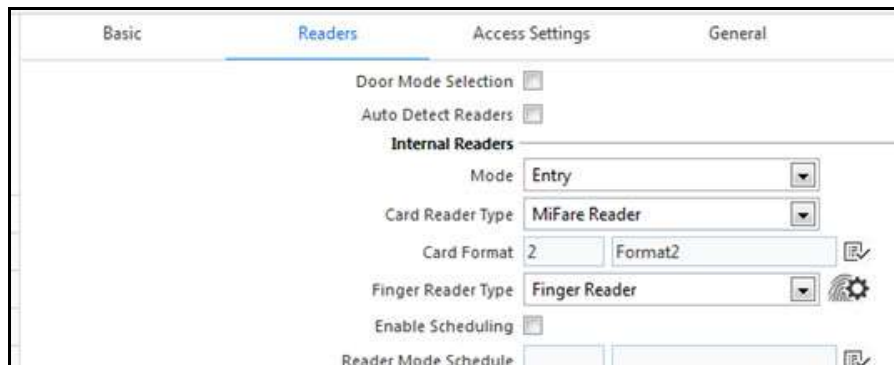
### Enrolling Smart Card for User:

**1: Configure the device with Internal or External Reader:** For Internal reader, connect the reader module inside the device. For External reader, connect the 15 pin connector of door controller (Eg:Vega) with the connector of Reader as shown below:



**2: Configure the device profile for Reader:** Make the configuration changes as per the physical connection of the reader.

If you have connected Mifare reader, then select the **card reader type** as Mifare. Also ensure that you have Mifare card for enrollment.



Similarly make the configuration as per your reader selection.

Then select the **card format** from the picklist as per which the Parity, CSN and FC will be written on the card.

**Note:** Card Personalization works for HID-iclass and Mifare cards only.

**3: Enroll the Smart Card for user:** Select the User> Credentials. Click on Enroll Credentials. Select the Door where enrollment is to be done. For the enrollment type Smart Card, click Enroll and show your card on device. The card will get enrolled after the successful enrollment. The card number will be shown in Access Card field.



**Enrollment of Special Card:** In a factory when workers want to use special function (for eg: Short leave), then they can take the card which is enrolled for that special function and show to the device. In this way worker can activate the short leave function on door using the special function card. Once the function is active, he can access the door using his credential.

To enroll the special function card, Go to Users module> Credential Management> Enrollment> Special Card. Select a door for which special function card is to be enrolled. You can enroll Read only card or Smart card for any of the special functions available from the drop down list.

## Step5

The user is assigned Shift Schedule, not the individual shift.

**Creating Shift:** First you have to create shifts eg: GS(General Shift), NS(Night Shift) etc. Define the timing of the shift. You can specify the working hours required to complete half day and full day.

Break Details and Grace details for the shift can be specified.

If Break deviation is not allowed, then the break Late-in and/or break early-out can be added to total late-in and/or total early-out respectively.

**Create Shift Schedule Group:** Add the required shifts to the created schedule group. You can specify the days for a particular shift to repeat. Eg: a schedule group has GS and NS shifts in which GS shift repeats for 7 days and NS shift repeats for 4 days.

Week-off days can be set in the shift. If both Off Day configuration and Week Off Group are defined for a user, then week off will be given as per the Week Off group. [See “Step6” on page 15.](#)

**Assigning Shift Schedule to User:** Select the User to whom the shift schedule is to be assigned.

Go to User Configuration> Access Control> Basic.

Select “Shift Schedule” to be assigned to the user. Then select “Start Shift” as the shift from which the schedule is to be started.

You can also create holiday schedule from Shifts and Schedule module and assign it to the user.

**Process Schedule:** Finally Go to Shifts and Schedule module> Process> Monthly Schedule. Select the user and the month for which shift-schedule is to be processed. If any existing schedule is available for the user, then you can overwrite the same by current schedule by enabling the respective box.

After processing the schedule, you can view from Shift and Schedule module> Utilities> Monthly Shift Schedule.

## Step6

If you want to assign Time Attendance policies to user then Go to T&A module> Policies. You can configure various policies as per your organization requirement.

**Configure Attendance Policy:** The Attendance Policy is the configuration of rules as per which attendance of the employee is recorded and processed. For details see [“Attendance Policy”](#)

**Configure Network hours Policy and OT Policy:** If you want to pay for the extra work hours of an employee, then you must calculate overtime hours of the employee. For details see [“Net-Work Hours Policy”](#) and [“Overtime Policy”](#)

**Configure Late-IN Policy:** To allow the user for flexibility in late-incoming to the organization, you can configure Late-IN policy and assign to the user. For details see [“Late-IN Policy”](#)

**Configure Early OUT Policy:** To allow the user for flexibility in going out early from the organization, you can configure Early-OUTN policy and assign to the user. For details see [“Early-OUT Policy”](#)

**Configure Absentee Policy:** When the Employee takes leave before or after Week off/Public holiday, then to consider him as absent will depend on the configured Absentee Policy. For details see [“Absentee Policy”](#)

**Configure C-OFF Policy:** If Overtime hours of an employee are to be rewarded by the C-OFF, then the C-OFF policy can be configured and assigned to the user. For details see [“C-OFF Policy”](#)

**Note:** For assigning new policies (other than Attendance Policy) to user, Go to T&A module> Utilities> Change Policy. Select a single user or multiple users and assign the desired policy to the user.

To change Attendance Policy of the user, Go to User> User Configuration> T&A> Policy.

## Step7

Additional to the basic configuration described above, the user can be assigned Reporting Group, Leave Group and Week-Off Group.

**1) Creating Reporting Group:** From User module> Reporting In-charge> Reporting Group, you can create a group with upto 5 in-charges. The users are then assigned this group. The authorization mode for the group can be selected as Any One, All or All Sequential.

Eg: Geeta, Dinesh, Aakash, Shruti and Khushbu are members of reporting group QA. The incharge1 is Shruti and incharge 2 is Khushbu. The authorization mode is All Seand final authority in Incharge2. In this case any application (leave application/ attendance correction/Cafeteria correction application) by user Geeta will require authorization by both incharges. And final verdict will be given by incharge2.

In case of Any One mode, authorization by any of the two incharges will be allowed.

In case of All Sequential mode, first incharge will authorize. Only after the verdict of first incharge or due to auto forward, the application will go to second incharge for the final verdict.

**Assigning Reporting Group:** Select the User to whom the reporting group is to be assigned.

Go to User Configuration> T&A> Group. Select the “Reporting Group” from the pick-list to be assigned to the user.

Eg : The new user Sheetal is assigned the group QA. So Shruti and Khushbu who are in-charges of QA group will become the Reporting In-Charges of Sheetal.

**2) Creating Leave Group:** From Leave Management module> Leave Group

Create a new leave group and add the leaves in the group. But you must configure the leaves first.

If you Enable pro-rata for a leave group, then the leave will be given to the user as per the no. of working days.

**Assigning Leave Group:** Select the User to whom the leave group is to be assigned.

Go to User Configuration> T&A> Group. Select the “Leave Group” from the picklist to be assigned to the user.

### Crediting Leave:

To avail the leave, the user must have leave balance. For this you must credit the leaves to the user. Go to Leave Management> Balance Management> Credit/Debit/Encashment.

You can credit the selected leave to one/more user on monthly or yearly basis.

- For a fixed value of leave, Pro-rata can be applied. This implies that the leave will be given as per the no. of working days.

Eg: The user has joined a company on 21st of month. You are crediting 10 leaves but actually 3.5 leaves will be credited to the user.

The rounding of credited leaves can be configured from Leave Rounding Parameters.

- Using Accrual Policy, you can credit advanced leaves for monthly or yearly period in fixed mode (fixed number of leave) or calculated mode (calculation based on attendance of previous month).

### **3) Creating Week-Off Group:** From Shifts and Schedules module> Week Off Group

You can create week off group with two week-offs. The 2nd week-off can be customized to give off for alternate week or any particular week or all the weeks.

Eg: IT Company gives 2nd week-off as Saturday on all weeks so select Saturday as Off day2 and check all the boxes. Some other company may give Off on second (W2) and fourth Saturday (W4).

#### **WO Rotation:**

The week off group can have one or both week-offs rotating. This implies if Off Day 1 is Sunday and Off Day2 is Friday and rotation count is 10 days. So WO Sunday will become Monday after 10 days. Eg: 1st July is Sunday (WO-1). After 10 days i.e. on 11th July you will have WO on Monday (WO-1). Similarly WO-2 will be rotated.

**Note:** WO Rotation will be disabled for Auto Week off assignment.

**Assigning Week-Off Group:** Select the User to whom the Week Off group is to be assigned.

Go to User Configuration> T&A> Group. Select the "Week Off Group" from the pick-list to be assigned to the user.



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## Installation Precautions

It is very important for the installer to read and understand all the instructions in this manual before starting the installation process. For each stage in the controllers' installation and commissioning procedures a brief description is given of its purpose, complete with detail drawings, flow diagrams and/or other graphics, wherever possible, to make the instructions easy to follow. Before installing the Matrix COSEC Access Control Units, you must first ensure that the following criteria have been met. Failure to do so may not only result in damage to the equipment, but may also cause problems when commissioning the system and may adversely affect its performance.

### Product Inspection

The COSEC Access Control Units are simple to install and commission if the procedures as described in this System Manual, and the Installation and Commissioning sections of this manual, are followed.



*Follow all installation instructions described in this manual. These instructions must be understood and followed to avoid damage to the controllers and associated equipment.*

### Checking the Controller for Damage

Before attempting to install your Panel/ Panel Lite/ Panel200 you should do the following:

1. Remove the PANEL from its packaging, and check for any damage that may have been caused during transit. Any missing item/part or damaged component should be reported immediately.



*In the unlikely event that the PANEL has been damaged in transit, you **MUST NOT** install it but contact your supplier for their return procedure.*

### What to do if you Suspect the PANEL is Damaged

The procedure described below tells you what to do in the unlikely event that the supplied equipment has been damaged after leaving the factory. However, if you have problems regarding the quality of any supplied order items including the PANEL, its ancillaries or this manual, or items are missing, follow the procedure below.

1. If, after removing the PANEL from its packaging, a visual inspection reveals that it has been damaged, you **MUST NOT** continue with the installation but contact your supplier for advice on what to do next. Similarly, if the product is found to be faulty during installation contact your supplier immediately.

2. To aid your supplier you are requested to note all the details relevant to your complaint, clearly stating details of any technical problems, date of receipt, packaging condition, etc. and forward this to your supplier.
3. Where the product needs to be returned to your supplier, you are requested to use the original packaging wherever possible.

## **Do's and Don'ts:**

Prior to selecting a location for the COSEC PANELs and DOORs, Do make sure that:

- a. The ambient temperature is in the range: +5 deg C to 35 deg C.
- b. The relative humidity is between: 5% and 95% (non-condensing).
- c. The COSEC PANELs and DOORs are wall mounted in a position which allows clear visibility of display and easy access to operating controls. The height above floor level should be chosen such that the middle of the COSEC PANEL is just above normal eye level (approximately 1.5 meters) while that of the COSEC DOOR should be approximately 1.0 meter.
- d. Do not locate the COSEC PANELs and DOORs where they are exposed to high levels of moisture.
- e. Do not locate the COSEC PANELs and DOORs where there are high levels of vibration or shock.
- f. Do not mount the COSEC PANELs where there would be restricted access to the internal equipment and cabling/wiring connections.

## **Safety Instructions**

**NEVER INSTALL THE EQUIPMENT DURING A LIGHTNING STORM!**

The Installer should always take basic safety instructions to reduce the risk of fire, electric shock and injury to personnel and system. The following points need to be taken into account:

1. The COSEC PANEL should be installed and used within a pollution free environment and at a safe and secure indoor location.
2. The equipment is FIXED and PERMANENTLY CONNECTED and is designed to be installed by authorized Service Persons only. The COSEC PANEL comes installed in a metallic cabinet.
3. Do not place the product at a location from where it can fall and cause damage to the product.
4. The product should be operated with appropriate power voltage supply as mentioned in the specification sheet.
5. Cable splices can cause trouble. Make sure you measure your runs and order sufficient cable for unspliced runs. If splicing is required, solder the splices together, rejoin the shielding the best you can, and restore (heat shrink) the cable insulation.
6. Label each cable run and each individual wire. Make sure you don't cross cables at splices or junctions. Color coded cable makes life easier and assures straight through connections.
7. Make sure the site's electrical system is properly grounded.
8. Internal wiring must be routed in a manner that prevents:

- Excessive strain on wire and on terminal connections;
  - Loosening of terminal connections;
  - Damage of conductor insulation.
9. It is the end-user's and/or installer's responsibility to ensure that the disposal of the used batteries is made according to the waste recovery and recycling regulations applicable to the intended market.
10. There are **no serviceable parts within the equipment**. For any issues or queries regarding the equipment please contact your installer.



*Disconnect Power before Servicing.*





## COSEC Software Installation

---

Before commencing the installation, make sure that the computers on which the software will be installed meets the necessary requirements.



*The COSEC setup installation is explained for Premise based solution. For Cloud based solution; setup installation will be done at cloud server.*

### System Requirements

Make sure that the computer on which you are installing the software meets the following requirements:

- **Operating Systems:** Windows7 Professional and above
- **Processor:** Recommended is dual core processor and above
- **RAM:** Minimum available is 4GB
- **Hard disk:** Minimum available is 40 GB
- **Screen resolution:** Minimum Recommended is 1366 x 768
- **DVD/CD-ROM** drive
- **Network Interface card:** 10/100 Base-T network adapter
- Recommended **IIS** ver 6.0 or higher
- **Microsoft .Net Framework** ver 4.5
- **Internet Explorer** 9.0 - 11.0
- Requires **USB2.0** or higher Port for license dongle



*Please ensure that you have installed the IIS ver 6.0 or higher, prior to proceeding with the installation of the application as described in the following section. The user needs to ensure that the .Net Framework 4.5 is installed only after the installation of the IIS component to enable appropriate registration of the asp.net with IIS. To check if IIS is installed on the computer, open the web browser (Internet Explorer) and type in <http://localhost> in the address field. The IIS home page must appear.*



*SQL database is supported for SQL server 2008 R2 and above. Oracle database is supported from version 10g upto version 21c (Basic Authentication).*

## Pre-Requisites for Face Recognition and Face Enrollment

Face Recognition and Face Enrollment System Requirement support for windows application development targets 3 major platforms: x86 (CPU), x64 (CPU) and x64 (NVIDIA GPU).

### Computer Hardware Platform

#### For Windows with CPU:

- 6th and above generation Intel Core processors and Intel Xeon processors.
- Intel Xeon processor E family (formerly code named Sandy Bridge, Ivy Bridge, Haswell and Broadwell)
- 3rd generation Intel Xeon Scalable processor (formerly code named Cooper Lake)
- Intel Xeon Scalable processor (formerly Skylake and Cascade Lake).

#### For Windows with GPU:

- Nvidia GeForce GTX 1050 Ti-4 GB onwards

### Operating System

Microsoft Windows 10 64-bit

### Recommendations for Liveness Verification

Below mentioned recommendations for Liveness Verification is applicable for all Matrix's Cameras.

- Custom ROI of Height ~= 1000 px and Width ~= 700 px.
- Good and evenly distributed light is required on person's face.
- Good lighting is required at setup location facing person's front. Back light degrades acceptance rate of real person.
- Person's distance from camera when marking attendance must be between 1 to 2 ft (For Moderate and Advance Face Anti-Spoofing Mode) and more than 3 ft (For Basic Face Anti-Spoofing Mode).
- Face horizontal shift must be between -30% to 30% which means faces looking more left or right are rejected.
- Face coordinates must not exceed 10% area near left and right edges and 5% area near top and bottom edges of input image.
- Face touching image's border is rejected.
- Face must cover less than 70% area of valid image region. Faces very close to camera are also rejected.

## Recommendations for Face Recognition

- User's distance from camera when marking attendance must be between 1 to 3 ft (i.e. Face Height should be more than 80px).
- Good and evenly distributed light is required on user's face.
- Shadow / Under Exposure / Over Exposure lighting should be avoided.
- Motion Blur / Over Image Compression / Environmental Noise should be avoided.
- Any type of Occlusions like Sunglasses / Mask / Helmet / Cloths covering the face should be avoided.
- Face Angle should not be more than 30 degree horizontal and 10 degree vertical.

## Recommended Camera Settings for Liveness Verification

The below mentioned recommendations are applicable to SATATYA MIDR20FL28CWS or Wall mounted Cogniface Cameras.

Name	Value
Profile No.	4
CODEC	MJPEG
Resolution	720p
Bit Rate Control	VBR (For all Modes)
Bit Rate	1024 kbps
FPS	10
Lens Correction	Off

## Security Setup for COSEC<sup>1</sup>

If you are having any security concerns then make sure you manually configure the changes as per the steps given below along with installation of the COSEC package:

### Step 1:

It is expected that wwwroot folder contains only Cossec Web Applications i.e. COSEC, COSECAdmin, COSECVisitor. If there are any other applications in wwwroot folder then placing/updating web.config file may impact other application too.

If your www.root folder does not have the **web.config**, then follow the steps mentioned below:

- You need to copy the **web.config** file from the COSEC Setup/Prerequisites and place it in the root folder.  
Path of the root folder: C:\inetpub\wwwroot.

---

1. These settings need to be done if COSEC is to undergo security testing via any third party to evaluate that the software is free from security vulnerability. These tests help validate the software's security controls and measures against real world's attacks, for example VAPT.

- Open this file in notepad, and replace the **matrixvyomqa.com** text with the IP or Domain which the user wants to use.

If your www.root folder already has the **web.config**, then follow the steps mentioned below:

- Copy the **web.config** file from the COSEC Setup/Prerequisites and place it on the desktop.
- Open this file in notepad, and replace the **matrixvyomqa.com** text with the IP or Domain which the user wants to use.
- Then copy the content from the dummy file and append it in your web.config file.

### Step 2:

Uncomment the **httpCookies** tag in the following config files of COSEC.

- COSEC Path: C:\inetpub\wwwroot\COSEC\Web.config
- COSEC Admin Path: C:\inetpub\wwwroot\COSECADMIN\Web.config
- COSEC Visitor Web Path: C:\inetpub\wwwroot\COSECVisitor\Web.config

### Step 3:

Enable TLS1.2 in the Server.

## Port Requirement

The Default Ports for running different COSEC services for SSL and Non SSL communication are as follows:

1. **Master Service:** Non-Secure = 15001 & Secure = 15010
2. **Alert Service:** Non-Secure = 13001 & Secure = 13010
3. **Enroll Service:** Non-Secure = 12001 & Secure = 12010
4. **Monitor Service:**
  - Communication with Master Service: Non-Secure = 11001 & Secure = 11010
  - Communication with Device: Non-Secure = 11000 & Secure = 11009
  - Communication with Monitor Utility: 11003
5. **Admin Portal Service:** Non-Secure = 14001 & Secure = 14010
6. **Visitor Service:** Non-Secure = 16001 & Secure = 16010

# Installing Prerequisites

---

The following Prerequisites should be installed (not included in setup) by user who is using Premise based solution (COSEC Centra) before running the COSEC Installation Setup:

1. Install Internet Information Services (IIS).

For Installing Internet Information Services (IIS) click on ["Installing IIS on the Windows Operating System \(Windows10\)"](#)

2. Install .Net Framework ver. 4.5 (mandatory).

For Installing .Net Framework click on [".Net Framework Installation"](#)

3. Microsoft SQL Server 2008 R2 SP2 or above.

For Starting Microsoft SQL Server click on ["Microsoft SQL Server"](#)

4. Oracle database server- from 10g upto version 21c (Basic Authentication). For Starting Oracle click on ["Oracle Installation"](#)

## Installing IIS on the Windows Operating System (Windows10)

To install the IIS on the Windows operating systems, the administrator needs to open the Windows Features dialog by performing the following steps.



**To know about IIS installation procedure in different operating systems, read the Help topic from the installation Setup.**

The following IIS components must be enabled for Windows 10 and above.

"WCF-HTTP-Activation45"  
"IIS-WebServerRole"  
"IIS-WebServer"  
"IIS-ApplicationDevelopment"  
"IIS-NetFxExtensibility46"  
"IIS-ASPNET46"  
"IIS-ISAPIExtensions"  
"IIS-ISAPIFilter"  
"IIS-CommonHttpFeatures"  
"IIS-DefaultDocument"  
"IIS-DirectoryBrowsing"  
"IIS-HttpErrors"  
"IIS-HttpRedirect"  
"IIS-StaticContent"  
"IIS-Performance"  
"IIS-HttpCompressionStatic"  
"IIS-HttpCompressionDynamic"  
"IIS-Security"  
"IIS-RequestFiltering"  
"IIS-WindowsAuthentication"  
"IIS-WebServerManagementTools"  
"IIS-ManagementConsole"  
"IIS-IIS6ManagementCompatibility"  
"IIS-Metabase"  
"IIS-WMICompatibility"

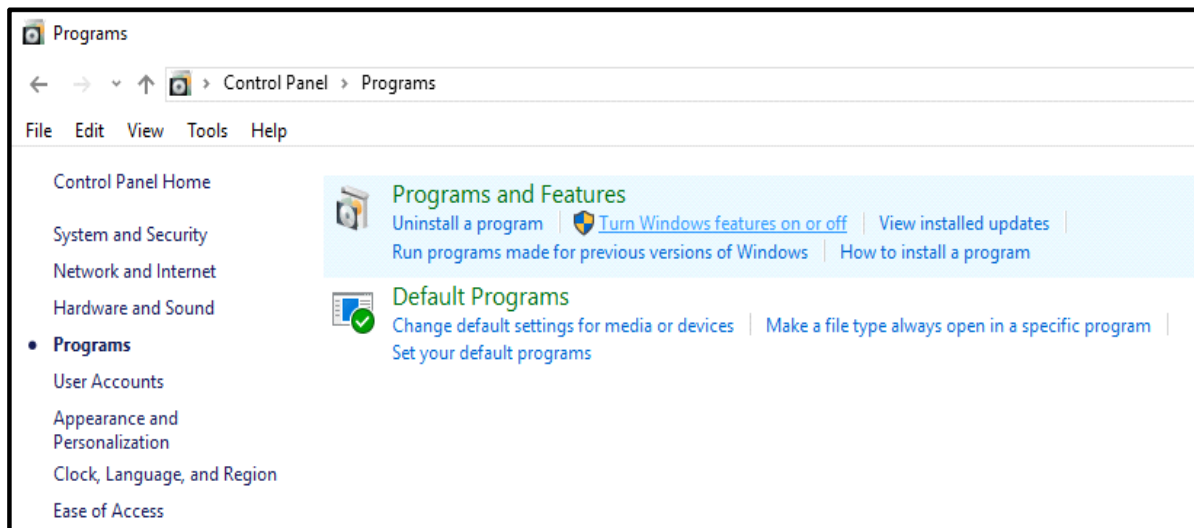
"IIS-LegacyScripts"  
"IIS-LegacySnapIn"

The figures depict the screens as they appear on the **Windows 10** Operating system. However, the same procedure may be followed to activate IIS on other Windows Operating system.

- Navigate to Control Panel by typing it in "Search the Web and Windows" field. The Windows Control Panel appears as shown below. Now click on **Programs** as shown in the figure.

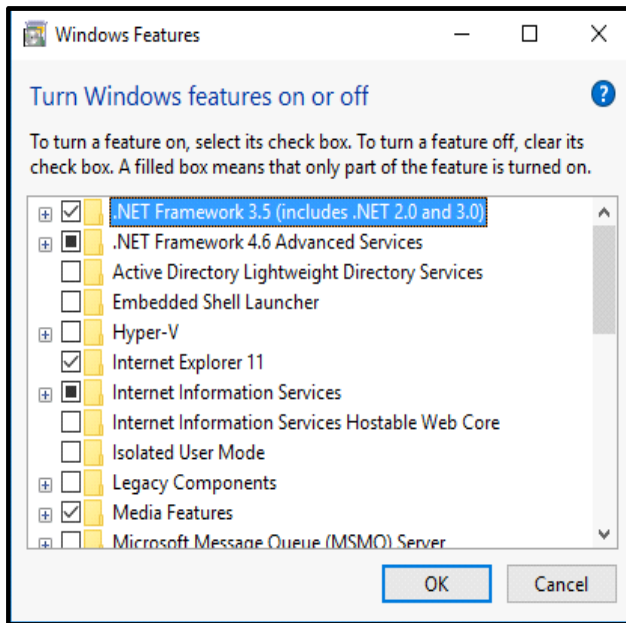


- The Control Panel **Programs and Features** options are displayed.

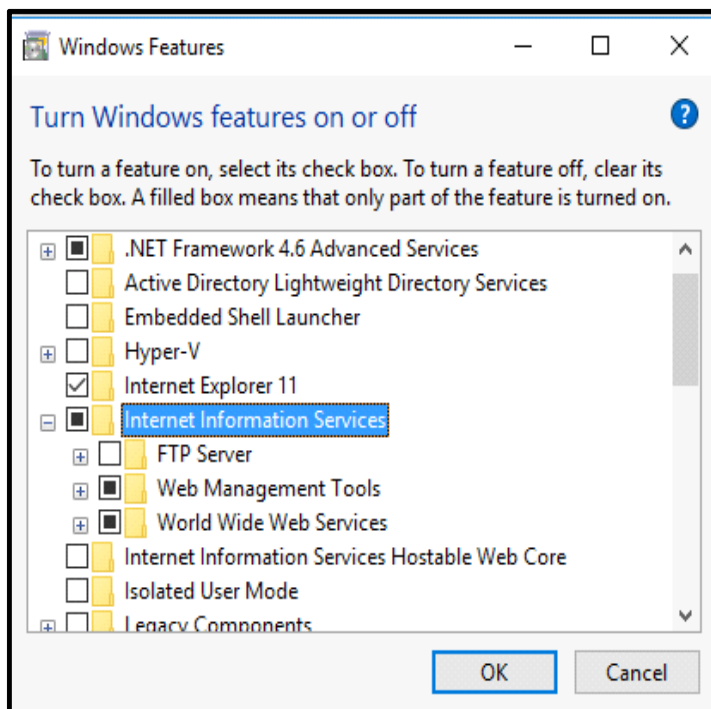


- Click on **Turn Windows features on or off**. You may receive the Windows Security warning at this point. Click **Continue** to continue.

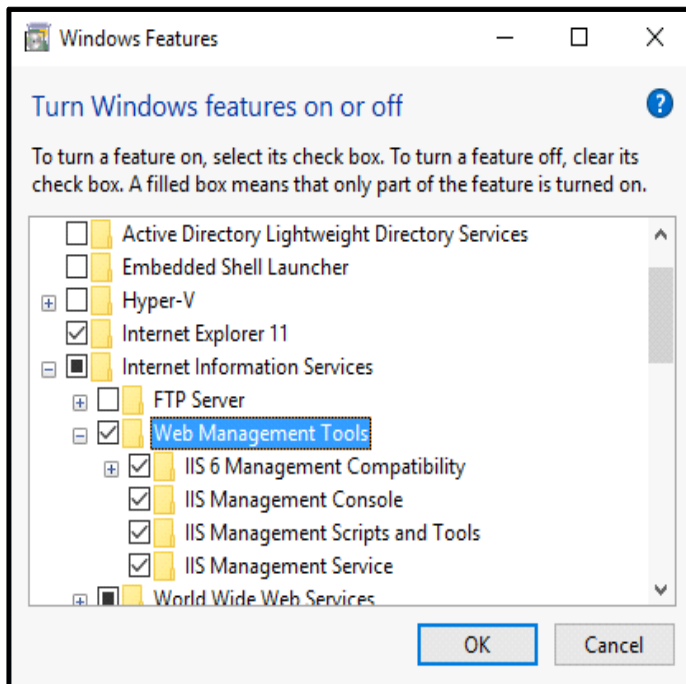
The Turn Windows Features on or off window will be displayed as shown below:



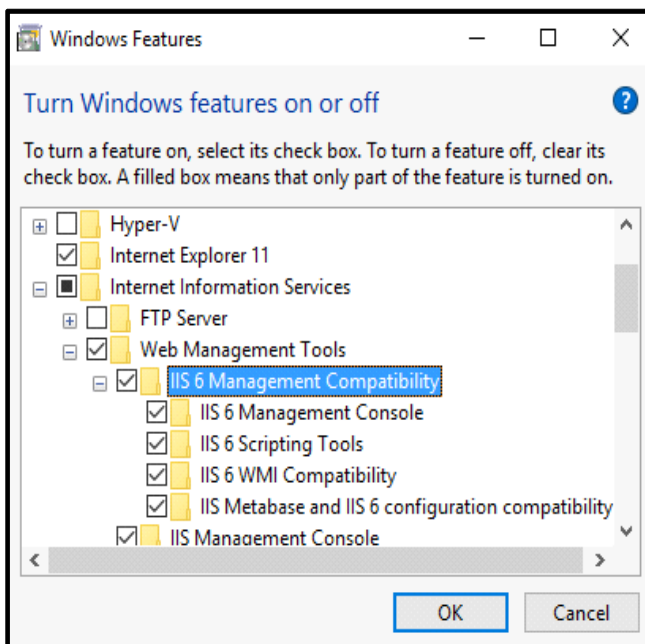
- The IIS default install features are shown as selected. Click on **Internet Information Services**. Additional IIS features will be displayed as shown.



- Click on **Web Management Tools** to view the available features. Check the boxes against the features to be turned on as shown below.

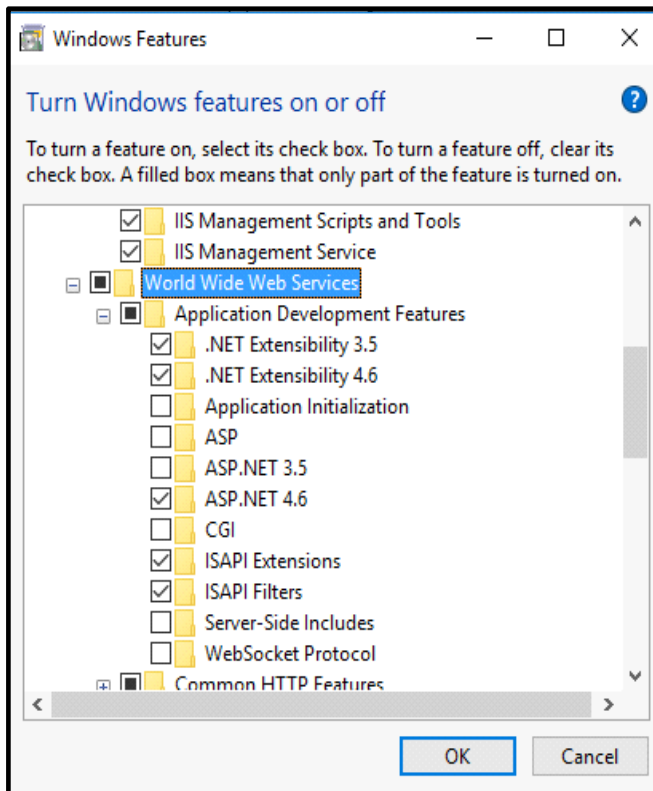


- Click on **the IIS 6 Management Compatibility** (Version depends on OS) and check the boxes against the features as shown.

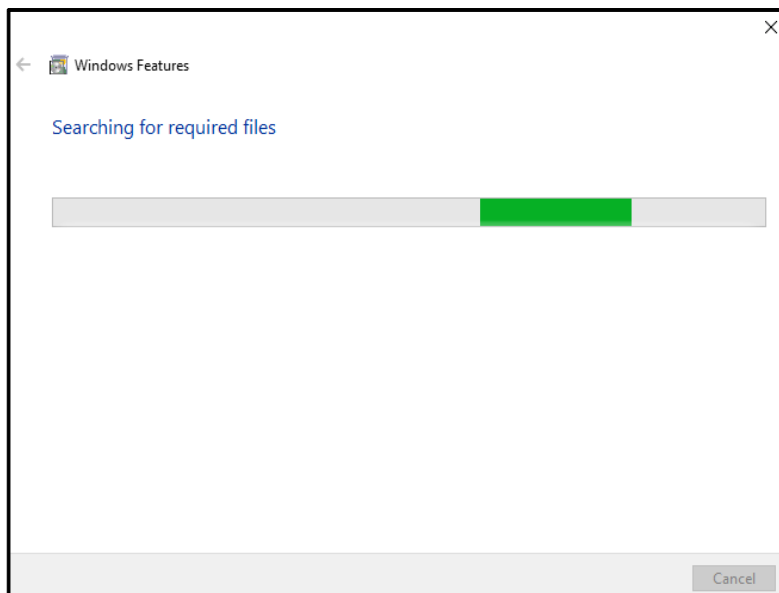


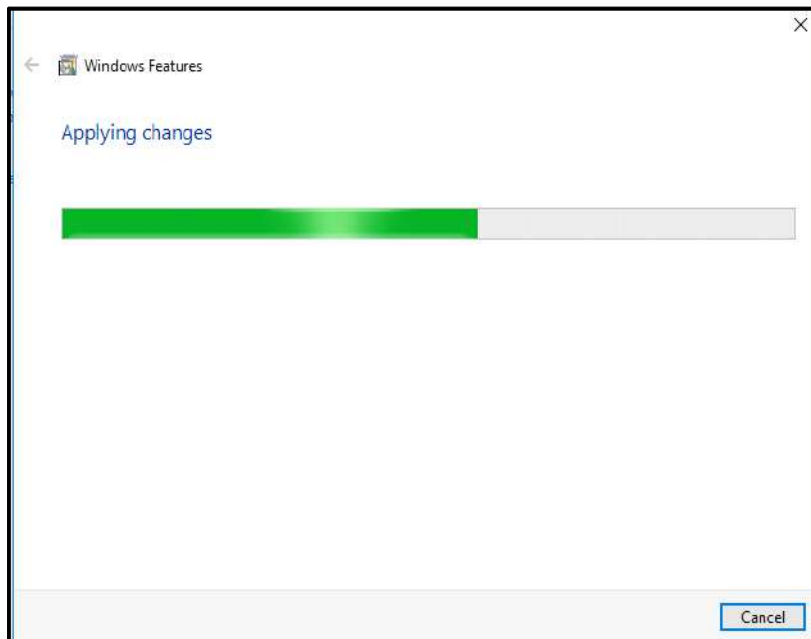


- Now click on **World Wide Web Services** and then on the **Application Development Features** option. Check the boxes against the features as shown.



- After selecting the IIS features as described above, click OK to start installation. The following Progress window will be displayed.





When the installation completes, the Windows Features dialog closes and you are returned to the Control Panel.

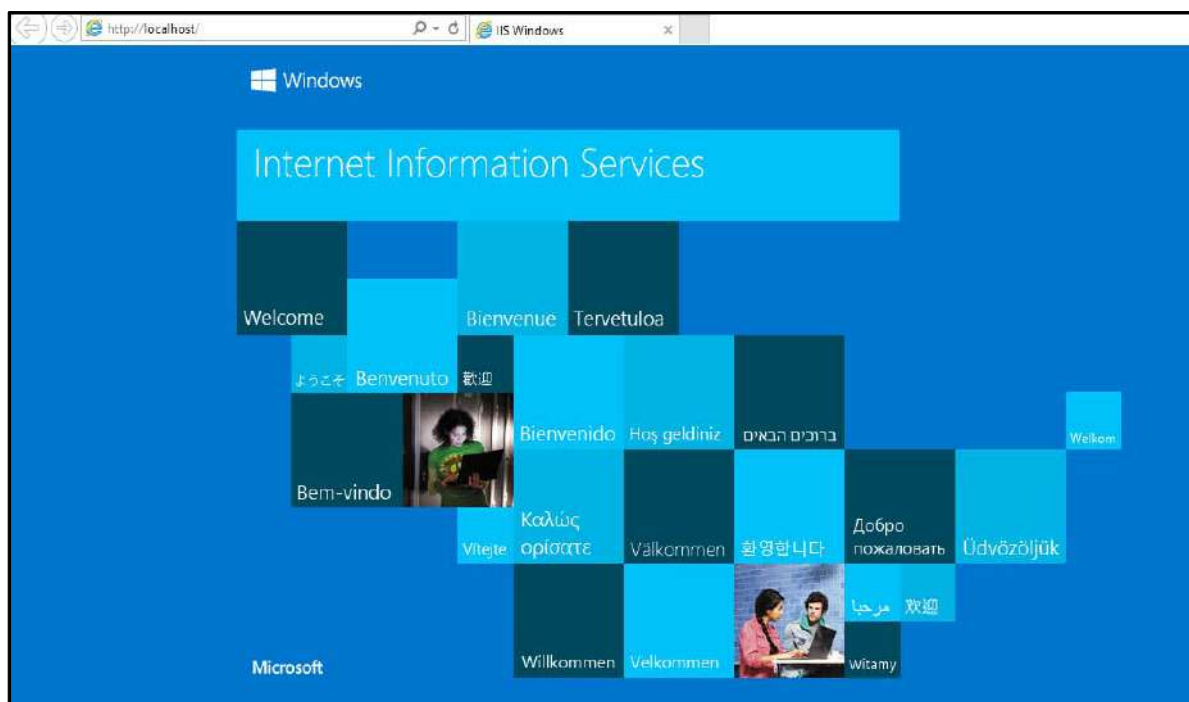


*In order to perform a quick check to verify that IIS is installed:*

*Start Internet Explorer web browser and enter the address <http://localhost/>  
You should see the default IIS “Welcome” page.*



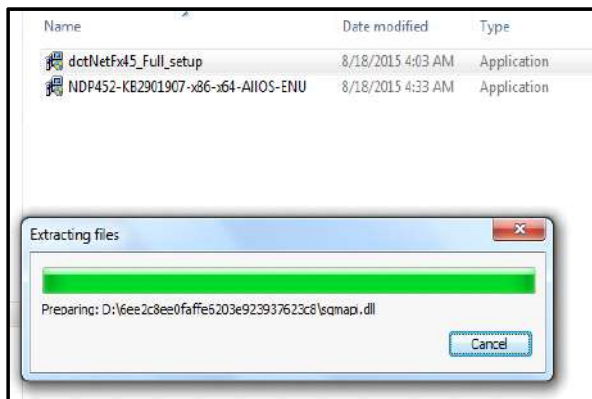
*IIS version may change depending on the software updation and Windows in your Computer.*



## .Net Framework Installation

In the absence of the **.Net Framework**, user must install it before proceeding with COSEC installation.

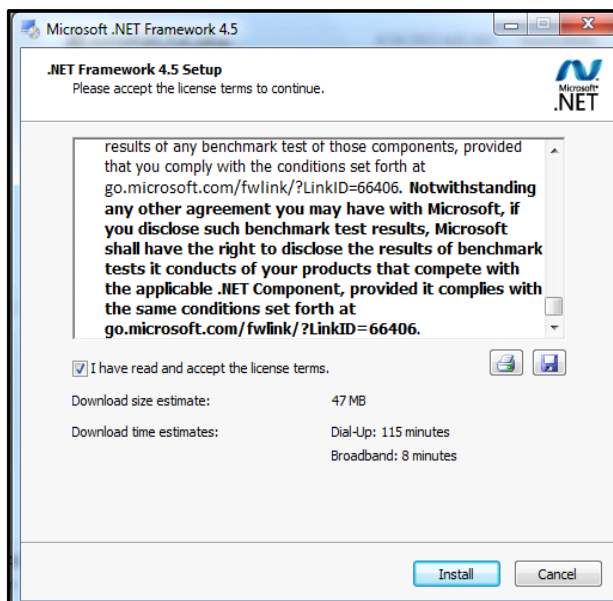
Name	Date modified	Type	Size
dotNetFx45_Full_setup	8/18/2015 4:03 AM	Application	982 KB
NDP452-KB2901907-x86-x64-AIOS-ENU	8/18/2015 4:33 AM	Application	68,359 KB



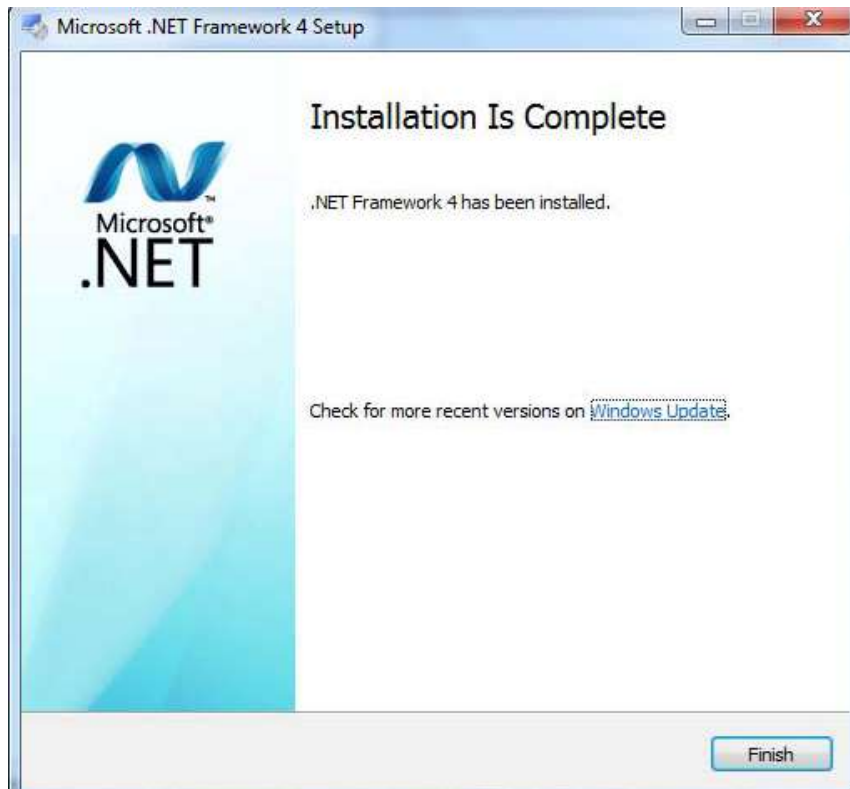
Browse the set and run the application.



Click on **Install** to install Microsoft .NET Framework. The Installation will begin.

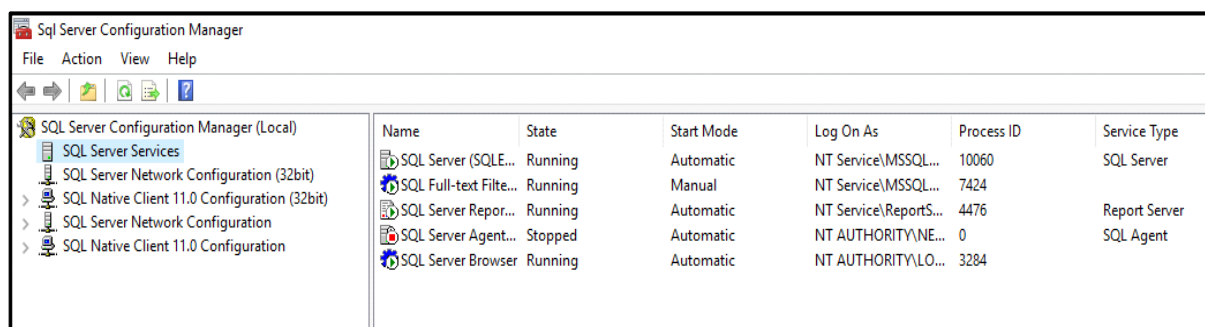


After installation is complete Click on **Finish** to exit the setup.

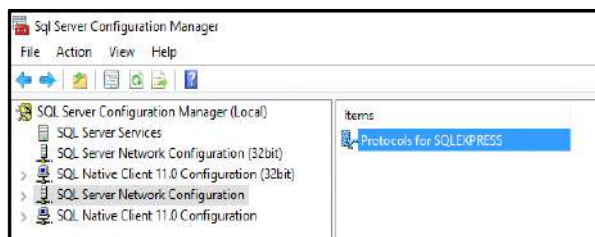


## Microsoft SQL Server

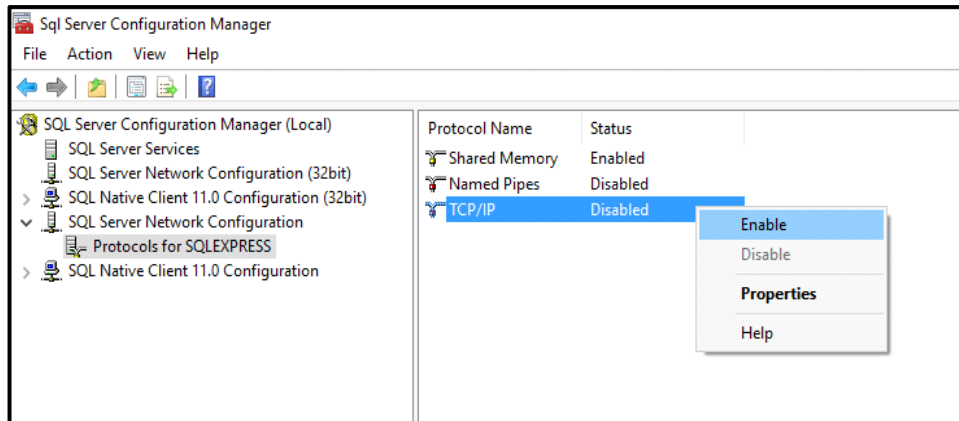
Now the installer needs to enable the appropriate protocols from the **SQL Server Configuration Manager** to allow the connectivity to the SQL server. For example; Navigate to the SQL Server 2014 Configuration Manager by typing it in “Search the web and Windows” option.



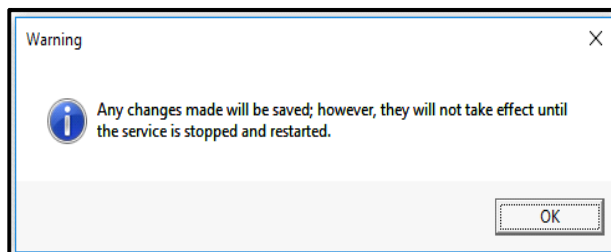
Go to **SQL Server Network Configuration > Protocols for SQLEXPRESS** option as shown in the figure.



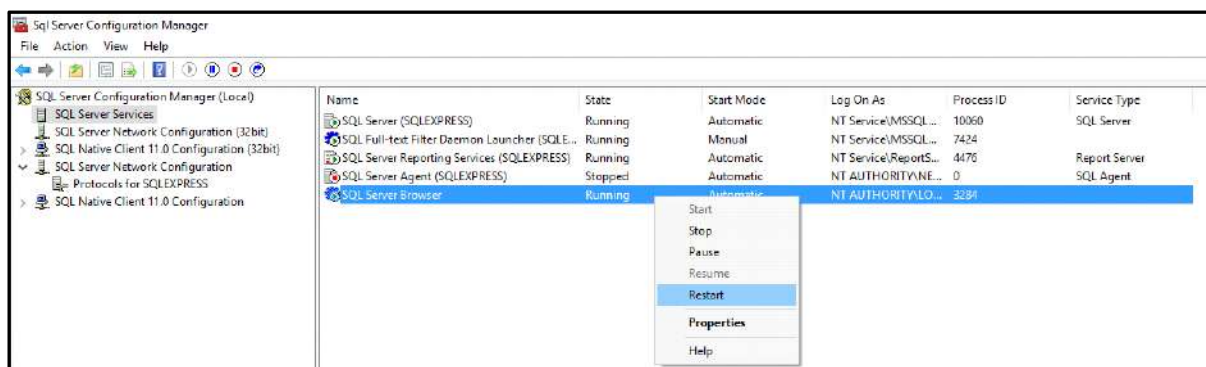
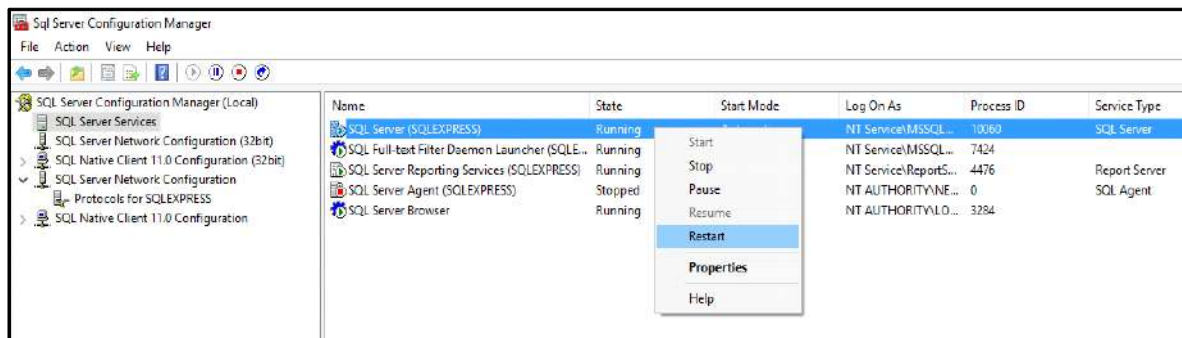
Click on the **Protocols for SQLEXPRESS** option in the left pane. The protocol options appear in the right pane as shown.



Right click on the **TCP/IP** option in the right pane and select the **Enable** option. The System will display the warning that the changes have been saved but it will take effect only after the service is restarted. Click OK to continue.

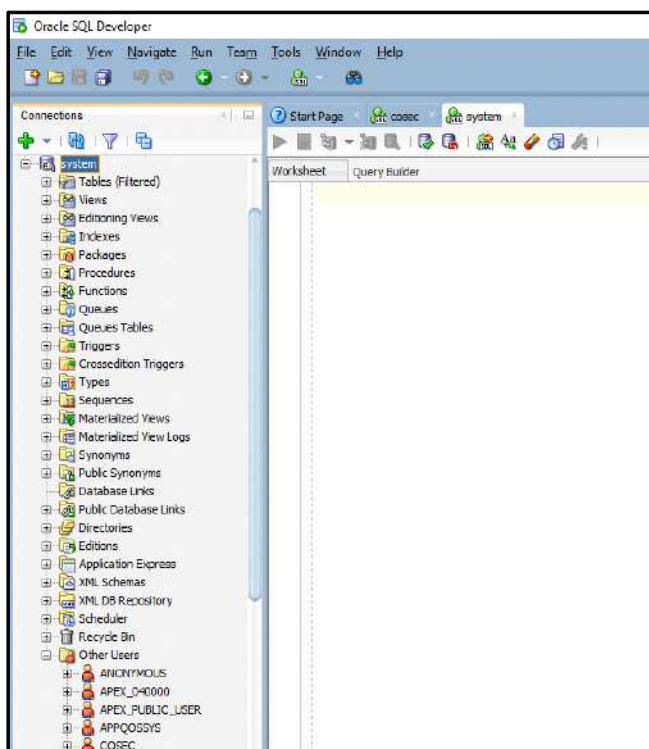
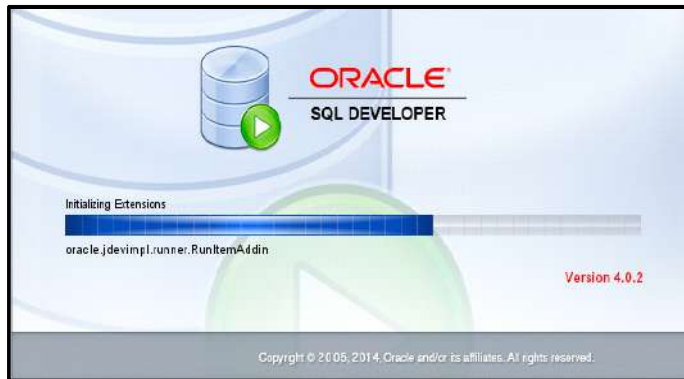


Select the **SQL Server Services** in the left pane. Restart the **SQL Server** and the **SQL Server Browser** services by right clicking on the options and selecting the **Restart** option as shown below:

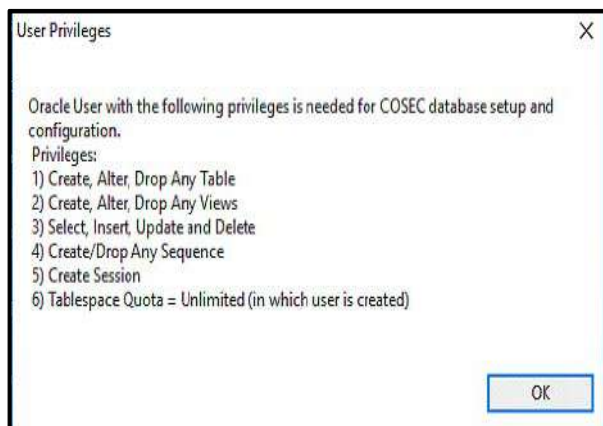
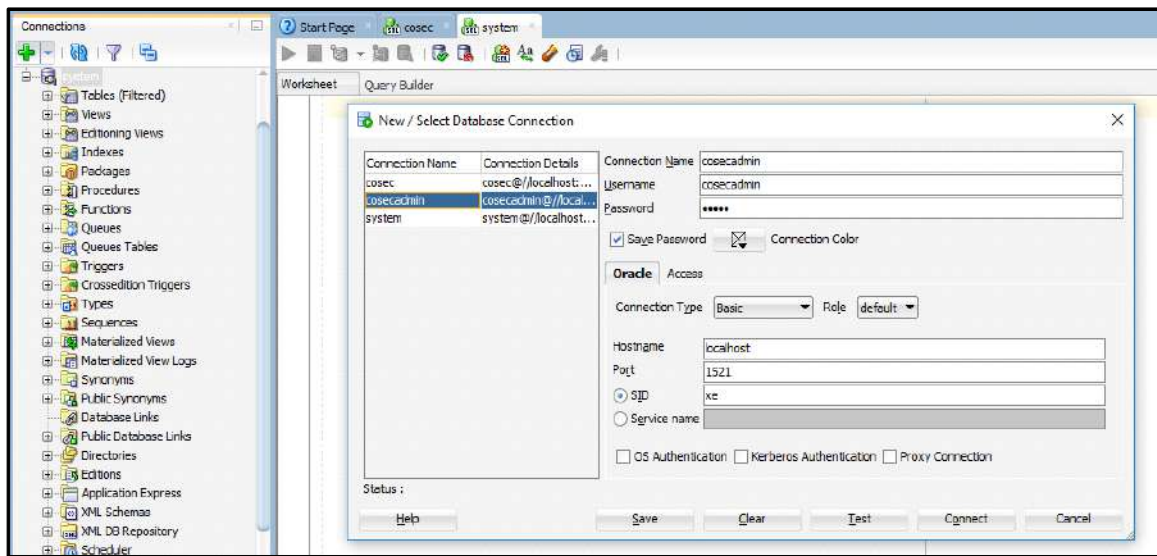



## Oracle Installation

For Oracle database, Oracle setup must be installed as shown below.



Then you must create the user and assign the required privileges as shown below.

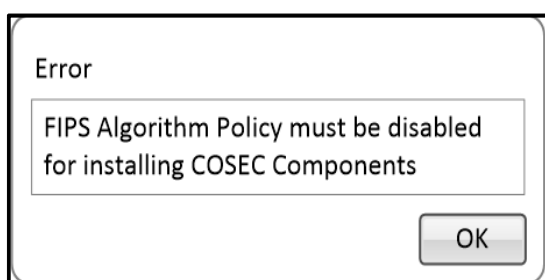


 From PC where COSEC Web is installed - Execute msi file available at following path of Setup folder:  
Setup\Prerequisites\SqlLocalDB\x64 OR x86 (as per 64-bit OR 32-bit system respectively)

Now once the Oracle user is created, you can start with the COSEC installation.

## FIPS Algorithm Policy Check

To Install COSEC Component the FIPS Algorithm Flag must be disabled. If the FIPS Algorithm flag is enabled then following pop up will appear while installing the setup.



To disable FIPS Algorithm policy go to Registry Editor by typing regedit from the start menu of your computer.

Then go to the path:

**Computer\HKEY\_LOCAL\_MACHINE\SYSTEM\CurrentControlSet\Control\Lsa\FipsAlgorithmPolicy.**

Now you can disable the FIPS Algorithm policy. Then Reset IIS Server and install the setup.



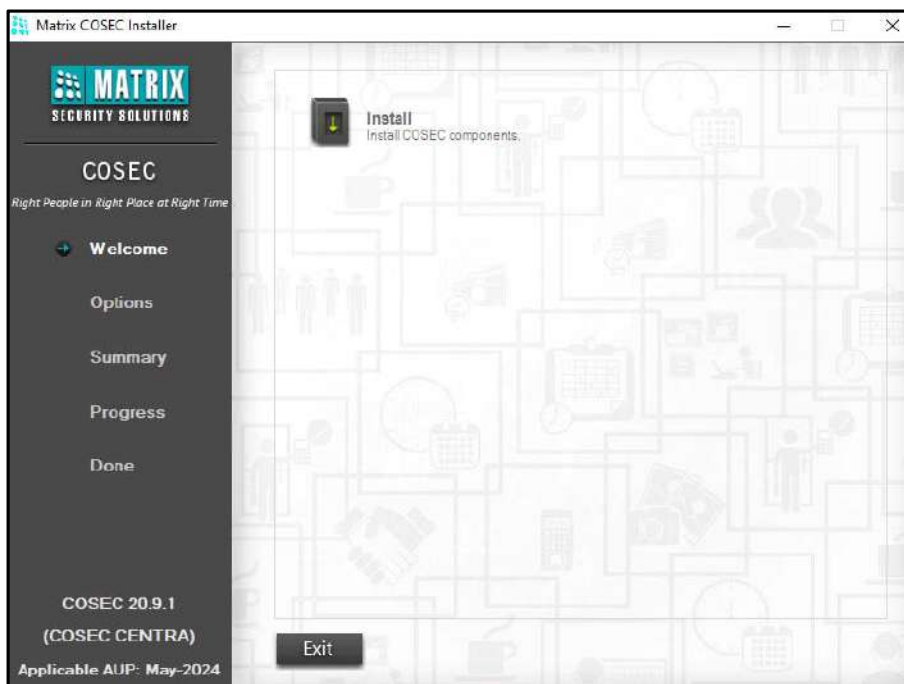
# Installing COSEC

---

In order to install the COSEC application:

- Open the COSEC **Setup** folder in your PC.
- Double-click the COSEC Installer Application.
- The **Matrix COSEC Installer** page opens.

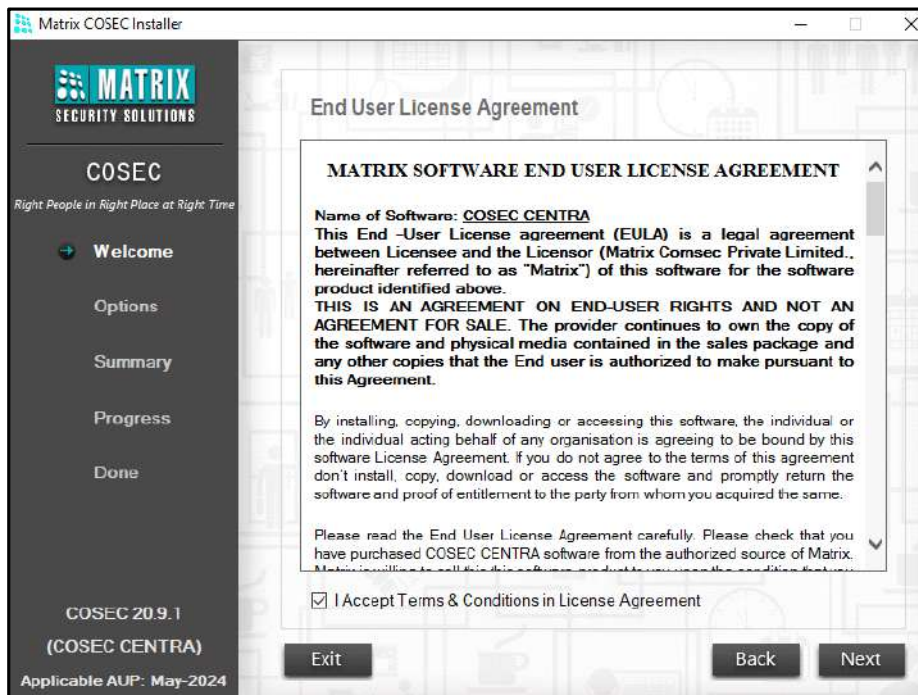
Name	Date modified	Type	Size
Help	09-12-2021 10:33	File folder	
Release Document	29-10-2021 14:54	File folder	
Setup	09-12-2021 10:47	File folder	
autorun.inf	16-08-2010 19:49	Setup Information	1 KB
COSECInstaller.exe	04-08-2017 11:23	Application	1,352 KB



This Installer automatically checks the computer for the prerequisites required for the installation of the applications prior to starting the installation process. Prior to running the Installer utility it is necessary to ensure that the logged in user has administrator rights on the computers where the various COSEC components are to be installed.

The COSEC application requires the Microsoft .Net Framework ver 4.0 to be installed prior to its installation on the application server. The COSEC Installer utility automatically detects the presence or absence of this component and the same must be installed in its absence.

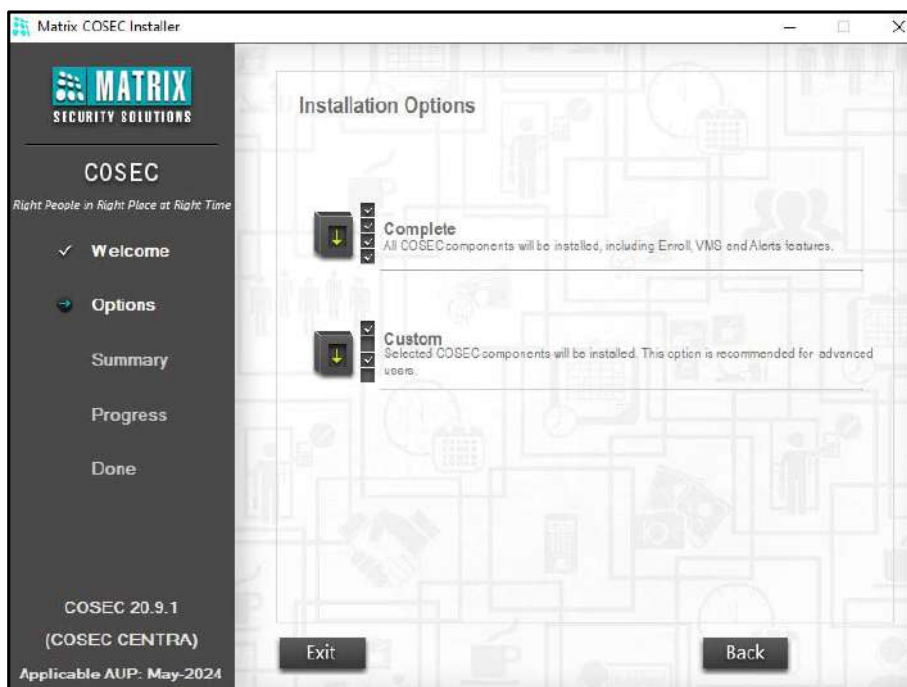
Click on **Install** to initiate the installation process.



*The End User License Agreement page will appear when new installation is done.*

*The **Annual Upgrade Package** for COSEC must be updated. Only then you can access COSEC. When the package gets expired; then you must have to get it upgraded through the Matrix channel partners.*

Click the check box to accept the Terms and Conditions in the License Agreement and click **Next**. The window appears with the following installation options:



**Complete:** Select this option if you wish to install all the components of the COSEC application. For details, refer to ["Complete Installation"](#).

**Custom:** Select this option if you wish to install the components of the COSEC application selectively. For details, refer to [“Custom Installation”](#).



*If you have opted for Virtual License and you are upgrading the system to V20R09 and then if you downgrade the system to any version below V20R09, this will hamper the functioning of the Virtual License and eventually it will stop working (that is, COSEC will be non-functional). To resume the functionality, you will have to contact the Matrix Support Team.*

Select the appropriate installation option to continue.

## Complete Installation

The **Complete Installation** option will install all the COSEC components. Click on **Complete** option. The Database creation page will appear from where you can configure Admin Management Database and COSEC Database.

### COSEC Admin Management Portal DB Details

Enter the details to configure Admin Management Portal Database.

**Database Type:** Select the database type as **MS SQL** or **ORACLE** to configure and connect the Admin Management Portal Database.

## MS SQL Database Type

If you select **MS SQL** as the **Database Type**, configure the following parameters:

Matrix COSEC Installer

**MATRIX**  
SECURITY SOLUTIONS

**COSEC**  
*Right People in Right Place at Right Time*

✓ **Welcome**

➔ **Options**

Summary

Progress

Done

COSEC 20.9.1  
(COSEC CENTRA)  
Applicable AUP: May 2024

**Complete Installation Options**

**COSEC Admin Management Portal DB Details:**

Database Type: MS SQL

Server Address: 192.168.103.155\SQLEXPRESS

Authentication: SQL Authentication

UserName: sa

Password: \*\*\*\*\*

Database Name: AdminPortalDB

Create new database or Upgrade existing one

**Test Connection**

COSEC Web URL:   
Location of COSEC Web folder

COSEC Visitor Portal URL:   
Location of COSEC Visitor Portal folder

Note: Do not mention protocol http or https in URL

**Exit** **Back** **Next**

**Server Address:** Enter the Server Address where the database of Admin Management Portal is to be created. For example: 192.168.103.155\SQLEXPRESS.

**Authentication:** Select the desired authentication type — SQL Authentication or Windows Authentication.

- If you select Authentication Type as **SQL Authentication**, configure the following:
  - **User Name:** Specify the user name as created during sql server instance. For example: sa
  - **Password:** Specify the password as created during sql server instance. For example: matrix\_1
- If you select Authentication Type as **Windows Authentication**, you do not need to configure any parameter.

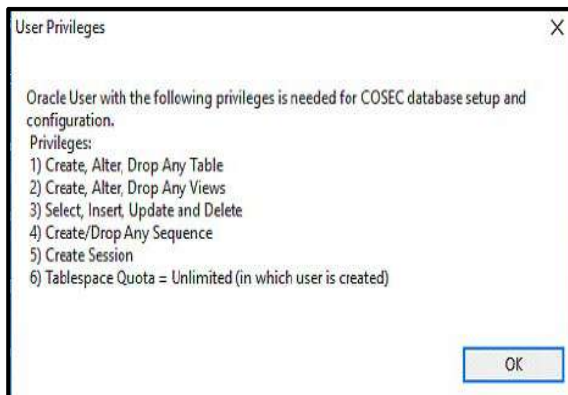
**Database Name:** Enter the name with which Tenant Admin database is to be created in the server.

**Test Connection:** Click Test connection to establish connection with the configured SQL database.

## Oracle Database Type

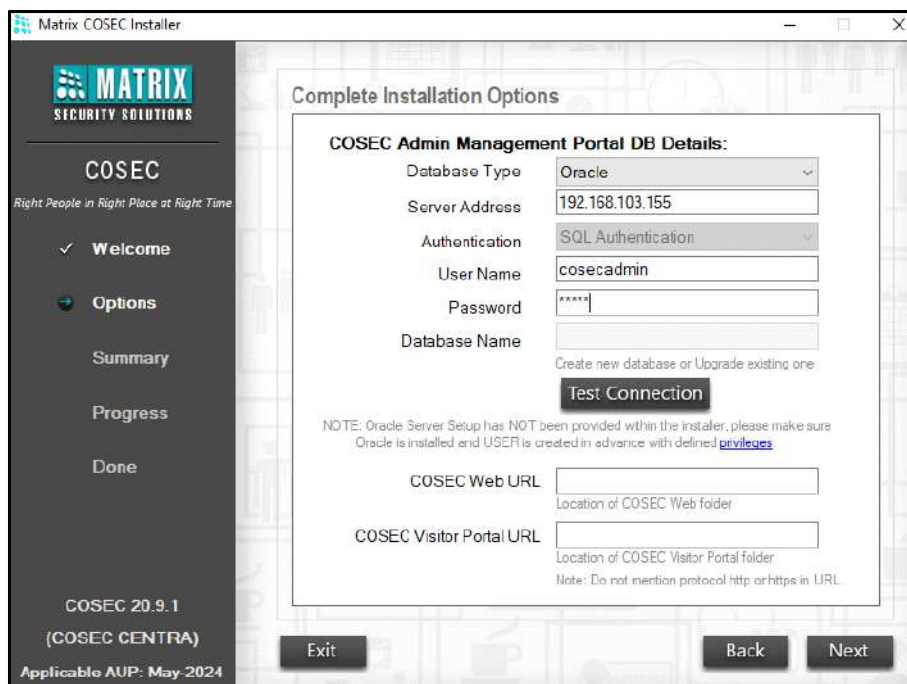


Make sure you have created the user in ORACLE with following privileges.



For details, refer to [“Oracle Installation”](#).

If you select **Oracle** as the **Database Type**, configure the following parameters:



**Server Address:** Enter the Server Address where the database of Admin Management Portal is to be created. For example: 192.168.104.23.

**User Name:** Specify the user name as the name of the user created from Oracle system. For example: cosecadmin

**Password:** Specify the password as created while creating the user in Oracle. For example: admin

**Test Connection:** Click Test connection to establish connection with the configured Oracle database.

If you have selected Database Type as **MS SQL** or **Oracle**, configure the following parameters:

Matrix COSEC Installer

**MATRIX**  
SECURITY SOLUTIONS

**COSEC**  
*Right People in Right Place at Right Time*

- ✓ Welcome
- ➔ **Options**
- Summary
- Progress
- Done

COSEC 20.9.1  
(COSEC CENTRA)  
Applicable AUP: May-2024

### Complete Installation Options

**COSEC Admin Management Portal DB Details:**

Database Type: MS SQL

Server Address: 192.168.103.155/SQLEXPRESS

Authentication: SQL Authentication

User Name: sa

Password: \*\*\*\*\*

Database Name: AdminPortalDB

Create new database or Upgrade existing one

**Test Connection**

COSEC Web URL: localhost/COSEC  
Location of COSEC Web folder

COSEC Visitor Portal URL: localhost/COSECVisitor  
Location of COSEC Visitor Portal folder

Note: Do not mention protocol http or https in URL

**Exit** **Back** **Next**

**COSEC Web URL:** Enter the URL through which COSEC Web is to be accessed. If you are installing COSEC Web in PC2 and accessing from PC1; then give IP of PC2 where Web is installed. If Web is to be accessed locally then IP or localhost can be given in URL.

**COSEC Visitor Portal URL:** Enter the URL through which COSEC Visitor Portal is to be accessed. If you are installing COSEC Visitor Portal in PC2 and accessing from PC1; then give IP of PC2 where Visitor Portal is installed. If Visitor Portal is to be accessed locally then IP or localhost can be given in URL.

Now click on **Next** button.

## COSEC DB Details

Configure the parameters for COSEC Database.

Matrix COSEC Installer

**MATRIX**  
SECURITY SOLUTIONS

**COSEC**  
*Right People in Right Place at Right Time*

✓ Welcome  
● Options  
Summary  
Progress  
Done

COSEC 20.9.1  
(COSEC CENTRA)  
Applicable AUP: May-2024

### Complete Installation Options

Proceed with Single DB ☐  
Note: By enabling above flag, the deployment of server will work on Single Database.

**COSEC DB Details:**

Database Type: MS SQL  
Server Address:   
Authentication: SQL Authentication  
User Name:   
Password:   
Database Name:   
Create new database or Upgrade existing one.  
Test Connection

**Company Details:**

Name:

Exit Back Next

**Proceed with Single DB:** Select this check box to complete the installation with creation of single database for Admin Portal and COSEC. The details will be auto-filled as configured under **COSEC Admin Management Portal DB Details**.



**COSEC DB Details and Company Details must be configured only in COSEC CENTRA.**

**Database Type:** Select the database type as **MS SQL** or **ORACLE**.



## MS SQL Database Type

If you select **MS SQL** as the **Database Type**, configure the following parameters:

Matrix COSEC Installer

**COSEC**  
Right People in Right Place at Right Time

✓ **Welcome**  
➡ **Options**  
Summary  
Progress  
Done

COSEC 20.9.1  
(COSEC CENTRA)  
Applicable AUP: May-2024

### Complete Installation Options

☐ Proceed with Single DB  
Note: By enabling above flag, the deployment of server will work on Single Database.

**COSEC DB Details:**

Database Type: MS SQL  
Server Address: 192.168.103.155\SQLEXPRESS  
Authentication: SQL Authentication  
User Name: sa  
Password: \*\*\*\*\*  
Database Name: COSEC  
Create new database or Upgrade existing one  
**Test Connection**

**Company Details:**  
Name: \_\_\_\_\_

Exit Back Next

**Server Address:** Enter the Server Address where the database of Admin Management Portal is to be created. For example: 192.168.103.155\SQLEXPRESS.

**Authentication:** Select the desired authentication type — SQL Authentication or Windows Authentication.

- If you select Authentication Type as **SQL Authentication**, configure the following:
  - **User Name:** Specify the user name as created during sql server instance. For example: sa
  - **Password:** Specify the password as created during sql server instance. For example: matrix\_1
- If you select Authentication Type as **Windows Authentication**, you do not need to configure any parameter.

**Database Name:** Enter the name with which Tenant Admin database is to be created in the server.

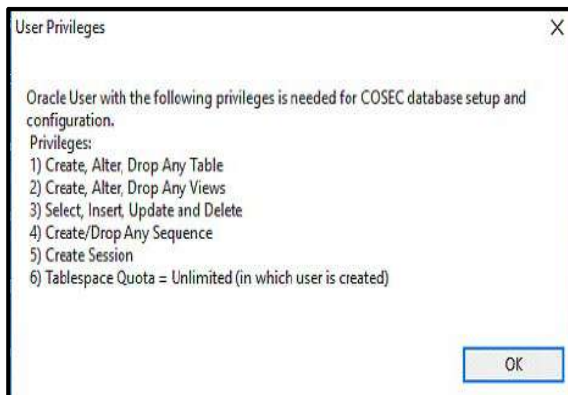
**Test Connection:** Click Test connection to establish connection with the configured SQL database.



## Oracle Database Type

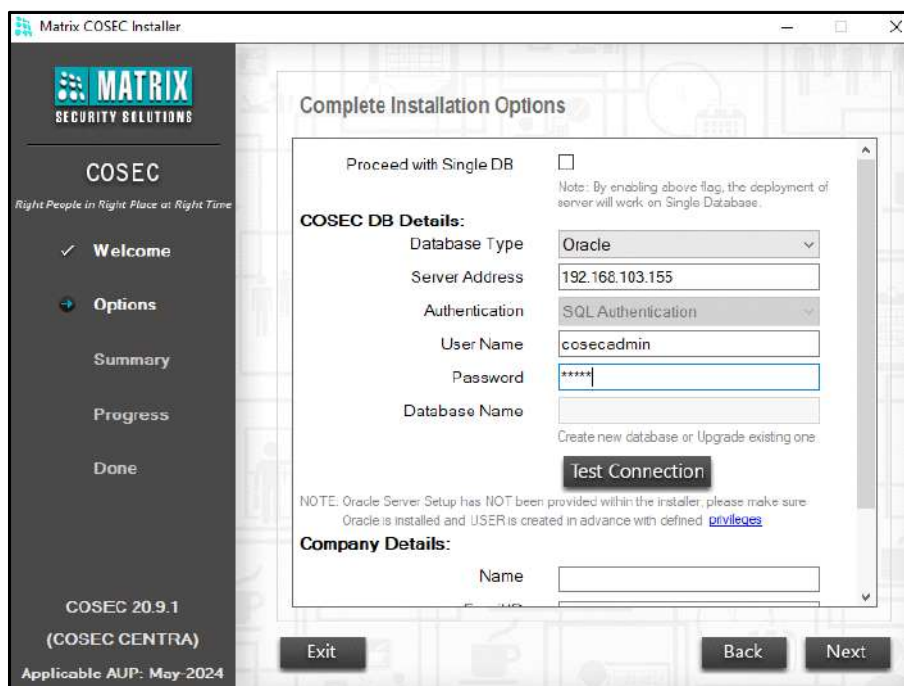


Make sure you have created the user in ORACLE with following privileges.



For details, refer to [“Oracle Installation”](#).

If you select **Oracle** as the **Database Type**, configure the following parameters:



**Server Address:** Enter the Server Address where the database of Admin Management Portal is to be created. For example: 192.168.103.155.

**User Name:** Specify the user name as the name of the user created from Oracle system. For example: cosecadmin

**Password:** Specify the password as created while creating the user in Oracle. For example: admin

**Test Connection:** Click Test connection to establish connection with the configured Oracle database.

## Company Details

If you have selected Database Type as **MS SQL** or **Oracle**, configure the following parameters:

Matrix COSEC Installer

**COSEC**  
Right People in Right Place at Right Time

✓ Welcome  
➔ Options  
Summary  
Progress  
Done

COSEC 20.9.1  
(COSEC CENTRA)  
Applicable AUP: May-2024

**Complete Installation Options**

Database Type: MS SQL  
Server Address: 192.168.103.155\SQLEXPRESS  
Authentication: SQL Authentication  
User Name: sa  
Password: \*\*\*\*\*  
Database Name: COSEC  
Create new database or Upgrade existing one  
Test Connection

**Company Details:**  
Name: Matrix  
Email ID: smita.baria@matixrd.org  
Contact No.: 9825095600  
License Verification Mode: Device Based  
Server Based  
Device Based  
Virtual License

Exit Back Next

**Name:** Enter the name of the company which will be created by default in the Admin Management Portal. This Name will appear in the Admin Management Portal > Company Configuration > Profile.

**Email ID:** Enter the Email ID of the company. This Email ID will appear in the Admin Management Portal > Company Configuration > Profile > Contact Details.

**Contact No:** Enter the Contact Number of the company. This Contact No. will appear in the Admin Management Portal > Company Configuration > Profile > Contact Details.

**License Verification Mode:** Select the option as **Server Based**, **Device Based** or **Virtual License** for verifying the license.



*The License Verification Mode selected here will be set automatically in **Admin Management Portal > Company Configuration > Profile**.*

- If you select **Server Based**, License will be verified from the Dongle connected to the PC where Master service is installed. For details refer to "[Server Based](#)"
- If you select **Device Based**, License will be verified from the Dongle connected to the COSEC Device. This device will communicate with Master Service so that Master Service can fetch the license key from the Dongle and all of the COSEC services will function. For details refer to "[Device Based](#)"



*For Device Based License Verification, the devices — VEGA, ARGO, ARGO FACE Direct Doors and Panel lite V2/Panel200 in Server Mode — can be used.*

*Make sure you have a **COSEC CENTRA** connection mode and the devices are configured in the same application.*

Once Dongle is connected to the device; enter the License Server URL (Default is 192.168.50.100) and License Server Port (Default is 15025) in Server Settings from the device or its webpage.

- If you select **Virtual License**, the license will be verified thorough the Virtual License Manager Server. For details refer to [“Virtual License”](#).



*You can opt for Virtual License in the following scenarios:*

- *Fresh installation of COSEC CENTRA. For details, refer to [“Virtual License”](#).*
- *You already have a Dongle License but you wish to migrate to Virtual License or vice versa. For details contact Matix Support Team.*

## Server Based

Make sure the License Dongle is connected to the USB port of the computer where the Master Service is running. Master Service checks for the presence of this License Dongle. If the Dongle is available, then the Master Service sends the Refresh command to all other services.

The Dongle only has the Generic Key, you need to purchase other licenses as per your requirement and update the new license key. For details, refer to Admin Management Portal > Company Configuration > **License and Services** and in the Admin Management Portal User Guide, Appendix > **Supported Licenses**.

## Device Based

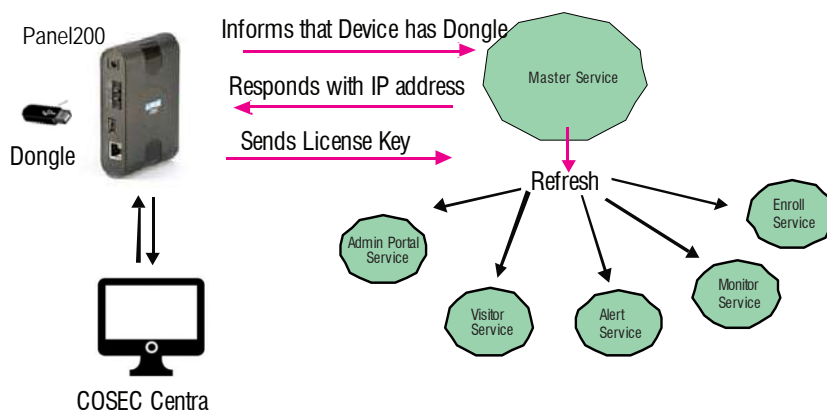
In Device Based licensing VEGA, ARGO, ARGO FACE Direct Doors or Panel200 can be used. Also make sure the Tenant/ Company is configured with License Verification Mode as Device Based.

Make sure the License Dongle is connected to the desired device. The **MAC Address** of this device will be displayed in Admin Management Portal > Company Configuration > **Profile**.

The Dongle only has the Generic Key, you need to purchase other licenses as per your requirement and update the new license key. For details, refer to Admin Management Portal > Company Configuration > **License and Services** and in the Admin Management Portal User Guide, Appendix > **Supported Licenses**.

Now,

- The device (in this case Panel200) sends information to the Master Service that device has the License Dongle.
- The Master Service responds to the device by sending the IP Address of Master service.
- Now device sends License Key to the Master Service. The Master Service gets the License Key and gives the same to the other services.



When Dongle is removed from the device, then immediate information is sent to the Master Service and immediate refresh is sent to other services.

When device goes offline, then Master Service will continue working for a considerable time after which the Master Service and other services will be refreshed.

Any change or updation in License Key will be fetched by the device when it is online. The updated License Key will then be sent to the Master Service and hence other services.



*In the Server Settings of Panel200;*

- enter the URL for COSEC CENTRA Server as the IP Address of the computer where Monitor Service is running.
- enter the License Server URL as the IP Address of the computer where Master Service is running.

## Virtual License

With the introduction of Virtual License, the need of a Dongle is eliminated, but you need to make sure you have:

- Persistent Internet connection with good speed.
- Received the MATRIX VIRTUAL DONGLE300 Key in PDF form.
- Received the COSEC CENTRA PLATFORM Key in PDF form.
- Received the desired module activation License Keys.

The licenses need to be purchased as per your requirement. For details, refer to **Supported Licenses** in the Admin Management Portal User Guide

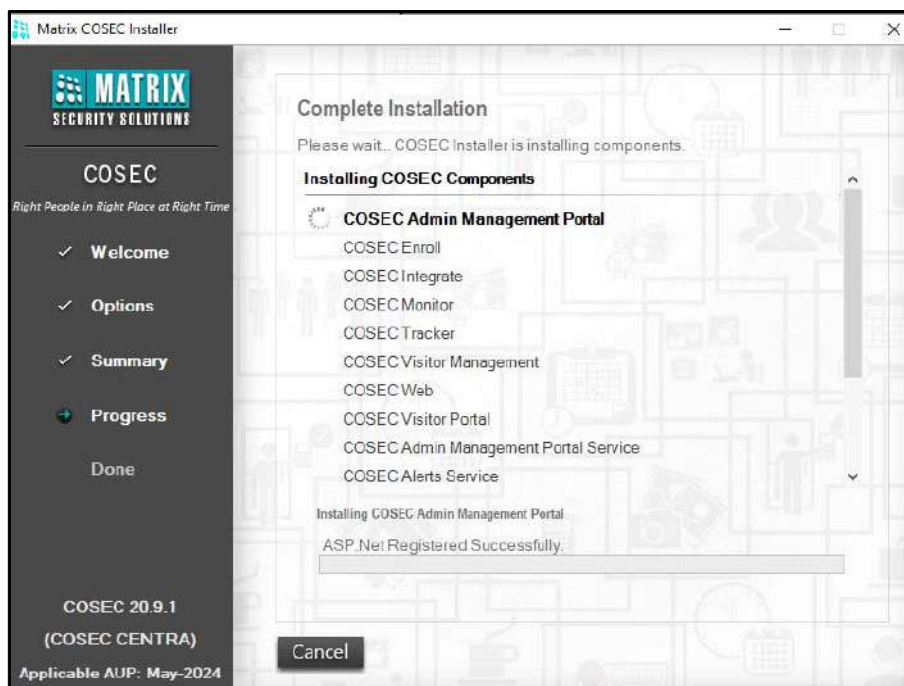
Once the keys are received you need to Register/Update the same. For details, refer to **License and Services** in the Admin Management Portal User Guide.

The registration request is sent to the Virtual License Manager. The Virtual License Manager checks for the authenticity of the key as well as it communicates with the Matrix License Manager. Thereafter the request is served.

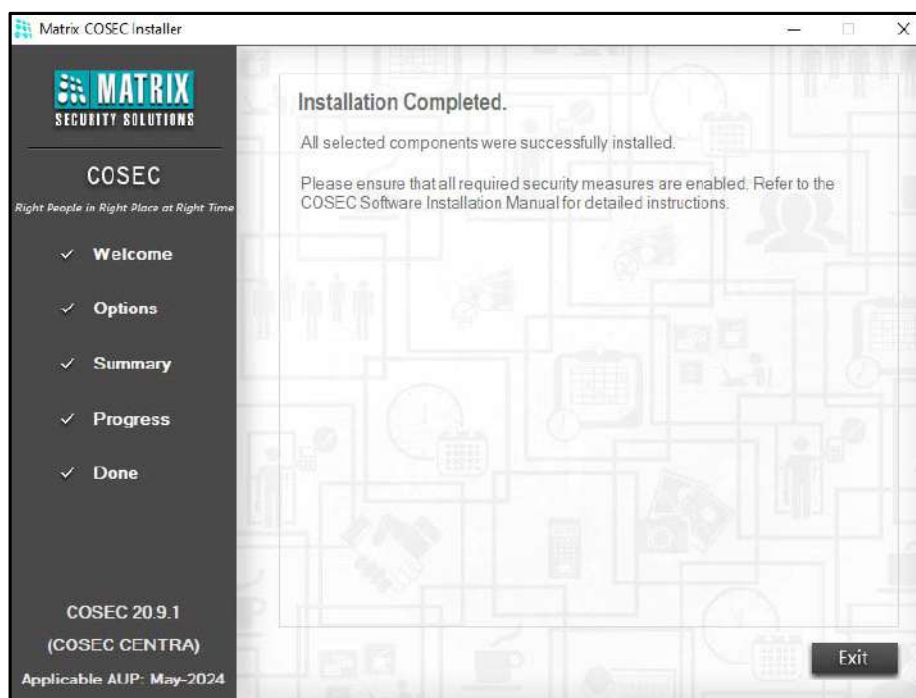
Once the License Verification Mode is selected and test connection is successful, click **Next** to proceed with the installation.



*If you have opted for Virtual License and you are upgrading the system to V20R09 and then if you downgrade the system to any version below V20R09, this will hamper the functioning of the Virtual License and eventually it will stop working (that is, COSEC will be non-functional). To resume the functionality, you will have to contact the Matrix Support Team.*



Once the Installation is complete the following screen appears.



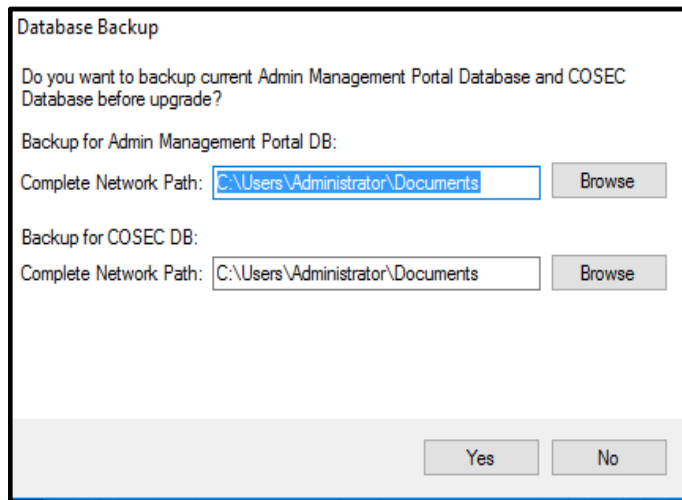
We recommend you to enable certain Security Settings after the Installation is done. To do so, make sure you download and run the Security Configuration Utility.

To download, click [https://drive.google.com/drive/folders/1JsMUCn5mCAS78mOthlrAEi0\\_1R\\_AuXDu](https://drive.google.com/drive/folders/1JsMUCn5mCAS78mOthlrAEi0_1R_AuXDu)

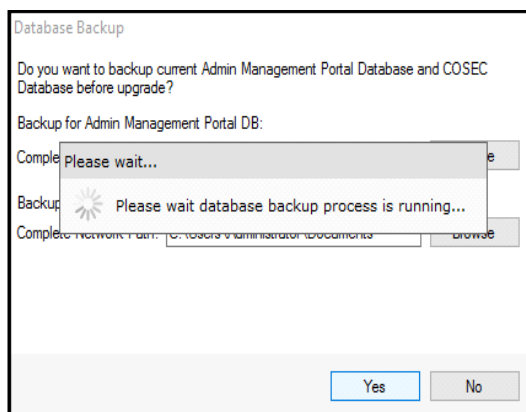
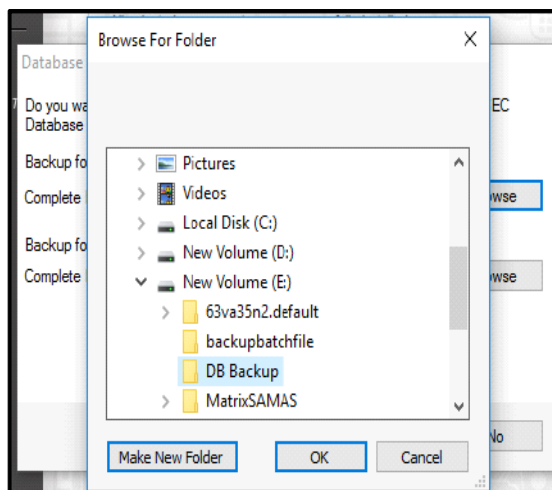
After the Installation is successful, the **Database Backup** pop-up appears.

- You can take the backup of the Admin Portal Database as well as COSEC Database.

- By default, the **Complete Network Path** is set as C:\Users\Administrator\Documents. You can also change this path as per your requirement. To do so,



- Click **Browse** and select the desired path where backup is to be taken.



In case the Backup fails at the time of installation then its log entry will be visible in its backup log file which would be created at the same location as backup.

After taking the backup, the following services will start automatically.

- COSEC Master Service
- COSEC Admin Management Portal Service
- COSEC Alert Service
- COSEC Enroll Service
- COSEC Monitor Service
- COSEC Identification Service
- COSEC VMS Service

Once all the services are running, they appear in the tray.

The Master Service will only function when it gets the relevant license information. Hence, if you have opted for Dongle - Server Based or Device Based, make sure the Dongle is connected and if you have opted for Virtual License, you need to register the license key.

For more details related to License updation or registration of Server Based license or Device Based license or Virtual License, refer to the Admin Management Portal User Guide.

Now you can login into the Admin Portal and COSEC Web.



For more information regarding the above services refer, **COSEC Services User Manual**.

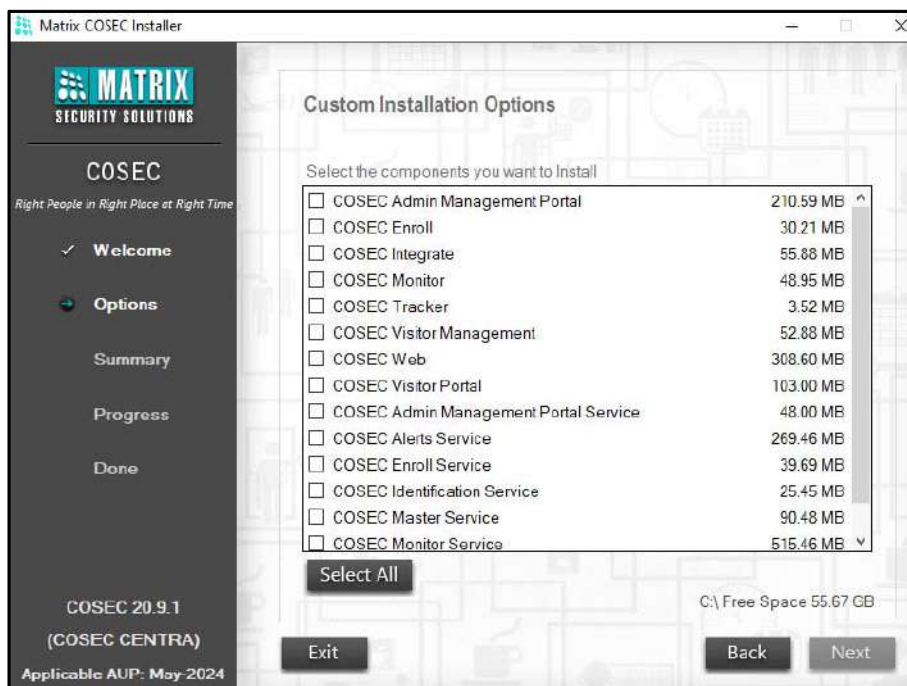
## Custom Installation

The **Custom Installation** option will install the selected COSEC components. Click on **Custom** option.



Make sure you install the following services for basic usage of COSEC Application —COSEC Admin Management Portal, COSEC Web, COSEC Admin Management Portal Service and COSEC Master Service. You can install other components as per your requirement.

- Select check boxes of the desired components from the list that you wish to install.





- Click **Next** to proceed. The remaining steps of installation are similar to **Complete Installation**. For details, refer to "[Complete Installation](#)".

We recommend you to enable certain Security Settings after the Installation is done. To do so, make sure you download and run the Security Configuration Utility.

To download, click [https://drive.google.com/drive/folders/1JsMUCn5mCAS78mOthlrAEi0\\_1R\\_AuXDu](https://drive.google.com/drive/folders/1JsMUCn5mCAS78mOthlrAEi0_1R_AuXDu)

## Login to Admin Portal

To access the Admin Management Portal, type the following link in your browser.

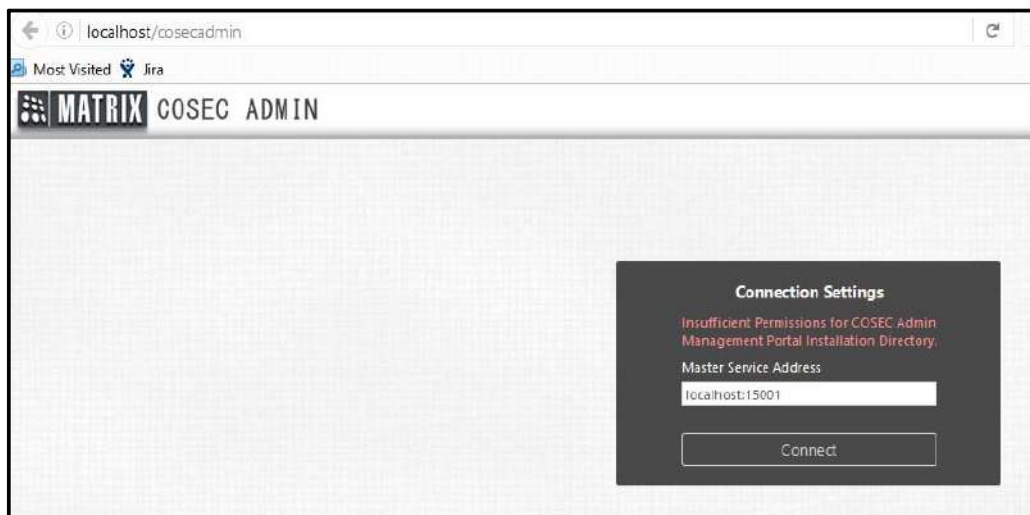
**http://localhost/cosecadmin**



OR click on



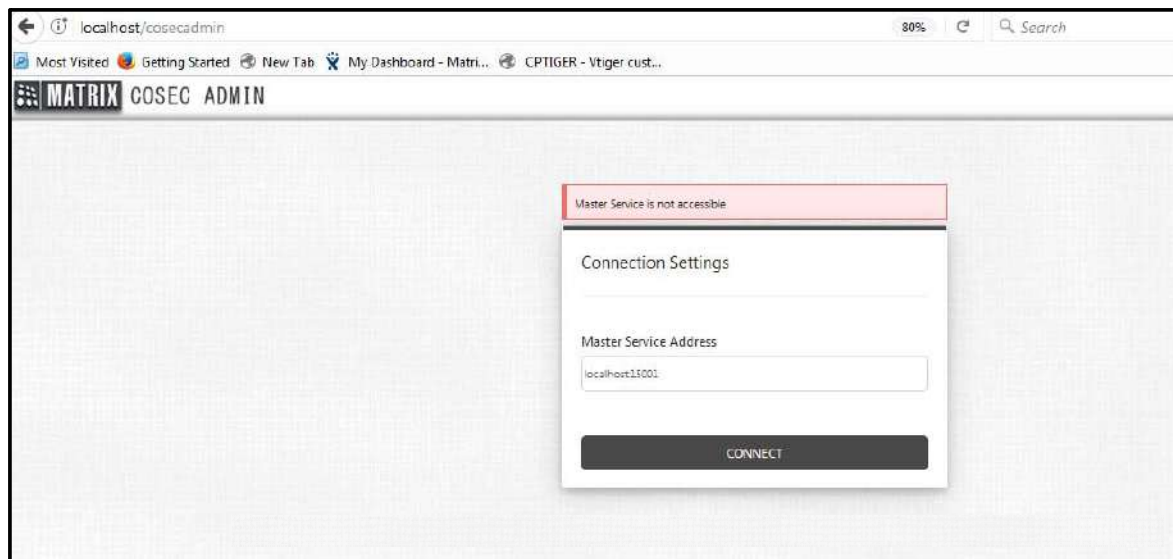
*The COSECADMIN folder in inetpub must have administrator rights to access the Admin Portal.*



Check the rights on COSECADMIN folder. For this go to path C:\inetpub\wwwroot. The IIS user must be given full control rights. So click Edit and enable Full control checkbox. Then apply the changes. Now you can login to Admin Portal.

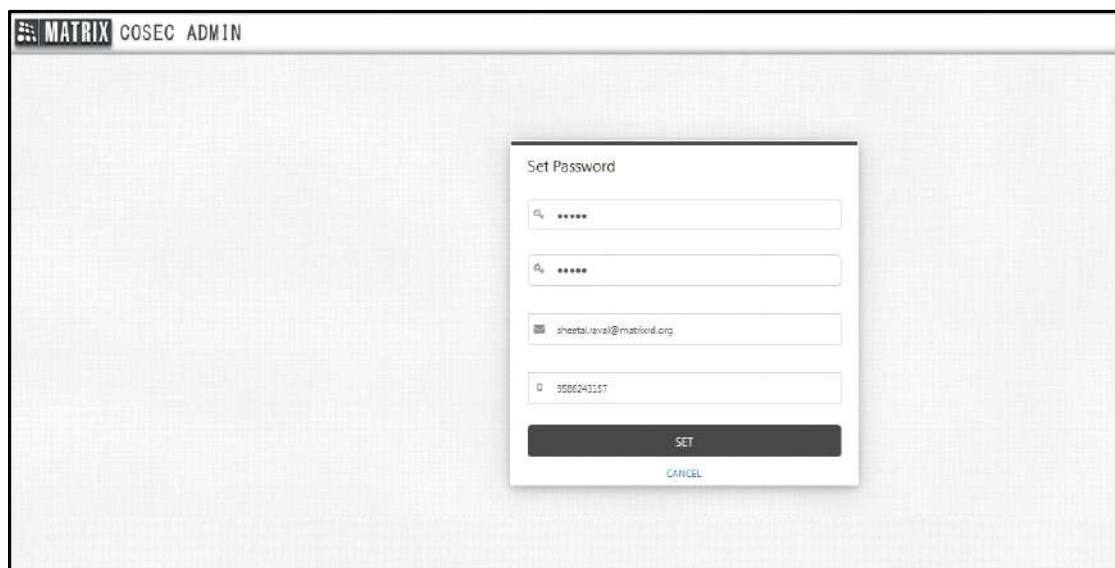


The Connection Settings page will appear as shown below:

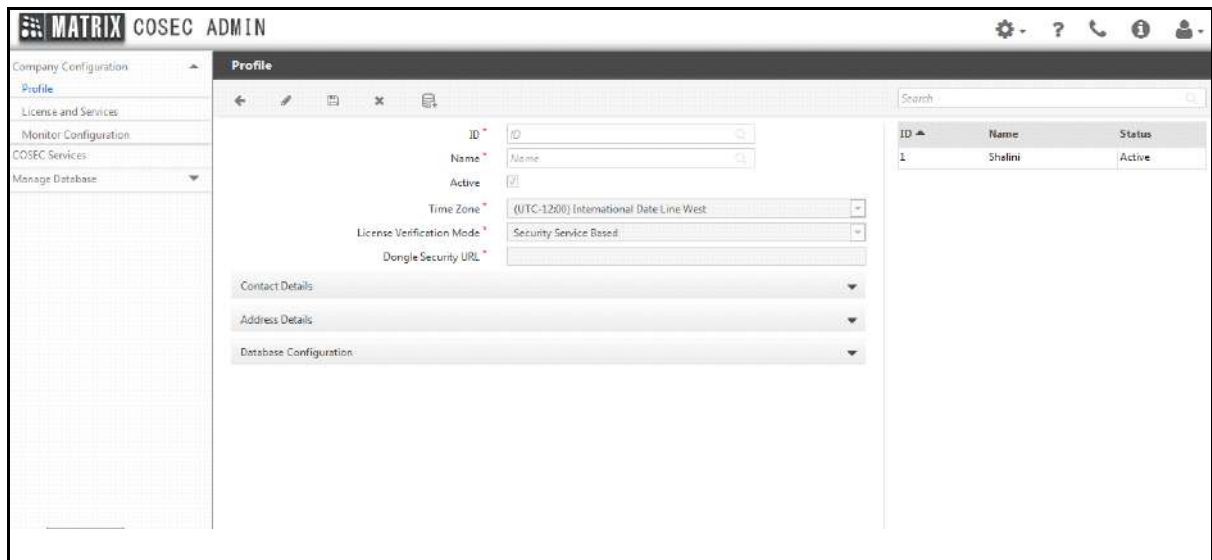


Enter the **Master Service Address** to connect with the database and click **Connect**. The Admin Portal will get connected with its database through the Master service. Ensure that Master service is running.

Then login with default login ID “sa” and set the desired password.



The Admin Portal page will open as shown below.



For detailed information regarding Admin Portal read **Admin Mgt Portal User Guide** from the setup.

## Login to COSEC Web

Now you can login to the COSEC Web using the Web URL say **192.168.104.12/cosec** or **localhost/cosec** in your browser. For login process "[COSEC Web](#)"

For detailed information regarding COSEC Web read **COSEC User Guide** from the setup.

## Launching the COSEC Application

There are three components to start COSEC application.

- **COSEC Master Service**, refer to “[Master Service Connection](#)”.
- **Admin Portal Web Server application** refer to “[Admin Management Portal](#)”.
- **COSEC Web server application** refer to “[COSEC Web](#)”.

### Master Service Connection

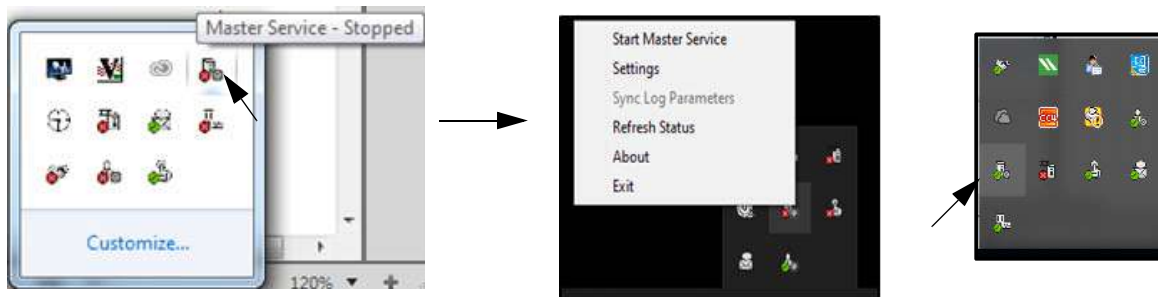
For Tenant Portal connection with Master Service, you must enter the Master Service URL in web configuration file at path **C: > inetpub > wwwroot > COSECADMIN>Web**

```
</system.web>
<appSettings>
<add key="MasterUrl" value="://localhost:15001/MasterService/" />
  <add key="HttpEnable" value="false" />
  <add key="IsSSL" value="false" />
  <add key="webpages:Version" value="3.0.0.0" />
  <add key="webpages:Enabled" value="false" />
  <add key="ClientValidationEnabled" value="true" />
  <add key="UnobtrusiveJavaScriptEnabled" value="true" />
  <add key="DomainName" value=".matrixvyom.com" />
  <add key="WebVirtualDir" value="Vyom" />
  <add key="Identity" value="" />
  <add key="IsInternal" value="true"/>
</appSettings>
```

For COSEC Web connection with Master Service, you must enter the Master Service URL in web configuration file at path **C: > inetpub > wwwroot > COSEC > Web**

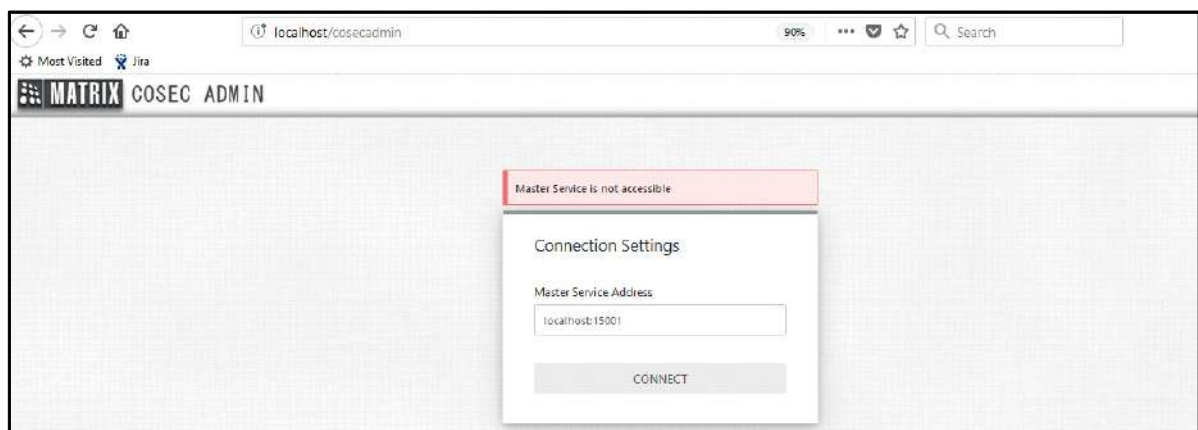
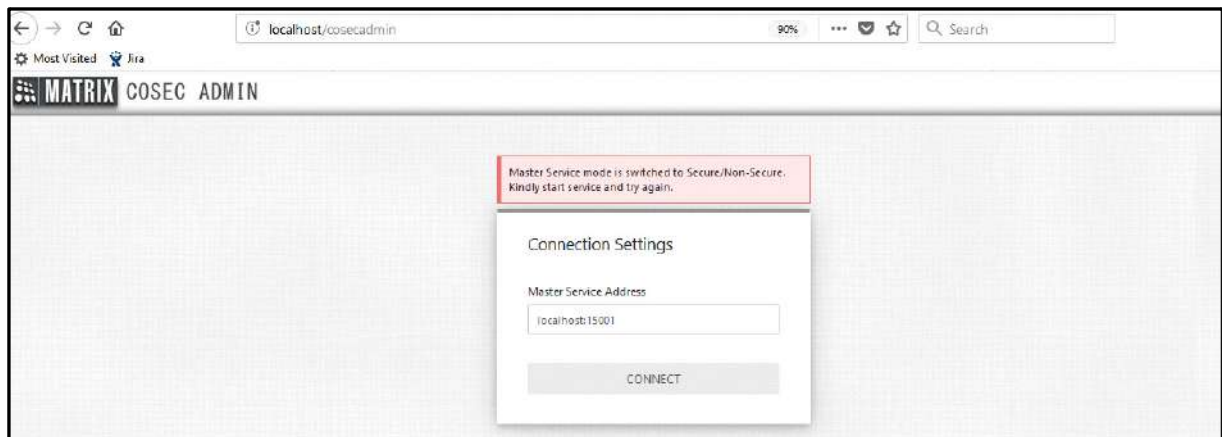
```
<appSettings>
  <add key="CrystalImageCleaner-AutoStart" value="true"/>
  <add key="CrystalImageCleaner-Sleep" value="60000"/>
  <add key="CrystalImageCleaner-Age" value="120000"/>
  <add key="ClientURL" value="www.sheelal.matrixvyom.com" />
  <add key="MasterUrl" value="://192.168.104.12:15001/MasterService/" />
  <add key="HttpEnable" value="false" />
  <add key="IsSSL" value="false" />
  <add key="baseUrl" value="http://192.168.104.12/cosec/" />
  <add key="isCloudApp" value="true" />
  <add key="Identity" value="" />
</appSettings>
```

The Master Service can be started from the Master Service icon from the system tray as shown below.



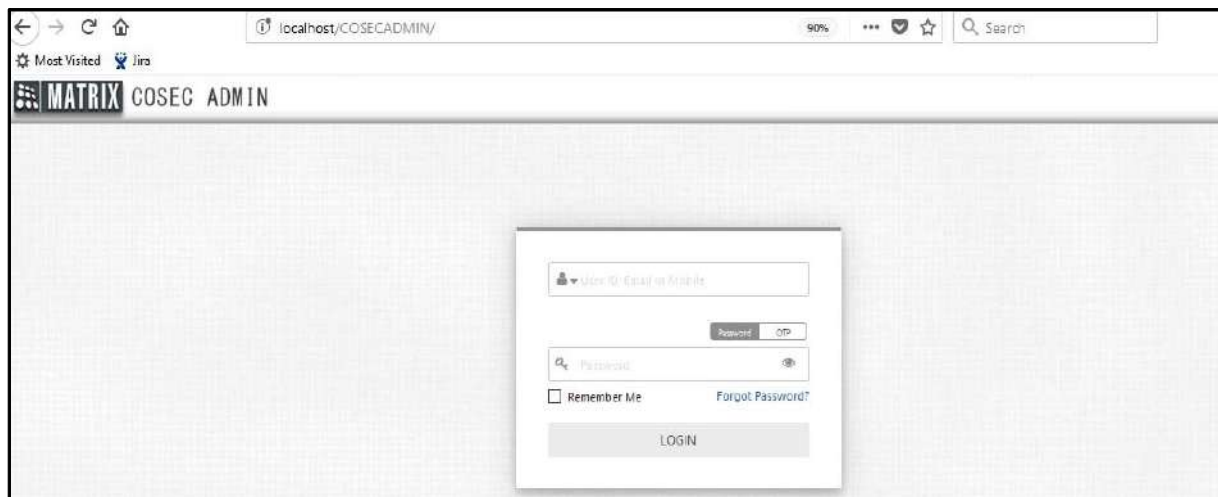
## Admin Management Portal

Now login to the Tenant Admin Portal with URL **localhost/cosecadmin** or say 192.168.104.12/cosecadmin Or click



**Connection Settings:** Enter the Master Service URL to connect Tenant Admin Portal. Ensure that Master Service is running. Then click Connect button.

The Admin Portal login page appears as shown below:

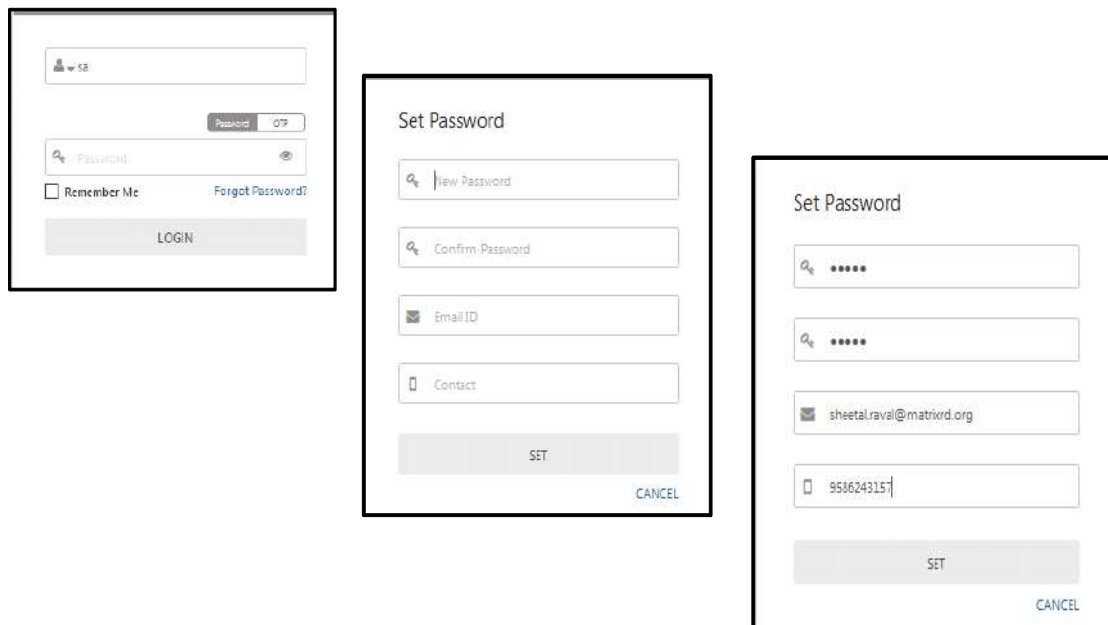


When you are accessing Admin Portal for the first time; then enter the login ID as “sa”. Click Login and set the password for “sa” from the **Set Password** screen.



*For the first login, the Password Policy will be applicable with the default values of the parameters. For details, refer to Password Policy in Admin Management Portal User Guide.*

Enter the **Email ID** and **Contact** number through which you can retrieve your account when you forget your password. Also the OTP can be received on this Email ID and Contact number. Click **Set** to save the details.



Then Enter the **Login ID** and **Password/OTP** to login into Admin Portal. You can use Login ID as **User ID/Mobile Number/Email ID**. The login process is similar to that described in “[COSEC Web](#)” section. The detailed description for login into Admin Portal is given in Admin Management Portal User Guide.

The Admin Portal Profile page appears and the tenant would be created with name as entered in Company details.

ID	Name	Status
1	sheetal	Active

## COSEC Web

Now you can login to the COSEC Web using the Web URL **localhost/cosec** or say **192.168.104.12/cosec** in your browser.

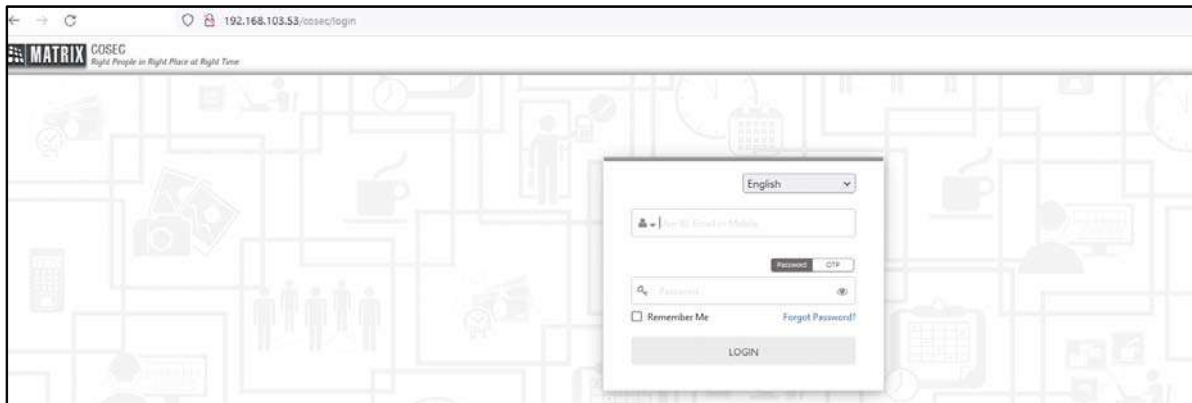


*If Server Based/ Device Based is selected as the License Verification Mode, make sure the Dongle is connected to the USB port of the Application Server or the desired Device and the Database has been upgraded from the Admin Portal, prior to the launching of the COSEC application.*

*If Virtual License is selected as the License Verification Mode, make sure that the license has been registered and the Database has been upgraded from the Admin Portal, prior to the launching of the COSEC application.*

*For details, refer to the Admin Management Portal User Guide.*

The login page appears.



You can select the desired language in which you wish to view the login page. To do so,

- Select the desired language from the dropdown list. The default language is English.



*Language selection on login page is applicable for COSEC CENTRA and OEM only.*

*The options for languages appear as per the language files available in the **Language Resource** folder at the following path: **C:\inetpub\wwwroot\COSEC\Language Resource**.*

*You can add language files to this folder via Language translation using the Multi-Language Utility. To know more, refer to the Multi- Language Utility User Guide.*

*The language set from **Global Language For Login** will be applicable to the login page. For details, refer to **Global Language For Login** in [“Basic Policy”](#). If you wish to view the pages in another language post login, click **Account Settings > Set Language> Preferred Language**. For details, refer to [“Account Setting”](#).*

- The login page will appear in the selected language for the current session.



*Select **Remember Me** checkbox to view the login page in the selected language for subsequent sessions.*

You can login with the default User Names **sa** in the Login ID field.

The **se** and **so** login are inactive by default. You can activate these login account from System Accounts page once you have logged in using **sa** login.

**sa-** System Administrator having unlimited access rights

**se-** System Engineer has access rights limited to access control and back up related pages

**so-** System Operator has the minimum access rights

When any of the system account user logs in for the first time, they need to enter just the Login ID and directly click on Login. The password setting page will appear from where password can be set.



For the first login, the Password Policy will be applicable with the default values of the parameters. For details, refer to [“Password Policy”](#).

Set the **New Password** for System Admin from the login page. You can enter the **security question** and its answer to retrieve the login account in future.

Click **Set**. Then enter the **Login ID** as **User ID/Mobile Number/Email ID** to login into COSEC using the newly created password. You can login using OTP once Alert configurations are done.



The valid characters for Login ID are **"A-Z a-z 0-9 @ \_ \ : . / + -"**

By default the Login Policy will be enabled for **Password or OTP**. So user can login using password or OTP. To enable 2 step verification; the option in login policy must be selected as **Password Then OTP**.

If you configure the Login policy as **Password or OTP** or **Password Then OTP**, make sure that you have linked an ESS user for the **SA** account. Refer **Admin Module > System Accounts > Optional > Linked ESS User**. For more details, refer **Linked ESS User** in [“Optional”](#).

Refer **Maximum OTP Generation Attempts** in [“Password Policy”](#) for generation of OTP.

You can view the password characters by clicking on **View Password**  button.

You can select **Remember Me** checkbox which will remember the password as well the selected language during future login sessions.

You can click on **Forgot password** if you have forgotten your login password which will enable to get new password. For details, refer to [“Forgot Password”](#).



You must ensure that the Login ID being used has the respective correct icon. For details, refer to [“Icon of Login ID”](#).


## Password or OTP

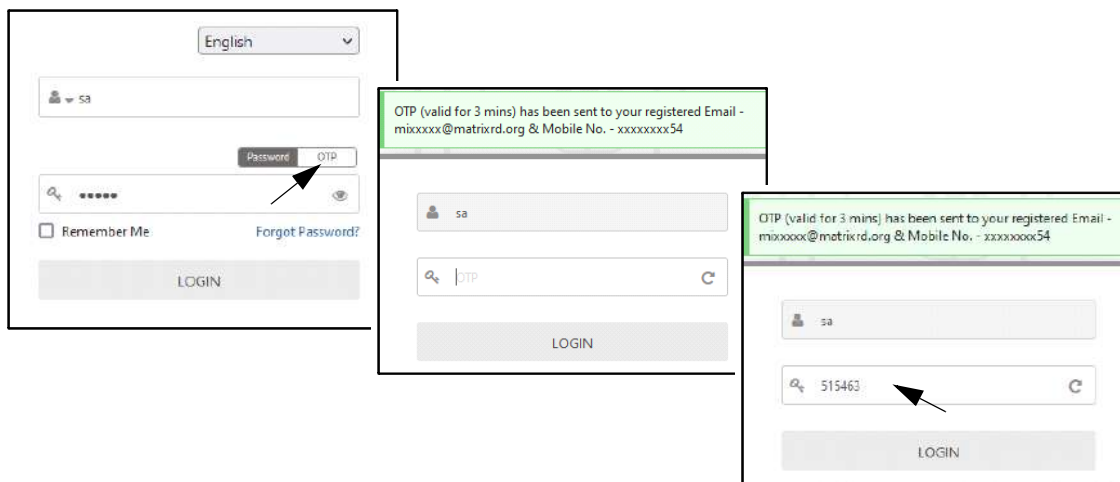
In this authentication mode, you can enter either Password of login ID or OTP for accessing the COSEC Web.

### User ID with Password or OTP

Enter the **User ID** of login user. Then enter the password and click **Login** button to login into COSEC Web.

You can also login using OTP by clicking OTP button once Email/SMS configuration and OTP alert is configured. The OTP is sent to the contact details (Email ID and Mobile number as available in User Configuration) of login user. Enter the OTP and click **Login** button to login into COSEC Web.

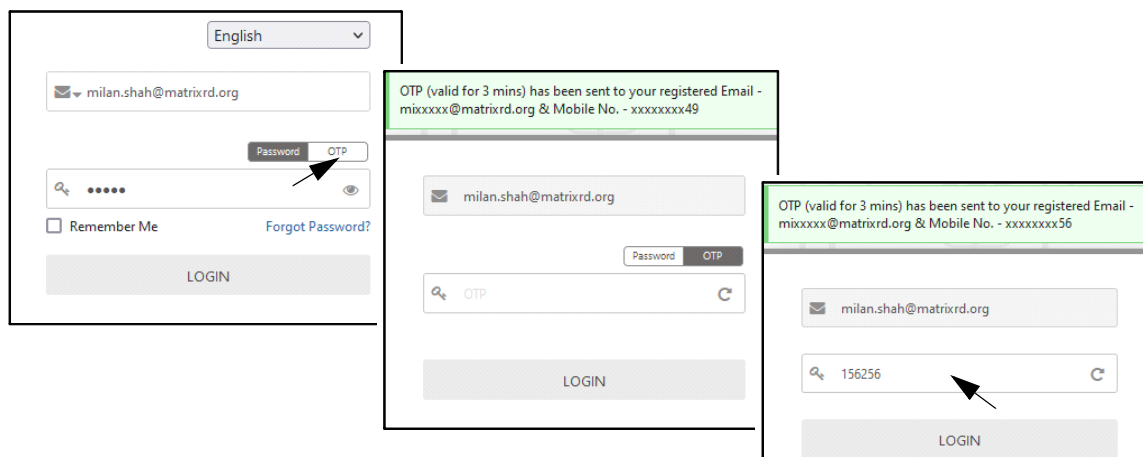
You can click on Resend OTP  button if OTP is to be sent again.



*User entering Active Directory ID cannot login with OTP. They can log in with Password only.*

### Email ID with Password or OTP

Similar to User ID, you can login with your **Email ID**. Then enter the login password or OTP which is sent to the registered contact details. Then click Login to login into COSEC Web.



The login icon will be automatically changed when Email ID is entered.

The Email ID/Mobile No. must be available in the contact details of the System Account/ESS/CSS user.

For system account user; Email ID/Mobile No. of linked ESS user is considered. For eg: System Account user SA is linked to user Aditi having Email ID- aditi.gupta@matrixrd.org and Mobile number- 9667624826 So the user Aditi can login into COSEC using Email ID/Mobile number along with Password or OTP.

**Using Password:** Click on Password button. Enter the password in the field and click login.

**Using OTP:** Click on OTP button. The one time password will be sent to the registered Email ID/Mobile number.


Enter that OTP in the field and click login. You can click on **Resend OTP** button  to send the OTP again.

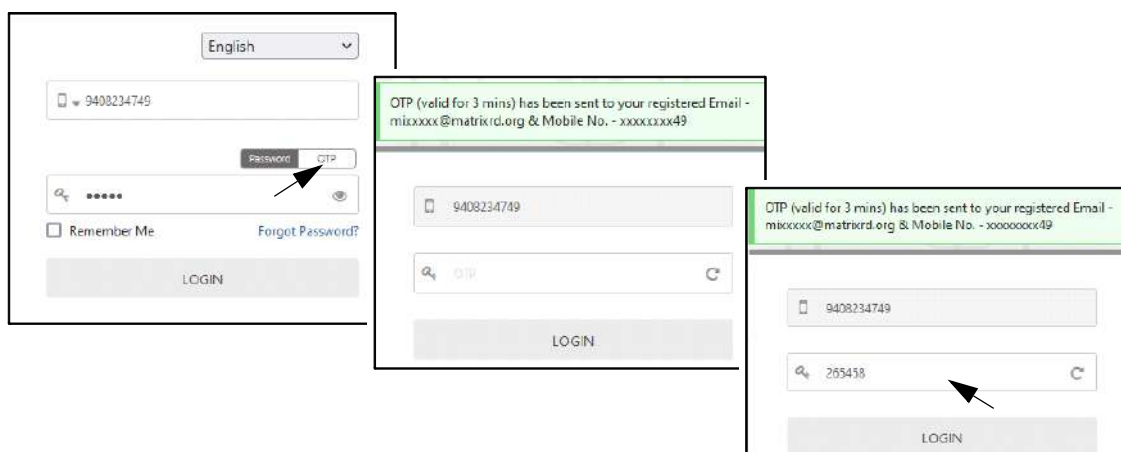
For sending OTP, **OTP Generated** Alert must be configured from Admin> System Configuration> Alert Message Configuration. For details, refer to ["Configuring Alert Messages"](#). Also Email/SMS Configuration must be done from Admin > System Configuration.

### **Mobile Number with Password or OTP**

You can also login into COSEC using Mobile number similar to login using Email ID as described above.

Enter the **Mobile number** of login user. Enter the Password or click OTP to get OTP number. Then enter OTP and click Login.

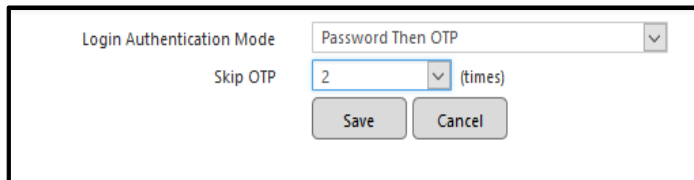
You can click on **Resend OTP** button  to send the OTP again.



## Password Then OTP

If Login Authentication in Global Policy is set as Password Then OTP; then 2 step verification is enabled for login into COSEC. After entering the User ID/Mobile number/Email ID; you will have to enter the password and then OTP.

In case when you cannot enter the OTP in “Password Then OTP”; you can click on **SKIP OTP** which will skip the 2nd step of verification. The SKIP OTP can be done for the number of times defined in Global Policy.



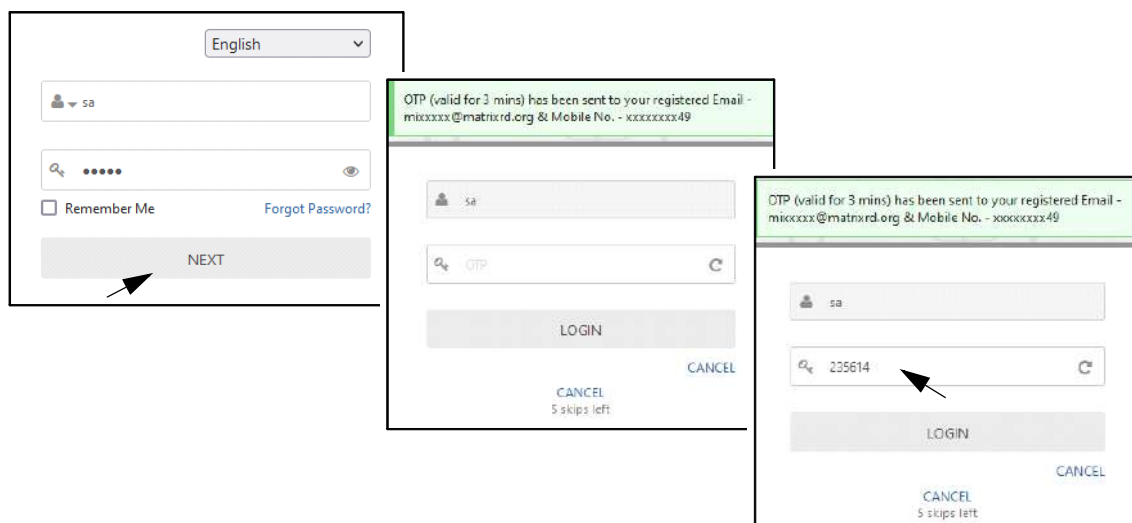
The screenshot shows a configuration window for 'Login Authentication Mode'. It is set to 'Password Then OTP'. Below this, there is a 'Skip OTP' section with a dropdown menu showing the number '2' and the text '(times)'. At the bottom of the window are two buttons: 'Save' and 'Cancel'.

Eg: If Skip OTP is set as 2, the user can click on SKIP OTP for 2 times. When later if SKIP OTP in Global policy is changed to 5; then for 3 more times user can use SKIP OTP.

### User ID with Password Then OTP

Enter the User ID of login user. Then enter the password and click **Next** button.

Now you will have to enter the OTP which is sent to the contact details of login user. After entering OTP click **Login** button to login into COSEC. If you click **Cancel** button; then it will go to the password page. You can also skip entering OTP by clicking on **SKIP OTP** link. This will directly login to COSEC Web without requiring OTP.



The first screenshot shows the initial login screen with a language dropdown set to 'English'. It has input fields for a user ID (containing 'sa') and a password (masked with dots). There is a 'Remember Me' checkbox and a 'Forgot Password?' link. A 'NEXT' button is at the bottom, with an arrow pointing to it.

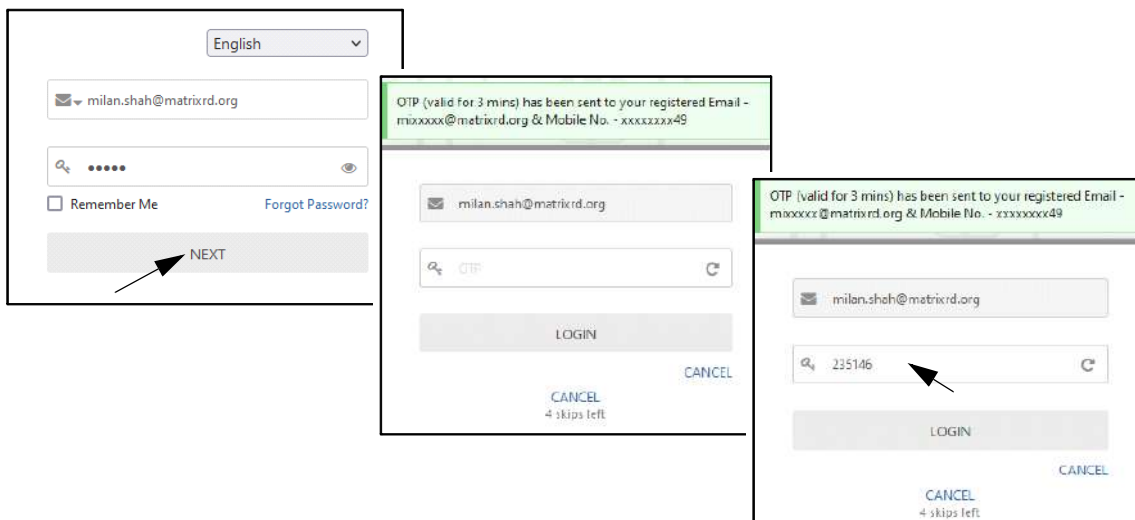
The second screenshot shows a green notification banner at the top stating: 'OTP (valid for 3 mins) has been sent to your registered Email - mxxxxx@matrixrd.org & Mobile No. - xxxxxxxx49'. Below the banner, the user ID field still contains 'sa', and a new 'OTP' field is present. There are 'LOGIN' and 'CANCEL' buttons at the bottom. The 'CANCEL' button is labeled '5 skips left'.

The third screenshot shows the OTP field now containing the value '225614'. An arrow points to this field. The 'LOGIN' and 'CANCEL' buttons are still at the bottom, with 'CANCEL' labeled '5 skips left'.

### Email ID with Password Then OTP

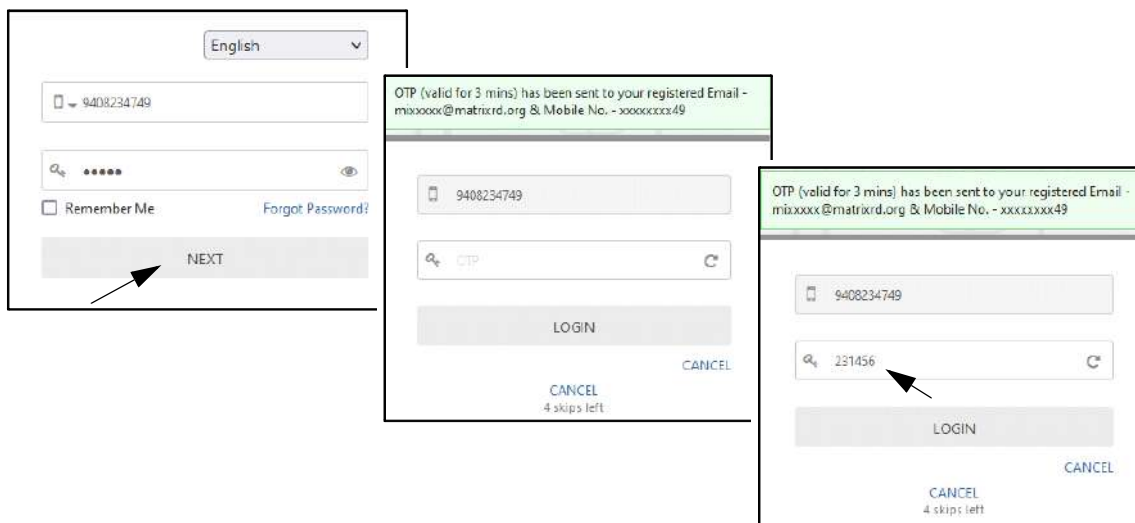
Enter the **Email ID** of login user. Then enter the Password and click **Next** button.

The OTP will be sent to the registered contact details. Then enter the OTP and click Login button to login to COSEC.



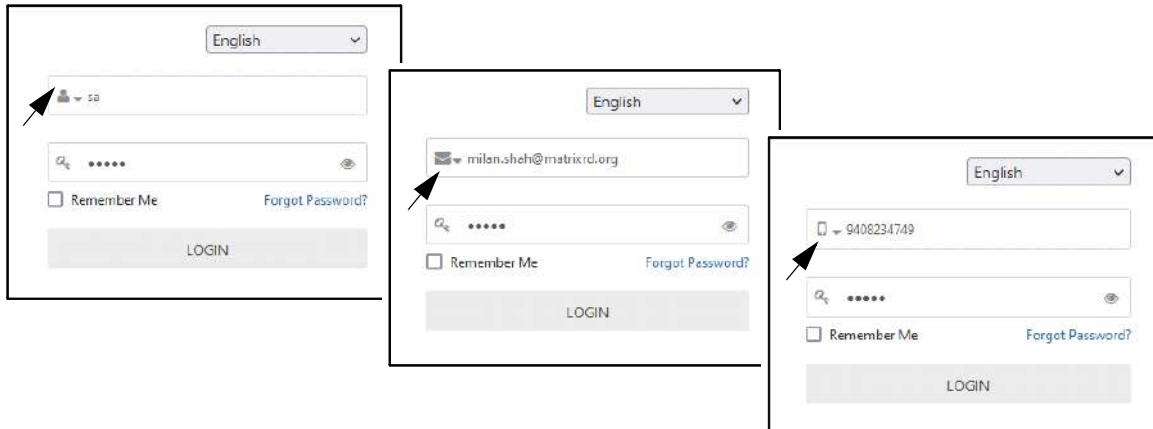
### Mobile Number with Password Then OTP

Enter the **Mobile number** of login user. Then enter the Password and click **Next** button. The OTP will be sent to the registered Mobile Number/ Email ID. Then enter the OTP and click **Login** button to login to COSEC.





### Password

You can select Login Authentication mode as "Password". This will require login ID with only password. Enter the login ID as User ID/ Email ID/ Mobile Number and the password. Then click Login to login into COSEC Web.

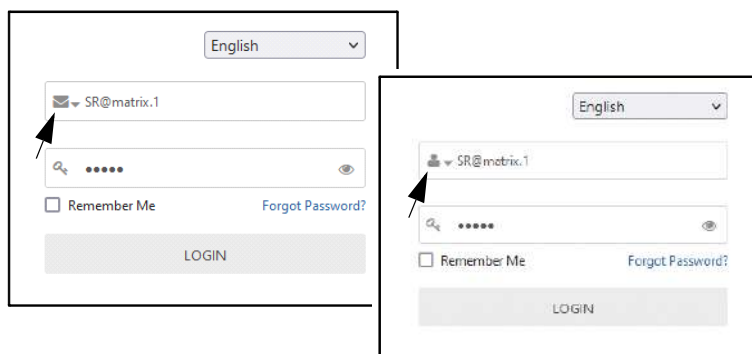


### Icon of Login ID


Suppose you are logging into COSEC with your User ID  which is similar to Email ID  configuration.

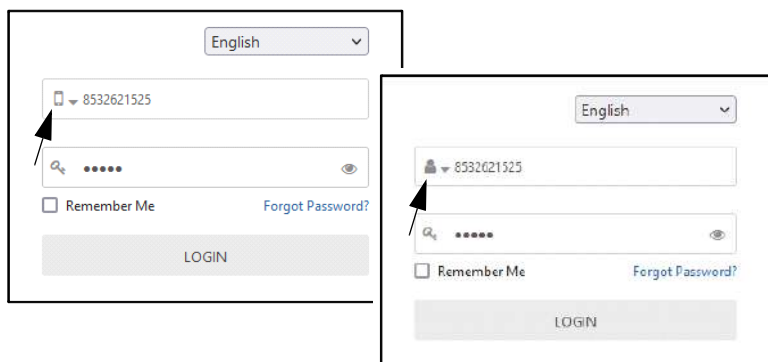
eg: SR@matrix.1.

So the icon will automatically change to Email ID and it will try to login using Email ID. As there is no such Email ID; you will not be able to login. Hence you should manually click on the icon to change from Email ID to User ID.



Suppose you are logging into COSEC with your User ID  which is of 10 characters eg: 8532621525 so as

there are 10 numeric characters; the icon will automatically change to Mobile Number  and it will try to login using Mobile number. As there is no such mobile number; you will not be able to login. Hence you should manually click on the icon to change from Mobile to User ID.





If the entered Mobile number/ Email ID is found for more than one user; then you will get the error "Unable to Identify the user. Please enter different Login ID". So Ensure that your Mobile Number/Email ID are entered correctly.

## Link ESS User

For authentication mode equal to "Password Then OTP"; linked ESS user is mandatory. But when ESS user is not linked to System account user and system account user is trying to access COSEC then he will have to link the ESS user along with the contact details.

Enter the login ID and password. Click **Next** button.

If ESS user is not linked, then **Link ESS ID** page will appear. Enter the **ESS User ID** who is to be linked. Then click on arrow; the name of the user will appear. Then click Next. The Contact details page will appear.

If ESS user is linked but contact details are not available, then directly Contact details page will appear where Email ID and Mobile number can be entered.

Enter the **Email ID** or **Mobile number** of the ESS user which will be stored as Official Email ID and Official Mobile number respectively. Then click **Get OTP**. The OTP will be sent to the registered contact details. Noe Enter that OTP and click **Login** button to login into COSEC Web.

## Forgot Password

Click on the Forgot password link from the login page to get a new password for your login ID. The password reset will be allowed if contact details of user, OTP generation alert, SMS Configuration, Email Configuration are available in the system.

The login screen features a language dropdown set to 'English', a username field with 'sa' entered, and tabs for 'Password' and 'OTP'. Below these is a password field with a toggle icon, a 'Remember Me' checkbox, and a 'Forgot Password?' link. A 'LOGIN' button is at the bottom. An arrow points to the 'Forgot Password?' link.

For “sa” login you can select Send OTP or Security Question. The **Send OTP** option will send an OTP to the registered contact detail. By entering this OTP you can set a new password.

### **Send OTP**

The flowchart illustrates the 'Send OTP' process in three steps:

- Forgot Password:** A screen with two radio buttons: 'Send OTP' (selected) and 'Security Question'. A 'SEND' button and a 'CANCEL' link are at the bottom.
- Enter 6-digit OTP:** A screen with a text input field containing '880616', a refresh icon, a 'VERIFY' button, and a 'CANCEL' link.
- Set Password:** A screen with two text input fields: 'New Password' and 'Confirm Password'. A 'SET' button and a 'CANCEL' link are at the bottom.

You can select **Security Question** which will ask you the question as entered during the first login. By entering the answer of the security question, you can set a new password.

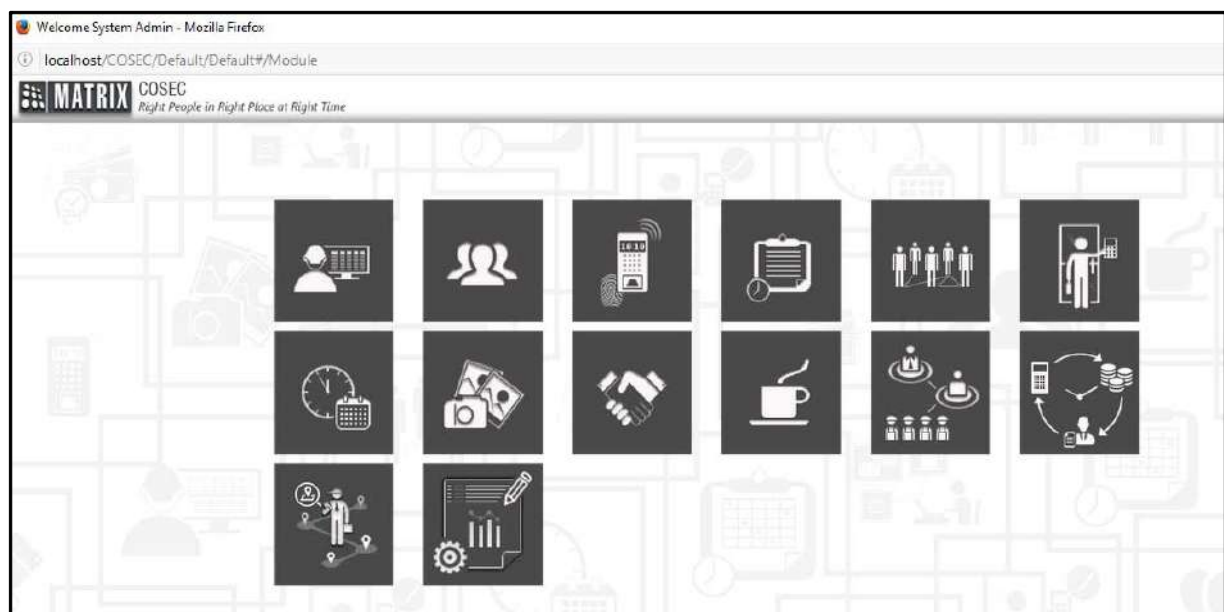
## Security Question

The first screenshot, titled 'Forgot Password', shows two radio buttons: 'Send OTP' and 'Security Question'. The 'Security Question' option is selected. A 'NEXT' button is at the bottom. The second screenshot, titled 'Security Question', asks 'fav actor?' with a text input field containing 'A. Hrithik'. It has 'NEXT' and 'CANCEL' buttons. The third screenshot, titled 'Set Password', has two password input fields labeled 'New Password' and 'Confirm Password', followed by 'SET' and 'CANCEL' buttons.

For system account users other than “sa” or ESS/ CSS users, when Forgot password link is clicked then Forgot Password screen will appear as shown below. Clicking on **Send** will send an OTP to the registered contact detail. By entering this OTP you can set a new password.

The first screenshot shows a login form with fields for 'SE' (username) and 'Password' (password). There is a 'Remember Me' checkbox and a 'Forgot Password?' link. A mouse cursor points to the 'Forgot Password?' link. The second screenshot, titled 'Forgot Password', states 'A 6-digit OTP will be sent to your registered Email Id.' and features a 'SEND' button and a 'CANCEL' link.

Now Login with UserID/Email ID/Mobile number with Password/OTP. Then click **Login** button. The home page of COSEC will open as shown below.





The home page displays of the list of modules which are available as per the license. The user can now select the appropriate module and configure the parameters as per the site requirements.

Now user can start the online **COSEC Monitor** and Control application. The COSEC Monitor Utility connects with the Panel lite and Doors on the TCP port. This enables the COSEC application to connect to the COSEC controllers and upload and download configuration changes.

COSEC Monitor Service must be running to add devices to COSEC Web application. For more information on COSEC Monitor, ["Starting Monitor Service & Utility"](#)

# Starting Monitor Service & Utility

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The COSEC Monitor application consists of two components:

- Monitor Service
- Monitor Utility

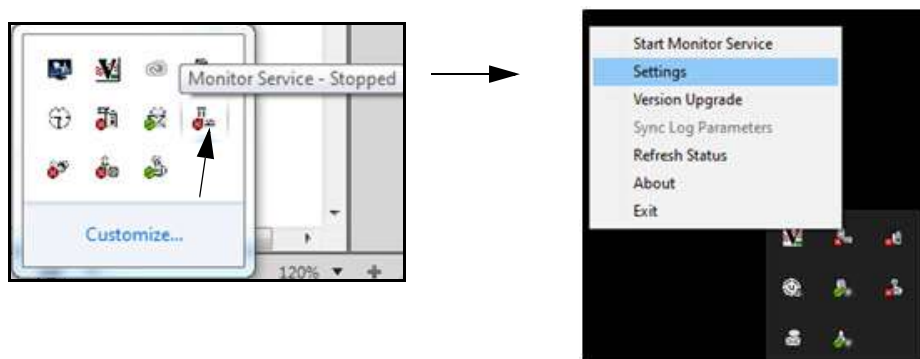
## Monitor Service

For COSEC Centra, Monitor Service has to be started for using the Monitor Utility. For COSEC VYOM, Monitor Service will be running at Cloud so user can access the Monitor Utility directly.

The **Monitor Service** connects with the configured COSEC devices. This service starts up each time the computer is restarted.

After the Installation of COSEC Centra (Premise based setup), you can start the COSEC Monitor Service by browsing the folder from *C:\Program Files (x86)\Matrix\COSEC Monitor Service*.

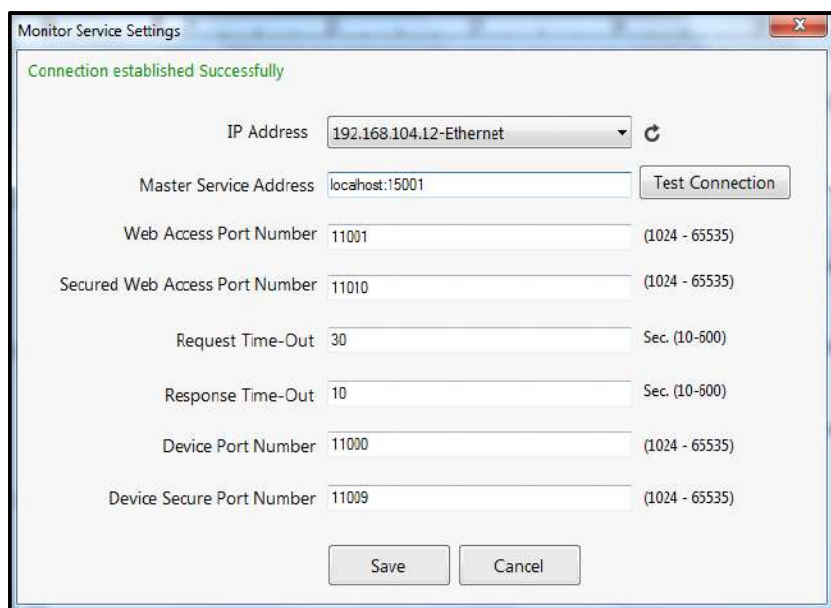
When the Monitor Service is started, an icon will be visible in the system tray as shown below. Then Right click on icon to configure the settings and start the service.



On the **Monitor Service Settings** window select the **IP Address** of the PC where Monitor service is to be started. Enter the **Master Service Address** as the URL of the system where Master service is running.



1. Refer Monitor Service in Service User Guide for details.
2. Monitor Service will be active and running only if Master service is running.

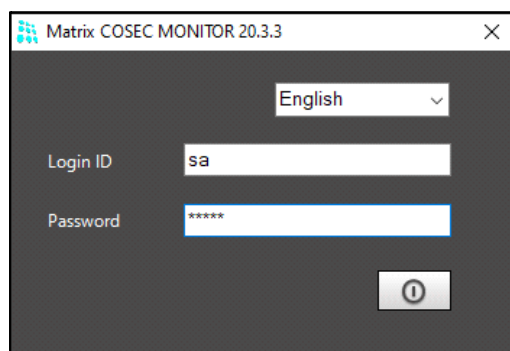


## Monitor Utility

The Monitor application is used to send commands to the COSEC devices as well as monitor and control the device and user events.

Once the Monitor Service is running, the COSEC Monitor Utility can be accessed through the COSEC Monitor icon

on the desktop.



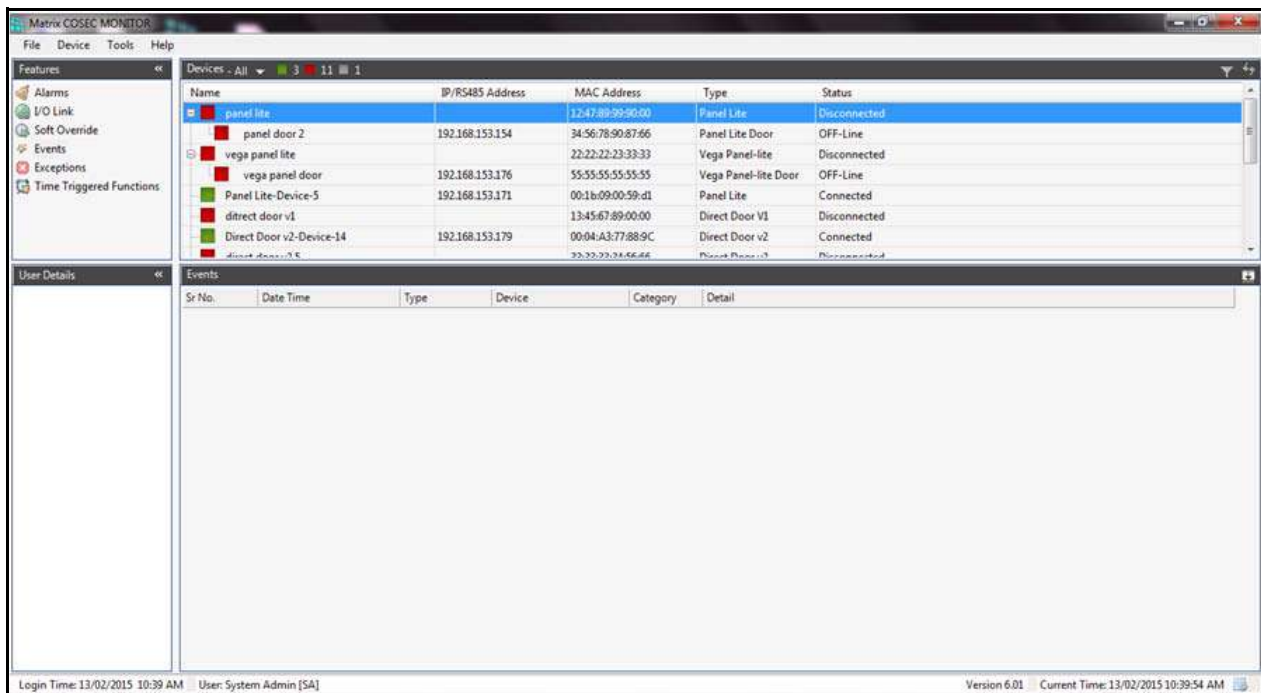
To view the login page in the desired language, click the Language dropdown list and select the desired language.



*By default, the login page appears in the language as set by the System Administrator in **Global Language For Login**. For more information refer **Global Language For Login** in User Guide, **Admin Module> System Configuration> Global Policy> Basic Policy> Global Language For Login**.*

Enter the **Login ID** and **Password** as set in the web application module.

The COSEC Monitor window appears as shown.



# Dongle/Virtual License in COSEC CENTRA

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In COSEC CENTRA, License Dongle is required for accessing the COSEC application if you have select the License Verification Mode as Server Based or Device Based. Refer to [“Served Based/Devices Based Verification Mode”](#)

However, if you have selected the License Verification Mode as Virtual License, you do not require any Dongle. Make sure the Virtual License has been registered. Refer to [“Virtual License Verification Mode”](#).

For more details refer to the Admin Management Portal User Guide.

## Served Based/Devices Based Verification Mode

If the License Verification from the Dongle is not done, then the application will show license verification failed as shown below:



The License Verification can be done by following modes for Dongle:

- **Server Based:** License will be verified from the Dongle connected to the PC where Master Service is installed.
- **Device Based:** License will be verified from the Dongle connected to the COSEC Device. This device will communicate with Master Service so that Master Service can fetch the license key from the dongle and all of the COSEC services will function.

For License Verification Mode as Virtual License, refer to [“Virtual License Verification Mode”](#).

The mode of License Verification Mode can be selected while installation the COSEC setup.

**Matrix COSEC Installer**

**COSEC**  
Right People in Right Place at Right Time

✓ Welcome  
➔ Options  
Summary  
Progress  
Done

COSEC 20.9.1  
(COSEC CENTRA)  
Applicable AUP: May-2024

### Complete Installation Options

Database Type: MS SQL  
Server Address: 192.168.103.155\SQLEXPRESS  
Authentication: SQL Authentication  
User Name: sa  
Password: \*\*\*\*\*  
Database Name: COSEC  
Create new database or Upgrade existing one:  
**Test Connection**

**Company Details:**  
Name: Matrix  
Email ID: smita.baria@matixrd.org  
Contact No.: 9825095600  
License Verification Mode: Device Based (selected)  
Other options: Server Based, Device Based, Virtual License

Exit Back Next

For Server Based License Verification, make sure the Dongle is connected to the USB port of the PC where the Master Service is running.

For Device Based License Verification,

- the devices — VEGA, ARGO, ARGO FACE Direct Doors and Panel lite V2/Panel200 in Server Mode — can be used.
- make sure you have a **COSEC CENTRA** connection mode and the devices are configured in the same application.

Once Dongle is connected to the desired device, enter the License Server URL (Default is 192.168.50.100) and License server Port (Default is 15025) in Server Settings from device or its webpage.

**MATRIX VEGA Door - vega door ip 101 (36)**

Settings ▾

- Basic Profile
- LAN Settings
- Wi-Fi Settings
- Mobile Broadband Settings
- Bluetooth Settings
- Server Settings**
- CCC Settings
- Identification Server Settings
- Date-Time Settings
- Cafeteria Settings
- Multi Language Support
- Manage ▸
- View ▸

**Server Settings - COSEC CENTRA**

This will be used to communicate with Monitor Service

Connectivity Status: ● via Ethernet

Encryption (SSL): ☐

Configuration: ☒ Basic ☐ Custom

URL: 192.168.104.13 | 11000

**License Server**

Connectivity Status: ● Disconnected

License Dongle: ● Unavailable

URL: 192.168.50.100 | 15025

**Web Server**

Encryption (HTTPS): ☐

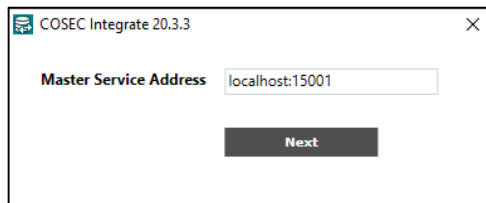
Network Interface: Ethernet

URL: 192.168.104.13 | 80

Directory Name: cosec

You can use COSEC Utilities in different computer by accessing Master Service from the PC where License Dongle is connected.

If Master Service and License Dongle are connected in PC (192.168.104.12) and COSEC Integrate is installed in PC (192.168.104.24). Then start the COSEC Integrate application in PC (192.168.104.24) and enter the Master Service Address as the URL of the PC where Master service is running.

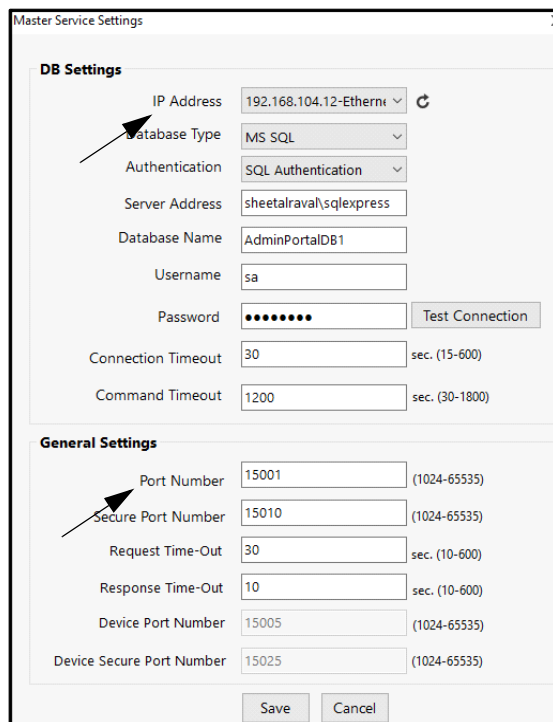


COSEC Integrate 20.3.3

Master Service Address: localhost:15001

Next

The Master Service Settings in PC are as below. If the IP Address and Port are changed in Settings; then the URL also must be changed.



Master Service Settings

**DB Settings**

IP Address: 192.168.104.12-Ethernet

Database Type: MS SQL

Authentication: SQL Authentication

Server Address: sheetalraval\sqlexpress

Database Name: AdminPortalDB1

Username: sa

Password: [Masked]

Test Connection

Connection Timeout: 30 sec. (15-600)

Command Timeout: 1200 sec. (30-1800)

**General Settings**

Port Number: 15001 (1024-65535)

Secure Port Number: 15010 (1024-65535)

Request Time-Out: 30 sec. (10-600)

Response Time-Out: 10 sec. (10-600)

Device Port Number: 15005 (1024-65535)

Device Secure Port Number: 15025 (1024-65535)

Save Cancel

## Virtual License Verification Mode

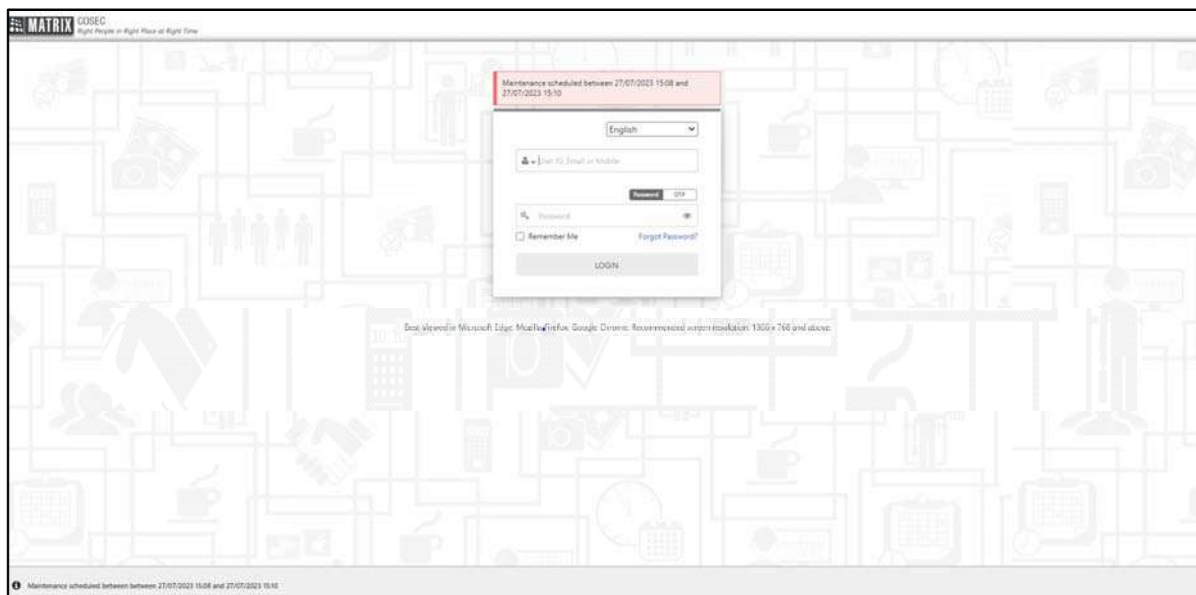
You need to register the Virtual License from the Admin Portal. The License registration request is sent from the Admin Portal to the Virtual License Manager. The Virtual License Manager checks for the authenticity of the key as well as it communicates with the Matrix License Manager. After the request is served successfully, communication is established between COSEC (Master Service) and Virtual License Manager, wherein the License verification is done. The Master Service and other Services function in the same manner as in Dongle Based.

# Maintenance Scheduling

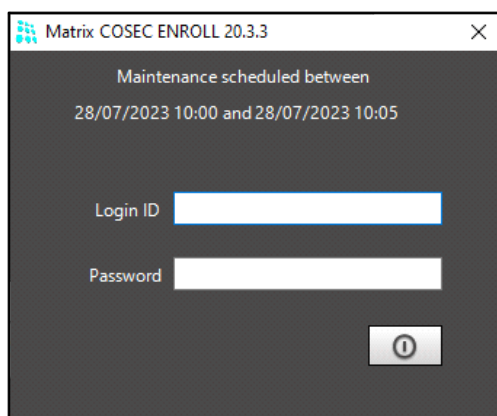
The COSEC system requires maintenance time for upgrading the version. During this time the user cannot access COSEC application. So the admin can configure the Maintenance duration in advance from the COSEC Admin Portal which will be displayed on the login page of COSEC Web, COSEC Enroll Utility and COSEC VMS Utility.

To configure the maintenance information go to the System Configuration> Maintenance Configuration of the Admin Portal.

When the user tries to login into COSEC Web within the maintenance duration then he will not be allowed to access the application.



The Maintenance duration can also be reset from the Admin Portal if the maintenance gets completed before the scheduled time.





COSEC VMS

Maintenance scheduled between  
28/07/2023 10:00 - 28/07/2023 10:05

Station Location

Default Location

Login ID

Password

Login



## *Getting Started With COSEC Devices*

The Matrix COSEC Application is truly scalable, allowing a customer to start with smaller configuration and expand step-by-step as the organisation grows. One PANEL(Site Controller) can control from 1 to 255 Door Controllers. An Enterprise can deploy up to 1000 such PANELs and 10000 Door Controllers, managing over 1 million users.

The COSEC Panel is designed to operate off-line, making access control decisions independently from a PC or other controlling device. It can also be connected to a host computer for system configuration, alarm monitoring and direct control. Connectivity to the host computer is accomplished via TCP/IP network connection. Another key feature of the Matrix COSEC Panel is its completely distributed database. All information regarding cards, time zones, relay control and alarm points are loaded into its memory, enabling the unit to operate independently of any other equipment.

The **COSEC PANEL/PANEL LITE** and its variant is designed to support following major features.

- PANEL is a stand alone unit with multiple PANEL Door that work as slave controllers.
- Finger Print templates storage on PANEL for easy replacement of door controllers.
- PANEL communicates with RS-485 and Ethernet interface with PANEL Doors simultaneously.
- PANEL Doors IP address assignment and configuration through PANEL.
- Automatic Door firmware upgrade from PANEL.
- Automatic verification of Doors' firmware at start-up.
- “[Degraded Mode](#)” support on PANEL Doors for Exit by default and for Entry through configuration selection.
- Network clock synchronization of all PANEL Doors with PANEL.



Specification	COSEC PANEL/ PANEL LITE
Total Door Controllers supported	255
Door Controllers supported on Ethernet	255
Door Controllers supported on RS 485	32
User database support	25,000 users per Panel/Panel lite
No. of Events that can be stored in the memory	5,00,000 Events

The **COSEC DOOR** is designed to support following major features.

- The COSEC Door can be configured as a PANEL Door or DIRECT Door.
- COSEC doors support a 128 x 64 pixel LCD display as well as a 16 key cap sense type keypad. However, the Panel doors are available in variants without the LCD display and Keypad (Standard Panel Door).
- Panel Doors depend on the PANEL for configuration while DIRECT Doors are configured directly from the COSEC application platform.
- DIRECT DOORS have limited functionality as compared to the PANEL DOORS



The basic configuration of COSEC Doors is given in following topics links.

[“Degraded Mode”](#)

[“Connecting the COSEC RF Module”](#)

[“Connecting the Door Locking Device”](#)

[“External Reader Wiring”](#)

[“Powering the COSEC DOOR”](#)

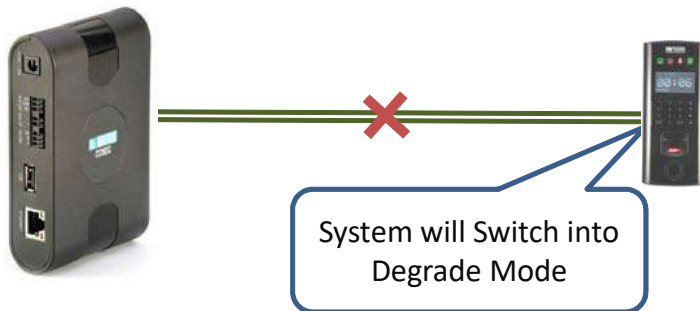
[“Setting the IP Address of the Direct DOOR”](#)

[“Default Initialization of the DOOR”](#)

“Connection Diagram for the COSEC DOOR”

“Connection Diagram for COSEC PANEL DOOR (Standard)”

## Degraded Mode



The Degraded mode of PANEL DOOR can be defined as a mode of operation, where the DOOR starts working in standalone mode.

This mode will allow users to have access to controlled area by providing their credentials. However the user access rights are not verified while allowing the access to these areas and hence it is known as Degraded Mode.

In degraded mode, the PANEL DOOR performs the following functions.

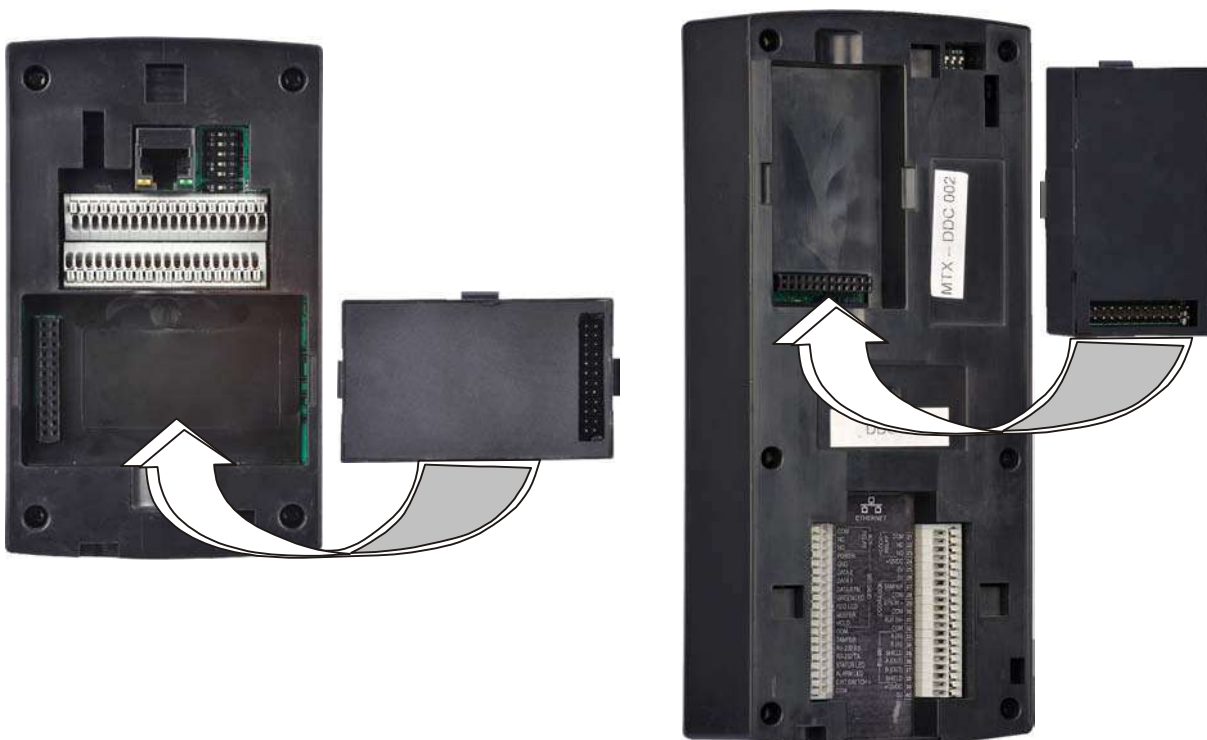
1. Read the user credentials through any of its reader ports. If required communicate with user for further inputs (Card with FP stored on card for 1:1 match)
2. Identify the user based on credentials provided by user.
3. If request is for exit, allows user without any validation.
4. If request is for entry, then identify the user as a valid user for the facility.
  - In case of Proximity cards with FC, user is identified as collective users allowed.
  - In case of smart cards/FP templates, the user is identified with user ID, FC, ASC and hence the user is individually validated with enhanced security.
5. Store all events in non-volatile memory and send it to COSEC PANEL on restoration of network.
6. Monitor the door sense and activate the Door Relay according to degraded mode settings received.



*The degraded mode has to be enabled at the PANEL (Advance Parameters) as well as the Access Zone level for the PANEL DOOR to be able to operate in this mode.*

## Connecting the COSEC RF Module

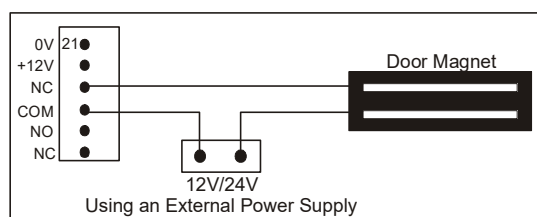
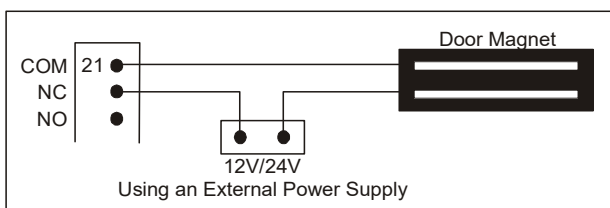
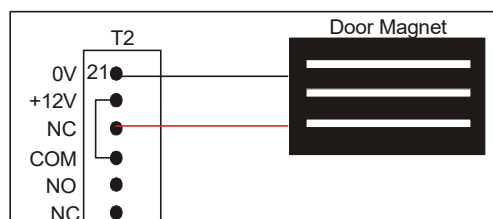
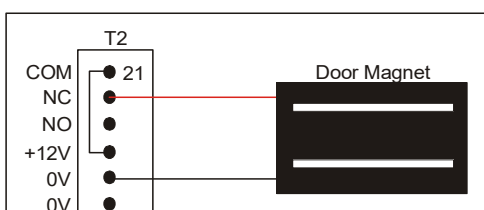
The COSEC DOOR enclosure has a connector for connecting the COSEC RF module. This female connector is located on the rear of the enclosure. The RF module has a corresponding male connector as shown. Place the RF module in the slot provided on the back of the door enclosure and apply a gentle pressure on the module and ensure that it is set properly in the slot.



## Connecting the Door Locking Device

The relay Normally Open (NO), COM, Normally Closed (NC) and +12VDC terminals for the Door lock are located at terminal nos. 21 through to 24 on the top right of the COSEC DOOR terminal strip. The locking device output is controlled by the software according to preset parameters for allowing access or unlocking doors according to schedules and access levels.

The Normally Open (NO) or Normally Closed (NC) output can operate DC powered locking devices such as electromechanical strikes and Magnetic Locks. The maximum permitted current is 250mA @ 12VDC per output. For locks of higher capacity an external 24 VDC power supply has to be used as shown.



*In order to use the 12VDC power supply from the COSEC DOOR, short the +12V and the COM terminals prior to connecting the Normally Open/ Normally Closed (NO/NC) and the 0V (terminal 25) to the Door locking device as shown in the above figures.*

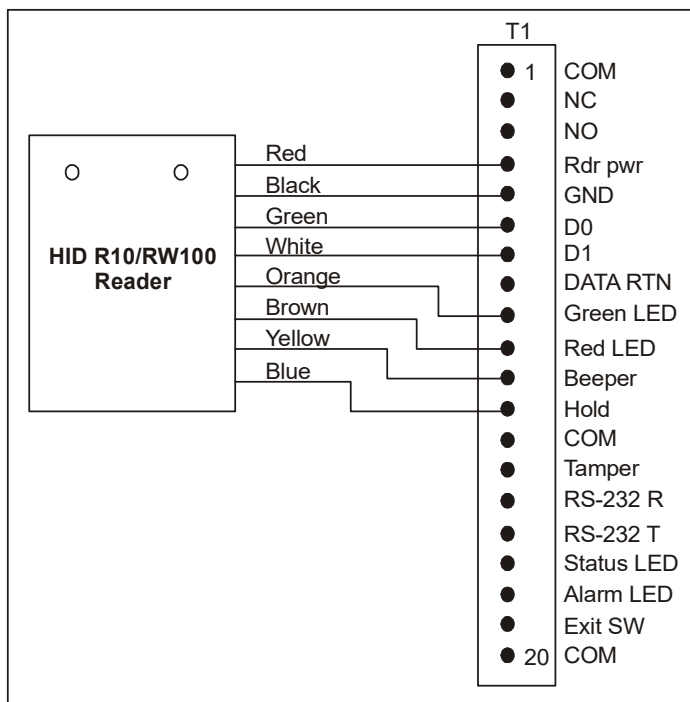
Terminal no.	Wire Color	Connects to Door Terminals
C5-1	Blue	COM
C5-2	Yellow	Normally Closed (NC)
C5-3	Orange	Normally Open (NO)
C5-4	Red	Power Out +
C5-5	Black	Power Out -
C5-6	Black	Power Out -
C5-7	Brown	Lock Tamper IN+
C5-8	Black	COM
C5-9	White	Door Status IN+
C5-10	Black	COM

## External Reader Wiring

The COSEC DOOR supports a maximum of 3 readers (2 internal and one External). The External reader port supports a single reader with Wiegand / Serial interface. To fully utilize Wiegand reader port, a shielded 13-conductor cable (18-22 AWG) is required. The maximum recommended length of wiring is 500 feet per reader. The COSEC system offers the following external reader options:

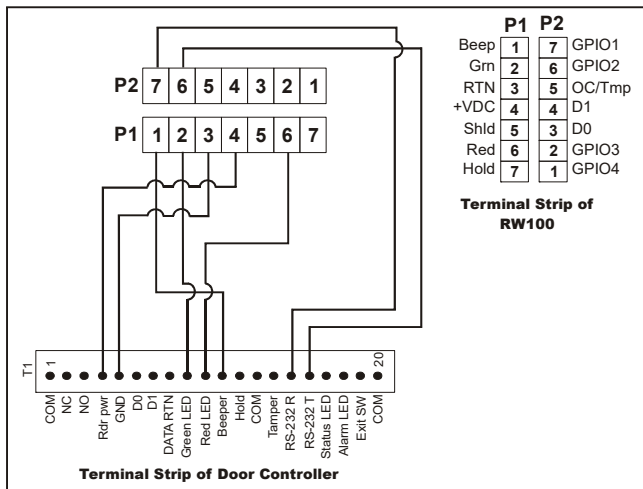
- HID Prox Reader R10 (Wiegand)
- HID Prox Reader RW10 (Wiegand / serial)
- COSEC Reader RFR (Serial)
- COSEC Reader FPR (Serial)

**Connecting the Wiegand HID R10 / RW100 Prox Reader:** The HID R10 and RW100 readers come with the Pigtail option which has color coded conductors as specified in the following connection diagram:

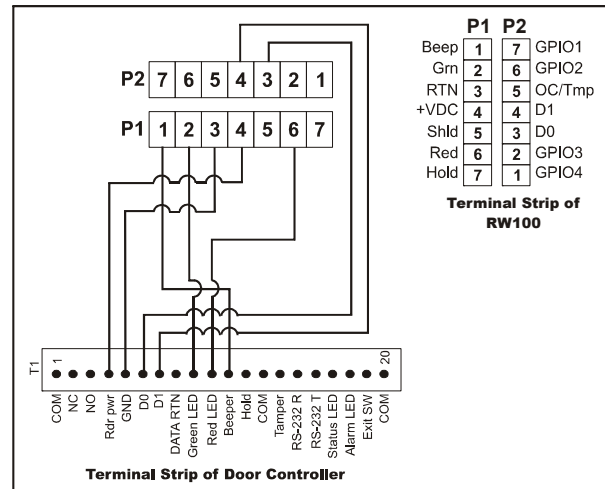


In the absence of the pigtail option on the RW100 reader the following are the connection diagrams for the serial and the Wiegand readers.

### Serial Reader



### Wiegand Reader



Connecting the red wire lead (or power lead) of a 5 VDC reader to the 12 VDC terminal may damage the reader. Refer the reader installation procedure for proper power connection.



For further connection details on External Readers, Refer COSEC DOOR Quick Start.

## Powering the COSEC DOOR

The COSEC DOOR can be powered using any one of the following three options:

- Connect the adapter giving an output of 12VDC @ 1A-1.5A to the terminals 39 and 40 on the COSEC DOOR Controller Unit.
- A 2 conductor cable can be drawn from the terminals on the power supply unit and can be connected to the terminals 39 and 40 of the DOOR terminal strip.
- Connect the two cables coming from the Matrix PSBB - Universal Mains Power supply(13.8 VDC @ 2A) with Battery Backup to the terminals 39 and 40 of the DOOR controller.

On powering up the COSEC DOOR it goes through the power on sequence and displays the booting message along with the following information:

- Matrix Logo
- Firmware Version
- RS-485 address as set on the DIP switch of the DOOR
- Mac address of the DOOR (Note the address to be used in COSEC application)
- Hardware Version of the DOOR



## Setting the IP Address of the Direct DOOR

There are two ways to configure the IP Settings of the Direct DOOR:

### From the Direct DOOR Display

After powering up the Direct DOOR, the user need to navigate to the Admin option using the keypad and display. Navigate to Admin > LAN Settings > IP. Change the IP by pressing 1 on keypad and enter the new IP.

### From the Direct DOOR Web Page

Type `http://192.168.50.50` in the Address field of internet browser. Enter admin as default user and password to login to the COSEC DOOR Web page. Navigate to Network Configuration and change the IP settings.

## Default Initialization of the DOOR

The COSEC DIRECT DOOR configuration comes with three DIP switches on the rear of the DIRECT DOOR as shown which can be used to initialize the **IP settings**, **Password** and **System Parameters** of the DIRECT DOOR to factory defaults.



The DOOR reconfigures its network settings to the factory defaults whenever the DIP Switch number 1 is set to the ON position and the DIRECT DOOR is powered up again.

Use the Network Defaults DIP switch (1) to correct potential errors in a DIRECT DOOR's network configuration. In order to reset the IP address of the DIRECT DOOR to default settings:

- Power down the DOOR.
- Set the DIP Switch no. 1 to ON position.
- Power up the DOOR.
- The DOOR goes through the IP default process and indicates on the display that the IP has been defaulted.

The IP address settings of the DOOR are now set back to default as follows:

DOOR IP address: **192.168.50.50**

Subnet Mask: **255.255.255.0**

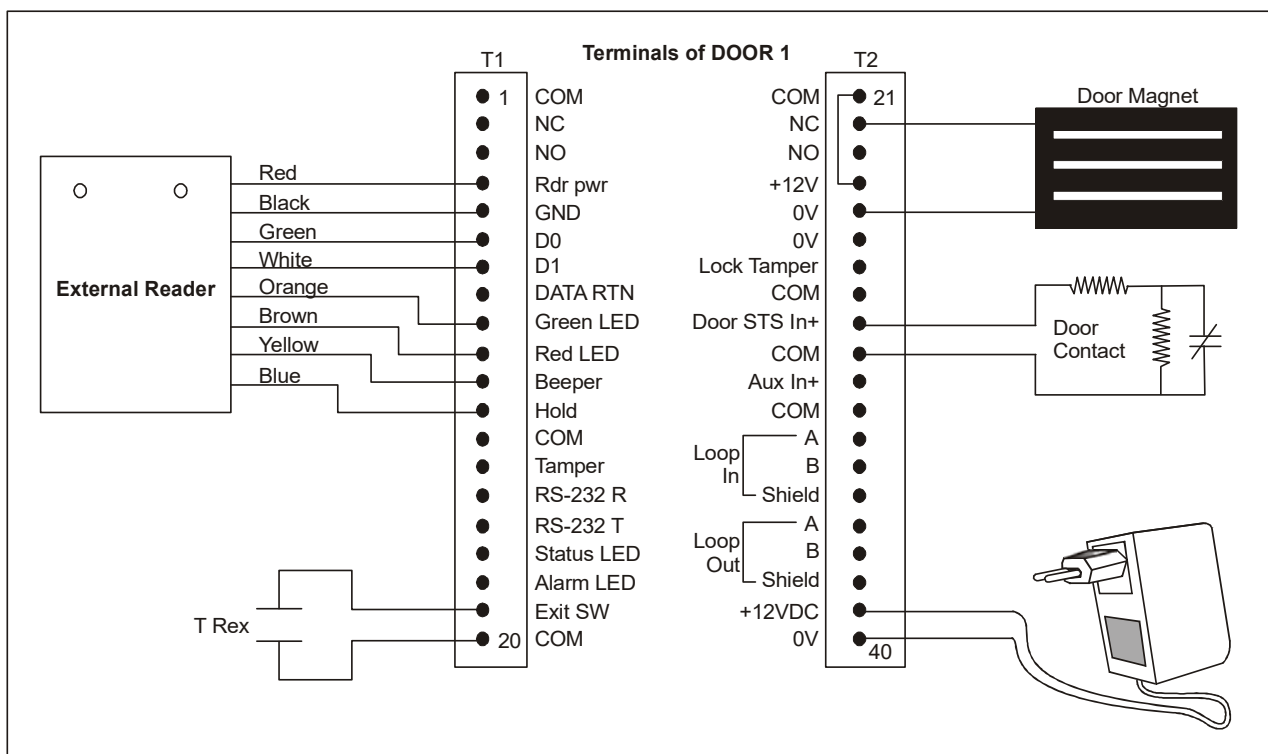
Push the DIP switch 1 back to Off position to ensure that the IP does not go back to default again the next time you power up the DOOR.

Similarly, DIP Switch no. 2 and 3 are used for resetting the Password and the system parameters respectively by following the same procedure as enumerated above.

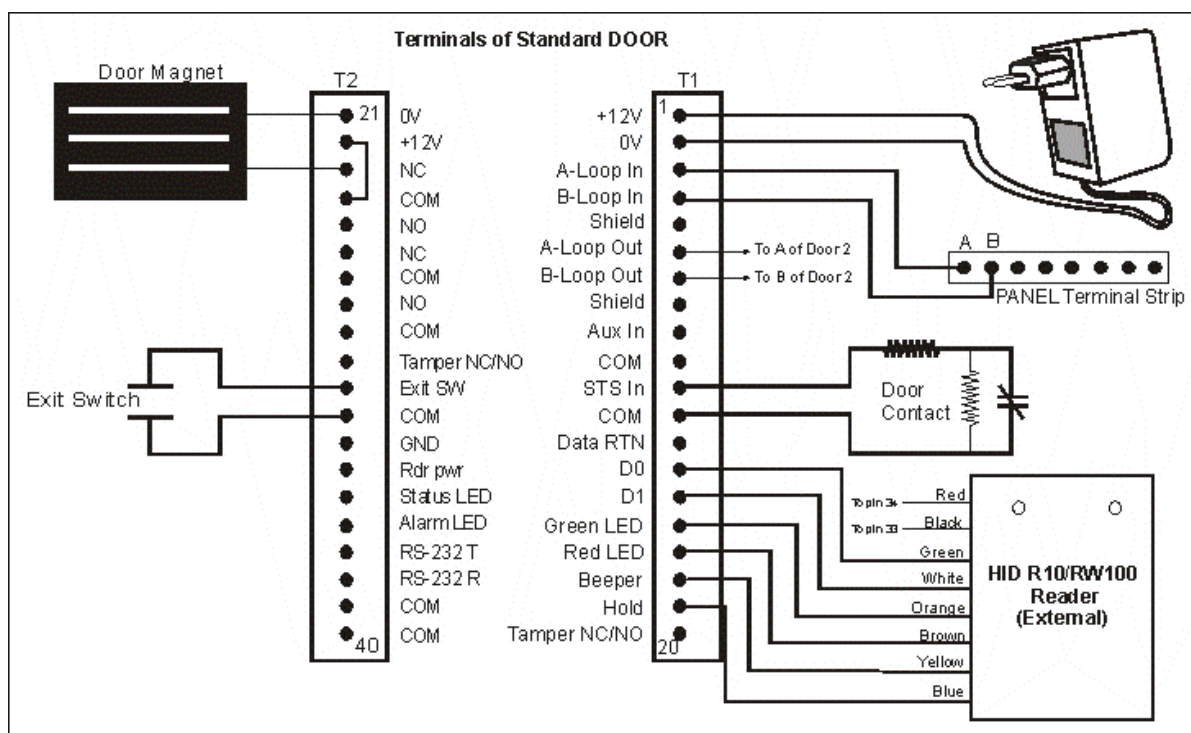


Please use the System default setting only in exceptional cases as it will erase all configuration and event data from the DOOR.

## Connection Diagram for the COSEC DOOR



## Connection Diagram for COSEC PANEL DOOR (Standard)



## Color code mapping for the Wire-to-Board Connectors of Wireless and PVR DOOR

### Terminal C2 (External Reader)

Terminal no.	Wire Color	Connects to
C2-1	Violet	Alarm LED
C2-2	Light Brown	Status LED
C2-3	Grey	RS232 Tx
C2-4	Pink	RS232 Rx
C2-5	Light Blue	Tamper
C2-6	White Red	COM
C2-7	Blue	Hold
C2-8	Yellow	Beeper
C2-9	Brown	Red LED
C2-10	Orange	Green LED
C2-11	White Blue	DATA RTN
C2-12	White	Wiegand Data1
C2-13	Green	Wiegand Data0
C2-14	Black	Ground
C2-15	Red	Reader Power

### Terminal C3 (Exit Switch)

Terminal no.	Wire Color	Connects to
C3-1	White	Exit Switch IN+
C3-2	Black	COM

### Terminal C4 (AUX I/O)

Terminal no.	Wire Color	Connects to
C4-1	Brown	AUX Relay COM
C4-2	Blue	AUX Relay Normally Closed (NC)
C4-3	Yellow	AUX Relay Normally Open (NO)
C4-4	NA	Unused
C4-5	White	AUX IN+
C4-6	Black	COM

### Terminal C5 (Door Lock Connectors)

Terminal no.	Wire Color	Connects to
C5-1	Blue	COM
C5-2	Yellow	Normally Closed (NC)

Terminal no.	Wire Color	Connects to
C5-3	Orange	Normally Open (NO)
C5-4	Red	Power Out +
C5-5	Black	Power Out -
C5-6	Black	Power Out -
C5-7	Brown	Lock Tamper IN+
C5-8	Black	COM
C5-9	White	Door Status IN+
C5-10	Black	COM

# Device Features

Features and functionality supported by the different COSEC doors and panels are listed in the table below:  
The \* marked features have given disclaimers at the bottom of table.

Sr. No	Feature Name / Product	Direct Doors										Panel/ Panel-Lite	Vega Panel-Lite (Panel I200)	Panel Door
		Door V1	Door V2	V2 e-Canteen	NGT	Wireless Door/ Door V3/ Door V4	PVR Door	Vega Door	FMX Door	ARGO Door	ARGO FACE			
1	2-Person Rule	x	✓	x	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
2	Absentee Rule	x	✓	x	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
3	Access Group	x	x	x	x	x	x	x	x	x	x	✓	✓	✓
4	Access Level*	x	x	x	x	x	x	x	x	x	x	✓	✓	✓
5	Access Modes*	✓	✓	x	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
6	Access Policies*	✓	✓	x	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
7	Access Request Response (ARR)	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
8	Access Route	x	x	x	x	x	x	x	x	x	x	✓	✓	✓
9	Access Zone	x	x	x	x	x	x	x	x	x	x	✓	✓	✓
10	Additional Security Code	✓	✓	x	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
11	Anti Pass Back	x	✓	x	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
12	Auto Alarm Acknowledge	x	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
13	Auto Relock	✓	✓	x	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
14	Aux IN	✓	✓	✓	✓	✓	✓	✓	✓	x	x	✓	✓	✓
15	Backup and Update	x	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
16	Blocked User	x	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
17	Buzzer Mute	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
18	Communication with ACMS	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	x
19	CDC Exit Reader Support	x	✓	x	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
20	Daylight Saving Time	x	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓

Sr. No	Feature Name / Product	Direct Doors										Panel/ Panel-Lite	Vega Panel-Lite (Panel 1200)	Panel Door
		Door V1	Door V2	V2 e-Canteen	NGT	Wireless Door/ Door V3/ Door V4	PVR Door	Vega Door	FMX Door	ARGO Door	ARGO FACE			
21	Date and Time	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
22	Dead Man Zone	✗	✗	✗	✗	✗	✗	✗	✗	✗	✗	✓	✓	✓
23	Default Configuration	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
24	Degraded Mode*	✗	✗	✗	✗	✗	✗	✗	✗	✗	✗	✓	✓	✓
25	DND Zone	✗	✗	✗	✗	✗	✗	✗	✗	✗	✗	✓	✓	✓
26	Door Alarm Configuration	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✗
27	Door Controller Configurations	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✗
28	Door Monitoring and Control	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✗
29	Duress* Detection	✗	✓	✗	✗	✓	✓	✓	✗	✓	✗	✓	✓	✓
30	HVR / NVR Integration	✗	✓	✗	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
31	Cafeteria*	✗	N.A	N.A	✓	✓	✗	✓	✓	✓	✓	✗	✗	✗
32	Enrollment	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
33	Event Configuration	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
34	Facility Code	✗	✗	✗	✗	✗	✗	✗	✓	✗	✗	✓	✓	✓
35	First IN User Rule	✗	✓	✗	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
36	Functional Groups	✗	✗	✗	✗	✗	✗	✗	✗	✗	✗	✓	✓	✓
37	Function Key	✗	✓	✗	✗	✓	✓	✗	✗	✗	✗	✓	✓	✓
38	Display Greeting Message	✗	✓	✗	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
39	Greetings (NGT) (Image+ Audio)	✗	✗	✗	✓	✗	✗	✗	✗	✗	✗	✗	✗	✗
40	Guard Tour	✗	✗	✗	✓	✗	✗	✗	✓	✗	✗	✓	✓	✗
41	Holiday Schedule	✓	✓	✗	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓

Sr. No	Feature Name / Product	Direct Doors										Panel/ Panel-Lite	Vega Panel -Lite (Panel 1200)	Panel Door
		Door V1	Door V2	V2 e-Canteen	NGT	Wireless Door/ Door V3/ Door V4	PVR Door	Vega Door	FMX Door	ARGO Door	ARGO FACE			
42	Input /Output Ports & Linking	x	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
43	Inter Digit Wait Timer (IDWT)	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
44	Login Access Privileges	x	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
45	Mantrap	x	x	x	x	x	x	x	x	x	x	✓	✓	✓
46	Master Slave	x	x	x	✓	x	x	x	x	x	x	✓	✓	✓
47	Menu	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
48	Mobile Broadband	x	x	x	✓	✓	✓	✓	✓	✓	✓	✓	✓	x
49	Network Settings	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
50	Network Interface Priority	x	x	x	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
51	Occupancy Control	x	✓	x	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
52	Palm Predictive Algorithm (per user per template)	x	x	x	x	x	✓	x	x	x	x	x	x	x
53	Panel Route Access	x	x	x	x	x	x	x	x	x	x	✓	✓	✓
54	Password*	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
55	Password Change from monitor	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
56	Request To Exit	✓	✓	x	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
57	RS-485 Assignment (manual)	✓	x	✓	x	x	x	x	x	x	x	✓	✓	✓
58	RS-485 Assignment (auto)	x	x	x	x	x	x	x	x	x	x	✓	✓	✓
59	Shift Schedule	x	x	x	✓	x	x	x	x	x	x	✓	✓	✓
60	Smart Card Based Route Access	x	✓	x	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓

Sr. No	Feature Name / Product	Direct Doors										Panel/ Panel-Lite	Vega Panel -Lite (Pane I200)	Panel Door
		Door V1	Door V2	V2 e-Cante en	NGT	Wireless Door/ Door V3/ Door V4	PVR Door	Vega Door	FMX Door	ARGO Door	ARGO FACE			
61	Smart Identification	x	✓	x	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
62	Soft override	x	x	x	✓	x	x	x	x	x	x	✓	✓	✓
63	Special Functions	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
64	System Timers	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
65	Tamper Detection*	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
66	Time Triggered Function	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
67	Time Stamping	x	x	x	✓	x	x	x	x	x	x	x	x	x
68	Time Zone	x	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
69	UHF Reader Support	x	✓	x	✓	✓	✓	✓	✓	✓	✓	x	x	x
70	USB Flash	x	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
71	Use Count Control	x	✓	x	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
72	User Configuration	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
73	VIP Access	x	✓	x	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
74	Visitor Management	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
75	Voice Guidance	x	x	x	✓	x	x	x	x	x	x	x	x	x
76	Wireless Connection*	x	x	x	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
77	IP Camera Integration	x	x	x	x	x	x	✓	✓	✓	✓	x	x	x
78	Auto Hide Menu	x	x	x	x	x	x	✓	✓	✓	✓	x	x	x
79	Punch marking via Bluetooth	x	x	x	x	x	x	✓	x	✓	✓	x	x	x
80	Elevator Access Control	x	x	x	x	x	x	x	x	x	x	x	✓	✓
81	Face Recognition *	x	x	x	x	x	x	✓	✓	✓	✓	x	x	x





- *The Access Level function in Direct Door would come into picture only with smart secure access.*
  - *Access Modes for Panel and Panel-Lite are applicable at zone level, while for Direct Doors, they are applicable to the particular Direct Door only.*
  - *Direct Doors have limited Access Policies applicable as compared to Panel Doors.*
  - *The Degraded Mode feature needs to be enabled for Panels at the zone level, but comes into use in Panel Doors only.*
  - *V1, V2, V3 and V4 Cafeteria Direct Doors can be converted into Panel Doors by manual RS-485 address assignment.*
  - *NGT has 6 digit password field whereas all other door has 4 digit password field.*
  - *Tamper Detection is present in Panel and not in Panel-Lite.*
  - *CDC Exit Reader Support in FMX door is without FP reader.*
  - *In Wireless door there is inbuilt Wi-Fi. which is not there in Door V3/V4. But in Door V3/V4; if dongle is inserted then it will work with wireless Wi-Fi.*
  - *Wiegand Out feature is supported only in Door V4 out of all Door Controllers i.e. Door V1, Door V2, Door V3.*
  - *COSEC MODE Device is specially designed for Face Recognition feature which uses in-built camera of Mobile device for capturing the face. See MODE Door for detailed configuration. COSEC Vega, COSEC FMX and COSEC ARGO supports face recognition by using IP camera for capturing the face.*
- Duress Detection - PIN is applicable to Door V3/V4 and PVR (Direct Doors and Panel Doors).*
- Duress Detection - Finger is applicable to ARGO, VEGA and PATH V2, ARC DC200 and Door V4 (Direct Door and Panel Doors).*

# Network Configuration

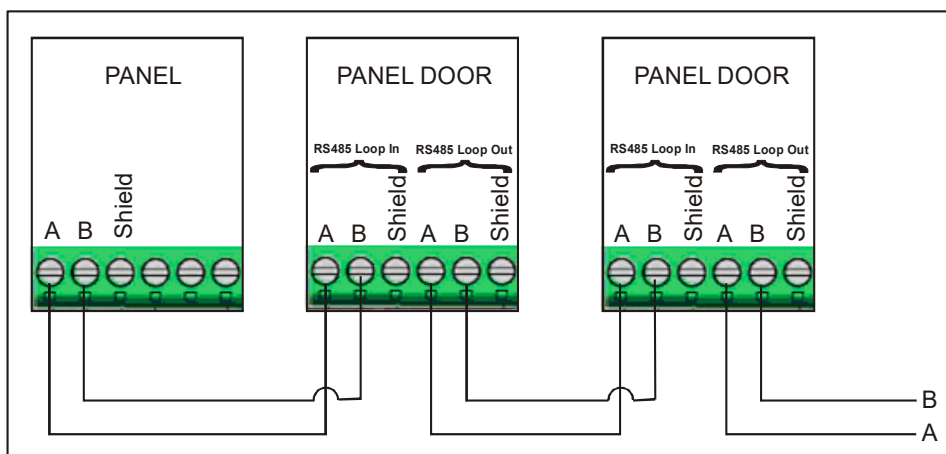
The COSEC PANELS and DOORs come with the following networking options:

- TCP/IP
- RS485

However, in the event of the DOOR being configured as a DIRECT DOOR, only the TCP/IP option will be available for communication. The DIRECT DOORs communicate directly with the COSEC Monitor application over the TCP/IP network while the PANEL DOORs communicate with the PANEL over the TCP/IP network or the RS485 loop.

## Connecting the PANEL DOOR to the RS-485 Bus

The PANEL DOORs are linked together through their RS-485 Loop in and Loop Out terminals in the event of a RS485 loop connection with the COSEC PANEL. The interface allows the wiring of a Multidrop communication network of up to 4,000 feet (1200 m) in length from the last PANEL DOOR to the COSEC PANEL. Only one host COSEC PANEL per RS485 loop is supported as shown in the following figure.



The RS-485 communication loop should be wired using a two conductor cable (see cable specifications Belden 1227A or equivalent). The RS-485 loop can operate from 1,200 to 115,200 baud, under normal conditions. The baud rate depends on the loop length and the environment. DIP switch positions 1-5 are used to select the Controller's address on the network. Refer to **Table 1** for DIP switch setting information.

Switch **SW3** is provided at the bottom right on the rear face of the Premium DOORs for supplying end-of-line termination for the RS-485 network. The board ships with the switch in the non-termination mode. Push the switch to the **ON** position on the last Controller in the RS485 loop to provide end of line termination. Similarly on the Standard DOOR Models the switch is located just above the terminal strip on the rear face of the DOOR.



0 is ALSO a valid address for a DOOR controller in the RS485 loop.

**DIP Switch Settings: Table 1**

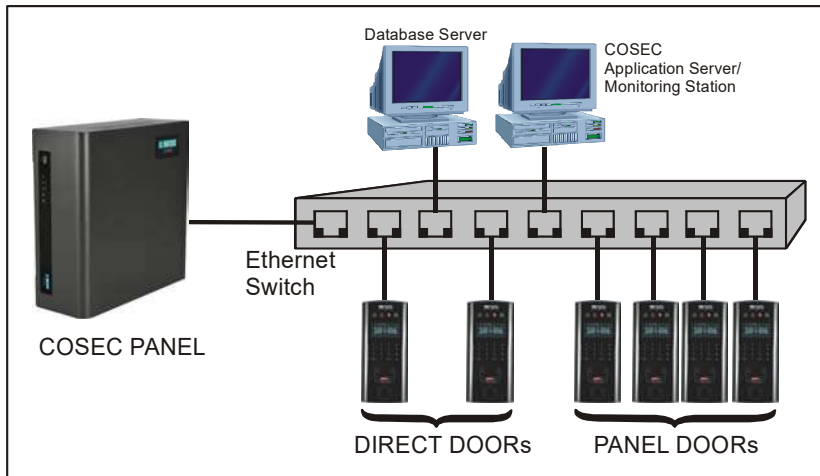
S1	S2	S3	S4	S5	Controller Address
Off	Off	Off	Off	Off	0
On	Off	Off	Off	Off	1

S1	S2	S3	S4	S5	Controller Address
Off	On	Off	Off	Off	2
On	On	Off	Off	Off	3
Off	Off	On	Off	Off	4
On	Off	On	Off	Off	5
Off	On	On	Off	Off	6
On	On	On	Off	Off	7
Off	Off	Off	On	Off	8
On	Off	Off	On	Off	9
Off	On	Off	On	Off	10
On	On	Off	On	Off	11
Off	Off	On	On	Off	12
On	Off	On	On	Off	13
Off	On	On	On	Off	14
On	On	On	On	Off	15
Off	Off	Off	Off	On	16
On	Off	Off	Off	On	17
Off	On	Off	Off	On	18
On	On	Off	Off	On	19
Off	Off	On	Off	On	20
On	Off	On	Off	On	21
Off	On	On	Off	On	22
On	On	On	Off	On	23
Off	Off	Off	On	On	24
On	Off	Off	On	On	25
Off	On	Off	On	On	26
On	On	Off	On	On	27
Off	Off	On	On	On	28
On	Off	On	On	On	29
Off	On	On	On	On	30
On	On	On	On	On	31

## Ethernet Connectivity with the COSEC PANELS and DOORS

If the COSEC controllers are used in a LAN-enabled corporate setting, use the RJ-45 Ethernet port to connect the controllers to the corporate network. This method uses the existing network cabling for data exchange between the

Application server and the COSEC PANEL and the DIRECT DOORS as well as between the COSEC PANEL and PANEL DOORS.



The COSEC PANELs as well as the DOORS come with an on-board RJ-45 Connector.

The **PANELs** come factory configured with a default IP address of **192.168.50.1** while the **DIRECT DOORS** come pre-configured with a default IP address of **192.168.50.50**.

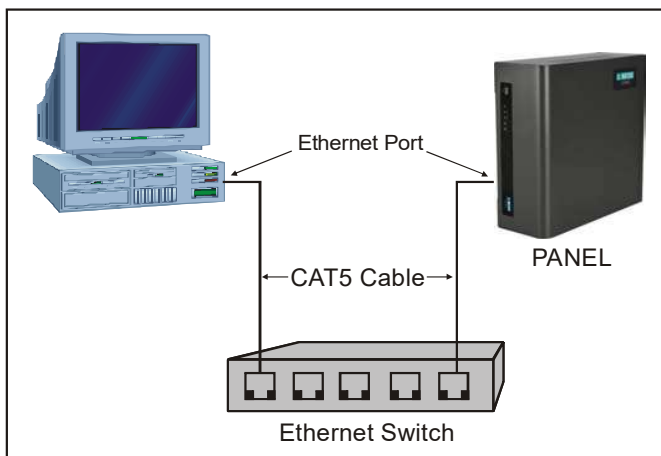
However, in the event of the DOORS being configured as PANEL DOORS, the IP addresses are assigned by the COSEC PANEL based on the **Slave network** parameters.

In order to change the IP address of the COSEC PANEL in line with the site requirements, change the IP settings of one of the computers on your LAN to **192.168.50.x** (where "x" can be any number from 2 to 254) by following the steps as described hereunder:

### Connecting the COSEC PANEL to the Monitoring PC

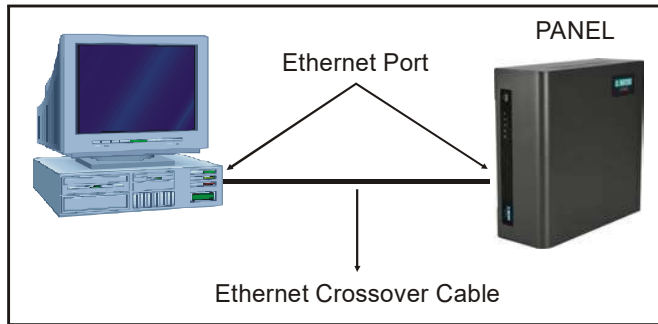
1. Connect your computer's Ethernet port and the PANEL's Ethernet Port by using either of two below mentioned methods:

**Option 1:** Connect both the computer's Ethernet port and the PANEL's Ethernet port to an Ethernet hub with standard straight-through Ethernet patch cables.



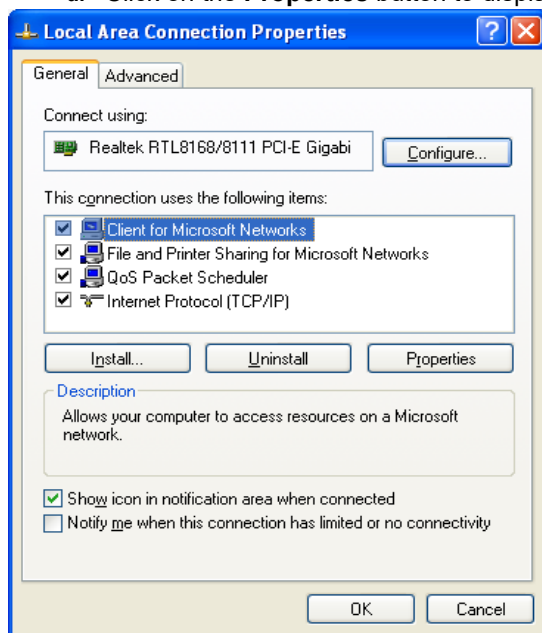
**Option 2:** Connect the computer's Ethernet port directly to the PANEL's Ethernet port with an Ethernet straight/crossover cable. A crossover cable is a cable that maps all output signals on one connector to the

input signals on the other connector. This allows the computer and the PANEL to perform full-duplex Ethernet communication.



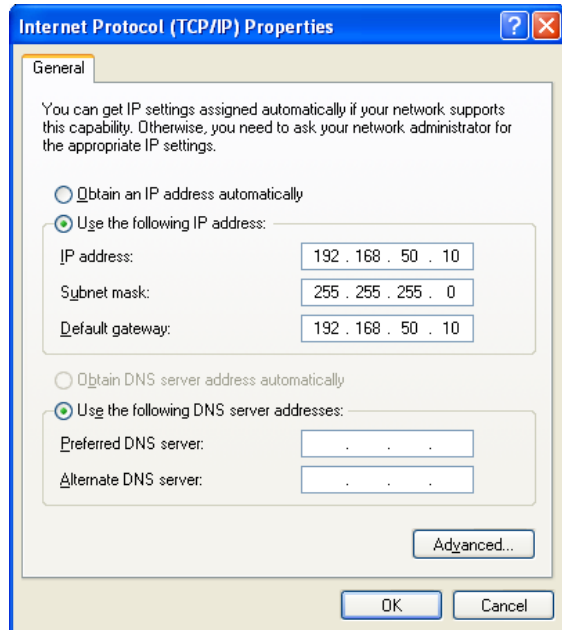
2. Configure the computer's network connection:

- a. Select **Start → Settings → Control Panel** from the Windows Desktop.
- b. Click **Network Connections**. The Network Connections window appears.
- c. Identify your local Ethernet connection (commonly labeled **Local Area Connection**), and click the icon to display the **Local Area Connection Status** window.
- d. Click on the **Properties** button to display the **Local Area Connection Properties** Window.

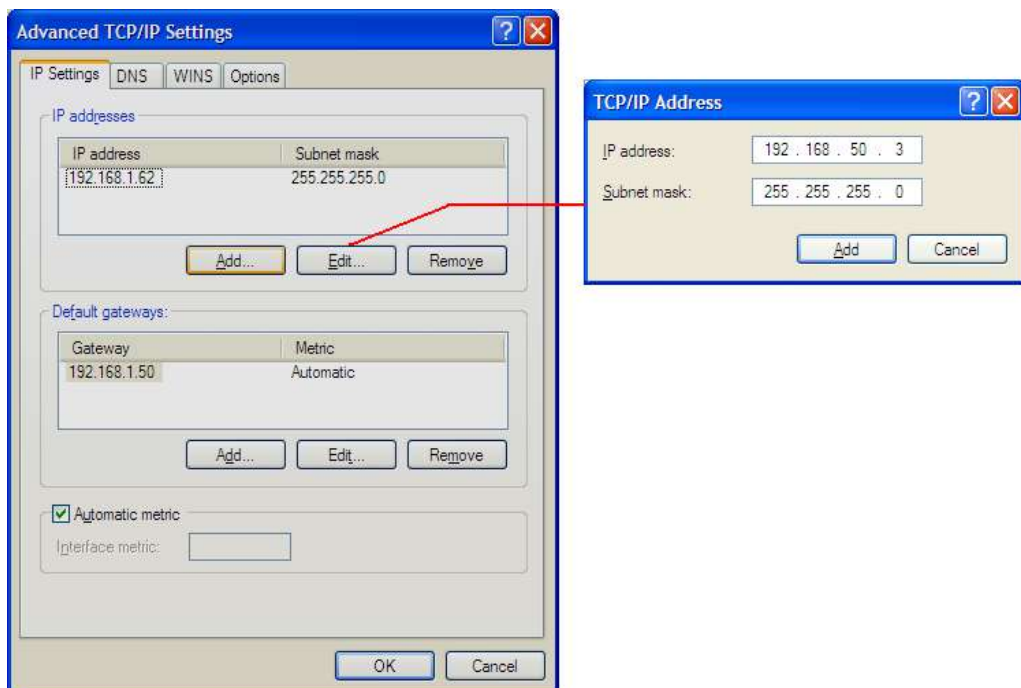


- e. Select the **Internet Protocol (TCP/IP)** option.

- f. Click **Properties** to display your system's current Internet Protocol properties.



- g. Click on **Advanced** to access the Advanced TCP/IP Settings window as shown below.



- h. Click on Add in the above window and enter "192.168.50.x" in the IP address field where "x" can be any number from 2 to 254.
- i. Enter "255.255.255.0" in the Subnet mask field.
- j. Click on Add to add the IP address to the list.

Click **OK** to save the settings.

# Licensing for Premise Solution

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The COSEC Application Platform has been partitioned into different modules to cater to the specific end user requirements.

The COSEC Application Platform has been categorized under the following licensing pattern based on the number of application users and door capacity. In addition to the above, the users can opt for the following modules at the time of placement of orders.

- **Platform/Basic Licence** - Admin + User + Device + Enterprise + Report Builder
- **T&A Licence** - Basic + T&A + Shift + Enterprise + Leave
- **ACS Licence** -Basic + Access Control
- **ESS Licence** - Used with T&A or Cafeteria
- **Cafeteria Licence** - Basic + Cafeteria
- **VMS Licence** - Basic +VMS
- **CWM Licence**- Basic +CWM including CSS+ Enterprise (CWM is recommended with T&A Licence)
- **JPC License**- Basic + T&A + JPC
- **FVM License**- Basic + T&A + FVM



*The Licensing for Cloud based solution is based on user days for the particular license voucher. The voucher activation is done by the Administrator of the Tenant Portal.*

In the event of the **Basic** COSEC Platform License, the following options will be available on the home page after logging into the web application.

- Admin
- Users
- Devices
- Enterprise
- Report Builder



*With Basic License; Report Builder will have only Events Template as default template. Other default templates of Report Builder will be available with T&A license.*

With the **Access Control** add on module the following options will be available on the home page after logging into the web application.

- Admin
- Users
- Devices
- Shifts & Schedules
- Access Control

The COSEC home page with only **Time and Attendance** add on module will have the following options available on the home page after logging into the web application.

- Admin
- Users
- Devices
- Shifts & Schedules
- Time & Attendance
- Leave management

The **Leave Management** module comes along with the Time and Attendance module and enables you to perform the following operations:

- Define Leave Policies
- Leave Opening Balance management
- Record Leave Adjustment transactions
- Record Leave Encashment transactions
- Leave application and approval
- View Reports

The **Visitor Management** module enables you to perform the following operations:

- Visitor Pre-Registration
- Maintain record of Blocked and Frequent Visitors
- Create Visitor E-Pass and Paper Pass
- View Reports

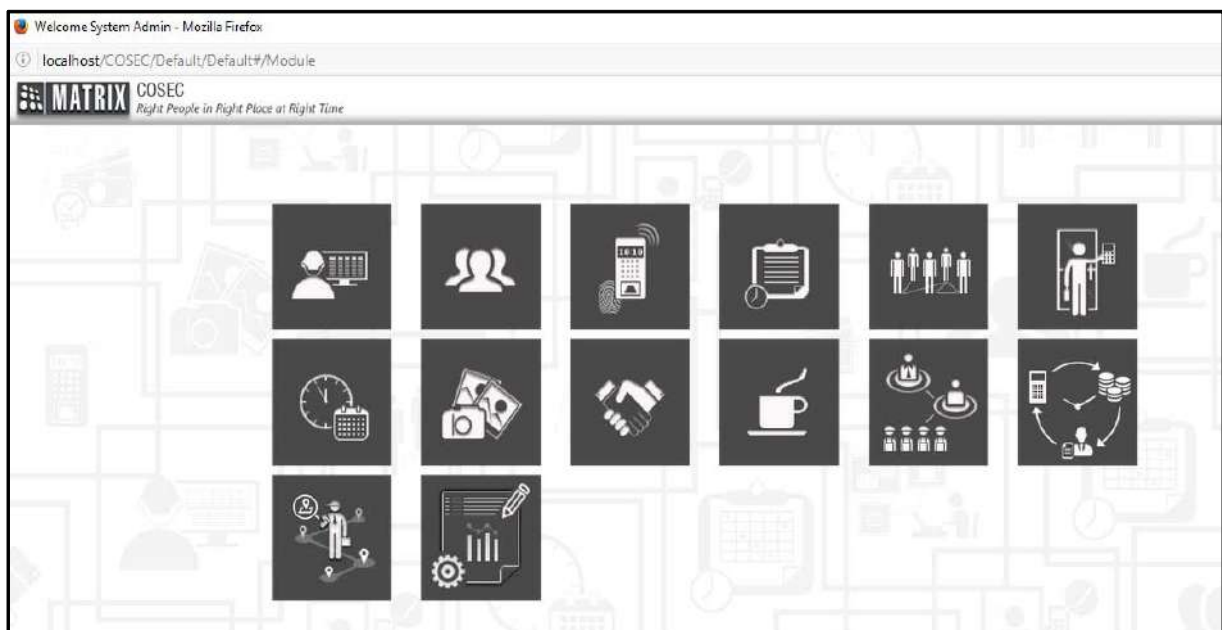
The **Contractor Worker Management** needs the Time and Attendance module to monitor contractor and workers and enables you to perform the following operations:

- Assign work orders to contractors
- Add and enroll contract workers and manage their credentials
- Manage worker assignments
- Approve, Reject, Blacklist contract workers
- Monitor daily and monthly work

The **Job Processing and Costing** Module enables to Create Project and Add Phases and Jobs to it, Assign Users to various Jobs. Also Monitor Daily Jobs and User's Time sheet.

The **Field Visit Management** Module enables to create task, assign task and location to some time slot. And monitor the user visiting the field.

A full COSEC application license will have the following home page.

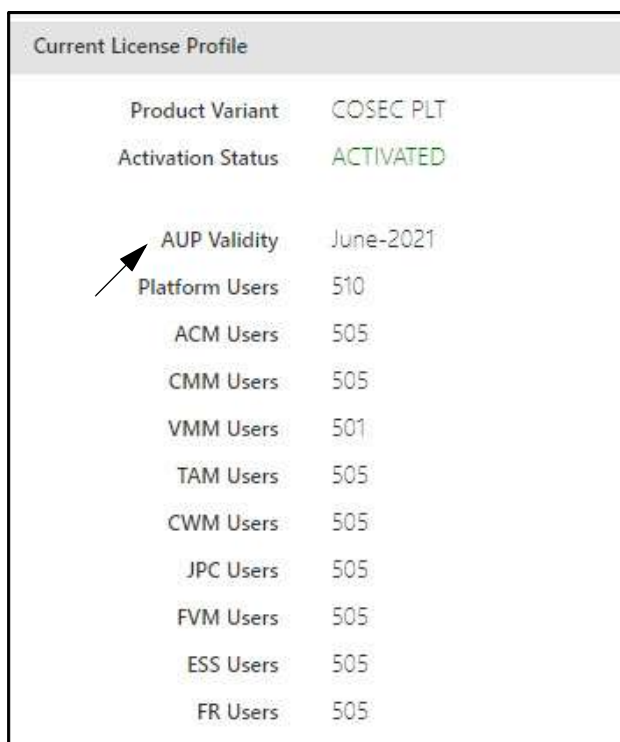




Thus, with the addition of module licenses, access to the various options are enabled.

### Application Upgrade Package (AUP) Validity

COSEC AUP License allows you to upgrade the firmwares available before the time period specified in the Application Upgrade Package (AUP) Validity in **COSEC Centra Admin> Company Configuration> License and Services> Current License Profile> AUP Validity**.



The screenshot shows a window titled 'Current License Profile'. It contains a table with the following data:

Product Variant	COSEC PLT
Activation Status	ACTIVATED
AUP Validity	June-2021
Platform Users	510
ACM Users	505
CMM Users	505
VMM Users	501
TAM Users	505
CWM Users	505
JPC Users	505
FVM Users	505
ESS Users	505
FR Users	505

An arrow points to the 'AUP Validity' row.

You will be allowed to upgrade the firmwares released before Month-Year specified in the Application Upgrade Package (AUP). These firmware upgradations are free of cost.

To upgrade the firmwares after this time period, you must renew the COSEC AUP License. As soon as you activate the License, AUP Validity date will be updated.

### For Example:

In a system, AUP Validity is displayed as June-2021.

If a new firmware is released on March 2021, then the system can be upgraded with this firmware free of cost.

Similarly, if a new firmware is released on July 2021, and you wish to upgrade the system, then you must renew the COSEC AUP License.

To take the above example further, if a new firmware is released on July 2023 and the AUP Validity displayed in your system is July 2021, if you wish to upgrade the system, you must renew the COSEC AUP License twice.

## Upgrading the COSEC License

For COSEC CENTRA, the COSEC application is shipped with the Generic license. This can be either a Dongle License or a Virtual License.

The License has to be updated with COSEC CENTRA PLT Voucher and Module specific vouchers based on User count as per your requirement.

You need to update the vouchers purchased against the Generic Key in case of Dongle license and in case of Virtual License, the Generic key needs to be registered first and then the other vouchers can be updated.

There are license keys (Dongle) with old structures also, in this case you need to first upgrade the key to the new structure and then other activations can be done.

Follow the Steps to upgrade the COSEC to new License structure (V14R1 onwards):

1. Ensure Application Upgrade Package (AUP) is available for upgrading to desired version.
2. Take Database Backup before upgrading.
3. Upgrade COSEC Software. Open COSEC Web login page/COSEC Admin Portal- License and Services page.
4. On License and Services page, SA user can accept and upgrade to new licensing structure. Once accepted; your license will be ported to new structure.



*Once new License structure is upgraded, you cannot move back to older license structure.*

The Login User name and Password will be provided by License Support team.

For more information on buying and upgrading license, refer to the Admin Management Portal User Guide as well as Contact Matrix Channel Partners or Matrix Technical Support.

# Using COSEC Web Application

The COSEC Web application enables the users to log in to the web application from local or remote computers and configure the various parameters available in the functional modules. After the installation of the COSEC web application on the computer, the users can access the application by entering the following URL in the web browser:

http://(ip address of web server computer)/cosec

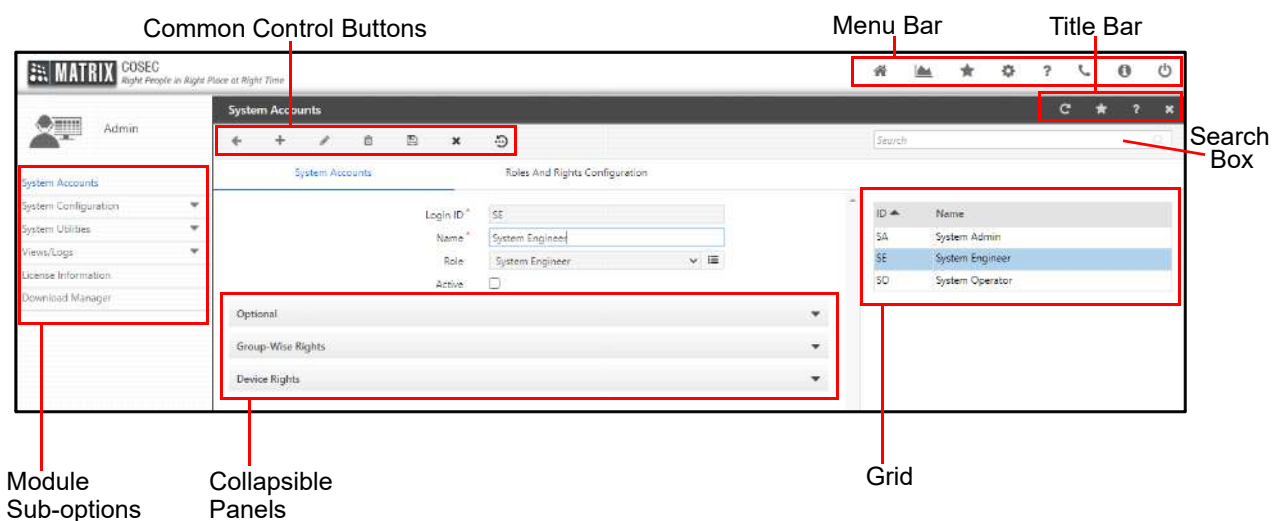
OR click on




From the home page of COSEC Web Application, the user can log into the various modules as supported by the License. The first page of any Module opens to the **Dashboard** as shown below which displays the information about the respective Module. On clicking the information links, the user can view additional details, or is directed to the corresponding configuration page.

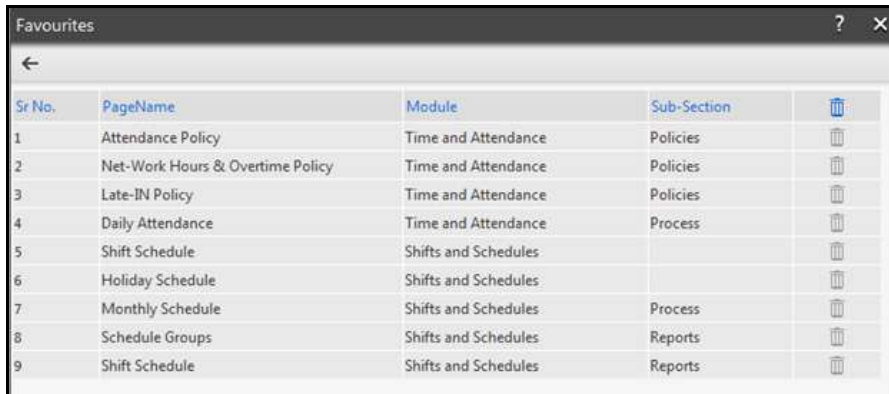











The Other interfaces are shown in below figure:



The **Menu Bar** at the top right side of window consist of following Icons:


- **Home:** Allows to go back to the Home Page.
- **Dashboard:** Allows to go to the dashboard page of the selected module.
- **Favourites:** Click on the **Favourites**  button from the Menu bar. This redirect to the Favourites Page as shown below.



Sr No.	PageName	Module	Sub-Section	
1	Attendance Policy	Time and Attendance	Policies	
2	Net-Work Hours & Overtime Policy	Time and Attendance	Policies	
3	Late-IN Policy	Time and Attendance	Policies	
4	Daily Attendance	Time and Attendance	Process	
5	Shift Schedule	Shifts and Schedules		
6	Holiday Schedule	Shifts and Schedules		
7	Monthly Schedule	Shifts and Schedules	Process	
8	Schedule Groups	Shifts and Schedules	Reports	
9	Shift Schedule	Shifts and Schedules	Reports	

- It shows the pages which are marked as favorites from pages of different modules by clicking on **Add to Favourite** button as shown below.



- The Favourite page can contain list of maximum 25 favourite pages. The user can remove the page from favourite list by clicking on delete button.
- **Account Settings:** Click on the Account Setting  button from the Menu bar. For more information, refer "[Account Setting](#)".
- **Help:** Gives the information about the COSEC Web Application.
- **Contact Us:** Gives the contact details of Matrix Comsec Pvt. Ltd. You can click on **Visit Us** link to view the Matrix website.
- **About:** Gives the details regarding the Product version, Product Variant and the Data Protection Manager. To configure and know more about the details of Data Protection Manager, refer "[Data Protection Manager](#)".
- **Logout:** Enables to log out from the application.

The **Title Bar** at the top right side of all module sub-options page consist of following Icons:

- **Refresh:** When you change any string in the language file and its reflection is required in the COSEC so click the Refresh button to get immediate reflection or else the changes will be reflected when you restart the system.
- **Add to favorites:** Enables to add the current page to favorites list.

- **Help:** Gives the information about the current page. For cross reference details refer to the complete System Manual.
- **Close:** Enables to close the current page and goes back to the selected module Dashboard.

The pages of the COSEC Web application have the following **Control/Command** buttons which are used to perform the functions as described below:

- **Back:** Allows to back to the previous page.
- **New/Add:** Allows creation of a new record for the selected option.
- **Edit:** Allows user to edit an already existing record.
- **Delete:** Allows user to delete the selected record.
- **Save:** Allows user to save the changes to the system.
- **Cancel:** Allows user to remove the data selected.



*The COSEC application basic platform consists of the modules mentioned earlier in this manual. In order to get the COSEC BASIC application up and running, the administrator needs to configure the parameters in the following order:*

*Admin>Device Configuration> User Configuration*



*In presence of other modules follow the configuration order as:*

*Admin>Device Configuration> Configure T&A Policies, Leaves, Enterprise Structure, Shifts & Schedules*

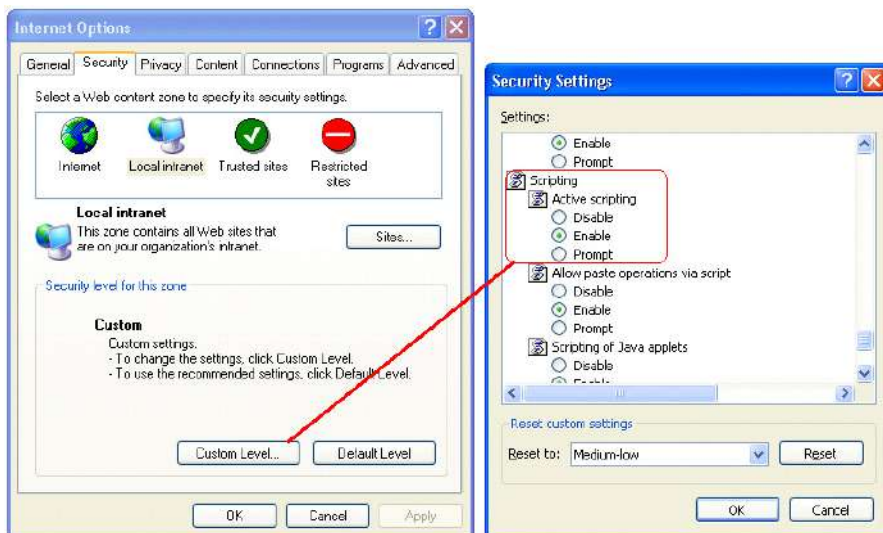
*>Then configure User configuration*

*> Configure at last Access Control,Canteen and Visitor Modules*



*Administrator needs to ensure that Java scripting is enabled in the security settings of the web browser application. In Internet Explorer this is done by selecting **Internet Options** from the **Tools** menu.*

*On the Internet options page go to the **Security** tab and click on the **Custom Level** button. Enable the Active Scripting option as shown.*



## Initial Configuration with Device

To begin with COSEC Web Application, first configure the device by setting the LAN IP and Server port in the Network parameters of Door. The LAN IP should be the IP of the PC where COSEC Monitor is installed.

Now in the COSEC Web application go to **Device List**> Click on **New** and select the device or select **Device Module**> **Device Configuration**> **Profile**> **Basic**: Enter the MAC Address of the device to be connected in the

MAC Address field. While saving the MAC, the IP from the device will be fetched by the web application and the device will get activated.

**OR**

There is easy option of Automatically addition of new device by checking the box **Auto Add New Device**. For enabling this feature go to **Admin Module> System Configuration> Global Policy>Device**.

If the Auto addition feature is enabled then there is no need to enter the MAC address. The application will automatically configure the parameters and the device will be added.



*For connecting the door as PANEL Door, auto addition has to be disabled. Then define the PANEL door manually then connect to the server. For details refer Devices Section.*


Now configure the Device with Basic and Advanced parameters from the Device Module. For more details see Devices Module.

The COSEC system enables the administrator to define **sites** which are to be used for reporting purposes. The Door Controllers can then be assigned to the defined sites.

For defining Sites go to **Device Module> Masters> Site**.

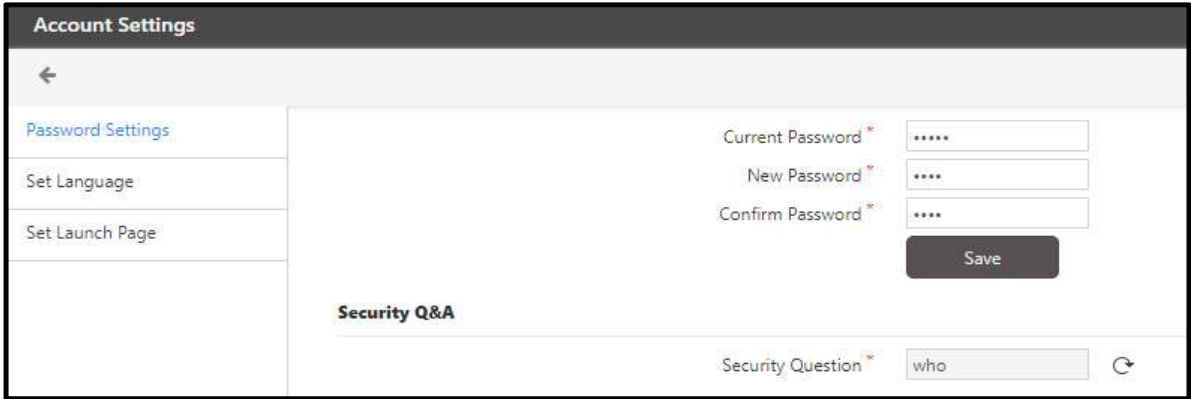
# Account Setting

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**Account Settings:** Click on the Account Setting  button from the Menu bar. This enables the user to change the password, set the preferred language and to set the launch page for the login user.

## Password Settings

- You can set new password from the Password Settings tab.



To change the Password,

- Current Password:** Configure the Current Password of the Admin Portal.
- New Password:** Configure the new password you wish to set.




You will be able to set the Password as per the parameters set in [“Password Policy”](#) in [“Defining Global Policies”](#).

- Confirm Password:** Re-enter the new password for confirmation.
- Click **Save**.

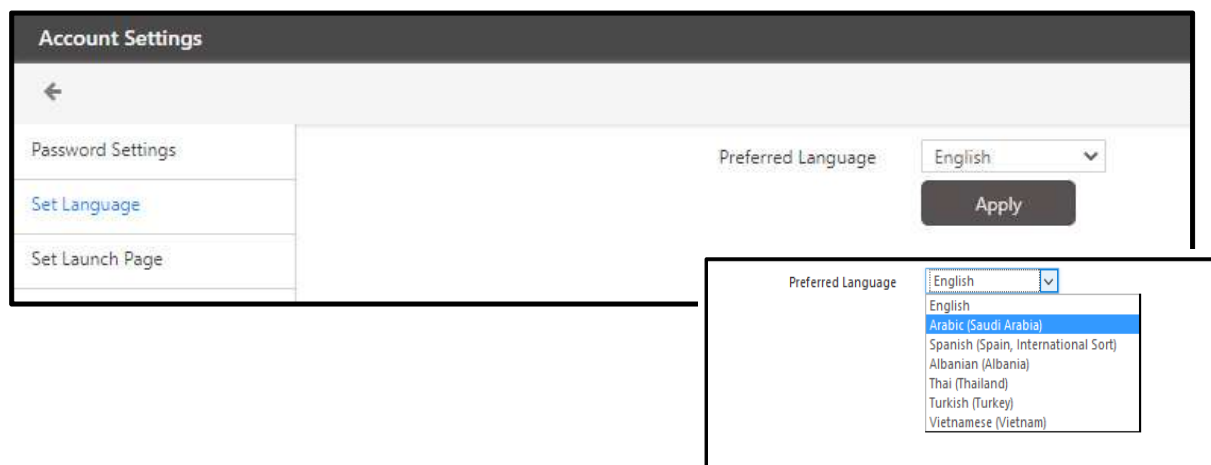
## Security Q&A

The Security Q&A will initially display the Security Question you already set at the time of login. However you can change the same. To do so,

- Click **Reset Security Q&A**  and configure the following parameter:
  - Security Question:** Configure the new question you wish to set as the Security Question.
  - Security Answer:** Configure the answer for the set Security Question.
  - Confirm Security Answer:** Re-enter the answer to confirm.
  - Current Password:** Configure the Current Password.
- Click **Save**.

## Set Language

- You can set the language by selecting the preferred language.



The screenshot shows the 'Account Settings' interface. On the left, there is a sidebar with options: 'Password Settings', 'Set Language' (highlighted in blue), and 'Set Launch Page'. The main area displays 'Preferred Language' with a dropdown menu currently set to 'English' and an 'Apply' button below it. A callout box shows the expanded dropdown menu with the following options: English, Arabic (Saudi Arabia), Spanish (Spain, International Sort), Albanian (Albania), Thai (Thailand), Turkish (Turkey), and Vietnamese (Vietnam).

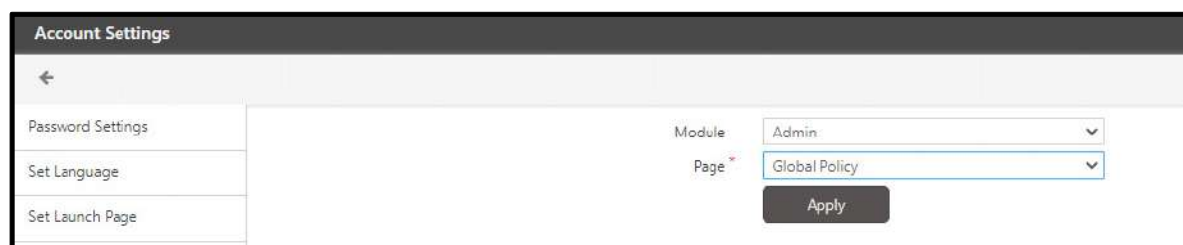


The Language translation can be done via Multi-Language Utility. To know more, refer to the Multi-Language Utility User Guide.

If you wish to set the language of the Login page, click **Admin module > System Configuration > Global Policy > Basic > Global Language For Login**. For details, refer to [“Basic Policy”](#) under [“Defining Global Policies”](#).

## Set Launch Page

- You can select the launch page i.e. the page which will appear directly after logging into COSEC.




The screenshot shows the 'Account Settings' interface. On the left, there is a sidebar with options: 'Password Settings', 'Set Language', and 'Set Launch Page' (highlighted in blue). The main area displays 'Module' with a dropdown menu set to 'Admin' and 'Page' with a dropdown menu set to 'Global Policy'. An 'Apply' button is located below these dropdowns.

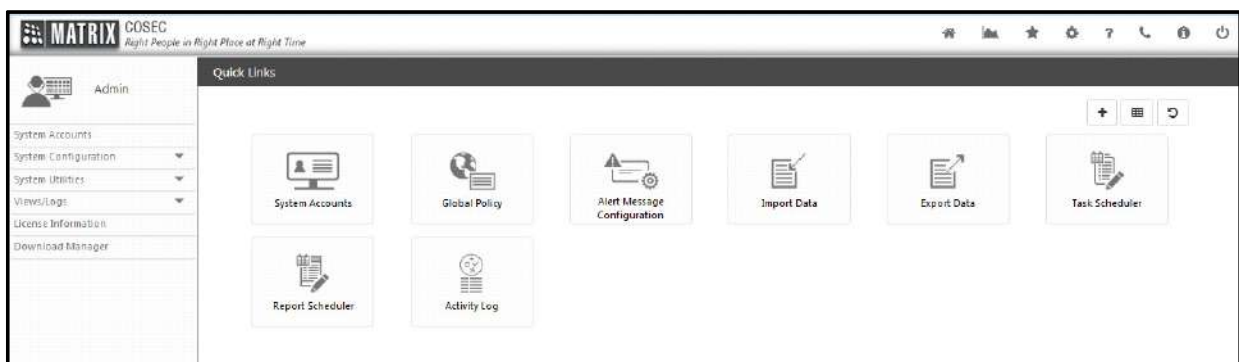


The **Admin** module allows the System Administrator to define users who will be using the COSEC application. Using this module, system rights and other information for the users of the COSEC application can be specified based on their roles. In addition, each user can be assigned a unique set of IDs and Passwords. It is recommended that this module be configured before starting the configuration of the COSEC Controllers for other applications.

A system administrator can set all parameters related to the use of the COSEC application and its modules. The administrator can also set the data export format based on certain database views which are provided by default along with the COSEC application. This would thus enable exporting of data which can be used as an input to external applications like Payroll.

This module also has the License Information option which allows the administrator to view the license details as well as enter new license string for updating the application and add more application user licenses as well as other modules.

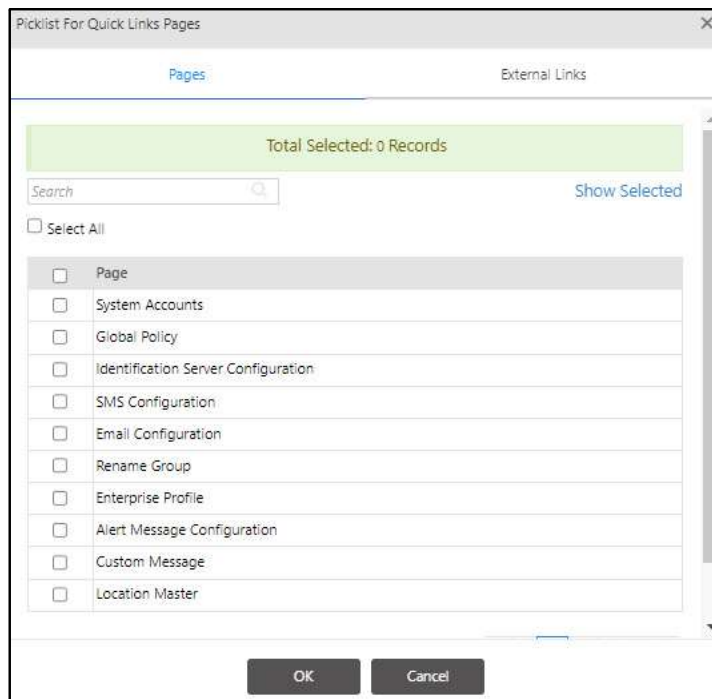
To use the system administration functionality, select the **Admin** module icon  on the module selection page. The **Admin** module page appears on the screen as shown below.



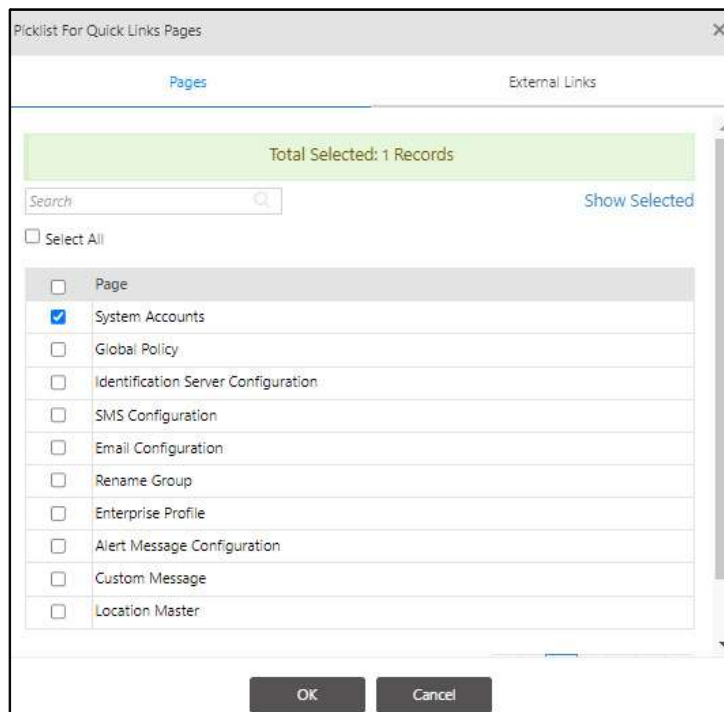
The page displays a menu and **Quick Links** to go to the required page in just one click. Quick Links are shortcuts to reach to a specific page easily. You can configure these options for Quick Links — **Add Quick Link**, **Select Layout** and **Reset to Default**.

### Add Quick Links

- Click **Add** . The **Picklist For Quick Links Pages** pop-up appears.

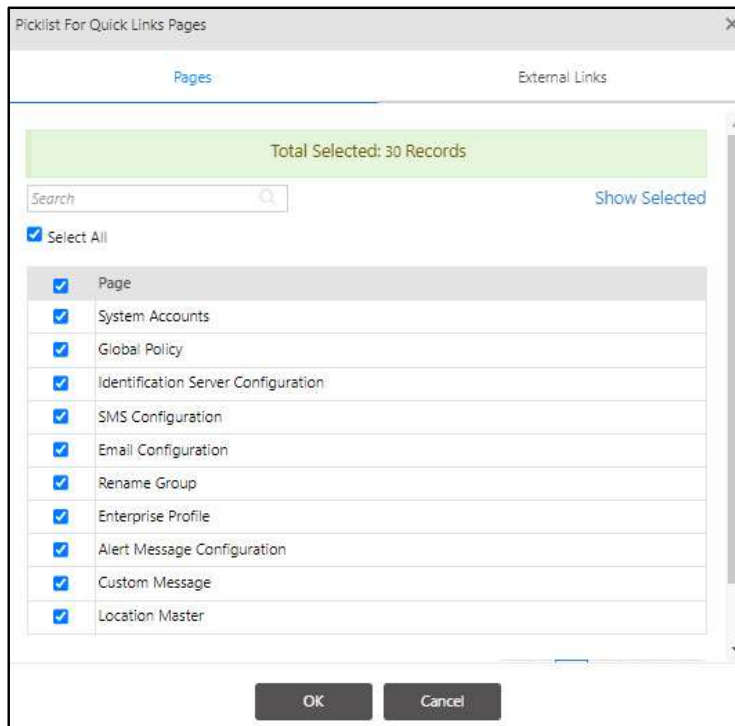


- You can either select particular page or can select all the pages at once. Maximum **20** quick links can be displayed.
- To select particular pages, select the check boxes of the desired pages.




**OR**

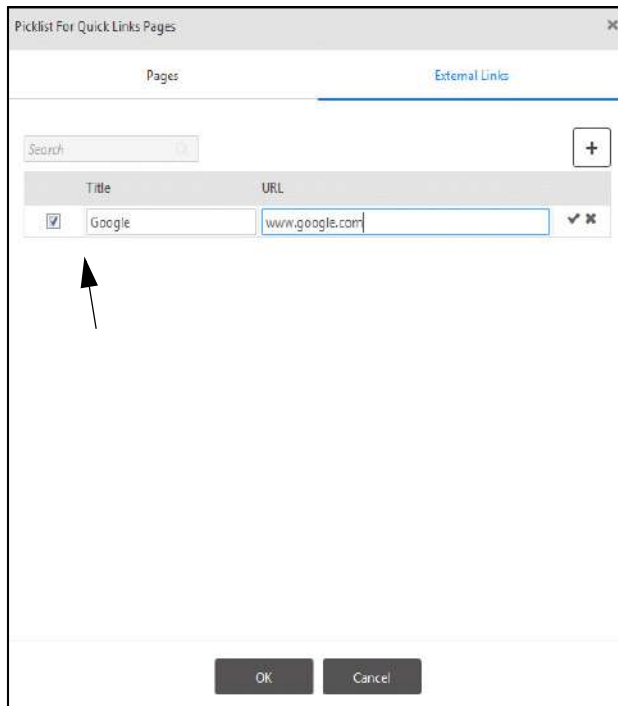
- To select all the pages at once, select the **Select All** check box. All the pages will be selected.





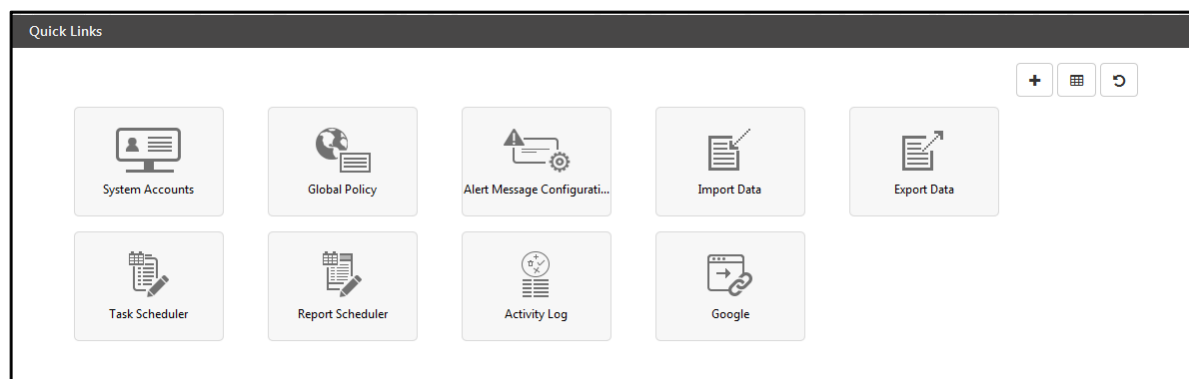
- Click **OK**.
- The Quick Links for selected pages appear on the Quick Link page.

#### **Adding External Links,**


- Select **External Link** tab and click on  button to add new external link.
- Configure the **Title** and **URL** of the external link under the respective fields. Select the check box to display the Quick Link for the configured link.




- Click **Save**  to save the configuration.
- Once you have saved the configuration, you can edit it. Click **Edit**  to edit the saved configuration.
- Click **OK** to save the configuration of the external link. The Quick Link for the external link appears on the Quick Link page.



## Select Layout

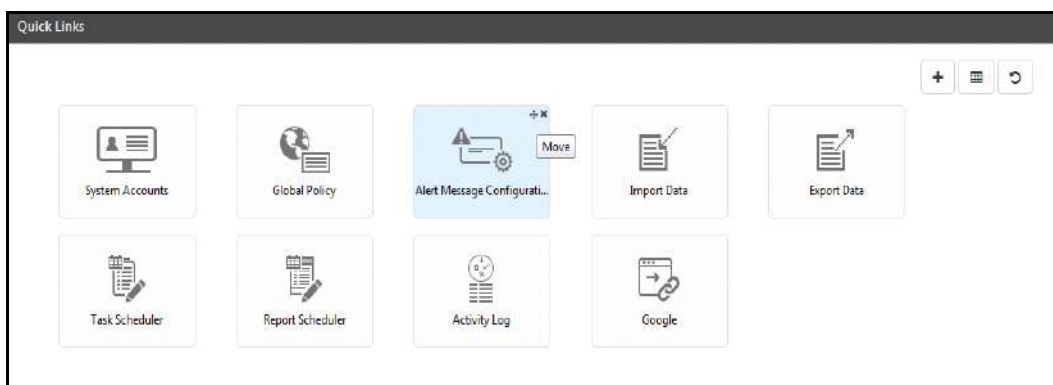
Click **Select Layout**  to select a layout for the quick links. You can select 5x4 or 4x5 layout to manage the quick links.

## Reset To Default

Click **Reset To Default**  to reset the quick links to the default quick links.

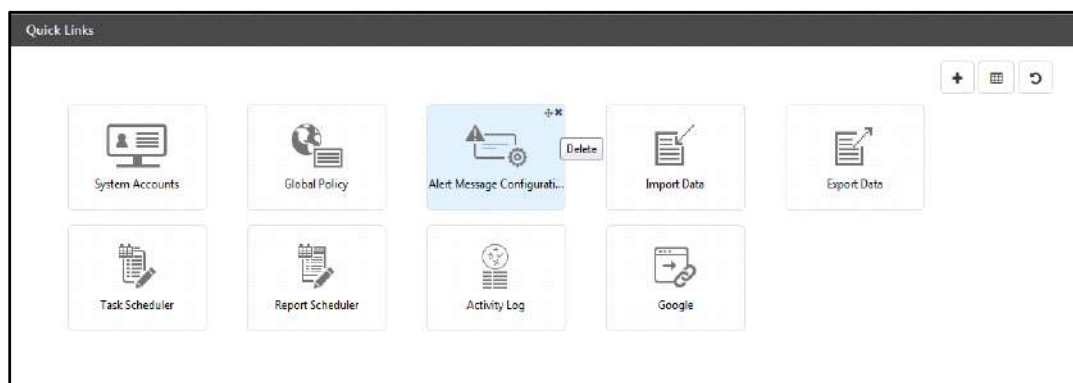
## Move the Link

To move the link from one place to another, hover on the link on top right corner and click **Move** icon as shown below. Then drag the quick link to the desired place. It will be placed at the desired location on the quick links page.




## Delete the Link

To delete a particular link, hover on the link on top right corner and click **Delete** icon as shown below.

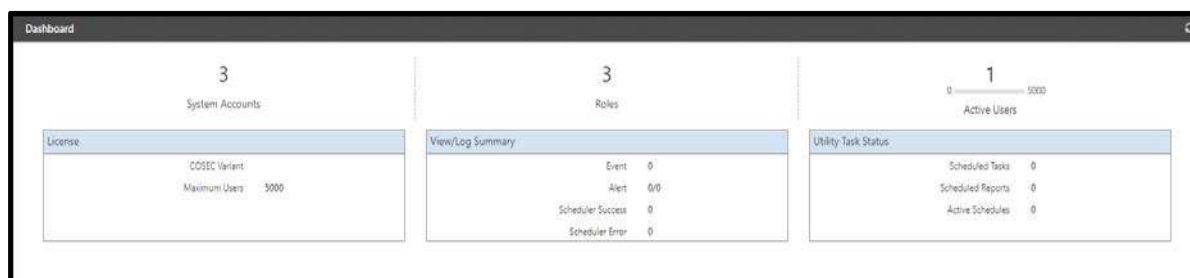


*Quick links are displayed as per rights given to System Account and ESS users.*

## Admin Dashboard

The Admin Dashboard presents an overview of system information along with current system status. It also displays the total number of created Users in System Account, total number of created Roles and total number of active users. To view the Dashboard, click the Dashboard button  on the **Admin** page. It appears with the following information:

- System Accounts- Displays the number of system accounts created in the COSEC.
- Roles- Displays the number of Roles created in the COSEC.
- Active Users- Displays the number of active users created in the COSEC.



## License


- Maximum Users - Maximum number of users allowed per license.

## View/Log Summary

- Event - No. of event views made on the current day.
- Alert - No. of SMS Alerts/No. of e-mail alerts for the current day.
- Scheduler Success - No. of scheduled tasks completed successfully on the current day.
- Scheduler Error - No. of scheduled tasks which failed on the current day.

## Utility Task Status

- Scheduled Tasks - Total tasks that are configured in scheduler.
- Scheduled Reports - Total reports that are configured in scheduler.
- Active Schedules - Total number of scheduled tasks and reports that are currently active.

For more information on the above Dashboard options, click the respective information links on the Dashboard. The Latest values on Dashboard are updated on clicking the Refresh  button.

# Managing System Accounts

Every system account on COSEC is associated with a login role and a login user.

A login role on COSEC is a pre-defined role that determines how a user associated with it may login or perform certain activities on the COSEC application. For example, a Human Resources (HR) Manager in an organization may be assigned the login role of a system administrator, thus enabling him to administer system policies for an organization.

COSEC identifies three types of system-defined login roles which determine the login and system operation rights for each user. These are -

- System Administrator (SA)
- System Engineer (SE)
- System Operator (SO)



*SE and SO account will be inactive by default during first login after installation. SA user can login and activate the SE and SO accounts.*

In addition to these, Admin can add new login roles and configure role rights for each role. Based on these role rights, all login users associated with a login role can perform specific activities on COSEC.

You can create On Behalf System Accounts Users also. On Behalf Users can perform specific activities such a Leave Applications, Attendance Corrections, Apply for Shout Leaves etc on behalf of other users. For details refer to [“On Behalf System Account User”](#).

To view System Accounts page go to **Admin module > System Accounts** and the following screen appears.

The screen displays two tabs namely:

- [“System Accounts”](#)
- [“Roles and Rights Configuration”](#)


## System Accounts

This tab enables to create login users.

To add a new login user to the system, go to **Admin module > System Accounts > System Accounts** tab and the following screen appears.

ID	Name
Aahar	Aahar
Canteen	Canteen
cosecdevic	COSEC Device
custom	custom
Devanand	Devanand
Enroll	Enroll
FR	Face Recognition
IDS	IDS
jayesh	jayesh
kanul	kanul

The page displays a **tool-bar** for creating, editing, deleting, saving, canceling and resetting password for a user along with configurations on the left hand side and a grid containing a list of created users on the right hand side. One can also search a particular user from the grid using **Search** field.

1. Click the **New**  icon on the **System Accounts** page.
2. Configure the following options as required:
  - **Login ID** - Assign a unique ID for the Login User.
  - **Name** - Enter a name for the login user.
  - **Role** - Select a login role from the drop-down list. One can also create a new login role from the Role Configuration tab or by clicking on the pick list button. Refer [“Roles and Rights Configuration”](#).
  - **Active** - Select to mark the status of the user as active. On enabling, the user becomes an active user.
3. Configure the remaining parameters on this page as described in the following sections.
4. Once the new system account is configured, click **Save** to add the new login user to the COSEC database.

### Optional

This section allows the administrator to perform additional configurations for defining a login user on COSEC. To do this,

Under **System Accounts**, expand the **Optional** collapsible panel as shown below.



Enter the following details:

- **Linked ESS User:** Select an ESS user using the picklist to link with the System Account. This allows selected employees to be assigned login rights to COSEC web system accounts. On logging into the respective system account, the user is now also able to access his/her ESS page directly from the COSEC Web module selection page.
- **Preferred Language:** Select the language to be preferred from the dropdown list. On selecting a specific language all the labels of the COSEC will change into that particular language. E.g. if Urdu language is selected, then all the labels get changed into Urdu.
- **Mobile No.:** Configure the Mobile Number of the System Account User/On Behalf System Account User. You can add multiple numbers if required. Multiple numbers must be separated by comma. If you have Linked ESS User, then the official mobile number, fetched from User > Profile > Contact > Official > Mobile) of this ESS User will be displayed here automatically. You can change/remove the same if required. Make sure you save the changes. Maximum 32 characters can be configured. Valid: 0 to 9,+()-



*Once the Mobile Number of Linked ESS User is fetched and displayed and later if the same is updated/ removed from User > Profile > Contact > Official > Mobile, then the same will not be updated here automatically.*

*If you change the Linked ESS User and the new user does not have any Mobile Number, then the mobile number of the previously Linked ESS User will be displayed.*

The following alerts will be triggered on the Mobile Number to the System Admin / [“On Behalf System Account User”](#) if the application is done by them and the final verdict for the same is received provided in these Alert Configurations, for the parameter **Send Alert To**, the **System Account** check box is enabled:

- Leave Approval
- Leave Rejection
- Attendance Correction Approval/Rejection
- Short Leave/Official Approval/Rejection
- Advance Overtime Approval/Rejection
- Shift Change
- Visit Request Approval Rejection

For details refer to [“Configuring Alert Messages”](#).

- **Email:** Configure the Email ID to be link with the System Account and to be mapped with the attributes received in the SSO response. After successful SSO configuration, through this Email ID the SSO User will be able to login.

The following Alerts will be triggered to the configured Email, to the System Admin / “On Behalf System Account User” if the application is done by them and the final verdict for the same is received provided in these Alert Configurations, for the parameter **Send Alert To**, the **System Account** check box is enabled:

- Leave Approval
  - Leave Rejection
  - Attendance Correction Approval/Rejection
  - Short Leave/Official Approval/Rejection
  - Advance Overtime Approval/Rejection
  - Shift Change
  - Visit Request Approval Rejection
- **Enable API Access:** Select this check box allow the System Account user to use an *Application Programming Interface* (API) to access or update the COSEC database. While accessing COSEC through API you will need to enter the API login credentials for devices as mentioned in Global Policy.
  - **Report Export Output In PDF Only:** Enable this check box to restrict exporting reports to the PDF format only. This will prevent risks of data manipulation using any other output format.

### Login Via Active Directory

This feature will be active only if the same parameter is also enabled at the Global system level (*Admin module > System Configuration > Global Policy > Login*). Select the check box to enable system account users to login using their Active Directory credentials.

Enter the Active Directory **Username**. For eg: admin123

Specify the **Domain** name. For e.g. if the domain name is matrix.com the domain name is specified as: dc=matrix,dc=com.

Click the **Default Domain** button to set the domain name as saved in Global Policy configuration.

### Set Launch Page

The user who accesses only one particular page in COSEC on a daily basis can be assigned that page as the launch page i.e. when the user logs into COSEC; the launch page will directly appear.

**Module:** Select the Module from the drop down list whose page is to be set as launch page.

**Page:** Select the page belonging to the selected module which will directly appear after login into COSEC.

Click **Save** button.



1. If a page is set to Launch page; then afterwards if the page view rights are made disabled or the respective Module rights are enabled to “Hide” then selection of Module and Page will get reset to default.

2. If Customized report is set to Launch page; then afterwards if the customized report is being deleted then selection of Module and Page will get reset to default.

## Assigning Group-Wise Rights

The administrator can assign all or specific enterprise groups to each login user. The login user will then have access rights only to the user records belonging to the assigned group.

To assign group-wise rights,

- Under **System Accounts**, expand the **Group-Wise Rights** collapsible panel as shown below.



Group-Wise Rights

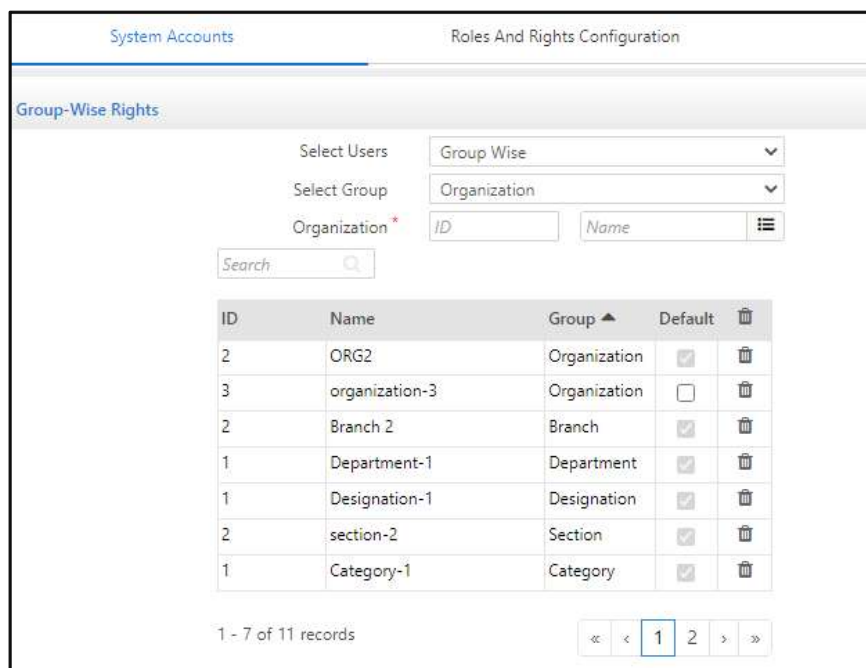
Select Users: Group Wise

Select Group: Organization

Organization \* ID Name

**Select Users:** Select the desired option — **All** or **Group Wise**.

- Group Wise:** To specify users based on the selected enterprise group using a picklist.
  - All:** To select all active users on the system.
- Select Group:** If **All** is selected, then the default enterprise groups will be assigned as per the assignment in the Enterprise Module.  
If **Group Wise** option is selected, select the desired enterprise group from the drop-down list — Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1/2/3.



System Accounts Roles And Rights Configuration

Group-Wise Rights

Select Users: Group Wise

Select Group: Organization

Organization \* ID Name

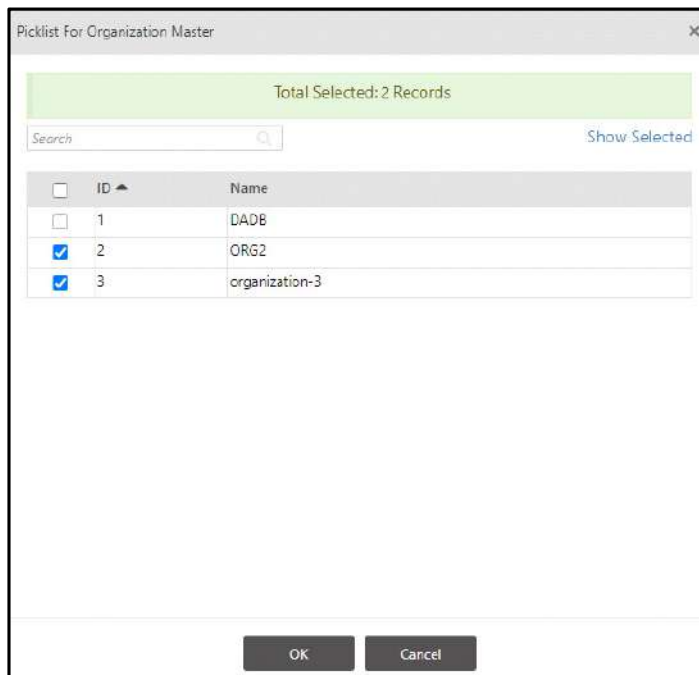
Search

ID	Name	Group	Default	
2	ORG2	Organization	<input checked="" type="checkbox"/>	
3	organization-3	Organization	<input type="checkbox"/>	
2	Branch 2	Branch	<input checked="" type="checkbox"/>	
1	Department-1	Department	<input checked="" type="checkbox"/>	
1	Designation-1	Designation	<input checked="" type="checkbox"/>	
2	section-2	Section	<input checked="" type="checkbox"/>	
1	Category-1	Category	<input checked="" type="checkbox"/>	

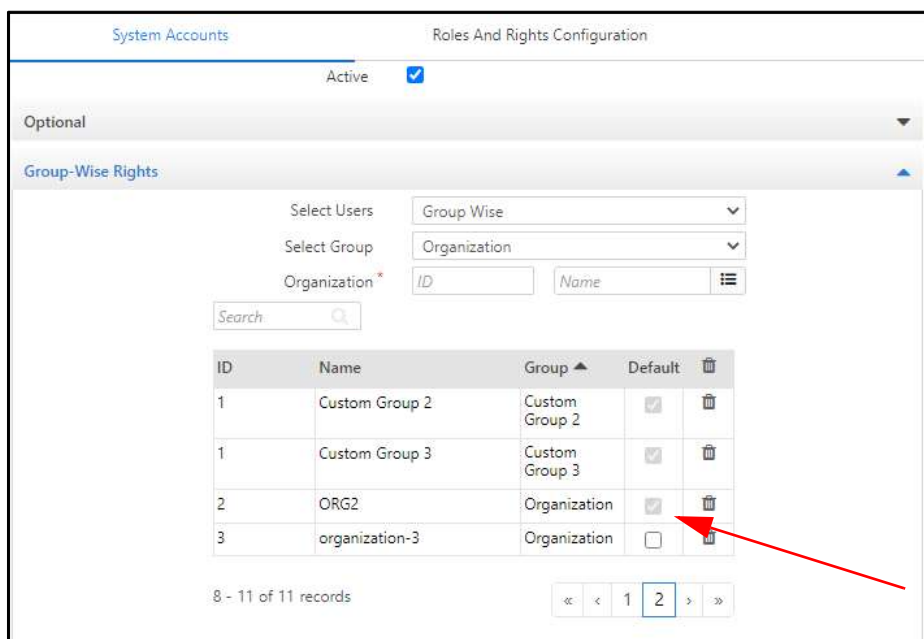
1 - 7 of 11 records

« < 1 2 > »

For each enterprise group — Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1/2/3, click the corresponding picklist to select the desired option/s.



Click **OK**.



If there are multiple options available in each group, you can also set the default option as per your requirement.

For example: If you have 3 organizations — ORG1, ORG2 and ORG3, then ORG1 will be assigned as default. If you wish to set ORG3 as default, select the corresponding check box under Default.

The SA User will have rights to these groups only. New users created using his/her SA login, will be assigned these groups as their default groups.

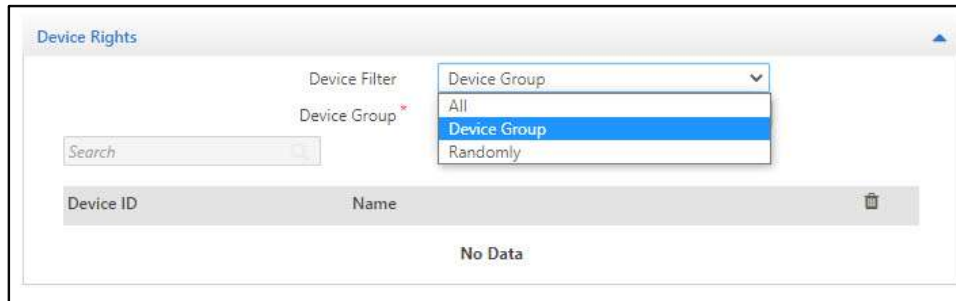
- These selected groups get displayed in the grid below the parameters. If required they can be deleted also by clicking on **Delete** icon.

## Assigning Device Rights

A login user can also be assigned rights to access only selected devices or device groups on COSEC.

To do this,

- Under **System Accounts**, expand the **Device Rights** collapsible panel as shown below.

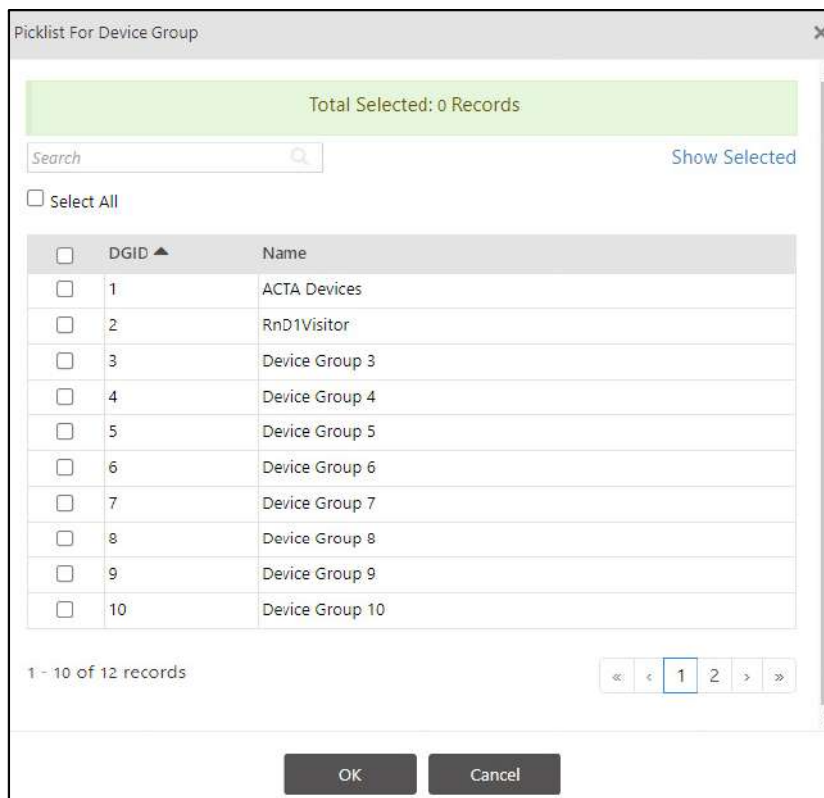


The screenshot shows the 'Device Rights' window. It has a 'Device Filter' dropdown menu with options 'All', 'Device Group', and 'Randomly'. The 'Device Group' option is selected. Below the dropdown is a search bar. At the bottom, there is a table with columns 'Device ID' and 'Name', and a 'No Data' message.

- Device Filter:** Select the desired option — All, Device Group, Randomly — from the drop-down list.
- Device/Device Groups:** Based on the option selected in the Device Filter select the devices/device groups using the picklist for which the rights are to be assigned.

If you select Device Groups as the Device Filter,

- Click the **Device Group** picklist. The **Picklist for Device Group** pop-up appears.



The screenshot shows the 'Picklist For Device Group' pop-up window. It has a search bar and a 'Show Selected' button. Below the search bar is a table with columns 'DGID' and 'Name'. The table lists 10 device groups. At the bottom, there is a pagination control showing '1 - 10 of 12 records' and a '1' button. There are 'OK' and 'Cancel' buttons at the bottom.

DGID	Name
1	ACTA Devices
2	RnD1Visitor
3	Device Group 3
4	Device Group 4
5	Device Group 5
6	Device Group 6
7	Device Group 7
8	Device Group 8
9	Device Group 9
10	Device Group 10

- You can either select particular Device Groups or can select all the Device Groups at once.

- To select particular Device Groups, select the check boxes of the desired Device Groups.

Picklist For Device Group

Total Selected: 2 Records

Search  Show Selected

☐ Select All

<input type="checkbox"/>	DGID ▲	Name
<input checked="" type="checkbox"/>	1	ACTA Devices
<input checked="" type="checkbox"/>	2	RnD1Visitor
<input type="checkbox"/>	3	Device Group 3
<input type="checkbox"/>	4	Device Group 4
<input type="checkbox"/>	5	Device Group 5
<input type="checkbox"/>	6	Device Group 6
<input type="checkbox"/>	7	Device Group 7
<input type="checkbox"/>	8	Device Group 8
<input type="checkbox"/>	9	Device Group 9
<input type="checkbox"/>	10	Device Group 10

1 - 10 of 12 records

« < 1 2 > »

OK Cancel

OR

- To select all the Device Groups at once, select the **Select All** check box. The Device Groups on all the pages will be selected.

Picklist For Device Group

Total Selected: 12 Records

Search  Show Selected

☒ Select All

<input checked="" type="checkbox"/>	DGID ▲	Name
<input checked="" type="checkbox"/>	1	ACTA Devices
<input checked="" type="checkbox"/>	2	RnD1Visitor
<input checked="" type="checkbox"/>	3	Device Group 3
<input checked="" type="checkbox"/>	4	Device Group 4
<input checked="" type="checkbox"/>	5	Device Group 5
<input checked="" type="checkbox"/>	6	Device Group 6
<input checked="" type="checkbox"/>	7	Device Group 7
<input checked="" type="checkbox"/>	8	Device Group 8
<input checked="" type="checkbox"/>	9	Device Group 9
<input checked="" type="checkbox"/>	10	Device Group 10

1 - 10 of 12 records

« < 1 2 > »

OK Cancel

- Click **OK**.
- The selected Device Groups appear in the grid.

The screenshot shows a window titled 'Devices' with a tab labeled 'Assign'. Below the tab, there are input fields for 'Device Group', 'ID', and 'Name'. A search bar is also present. Below these, there is a table with the following data:

DGID ▲	Device Group Name	
1	ACTA Devices	
2	RnD1Visitor	
3	Device Group 3	
4	Device Group 4	

- You can also delete the desired device group. To do so, click **Delete** of the respective Device Group.
- Similarly, if you select **Randomly** as the Device Filter, click the **Device** picklist. The **Picklist for Panel and Direct Doors** pop-up appears. To proceed, follow the steps as mentioned under Device Groups.
- Click **Save** button.



*Predefined System Account Login Roles (SA, SE or SO) are non-editable.*

Once the user is created, the password for ESS User can be reset by clicking on **Reset ESS Password** button located in the toolbar. On clicking the button a message stating **Password Reset Successfully** gets displayed on the screen.

## On Behalf System Account User

If in a certain scenario a user/worker is not able to access the system and subsequently fails to apply for a leave application, attendance correction or any other similar requests, in that case the On Behalf System Account User will be able to do so for that user/worker.

The On Behalf System Account User will have rights equivalent to that of a System Admin to execute the desired request of a User/Worker. You can modify the Roles and Rights assigned to this user as per your requirement.

To create the On Behalf System Account User follow the steps mentioned under [“System Accounts”](#) and for the roles and rights to be assigned to this user, refer to [“Roles and Rights Configuration”](#)

The On Behalf System User can either further the request of the application to the respective RIC or, the request can be considered for auto approval depending on the **Auto Approve** check box selection in Admin> [“Roles and Rights Configuration”](#).

The On Behalf System User can perform the following:

- [“Attendance Correction Application”](#)
- [“Short Leave/Official IN-OUT Application”](#)
- [“Advance Overtime Application”](#)
- [“Leave Application/Approval”](#)
- [“Tour Application/Approval”](#)
- [“C-OFF Application/Approval”](#)
- [“Manual Correction”](#)
- [“Field Visit Correction”](#)
- [“Time Sheet Correction”](#)
- [“Pre-Registration”](#)
- [“Shift Change Application/Approval”](#)

If the application are done by the On Behalf System User and the application’s final verdict is received then an Alert will be triggered to the On Behalf System User based on Alert Configuration done for below mentioned alert:

- Leave Approval
- Leave Rejection
- Attendance Correction Approval/Rejection
- Short Leave/Official Approval/Rejection
- Advance Overtime Approval/Rejection
- Shift Change
- Visit Request Approval/Rejection

Make sure you have configured the desired number in Mobile Number in [“Optional”](#) parameters as well as the desired Alert parameters. For details, refer to [“Configuring Alert Messages”](#).



## Roles and Rights Configuration

Login Roles can be created in COSEC and each role can be assigned rights by the system administrator to access and perform specific functions in the COSEC Web Application or COSEC Desktop Apps. To do this,



- Under **System Accounts**, click the Role pick-list button in the **New/Edit** mode or click the **Role Configuration** tab as shown in the screen below.


### Page Right

Menu	Parent Menu	View	Add	Edit	Delete	Print	Auto Approve
Dashboard		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
System Accounts		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Global Policy	System Configuration	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Identification Server Configuration	System Configuration	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
SMS Configuration	System Configuration	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Email Configuration	System Configuration	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Rename Group	System Configuration	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Enterprise Profile	System Configuration	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Alert Message Configuration	System Configuration	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Custom Message	System Configuration	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

- **Role:** Enter a name for the Login Role.
- **Copy Right As Per:** If role rights are to be copied from another role then select a created role using the picklist button. **E.g.** If a new role Employee is created and the Copy Right As Per value is SA. Then all the rights of SA are copied to Employee. So, now even Employee role has the same rights as SA role.

After you select the desired option in Copy Right As Per, if required you can manually change/modify the View, Add, Edit Delete, Print or Auto Approve options for the desired Module's Menu options.

- **Module:** Select a module from the drop-down list for which rights are to be assigned to the Login Role.
- Select the type of rights to be assigned to the role from **Page Rights**  / **Module Rights**  /

**Application Rights**  section by clicking on the respective icons.

- Further, as per the selected rights you can assign the View, Hide, Add, Edit, Delete, Print and Auto Approve login rights to the login role by selecting the respective check boxes against each function.
- **Auto Approve:** Select this check box, if you want the applications made by the On Behalf System Account User to be pre-approved. Clear this check box if you want the applications made by the On Behalf System Account User to be sent to the respective RIC for approval. To know more about On Behalf System Account User, refer to [“On Behalf System Account User”](#)



If no role rights are assigned to a system account, for a particular module (say, Leave Management), user can check the **Hide Module** option to hide this module from the login user's view for the same system account.

- Click **Save** button.

- All saved Login Roles can be viewed in the list on the left hand side. One can also search a login role using **Search Role** field.

## Module Rights

The screenshot shows the 'Roles And Rights Configuration' window. On the left, there is a 'System Accounts' list with 'System Administrator', 'System Engineer', and 'System Operator'. The 'System Administrator' role is selected. The main area displays a table of 'Module Rights' for this role. The table has columns for 'Module Name', 'Hide', 'View', 'Add', 'Edit', and 'Delete'. The 'Hide' column has checkboxes, and the other columns have checkboxes or checkmarks. The 'Module Rights' tab is active.

Module Name	Hide	View	Add	Edit	Delete
Admin	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Access Control	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Time and Attendance	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Leave Management	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Visitor Management	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Cafeteria Management	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Users	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Devices	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Shifts and Schedules	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Enterprise Structure	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

1 - 10 of 14 records



If you select the Hide check box of any Module then that Module will not be visible on the Home page of COSEC Web, however its reflections in other Modules will be visible. For example if you select the Hide check box for Visitor Management, then Visitor Management will not be visible on the Home page but the Visitor Management tab in the User > User Configuration will be visible.

If you want to remove any Module and its reflections from COSEC Web, it can be done from the COSEC Admin Portal > Company Configuration > License and Services. For details, refer to the Admin Mgt Portal User Guide

## Application Rights

The screenshot shows the 'Roles And Rights Configuration' window. On the left, there is a 'System Accounts' list with 'System Administrator', 'System Engineer', and 'System Operator'. The 'System Administrator' role is selected. The main area displays a table of 'Application Rights' for this role. The table has columns for 'Application Name', 'View', 'Add', 'Edit', and 'Delete'. The 'View' column has checkboxes, and the other columns have checkboxes or checkmarks. The 'Application Rights' tab is active.

Application Name	View	Add	Edit	Delete
Cosec	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Below the table, there is a section for 'Login Rights' and 'Rights Type'.

Application Name	Login Rights	Rights Type
COSEC Enroll	<input checked="" type="checkbox"/>	System Administrator
COSEC Monitor	<input checked="" type="checkbox"/>	System Administrator
COSEC Alert	<input checked="" type="checkbox"/>	System Administrator
COSEC VMS	<input checked="" type="checkbox"/>	System Administrator
COSEC Identification Server	<input checked="" type="checkbox"/>	System Administrator
COSEC Visitor Portal	<input checked="" type="checkbox"/>	System Administrator


# Defining Global Policies

---

Global Policies are general administrative policies that are applicable all across the COSEC system and define the governing parameters for all COSEC system account users. In COSEC, the system administrator has the rights to define such general system policies as per the organization's norms, practices and requirements. The different sets of policies that COSEC allows the administrator to configure are:

- *"Basic Policy"*
- *"User Policy"*
- *"Login Policy"*
- *"Password Policy"*
- *"Device"*
- *"Access Control Policy"*
- *"Time Attendance Policy"*
- *"Reports Policy"*
- *"Visitor Management Policy"*
- *"CWM"*
- *"Job Costing"*
- *"Field Visit Management"*
- *"ESS"*
- *"SSO Configuration"*
- *"Face Recognition"*

To define Global System Policies,

1. Go to **Admin module > System Configuration > Global Policy**
2. Configure different global system policies as described in the following sections.
3. Once all policies are defined as per requirement, click **Save**  button.

## Basic Policy

These policies govern the general working of the COSEC system.

To configure Basic Policy, go to **Admin module > System Configuration > Global Policy > Basic** and the following screen appears.

The screenshot shows the 'Global Policy' configuration window with the 'Basic' tab selected. The window has a sidebar on the left with a list of policy categories: Basic, User, Login, Password Policy, Device, Access Control, Time Attendance, Reports, Visitor Management, CWM, Job Costing, Field Visit Management, ESS, SSO Configuration, and Face Recognition. The main content area is divided into several sections:

- Create Activity Log:** A checkbox that is checked.
- Auto Login To COSEC Monitor:** An unchecked checkbox.
- System Date Format:** A dropdown menu showing 'dd/mm/yyyy'.
- Change Background:** A section with a 'Background' label and a preview image of a world map.
- Google API Key:** A section with a 'Get Location Details' checkbox (unchecked) and an 'API Key' text input field.
- General Data Protection Regulation:** A section with a 'Personal Data Protection' checkbox (unchecked) and a 'Custom Fields' checkbox (unchecked) with an information icon.
- Note:** A text note stating: 'Note: It is advisable to take backup of Database before updating value of Personal Data Protection.'
- Data Protection Manager:** A section with a form containing fields for Name, Designation, Organization Name, Organization Address, Email ID, and Contact No. Below these fields is a 'Privacy Policy' label with a download icon.

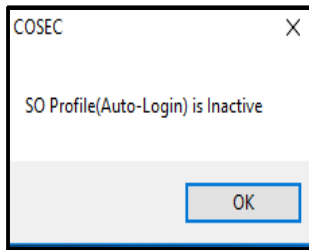
The parameters for configuring this system policy are as follows:

- **Create Activity Logs:** Select to enable the system to create and maintain an audit trail of all login user activity. The audit trail will have details of the login user id, activity date, activity time, key field information and activity description. Wherever applicable, it will also have the old and new values of the edited parameters.

To know more about viewing *Activity Logs*, go to *Admin Module > Views/Logs > Activity Log*.

- **Auto Login to COSEC Monitor:** Enable to allow users to directly login to the Desktop Monitoring application without going through the login process, once they login to the COSEC Web application.

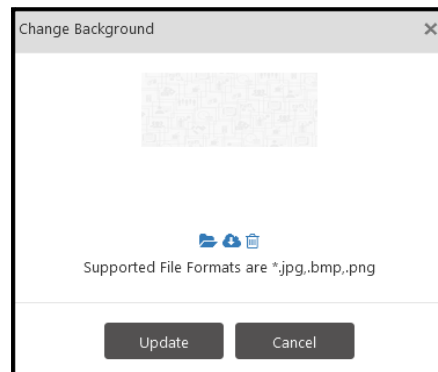
When this check-box is disabled and **SO** login is inactive (default on installation) then on direct login of COSEC monitor utility, following warning will be displayed. clicking on OK will allow to login through **SA** account.



- **System Date Format:** Set the system date format as per the site requirements from the dropdown list.

## Change Background

- **Background:** To change, download or remove the background of COSEC Web pages, click on background image. The pop up will open. Browse and select the image to be uploaded and Save from the toolbar. The uploaded image will be applied to the background of Web.



## Google API Key

- **Get Location Details:** Select this checkbox to perform Reverse Geo Coding, which is a process of converting a latitude and longitude coordinates into corresponding street address or human readable address using Google Maps. To perform Reverse Geo Coding process, refer [“Get Location Details”](#)
- Enter the **API Key** for displaying location on Google map. The maximum characters for API key are 100.



*For additional security and privacy while using Google API, COSEC supports Proxy Server Configuration. For more details, refer to [“Proxy Server Configuration”](#)*

## General Data Protection Regulation

General Data Protection Regulation (GDPR) aims in providing safety and privacy to users<sup>1</sup> data. They limit the access to the users personal data.

By enabling GDPR, the personal information of the users will be masked and the data will be encrypted, accordingly a dummy image shall be displayed in place of the user's profile picture.

1. Users include Workers and Visitors also.

The following will be able to View/Edit/Add data:

- System Administrator whether System defined or User defined having the roles and rights of the System Administrator.
- OR**
- System Administrator whether System defined or User defined having rights of View as well as Add/Edit for User Configuration, Worker Profile as well as respective rights of the pages of the Visitor Management Module.
- For details, refer to [“GDPR Reflections”](#).

Global Policy

Basic

Create Activity Log ☒

Auto Login To COSEC Monitor ☐

System Date Format dd/mm/yyyy

Change Background

Background

Google API Key

Get Location Details ☐

API Key

General Data Protection Regulation

Personal Data Protection ☐

Custom Fields ☐

Note: It is advisable to take backup of Database before updating value of Personal Data Protection.

Data Protection Manager

Name

Designation

Organization Name

Organization Address

Email ID

Contact No

Privacy Policy

**Personal Data Protection:** Select the checkbox to impose **General Data Protection Regulation**.

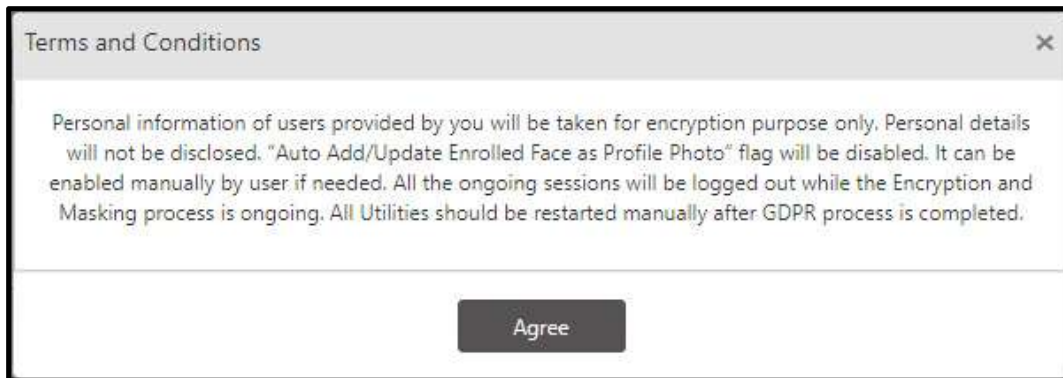


*Make sure while enabling/disabling GDPR all the services are running successfully.*

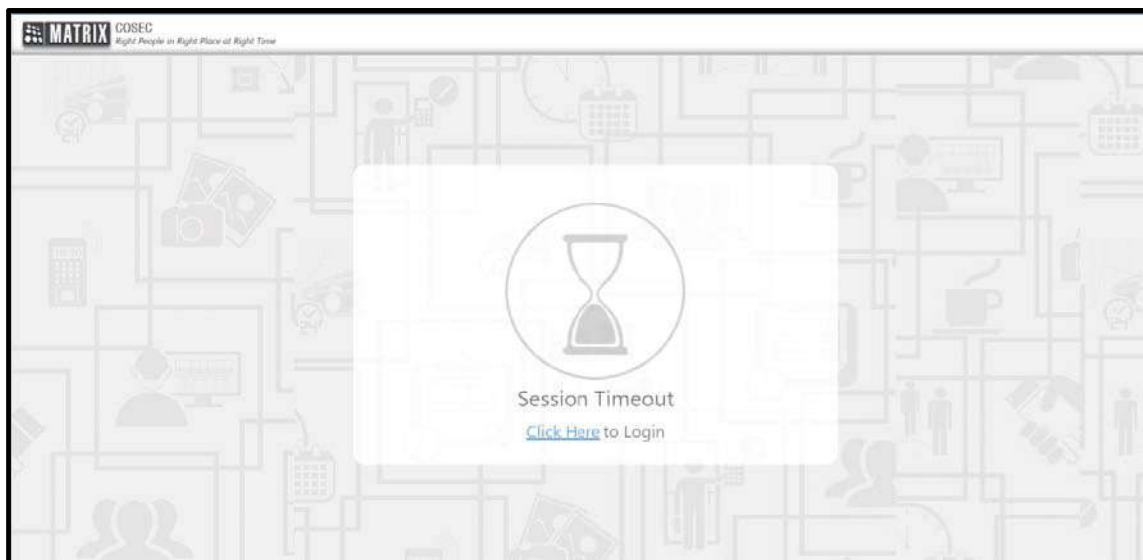
*Before proceeding with the GDPR process (before enabling), make sure you have taken the backup of the existing database. Refer to Manage Database in the Admin Mgt Portal User Guide.*

*If you take the backup of the data after enabling GDPR and after the GDPR process is completed, the backup database will be encrypted. We recommend you to take the backup before enabling GDPR.*

A pop- up stating necessary **Terms and Conditions** appears. Select **Agree** to proceed.

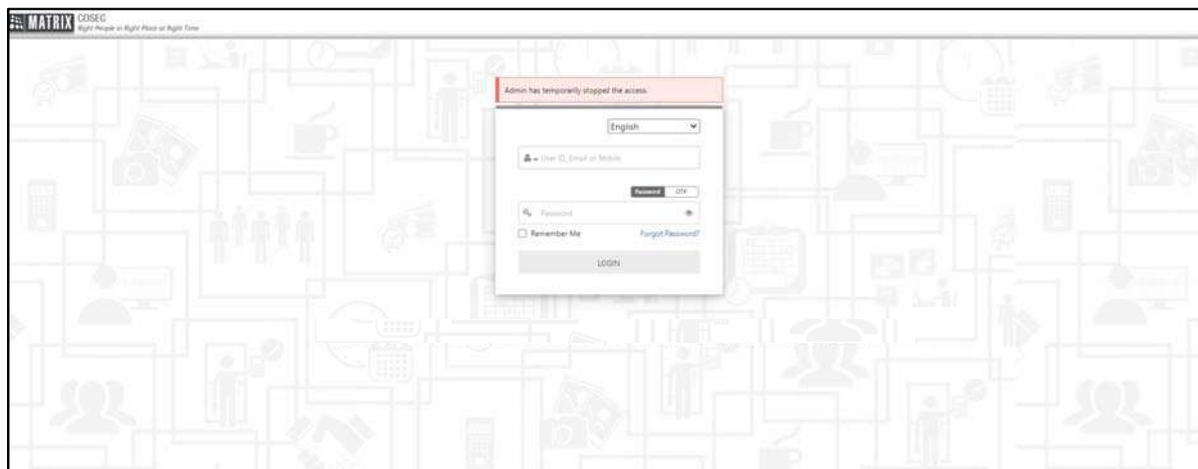


You will be re-directed to the **Session Timeout** page.



To re-login, click on the **Click Here** link.

The following screen appears, if the masking/encryption process is in-progress.



Else, you will be able to login successfully using your credentials and you can continue configuring the GDPR parameters.



*Make sure the login details are correctly entered, else login will fail.*

*It is recommended to restart the IIS, all the services and utilities for swift functioning on successful completion of GDPR Process.*

If you encounter a failure during the GDPR Process, the screen will display the error message “Processing Failed. Kindly contact Administrator.” or if the GDPR process remains in in-progress state for a prolonged period, there is a provision to Reset the GDPR Process. For details, refer to Company Configuration > Profile > Reset Personal Data Protection Process Flag in the **Admin Mgt Portal User Guide**.

**Custom Fields:** Select the check box if you desire masking the personal data provided in the customized fields.




*The custom fields masking will be applicable to Users, Visitors and Contractors.*

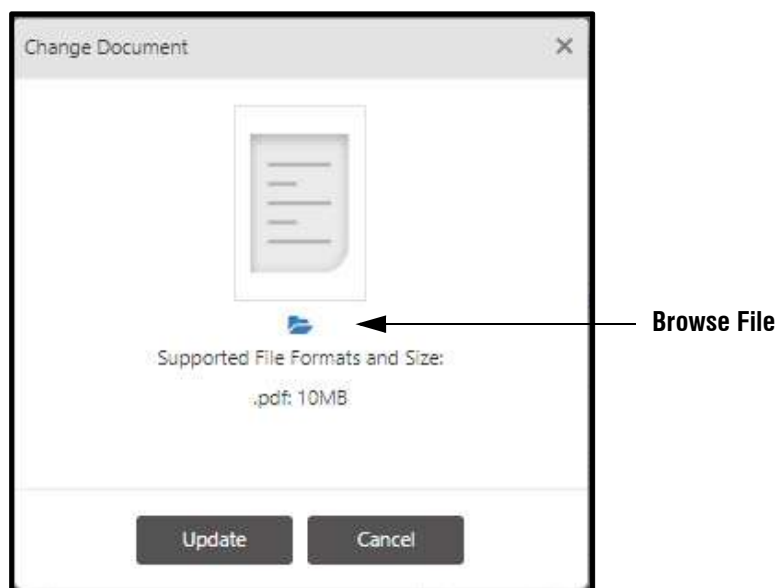
## Data Protection Manager


You need to update the details of the Data Protection Manager in this section

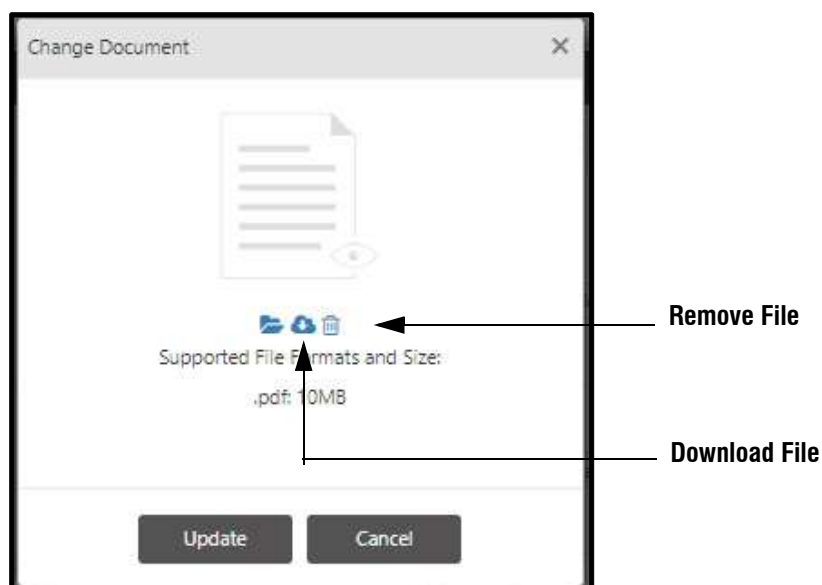
The screenshot shows a web form titled "Data Protection Manager". It contains several input fields for configuration: "Name", "Designation", "Organization Name", "Organization Address", "Email ID", and "Contact No". Each field has a corresponding text input box. Below these fields is a "Privacy Policy" label followed by an "Upload" icon (a small square with an upward arrow). The form is enclosed in a black border.




- Configure the **Name**, **Designation**, **Organization Name**, **Organization Address**, **Email ID** and **Contact No** of the Data Protection Manager.
- You can upload the **Privacy Policy** if you desire. To do so, click **Upload**  icon. The **Change Document** pop-up appears as shown below.





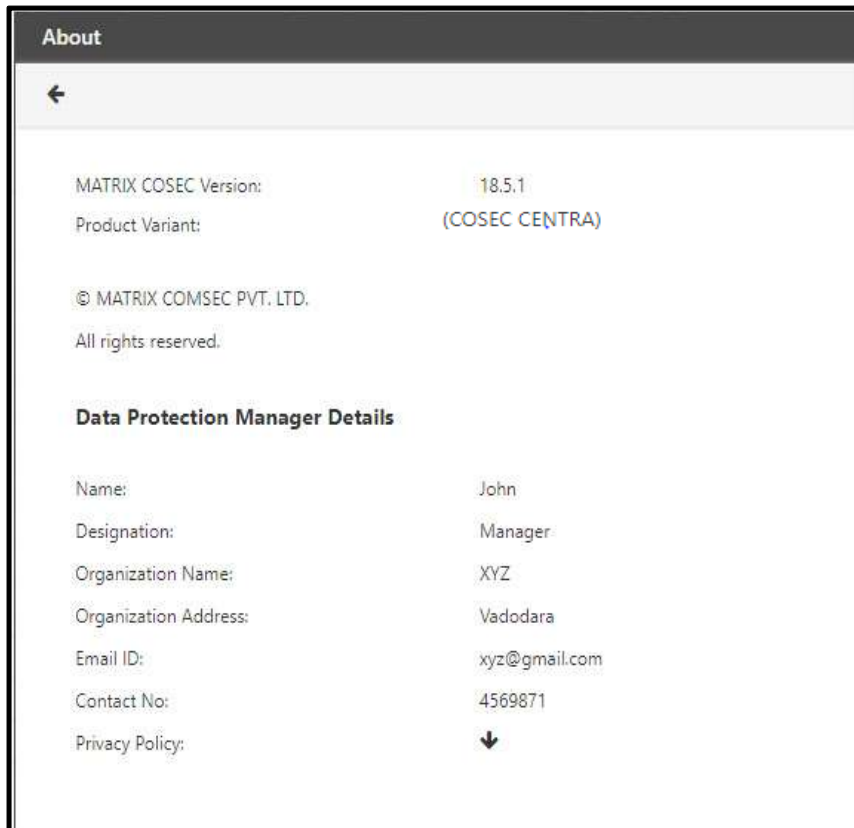
- Click **Browse File**  and select the desired file as per the supported formats and size from your local PC.
- Click **Update**.



- After uploading the file, if you wish to upload a different file instead of the current uploaded file, click **Browse File**  again and select the desired file from your local PC. The previously uploaded file will get replaced with the new file.
- To download the uploaded file, click **Download File** .
- To remove the uploaded file, click **Remove File** .

- Then click **Update**.
- Click **Save**

The details of the Data Protection Manager will be displayed in **About**. To view the details, click the **About**  icon on the top bar. To know more, refer [“Using COSEC Web Application”](#)



Enabling GDPR will have an impact on the various modules. For details, refer to [“GDPR Reflections”](#).

For specific module details refer to the links mentioned below.

- [“User Module”](#)
- [“Contract Worker Management”](#)
- [“Time and Attendance”](#)
- [“Visitor Management Module”](#)



To know more about GDPR reflections in Enroll Utility refer, COSEC Enroll User Manual.

*Masking will not be applicable for the VMS Web Portal and VMS Utility, only relevant data will be encrypted.*

*Masking will not be applicable for CSS Web Login as well as ESS/RIC Login, only relevant data will be encrypted.*

*For ESS/RIC user login, the data will be encrypted and as per the relevant user login the relevant fields will be visible.*

*For Host user login, relevant data will be masked as well as encrypted. Refer to the ESS manual for details.*

## User Policy

These policies define the credential limitations for users.

To configure User Policy, go to **Admin module > System Configuration > Global Policy > User** which is shown in next page.

User policy consists of:

- *“Minimum Age Requirement for Users”*
- *“Job Costing”*
- *“Sensor Calibration”*
- *“QR Scan Feature”*
- *“Generate User ID”*
- *“Custom Fields”*
- *“Temperature and Symptoms Configuration”*
- *“Invite User”*

The screenshot shows the 'Global Policy' configuration window with the 'User' tab selected. The left sidebar lists various policy categories. The main content area is divided into sections: 'Basic' (Save FP Image, Template Per Finger, Maximum No. of Fingers, Fingers On Device Per User, Maximum No. of Palm Templates, Palm Templates On Device Per User, Maximum No. of Faces, Self-Enrollment Retry Count, Auto Add/Update Enrolled Face as Profile Photo), 'Minimum Age Requirement for Users' (Date of Birth Mandatory, Minimum Age), 'Job Costing' (Job Assignment Level), and 'Sensor Calibration' (Fingerprint Security Level - Suprema, Fingerprint Security Level - Lumidigm, Fingerprint Fast Mode, Palm - False Rejection Ratio).

The screenshot shows the 'Global Policy' configuration window with the 'User' tab selected. The left sidebar lists various policy categories. The main content area is divided into sections: 'Job Costing' (Job Assignment Level), 'Sensor Calibration' (Fingerprint Security Level - Suprema, Fingerprint Security Level - Lumidigm, Fingerprint Fast Mode, Palm - False Rejection Ratio), 'QR Scan Feature' (Add/Update User/Worker through Aadhaar Scan, Aadhaar No. Mandatory), 'Generate User ID' (Auto Generate User ID, ID Format, Numeric Value Length, Zero Padding is required), 'Custom Fields', 'Temperature and Symptoms Configuration', and 'Invite User'.

The parameters available under User Policy are:

- **Save FP Image:** Enable the check box to store the source of your **FP templates** to avoid re-enrollment in case of changes in FP template format.
- **Template Per Finger:** Select the number of template copies to be stored at the DOOR Controllers for each enrolled finger from the drop-down list.

In the event of selecting the Dual Template/Finger option the Door Controllers would maintain an additional copy of the enrolled finger template, which would be updated as and when a change is detected in the fingerprints of the users.



*After making changes to this parameter the administrator needs to use the Restore Finger Print Template option from the Configuration tab of the COSEC Monitor application and restore the FPs to all the PANELs and DIRECT Doors.*

- **Max No. Of Fingers:** Select the number of fingerprint templates that can be enrolled per user and stored in COSEC database from the drop-down list. One can select maximum 10 fingers.
- **Fingers On Device Per User:** Based on the configured max no. of fingers, select the number of finger templates that will be sent to each device per user. This parameter limits the device to enroll not more than the set number of finger templates.

When the parameter “Fingers on Device per user” is changed, a pop-up is displayed giving a warning message to understand the necessary follow up step needed to be done later.

- **Max No. Of Palm Templates:** This field determines the number of palm templates that can be enrolled per user and stored in COSEC database. You can select maximum 10 palm templates.
- **Palm Templates On Device Per User:** Based on the configured max no. of palm templates, select the number of palm templates that will be sent to each device per user from the drop-down list. This parameter limits the device to enroll not more than the set number of palm templates.
- **Max No. Of Faces:** This field determines the number of Face templates that can be enrolled per user and stored in COSEC database. The valid range for Max No. Of Faces is 1-30.
- **Self-Enrollment Retry Count:** Specify the maximum retry count for self-enrollment. The user gets locked, if the retry count exceeds the limit.
- **Auto Add/Update Enrolled Face as Profile Photo:** Enrolled Image of a User/ Worker/ Visitor can be set as the Profile Photo automatically on successful Face Enrollment.

Select the **Auto Add/Update Enrolled Face as Profile Photo** check box to set User/ Worker/ Visitor Profile Photo automatically.

If the check box is disabled, then only Manual Photo Upload method will be applicable to set Profile Photo for the User.



#### For System Administrator:

- The system will consider the enrolled face image located at index number 0 of Enroll / VMS Utility to set it as Profile Photo.
- So to update an Enrolled face as Profile Photo, first delete the previously enrolled face image located at index number 0 via Enroll/ Visitor Utility and enroll a new image at the same location.

## Minimum Age Requirement for Users

Minimum Age Requirement for Users			
Date of Birth Mandatory	<input checked="" type="checkbox"/>		
Minimum Age	<input type="text" value="0"/>	Year(s) <input type="text" value="0"/>	Month(s)

- **Date of Birth Mandatory:** Select the check box if you wish to make the configuration of Date of Birth parameter compulsory in the User Configuration page.
- **Minimum Age:** If you select Date of Birth Mandatory check box, configure the Minimum Age limit in years and months. Any User Profile below this age will not be created.

## Job Costing

Job Costing	
Job Assignment Level	<input type="text" value="Department"/>

- **Job Assignment Level:** Selecting an Enterprise Group here will affect Site and Enterprise Group mapping in the **Job Costing And Processing** module. The group selected in *Global Policy* will be applicable to Enterprise Group-specific job assignment on the Site-mapping page.

## Sensor Calibration

User Identification can occur from COSEC Enroll application or it can occur on the back end via Identification Server. From the desktop applications, identification is done using an API. To manage all qualities of FP/Palm template, sensor calibration fields must be configured from the Global Policy.

Sensor Calibration	
Fingerprint Security Level - Suprema	<input type="text" value="Level 4"/>
Fingerprint Security Level - Lumidigm	<input type="text" value="High"/>
Fingerprint Fast Mode	<input checked="" type="checkbox"/>
Palm - False Rejection Ratio	<input type="text" value="Normal"/>

These below fields enable to improve the probability of finding the correct user match for an FP template in cases where there fingerprint mismatch occurs.

- **Fingerprint Security Level- Suprema:** You can select the security level for suprema sensor from the options of Level1 to Level7. The False Acceptance Ratio (FAR) varies as per the selection of levels.
  - For Level 1: FAR is below 1%

- Level 2: Below 0.1%
  - Level 3: Below 0.01%
  - Level 4: Below 0.001%
  - Level 5: Below 0.0001%
  - Level 6: Below 0.00001%
  - Level 7: Below 0.000001%
- **Fingerprint Security Level- Lumidigm:** You can select the security level for Lumidigm sensor from the options of Lowest to Highest. The default value of security level is set to High.
    - Lowest
    - Low
    - Normal
    - High
    - Highest

If the user is enrolling via Suprema, then Fingerprint Security level- Suprema will be considered for Enroll Utility and VMS Utility.

If the user is enrolling via Lumidigm, then Fingerprint Security level- Lumidigm level will be considered for Enroll Utility and VMS Utility.



1. If existing user has set the security level  $\leq 5$ , then the user will continue with existing security level.
2. If existing user has set the security level  $> 5$ , then security level will be set to "Highest" in Fingerprint Security level - Lumidigm drop-down.

- **Fingerprint Fast Mode:** Select to enable the fingerprint fast mode. This mode will then be used to identify the user from a template. It will also be considered when Verification button is clicked from desktop application (Enroll) or when Identification feature is involved via Identification API.
- **Palm-False Rejection Ratio:** Select the option as Normal, Highest, High, low or lowest. In COSEC Enroll Palm Identification method will use the value of FRR configured in Global Policy.

## QR Scan Feature

This feature allows user to enable the Aadhar Card scanning facility in order to fill up the required details while configuring the users and workers.

**QR Scan Feature**

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Add/Update User/Worker through Aadhaar Scan ☒

Aadhaar Number Mandatory ☐

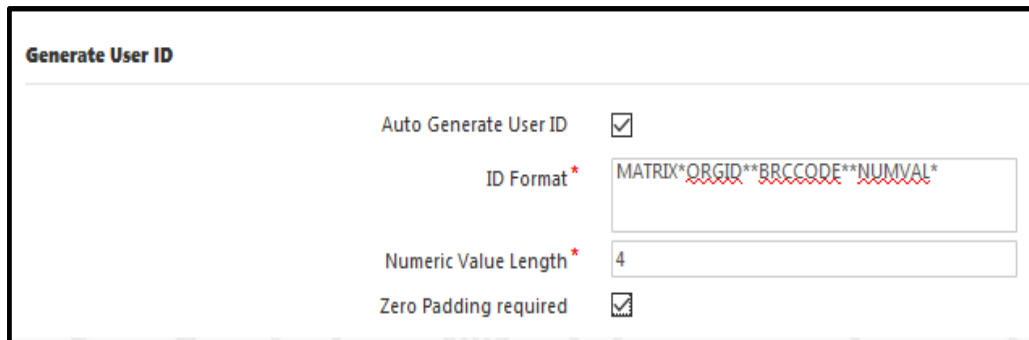
- **Add/Update User/Worker through Aadhaar Card:** By enabling the check-box, an option for scanning of the 'Aadhar Card QR Code' at user/worker configuration page will become visible.
- **Aadhar Number Mandatory:** Enable the check-box to make the 'Aadhar Card QR Code' scanning mandatory for the configuration of new users.



*In CSS module, 'Worker Assignment from CSS' option must be checked On to enable the QR Scan feature for the configuration of CSS Workers.*

## Generate User ID

You can configure the required format of the User ID and accordingly, the User ID will be generated automatically while configuring a new/temporary user. The format can be configured as shown below.




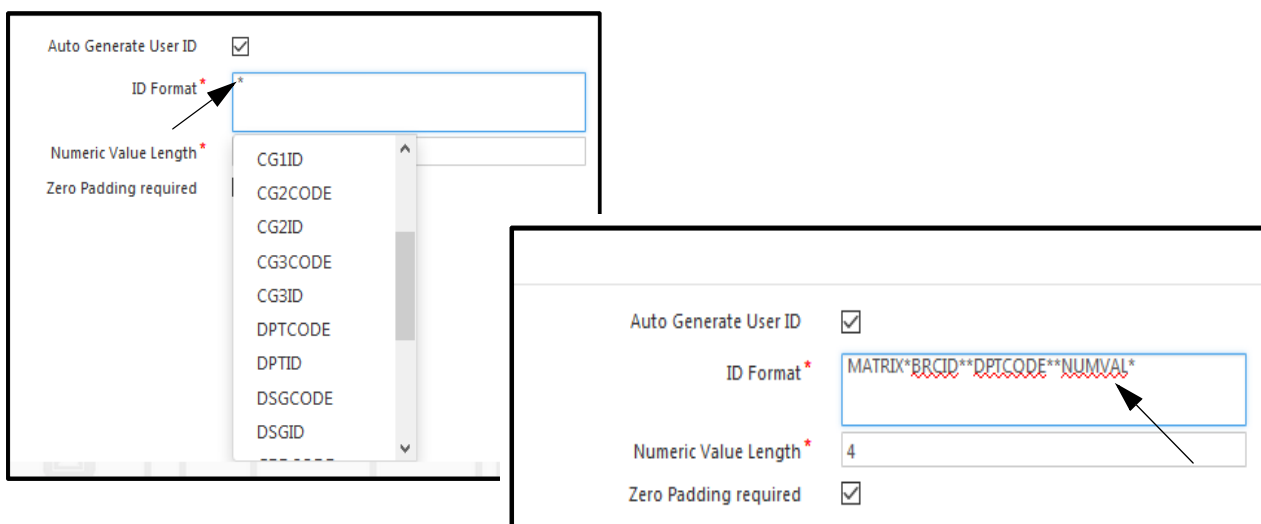
The screenshot shows the 'Generate User ID' configuration form. It includes the following fields and values:

- Auto Generate User ID:** ☒
- ID Format:** MATRIX\*ORGID\*\*BRCCODE\*\*NUMVAL\*
- Numeric Value Length:** 4
- Zero Padding required:** ☒

- **Auto Generate User ID:** Select this check box to generate User ID automatically for the configuration of new/temporary users. If disabled, then you need to enter the User ID manually.
- **ID Format:** Configure the required format of the ID by selecting the 'Numeric Value Format' and/or other Value Formats in any order as per the requirement. You can also enter the fixed value which will always be displayed along with the other components of the User ID for every user.

To select the different format for the ID, enter \* in **ID Format** box and the drop-down list containing different Value formats appears as shown below. Select the desired format from the drop-down list.

 The NUMVAL (Numeric Value) is mandatory to be selected.



The first screenshot shows the 'ID Format' field with an asterisk (\*) and a dropdown menu open, displaying a list of available formats: CG1ID, CG2CODE, CG2ID, CG3CODE, CG3ID, DPTCODE, DPTID, DSGCODE, and DSGID. The second screenshot shows the 'ID Format' field with the configured format: MATRIX\*BRCID\*\*DPTCODE\*\*NUMVAL\*

The drop-down list contains different formats for; Branch Code (BRCCODE), Organization Code (ORGCODE), Branch ID (BRCID), Department ID (DPTID), Numeric value (NUMVAL) etc. You can select the multiple formats, each time you need to enter \* and then select the desired format.

Example: As shown in above image, the fixed value 'MATRIX' is entered as a company name, BRCID and DPTCODE is selected which can vary as per the assigned 'Branch' and 'Department' for new configured users. The NUMVAL is selected which will provide a unique 'Numeric number' at the end of the ID.

Now, on the user configuration page while configuring the new user, the Branch is assigned as 4 (Waghodia) and the Department is assigned as Documentation.

So, once the user is configured and saved, the unique User ID “**MATRIX4DOC1**” will be generate and assigned automatically. Here, **MATRIX4DOC1**, that is **Fixed Value**, **Branch ID**, **Department Code**, Numeric Value.



*Numeric Value for each User ID will generate as per the next available number.*

- **Numeric Value Length:** Enter the desired number of digits from 1 to 15 till which the ‘NUMVAL’ must be generated. For example: 4
- **Zero Padding Required:** Select this check box to allow the prefixing zeros before the ‘NUMVAL’ value. For example, if the Numeric value length is configured as 4 and the number assignment starts from a single digit then as explained in above example, the new user id to be generated is ‘MATRIX4DOC1’ if Zero Padding is enabled, it will generated as ‘MATRIXDOC0001’.

Click on the **Save** button to save the configuration.

## Custom Fields







- **Field Name 1 - 10:** These are fields that can be customized as per your requirements (e.g. ID Proof, Security Number etc.). These field names will later be available for user/worker configuration on the COSEC Web as well as for ESS application (only for Users). These can also be used for third party integration purposes. The Field Names can be upto 20 alphanumeric characters (space, -, . and “comma” allowed).

Custom Fields						
Field No.	Active	Field Name	Type	Upload	Mandatory	
1	Yes	Security Number	Textbox	Yes	No	
2	Yes	ID Proof	Textbox	Yes	Yes	
3	Yes	Nominee Name	Textbox	No	Yes	
4	Yes	Field 4	Textbox	Yes	No	
5	No	Field 5	Textbox	No	No	

- **Field No:** It displays the serial number and order of the field.
- **Active:** Select the check-box for this field to be visible in User/ Worker Profile.
- **Field Name:** Enter the desired Name. For example: Security Number.
- **Type:** Select the desired type of the field—Textbox and Date.
- **Upload:** Select the check-box if the configured field requires a provision to upload a document.
- **Mandatory:** Select the check-box for this field to be mandatory.



You can always edit this custom field by clicking the **Edit**  button.

Custom Fields							
Field No.	Active	Field Name	Type	Upload	Mandatory		
1	<input checked="" type="checkbox"/>	Spouse Name	Textbox	<input checked="" type="checkbox"/>	<input type="checkbox"/>		
2	Yes	Spouse Birthdate	Date	Yes	No		
3	Yes	Aadhar No.	Textbox	Yes	No		
4	Yes	Field 4	Textbox	Yes	No		
5	No	Field 5	Textbox	No	No		

Click on the **Ok**  button and the pop-up appears.

Confirmation

Changing the 'Type' of the custom field will result in permanent loss of custom field data of all Users. Field will be set to default values. Do you want to continue?

Click the **Yes** button to save the configuration else click the **No** button.

The configured custom fields for Users will be visible in the **Users> User Configuration> Profile> General**.  
The configured custom fields for Workers will be visible in the **CWM> Workers> Worker Profile> Profile> General**.

## Temperature and Symptoms Configuration

You can configure the temperature and symptoms parameters with this feature.

Users need to declare their Health parameters from their ESS login. These will be displayed under Users> Utilities> Health> Health Declaration.

For ESS/Mobile Application users the Health Module will be visible only if the user is assigned the right for the **Health Records** and **Self Declaration** pages. For details, refer to [“ESS Role Rights”](#).

The admin can modify the health parameters displayed in [“Health”](#). The parameters displayed are those as declared by a user from Users> Utilities> Health> Health Declaration from their ESS login. According to this, an Alert will be sent to the user as well as a Warning message will be displayed to the user, if required.

If you disable both the **Enable** check boxes, that is Temperature Configuration and Symptoms Configuration, the following will not be visible:

- Health tab under Users> Utilities
- Health tab via ESS login of user.
- Health module on APTA Dashboard.
- [“Temperature Logging”](#) section under [“Settings - VEGA as Direct Door”](#).
- [“Temperature Logging”](#) section under [“Settings”](#) for [“ARGO Door”](#).
- [“Temperature Logging”](#) section under [“Settings - Direct Door”](#) for [“ARGO FACE Door”](#).



*Temperature Logging in Devices is dependent only on the Temperature Configuration check box.*

However, if you disable only Temperature Configuration, then you will only be able to view the Symptom details of the users from Users> Utilities> Health> Health Declaration as well as users will be able to declare only their Symptom status via ESS login and vice versa is applicable.

User will be notified by an Alert if the declared temperature and/or symptoms value is equal to or exceeding the predefined threshold values. Alerts will be generated for a user only if it is configured in Admin > System Configuration > Alert Message Configuration. The Alerts are as follows:

- Select Alert Filter as Users and Event as Health Declaration Pending.
- Select Alert Filter as Users and Event as Exceeding Health Declaration Parameters.
- Select Alert Filter as Users and Event as User Allowed- Threshold Temperature Exceeded.
- Select Alert Filter as Users and Event as User Denied- Threshold Temperature Exceeded.

For details, refer to [“Configuring Alert Messages”](#).

To configure the Temperature and Symptoms,

Click the **Temperature and Symptoms Configuration** collapsible panel.

## Temperature Configuration

The screenshot shows the 'Global Policy' configuration window. On the left is a sidebar with various policy categories: Basic, User (selected), Login, Password Policy, Device, Access Control, Time Attendance, Reports, Visitor Management, CWM, Job Costing, Field Visit Management, ESS, and SSO Configuration. The main area is titled 'Temperature and Symptoms Configuration'. It contains two sections: 'Temperature Configuration' and 'Symptoms Configuration'. In 'Temperature Configuration', the 'Enable' checkbox is checked, 'Temperature Unit' is set to 'Fahrenheit (°F)', and 'Temperature Threshold' is set to '99.5'. In 'Symptoms Configuration', the 'Enable' checkbox is unchecked. Below this is a table of symptoms: 'Fever', 'Cough', and 'Difficulty in Breathing'. Each symptom has edit and delete icons. A 'Symptoms Threshold' dropdown is set to 'Any one'. At the bottom, the 'Warning Message' section shows a message: 'Health declaration parameter exceeded threshold. Consult the Doctor'.




By default the temperature parameters are disabled for configuration. Configure the following parameters if you wish to use this feature:

- **Enable:** Select this check box to enable.
- **Temperature Unit:** Select the desired unit — Fahrenheit, Celsius — for the temperature.
- **Temperature Threshold:** You need to define the maximum threshold value above which the system will generate a warning message and an alert will be sent to the user, if configured.

For Example: The specified Temperature Threshold = 99.8 Fahrenheit and if the user's self declared value is equal to or greater than 99.8 Fahrenheit, then a warning message and an alert will be generated.



## Symptoms Configuration

By default the symptoms parameters are disabled for configuration. Configure the following parameters if you wish to use this feature:

- **Enable:** Select this check box to enable.
- To add the desired symptoms, click **Add**  .
- Enter the **Symptom Name**, for example Fever.
- Click **OK**  to save the assigned name or click **Cancel**  to discard.

This symptom appears in the Grid.



- You can edit the configured Symptom if required. To do so, click **Edit**  of the respective symptom and make the changes.
- If you wish to delete the symptom, click **Delete**  of the respective symptom.

Similarly, other symptoms can be added.

- **Symptoms Threshold:** If you have configured multiple symptoms, select the desired options — Any one, Any two or All.

As per the Symptoms Threshold option selected, the symptoms will appear for users in order to declare their health status from their ESS login.

A warning message and an alert will be generated if the number of symptoms declared by the user is equal to or greater than the predefined symptoms threshold.

**Warning Message:** By default a message is provided, but the same can be customized if required. This warning message will be displayed to the users when they are self declaring their Health status from their ESS login, if their declared temperature and symptoms parameters exceeds the predefined threshold values.

## Invite User

Invite User enables you to pre-determine the information that you need to collect from the on boarding employees prior to their physically joining the organization. To know more refer [“Invite User”](#), Users>Utilities> Invite User.

After you determine the parameters a link will be sent to the on boarding employee to collect the information. To determine the desired parameters:

- Click **Invite User** collapsible panel.

Parent Name	Field Name	Active	Mandatory
Basic	Profile Photo	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Basic	Name	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Basic	Full Name	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Basic	Short Name	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Basic	Face Image	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
General	Date of Birth	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
General	Joining Date	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
General	Vehicle Registration No.	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
General	Driving License	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
General	Passport No.	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

- **Link Expiry:** Enter the number of days after which the link will expire.
- A list of default parameters that will be sent to the on boarding employee will be displayed. You can customize the parameters as per your requirement.
  - Select the respective **Active** check boxes of the desired parameters. Only Active parameters will be visible in the link.
  - If you wish to make the parameter compulsory, select the **Mandatory** check box.
  - Here, you can also add customize fields as per your requirement. Refer to [“Custom Fields”](#). (Admin module > System Configuration > Global Policy > User > Custom Fields)

## Login Policy

These policies define the time till which the users can login to the system.

To configure Login Policy, go to **Admin module > System Configuration > Global Policy > Login** and the following screen appears.

Following are the parameters for configuration under Login Policy:

Login Policy ☒

Maximum Days Allowed Without Login \* 0

Restrict ESS Local Login ☐

Login Via SSO ☐

SSO Certificate (.pfx) Choose File No file chosen ⓘ

Password \*

Login Via Active Directory ☒

Secure Connection ☒

Active Directory Server Address \* 192.168.103.55 636

Domain Name \* DC=matrixsv,DC=acta

Enable Notification ☒

RSA Key Size 512 Generate Key

Modulus 2DORRZ5uhdTkeQB4f2KYw+4eYwBsf3VomxpZ7YrBPpyNQk/7d9Mc371KJ+PJrsX/o9wl5KGcEhKEIF5KNaLX3qcKEVOz1bh0n5lwHSi2+fg9/C9CWx53R

Exponent AQAB

Login Authentication Mode Password OR OTP

- **Login Policy:** Enable to allow administrator for enforcing the login policy for the system. If enabled the system will limit the period for which the user does not login to the system.
  - This period is specified in the **Maximum Days allowed without Login** parameter. If the user does not have successive logins within the period as specified then the user account is disabled.
- **Restrict ESS Local Login:** Select this check box to restrict the ESS Local Login for the Users via Web as well as the application (APTA).
- **Login via SSO:** Select this check box to enable the user to login into the ESS via SSO and/or for the System Account User to login via SSO. Configure the following parameters:
  - **SSO Certificate (.pfx):** Click **Choose File** and select the certificate to be uploaded from the local PC.
  - **Password:** Enter the password for accessing the certificate.

For Login via SSO to function, make sure you have configured the parameters — ACS Endpoint and ACS Logout Endpoint under IDP Configuration. For details of the SSO and IDP parameter configurations, refer to [“SSO Configuration”](#).



*The System Administrator will not be able to Login via SSO in APTA.*

- **Login Via Active Directory:** Select this check box, to enable ESS enabled users to login using their active directory credentials for COSEC Centra.
- **Secure Connection:** Select this checkbox to enable secure connection with the Active Directory Server.
- **Active Directory Server Address:** Specify the IP Address or the network name of the Domain Controller along with the port number, if configured.
- **Domain Name:** Specify the domain name here. For e.g. if the domain name is matrix.com the domain name is specified as: dc=matrix,dc=com.
- **Enable Notification:** Select this checkbox to enable notifications to be sent to a user on ESS.
- **RSA Key Size:** Specify the Key size to generate a public encryption key for securely sending credentials from a third party application using RSA encryption (for *Direct Login to ESS*). Select the key size from the dropdown list and click the **Generate Key** button to generate the public key **modulus** as shown below.

RSA Key Size	512	Generate Key
Modulus	2DORRZ5uhdTkeQB4f2KYw+4eYwBsf3VomxpZ7 YrBPpyNQk/7d9Mc371KJ+PJrsX /o9wI5KGcEhKEIF5KNaLX3qcKEVOz1bh0n5IwHSi2 +fg9/C9CW53RJPc/sF+BNr	
Exponent	AQAB	



*The higher the RSA Key Size, the more secure is the transmission.*



*Once a new key is generated from this page, all data that was encrypted using the previous key, will not be decrypted.*

- **Login Authentication Mode:** Select the option to allow users to login into system via Password, Password OR OTP or Password Then OTP.

Login Authentication Mode
Password OR OTP
Password
Password OR OTP
Password Then OTP

If **“Password OR OTP”** or **“Password Then OTP”** is selected; then you must configure OTP generated Alert in Alert Message Configuration to get OTP on SMS and or Email. And hence SMS Configuration and or Email Configuration must be done.

- **Skip OTP:** You can select the number of times for which OTP will be skipped when **“Password Then OTP”** is selected.

Login Authentication Mode	<input type="text" value="Password Then OTP"/>
Skip OTP	<input type="text" value="2"/> (times)

## Password Policy

This page allows to define policies for password.

To configure Password Policy, go to **Admin module > System Configuration > Global Policy > Password Policy** and the following screen appears.

- **Password Security Policy:** Enable to enforce the Application user to change password after the expiry of configured period as specified in the **Password Reset Period (Days)** field. Default: Disabled.
- **Password Reset Period (Days):** Configure the number of days after which you want to enforce the user to change the password. Default: 0.
- **Lock Account For Invalid Attempts:** By default this check box is selected, that is, the user's account will be locked after a certain number of consecutive failed login attempts.

- **Maximum Invalid Attempts:** Specify the maximum number of invalid attempts after which the account should get locked for the time specified in **Auto Unlock Timer**. Valid range is 1-15. Default: 5

If Login Authentication Mode is set as Password or OTP/ Password Then OTP in Global Policy> Login tab; then Invalid Login Attempts count will be incremented when wrong password or wrong OTP is entered. When this count reaches the value configured in **Maximum Invalid Login Attempts** then the account will be locked.

- **Auto Unlock Timer (Min):** Specify the time in minutes after which the locked user account will be automatically unlocked or you can request the system administrator to reset the password. Valid range is 0-999. Default: 15.



*While configuring **Auto Unlock Timer (Min)**, do not specify the value as 0. If you specify the value as 0, the account will be permanently locked and to unlock the account you will have to contact the **Support Team**.*

- **Maximum OTP Generation Attempts:** Specify the maximum number of invalid attempts to re-generate/ resend OTP for Forgot Password, Login and/or Password Setting. Valid range is 0-15. Default: 10.



*If the value of **Maximum OTP Generation Attempts** is configured as 0, then users will have infinite OTP generation attempts.*

- **Resend OTP After (Min):** Specify the time in minutes after which the user will be able to re-generate/ resend OTP. Valid range is 1-999. Default: 15.
- **Deny Password Reuse:** By default, this check box is selected, that is, the users is restricted from setting a new password that is same as a specific number of previously used passwords.
- **Reuse Count for System Account Users:** Specify the count of previously used passwords for System Account users. E.g.: If Reuse count for a System Account user is set to “3”, then a new password cannot be same as either of the last three used password. Default: 5.
- **Reuse Count for ESS Users:** Specify the count of previously used passwords for ESS users. E.g. if Reuse count for an ESS user is set as “2”, then a new password cannot be same as either of the last two used passwords. Default: 0.
- **OTP Authentication For Setting Password:** Select to enable OTP authentication for setting password. If enabled, the ESS user has to go through OTP Authentication for setting password while logging in for the first time into his/her ESS account.

### Process

Ensure that Email ID / Mobile Number of the ESS user is configured in the Contact Details of User Configuration. And Receive Alerts on Mobile/Email is enabled.

The Alert Message Configuration for SMS/Email for System Alert Event “OTP Generated” must be enabled. For details, refer to [“Configuring Alert Messages”](#).

To receive OTP on SMS, make sure you have configured SMS setting and to receive OTP on Email, make sure you have configured Email Setting The Alert service must be started for sending Email and SMS notification. For details, refer to [“SMS Configuration”](#) and [“Email Configuration”](#).



*If you upgrade the system to V20R09, then the value of all the above parameters will be the same as set by you (SA) before upgrade.*



## System Account User Password Strength

- **Minimum Required Characters:** Specify the minimum character count that is mandatory for setting a new password for any user account. Valid range is 5 to 45. Default: 6
- **Security Level:** There can be 3 security levels allowed for setting a password:
  - **Low:** No restriction. All characters are allowed in password.
  - **Medium:** 1 lowercase (a-z) character and 1 number (0-9) mandatory in password.
  - **High:** 1 uppercase (A-Z) character, 1 lowercase (a-z) character, 1 number (0-9) and 1 special character (`~!@#\$%^&\*()-=\_+[]\{}|;':",./<>?) mandatory in password.**Default: High**



*The values of these parameters will be applicable when you (SA):*

- *set the Password for the first time on the Login page.*
- *access Account Settings > Password Settings > New Password.*

*If you upgrade the system to V20R09, the values of the parameters under **System Account User Password Strength** as well as **ESS/CSS User Password Strength** will be the same (Minimum Required Characters and Security Level) as set by you (SA) before upgrade.*

## ESS/CSS User Password Strength

- **Minimum Required Characters:** Specify the minimum character count that is mandatory for setting a new password for any user account. Valid range is 5 to 45. Default: 6
- **Security Level:** There can be 3 security levels allowed for setting a password:
  - **Low:** No restriction. All characters are allowed in password.
  - **Medium:** 1 lowercase (a-z) character and 1 number (0-9) mandatory in password.
  - **High:** 1 uppercase (A-Z) character, 1 lowercase (a-z) character, 1 number (0-9) and 1 special character (`~!@#\$%^&\*()-=\_+[]\{}|;':",./<>?) mandatory in password.**Default: High**



*The values of these parameters will be applicable when the ESS/CSS User:*

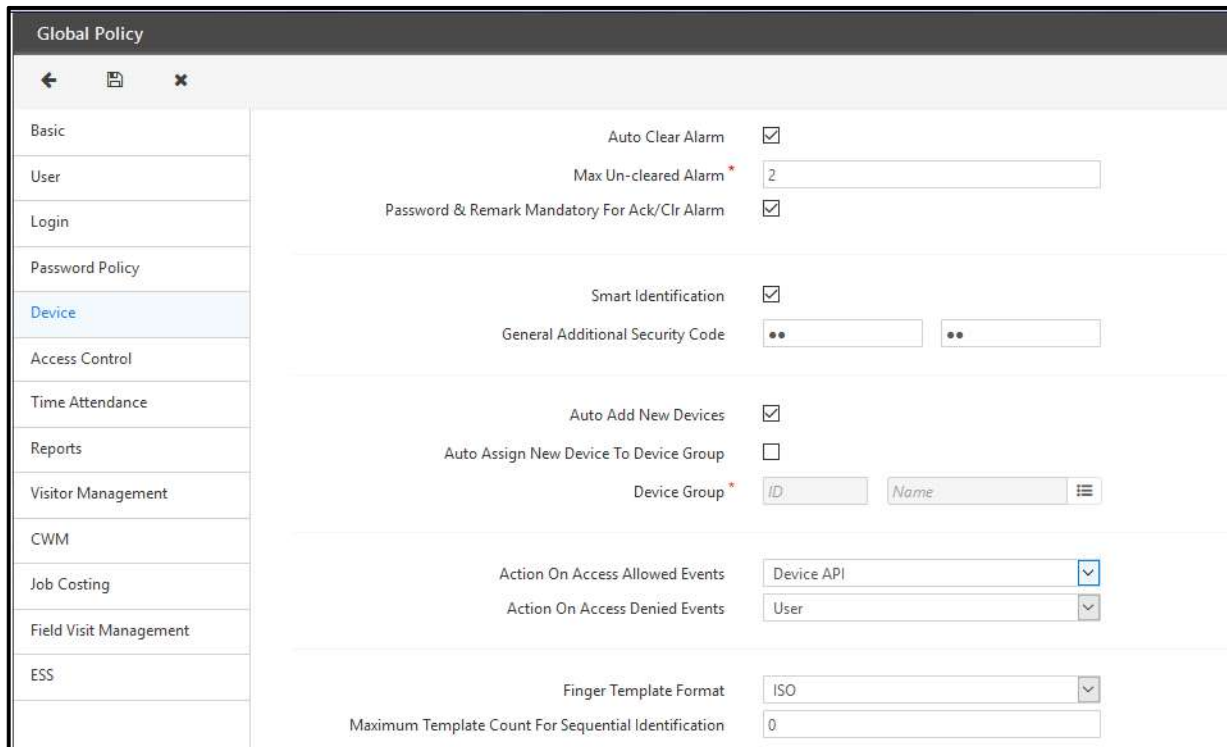
- *sets the Password for the first time on the Login page.*
- *access Account Settings > Password Settings > New Password.*
- *set/change Password via API.*

*If you upgrade the system to V20R09, the values of the parameters under **ESS/CSS User Password Strength** as well as **System Account User Password Strength** will be the same (Minimum Required Characters and Security Level) as set by you (SA) before upgrade.*

## Device

This page allows to define policies for device.

To configure Device Policy, click **Admin module > System Configuration > Global Policy > Device** and the following screen appears.



**Global Policy**

Basic | User | Login | Password Policy | **Device** | Access Control | Time Attendance | Reports | Visitor Management | CWM | Job Costing | Field Visit Management | ESS

Auto Clear Alarm ☒

Max Un-cleared Alarm \* 2

Password & Remark Mandatory For Ack/Clr Alarm ☒

Smart Identification ☒

General Additional Security Code .. ..

Auto Add New Devices ☒

Auto Assign New Device To Device Group ☐

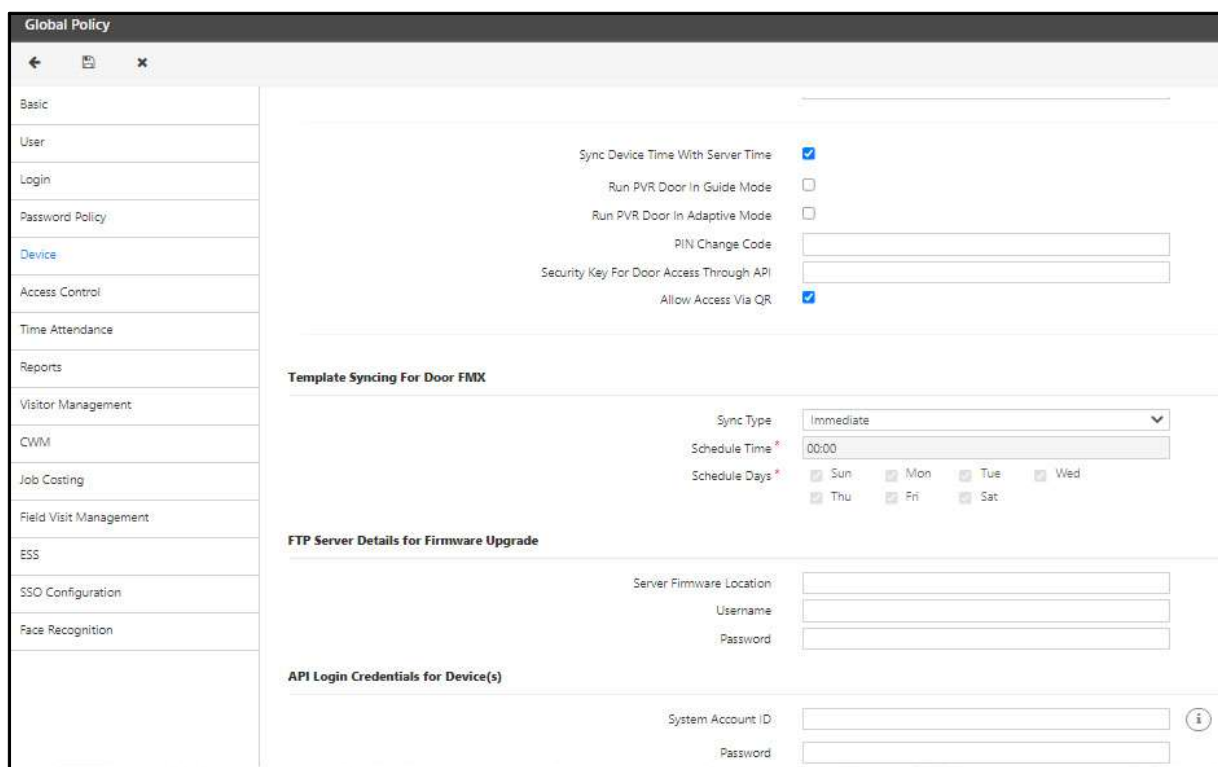
Device Group \* ID Name

Action On Access Allowed Events Device API

Action On Access Denied Events User

Finger Template Format ISO

Maximum Template Count For Sequential Identification 0



**Global Policy**

Basic | User | Login | Password Policy | **Device** | Access Control | Time Attendance | Reports | Visitor Management | CWM | Job Costing | Field Visit Management | ESS

Sync Device Time With Server Time ☒

Run PVR Door In Guide Mode ☐

Run PVR Door In Adaptive Mode ☐

PIN Change Code

Security Key For Door Access Through API

Allow Access Via QR ☒

**Template Syncing For Door FMX**

Sync Type Immediate

Schedule Time \* 00:00

Schedule Days \* ☒ Sun ☒ Mon ☒ Tue ☒ Wed ☒ Thu ☒ Fri ☒ Sat

**FTP Server Details for Firmware Upgrade**

Server Firmware Location

Username

Password

**API Login Credentials for Device(s)**

System Account ID

Password

**Auto Clear Alarm:** Select this check box, if you wish to Auto Clear the Alarms triggered on the devices connected into the system.

**Maximum Un-cleared Alarm:** Specify the number of Alarms which will be kept uncleared on the devices connected into the system.

Let us understand this with an example:

The number of **Maximum Uncleared Alarm** is set at 2 and total devices connected are 10. Any device alarm gets activated and after sometime the second device alarm also gets activated. Now, when any third device alarm gets activated, then the first device alarm will get deactivated automatically.

**Password & Remark Mandatory For Ack/Clr Alarm:** Enable this option if password and remark is to be provided mandatory for acknowledging or clearing an alarm.

**Smart Identification:** Select to enable the Smart Identification (SI) functionality at the system level. Under this functionality, users defined in the system are assigned smart cards by enrolling at the [“COSEC Enrollment station”](#). Access to these users is granted based on the information written on the smart cards.

**General Additional Security Code:** To take the security level a step higher, an Additional Security Code can be added. This Additional Security Check is possible only with Smart Cards which will prevent the duplicacy of card and restrict unauthorized access to the facility. Configure the Additional Security Code (ranging from 1 to 65535) and Re-enter the code to confirm.



*SI and ASC feature will work independently.*

*However, the user needs to ensure that the functionality is enabled at the device level. It is essential to install either a Mifare or an HID i-Class serial reader at the Door devices for this functionality to work. SI users need not be assigned any devices and need to be enrolled from the COSEC ENROLL application only.*

#### COSEC Enrollment station



**Auto Add New Devices:** Enable to automatically add new devices on the COSEC system on first-time detection.

The devices will be added but will be inactive. To connect the device to the network enable the Active check box in Device > Device Configuration > Profile of the desired devices.



*When installing COSEC for the first time the **Auto Add New Devices** check box will be enabled automatically.*

*When the Auto Add New Devices check box is enabled, it may be possible that multiple MODE devices are added in the Server in inactive state. Admin will have to manually remove these devices if not required.*

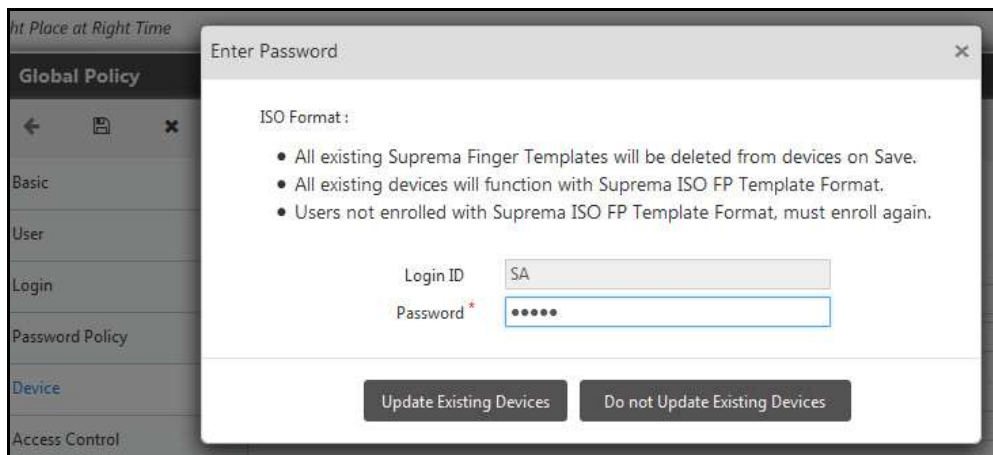
**Auto Assign New Device To Device Group:** Select to enable the system to automatically assign any auto-added device to a specified device group.

**Device Group:** Select and specify a device group by clicking the device group picklist button, to which the system can automatically assign auto-added devices.

**Action On Access Allowed Events:** Select the event types as **All, User, Devices API** whose occurrence will trigger actions as per IO Linking and Satatya Integration configuration defined in the COSEC Web Application. See *Device Configuration > Video Surveillance and Input/Output* for details.

**Action On Access Denied Events:** Select the event types as **All, User, Devices API** whose occurrence will trigger actions as per IO Linking and Satatya Integration configurations defined in the COSEC Web Application.

**Suprema/Lumidigm Finger Template Format:** COSEC Devices, by default, support a proprietary format for fingerprint templates. However, users also have the option to switch to the ISO format in Global Policy for saving templates. Changing from Proprietary to ISO format (and vice versa) will remove all existing fingerprint templates from the COSEC database and devices on saving, and finger enrollment for all users must be done again. Login credentials are required to save any changes in finger template format.



**Maximum Template Count for Sequential Identification:** This allows configuring Maximum Template Count on global level for all devices (PVR as Direct Door).

Device has a limited memory capacity for storage of templates so we need Identification Server which will store the more number of templates and respond to device when asked for identification.

The Identification Server is connected to many device. At a time, many device will request the Server for identification and the response by the server will consume more time. So at a small installation site with less number of users; your device locally can respond for the Identification.

Specify the “Maximum Template Count for Sequential Identification” as the maximum number of templates upto which identification will be done locally through device after which request is forwarded to the Identification Server.

**Example:**

- Suppose 10 templates are stored at device, and “Max Template count for Sequential Identification” set value is 60. When user punches on device, his template will be identified locally from the device first. If he is not identified by 10 templates, then identification will be done from server.
- Suppose 10 templates are stored, and Max Value is 8. Then Identification is done through both device and server.

**Sync Device Time with Server Time:** This parameter enables the system to synchronize the system time of the COSEC Monitor computer with that of the connected devices. This is enabled by default.

**Run PVR Door in Guide Mode:** PVR doors can be used with or without hand guides, depending on which, the enrollment and identification of palm credentials vary. Hence, COSEC enables the system administrator to run the PVR in two modes, the Guide Mode and the Non-guide mode (default mode). Palm templates are saved and identified by the device differently, depending on the mode selected.

The **Run PVR Door in Guide Mode** check-box is available only to login users with system administrator rights. Enable this option to remove all existing palm templates from COSEC and for all future palm enrollment and identification to be performed in the Guide mode only. On saving this option, the system administrator will be prompted to enter his login credentials for authentication as displayed below.

Auto Assign New Device To Device Group ☒

Device Group \* 1 Device Group-RnD

Run PVR Door In Guide Mode ☒ All existing palm templates will be deleted. Palm enrollment must be done again for all users. Note : All PVR Doors will re-boot.

Enter Password

PVR Guide Mode :

- All existing palm templates will be deleted.
- Palm enrollment must be done again for all users.
- All PVR Doors will re-boot.

Login ID SA

Password \* .....

Update Existing Devices Do not Update Existing Devices

**Run PVR Door in Adaptive mode:** Enable the check-box to run the PVR door in an Adaptive mode. In this mode, the new enrolled 'Palm Templates' will allow to be saved into the 'Smart Card' for the enrollment type; 'Smart Card' / 'Biometric then Card', which is selected in **User module > Enrollment**. The users will then allow to be identified by their Palm Credentials through the smart card if configured.



*Mifare 4K smart card is mandatory for the Palm Template to be saved.*

*If 'Run PVR in Adaptive Mode' checkbox is disabled then also the previously saved (compressed) Palm Templates will remain present into the COSEC Server.*

**PIN Change Code:** Enter the PIN Change Code which will be used by the employees to change their own code.

Example: If PIN change code is 11 and employee code is 1220 which is required to be changed to 1320 then you have to enter 11 on device. Then you will have to enter old code as 1220 and new code as 1320. If new PIN is unique, then it will be updated.

**Security Key For Door Access Through API:** This is required, to get access on door through APTA/MODE Application. That is, it is required for authenticating the API.

**Allow Access Via QR:** If you wish to allow users to access the Device using QR code, select this check box. Now, when you add new devices, this check box will be enabled by default. This feature is applicable for ARGO FACE (Direct Door as well as Panel Door only). The addition of this feature will eliminate the need of connecting a Wiegand QR Reader separately for detecting QR Codes.



*It is supported in ARGO FACE Panel Door when connected with Panel200 in Server Mode only.*

For the QR Code functionality to work, make sure:

- you have generated the QR Code for the desired user, refer to [“Credentials”](#), Access Card 2.
- you have generated the QR Code for the desired worker, refer to [“Worker Profile- Credentials”](#), Access Card 2.
- enabled the Alert, so that the generated/re-generated QR can be sent to the desired users/workers using SMS/Email/WhatsApp. Make sure you select the Alert Filter as **Users** and Event as **User Access - QR Credentials**. For details, refer to [“Configuring Alert Messages”](#)
- you have enabled Allow Access Via QR in the desired ARGO FACE (Direct Door / Panel Door) device as well as configured the Image Setting parameters. For details refer to [“Face/Image Settings”](#).
- users will be able to use QR Code as credential when User/Visitor Access Mode is set as Any One, Card, Card + PIN or Card + Face.
- users will be able to use QR Code as credential when Mobile Entry/Exit Access Mode is set as Mobile then Card.
- users will be able to use QR Code as credentials (if enabled) for Special Functions, if the QR number is configured against a Card1/2/3/4.

## Template Syncing for Door FMX

The screenshot shows the 'Template Syncing For Door FMX' configuration window. At the top, there are two input fields: 'PIN Change Code' (masked with dots) and 'Security Key For Door Access Through API'. Below these, the title 'Template Syncing For Door FMX' is displayed. The main configuration area includes a 'Sync Type' dropdown menu set to 'Immediate', a 'Schedule Time' field set to '00:00', and a 'Schedule Days' section with checkboxes for Sun, Mon, Tue, Wed, Thu, Fri, and Sat, all of which are checked.

**Sync Type:** Select the template sync type option as **Immediate** or **Scheduled**.

In **Immediate** option, the templates will get sync from server to device immediately with the enrollment. The user template will be identified immediately.

In **Scheduled** option, the templates will get sync from server to device based on the **schedule Time** and **Schedule Days**. The enrollment of the template will be done but the identification will be done once the template gets synced.

## FTP Server Details for Firmware Upgrade

The screenshot shows the 'FTP Server Details for Firmware Upgrade' configuration window. It contains three input fields: 'Server Firmware Location' with the value 'ftp://matrixtelecomsolutions.com', 'Username' with the value 'cosecforread', and 'Password' which is masked with dots.

**Server Firmware Location:** It is the location of FTP where device firmware files would be available for upgrade.

- For **COSEC VYOM**; default location is ftp://matrixtelecomsolutions.com.
- For **COSEC CENTRA** you can specify the desired FTP path. For this you have to create the folder structure for keeping Firmware files on FTP path. You must specify the URL path up- till COSEC\_ DEVICE folder. i.e. if your COSEC\_ DEVICE folder is at path ftp://192.168.107.15/Softwares/COSEC\_DEVICE then your URL would be ftp://192.168.107.15/Softwares

See "Example: Firmware upgrade from FTP" on page 1477. on Device Status page.

The folder structure for keeping Firmware files on FTP path is:

COSEC\_DEVICE\_NEW > GateController > CENTRA  
COSEC\_DEVICE\_NEW > NGT > CENTRA  
COSEC\_DEVICE\_NEW > PVR > CENTRA  
COSEC\_DEVICE\_NEW > FMX > CENTRA  
COSEC\_DEVICE\_NEW > WirelessDoor > CENTRA  
COSEC\_DEVICE\_NEW > V3 > CENTRA  
COSEC\_DEVICE\_NEW > V4 > CENTRA  
COSEC\_DEVICE\_NEW > VegaPanel200 > CENTRA  
COSEC\_DEVICE\_NEW > VEGA > CENTRA  
COSEC\_DEVICE\_NEW > V4 > CENTRA  
COSEC\_DEVICE\_NEW > PathV2 > CENTRA  
COSEC\_DEVICE\_NEW > ARCDC200 > CENTRA  
COSEC\_DEVICE\_NEW > VegaPanel200BLE > CENTRA  
COSEC\_DEVICE\_NEW > ARGO > CENTRA  
COSEC\_DEVICE\_NEW > ARGOFACE > CENTRA



*Before trying to Update Firmware for Centra (OnPremise Solution) above mentioned folder structure must be available on client side.*



*The file structure is Case Sensitive. So the folder structure must be created as specified.*

**User Name:** Enter the Username for accessing the FTP location in COSEC CENTRA. For COSEC VYOM default Username is cosecforread.

**Password:** Enter the password for accessing the FTP location in COSEC CENTRA. For COSEC VYOM default password is Cosec@341



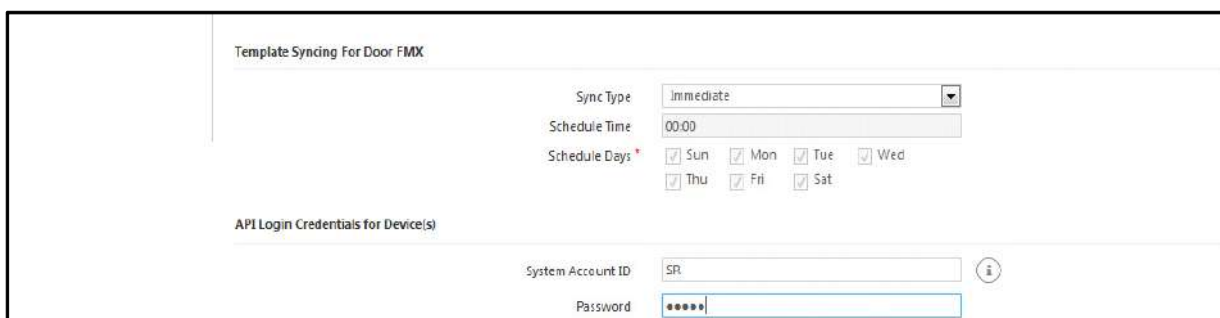
The valid values for above three fields are

**A-Z**

**a-z**

**0-9 !\"#\$%&'()\*+,-./:;<=>?@[\\]^\_`{|}~**

## API Login Credentials for Devices



This section enables to configure the API login credentials for the system account user and the same credentials can be used by devices. Only SA user can configure these parameters.

**System Account ID:** Enter the ID of system account type of user for whom API access is enabled. You can enable API access for a user from *Admin module > System Accounts > Optional*.

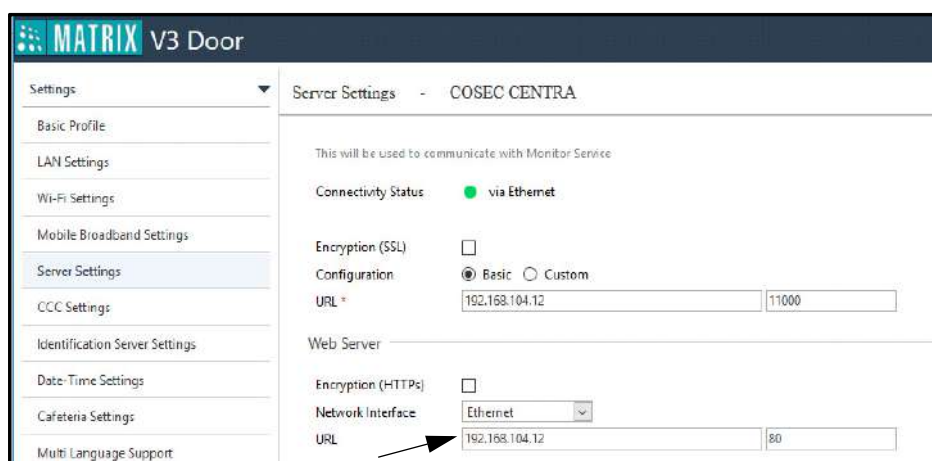
**Password:** Enter the password of the system account user with minimum 128 characters.

For APIs other than e-Canteen Account details; you have to enter the System Account ID and Password. Thus, whenever API is fired, if API's credentials don't match with the configured ID password in the global policy, then the request will get denied.



*If the System Account ID or Password are changed (refer "[Managing System Accounts](#)"), then these changes will not be reflected in API Login Credentials for Devices automatically. You need to update the changes manually.*

If System Account ID and Password are not entered, then only e-Canteen Account Details API will work. For getting Cafeteria Account details the URL of COSEC server must be specified in Web Server section of device webpage as shown below.



*In COSEC VYOM, Encryption in Web Server is must to enable to fetch the account details in API.*



## Access Control Policy

This page allows to define policies for access control.

To configure Access Control Policy, go to **Admin module > System Configuration > Global Policy > Access Control** and the following screen appears.

Global Policy

Basic

User

Login

Password Policy

Device

Access Control

Time Attendance

Reports

Visitor Management

CWM

ESS

Smart Card Based Access Route ☐

Access Route Type: Level 0 is lowest level

Smart Card Key Settings

Customize HID iClass Card Key ☐

16 Digit Hexadecimal Key

0 0 0 0 0 0 0 0

0 0 0 0 0 0 0 0

Auto Update Key Change On Cards ☐

Customize MIFare Card Key ☐

Card Type: Mifare 1K

Key Type: Global

12 Digit Hexadecimal Key

0 0 0 0 0 0 0 0

0 0 0 0 0 0 0 0

**Smart Card Based Access Route:** Select to enable access route based on smart card. For further configuration refer **Access Control Module > Smart Access > Smart Access Route** page

**Access Route Type:** If Smart Card Based Access Route is enabled, select the Access Route type as incremental by selecting **Level 0 is lowest level** and decremental by selecting **Level 0 is highest level**.

### Smart Card Key Settings

You can either use the default Matrix Key for Smart Cards or customize the Smart Card key. You can change the Smart Card key as many times as you want or revert to the default Matrix Smart Card key.

You can define two custom keys—one for HID and one for MIFare cards. To use a custom key, select the type of Smart card to be used and enter the desired key in hexadecimal digits.

#### Customize HID iClass Card Key

Customize HID iClass Card Key ☒

16 Digit Hexadecimal Key

E 6 G H F 6 C E

B C F D A 6 8 0

Check the box to enable HID iClass Card Key configuration.

Enter **16 Digit Hexadecimal Key** as a custom key which will be used for all the sectors of Card.

Select the **Auto Update Key Change On Cards** check box to update all Smart Cards with the new (custom) key, when they communicate with the devices connected with COSEC.



**Auto Update Key Change On Cards** checkbox will be enabled only if “Customize HID iClass Card Key” / and “Customize MiFare Card Key” checkbox is enabled.

### Customize MiFare Card Key

Check the box to enable Mifare Card Key configuration.

**Card Type:** You can select the Card type as **MiFare 1K** or **MiFare 4K**.

**Key Type:** You can select the Key type as **Global** or **Sector-Wise**.

#### For Global Key-Type:

All the sectors of card will be assigned same key.

Enter **12 Digit Hexadecimal Key** as custom key for the selected MiFare Cards.

#### For Sector-Wise Key-Type:

Smart cards are used for multiple purposes like storing user details for access control, his cafeteria details etc. So, in-order to ensure that all the information in card is not getting vulnerable to security threats like unauthenticated data access, different keys for different sectors of smart cards can be defined.

**Save Sector-Wise Keys in DB:** If this checkbox is **enabled**, configured sector-wise key sets will be saved in database and simultaneously sent to devices as commands.

If this checkbox is **disabled**, configured sector-wise key sets will not be stored in database but will be sent to devices as commands. If there are any old sector-wise keys in database, then it will be removed.



*If there are no keys saved in database, then COSEC Utilities (VMS, Enroll) will work with Default Keys for all the sectors. (FFFFFFFFFFFF).*



*Sector-wise configuration of keys in MiFare cards is supported in following Direct Doors: Wireless Door, Door V3, Door V4, NGT Direct Door, PVR Door, Vega Controller and Door FMX.*

## Configuring sector-wise keys for different sectors.

Customize MIFare Card Key ☒

Card Type

Key Type

Save Sector-Wise Keys in DB ☒

Search

Start Sector	End Sector	Key A	Read Using	Write Using	
8	12	D E 2 4 A 3 A F C 0 8 F	Key A	Key A	✓ ✕

**Start Sector:** Select the starting sector of card. If Card type selected is Mifare 1K; then you can select from 0 to 15 sectors for defining key. If Card type selected is Mifare 4K; then you can select from 0 to 39 sectors for defining key.

**End Sector:** Select the ending sector of card. If Card type selected is Mifare 1K; then you can select from 0 to 15 sectors for defining key. If Card type selected is Mifare 4K; then you can select from 0 to 39 sectors for defining key.



*The End Sector will be always greater than or equal to the option value selected in Start Sector.*

**Key A:** Enter the Custom key value in hexadecimal format (0 to 9 & A to F)

**Read Using:** This field displays Key A as default. The hexadecimal Key A will be used for reading the selected Mifare card.

**Write Using:** This field displays Key A as default. The hexadecimal Key A will be used for writing on the card.



1. If Key is kept blank, then the grid will show as blank for the corresponding key.

2. If previously key is defined for sector 0 to 10 and new key is defined for sector 8 to 12. Then the new key will be assigned to sector 8 to 12. And the previous key will be marked for sector 0 to 7. See below image.

3. If previously key is defined for sector 0 to 10 and new key is defined for sector 3 to 8. Then the new key will be assigned to sector 3 to 8. And the previous key will be marked for 0 to 2 and 9 to 10.

Customize MIFare Card Key ☒

Card Type 

MiFare 1K

Key Type 

Sector-Wise

Save Sector-Wise Keys in DB ☒

Search

+

Start Sector ▲	End Sector	Key A	Read Using	Write Using	
0	10	A2DC3F4DACBF	Key A	Key A	

After defining new key for sector 8-12, the previous key is marked to 0-7

Search

+

Start Sector ▲	End Sector	Key A	Read Using	Write Using	
0	7	A2DC3F4DACBF	Key A	Key A	
8	12	DF0903EADF2B	Key A	Key A	

Click **Add** button to save the key configuration to the grid. The newly defined keys for sector8 to 12 will be listed along with previously defined keys for Sector 0 to 7 as shown above.

## Time Attendance Policy

This page allows to define policies for time attendance.

To configure Time Attendance Policy, go to **Admin module > System Configuration > Global Policy > Time Attendance** and the following screen appears.

- **Auto Run Daily Process:** Select this checkbox for the system to run the daily attendance process automatically at 12:00 AM. The attendance status will be updated for the previous day only.

Example:

- Current Date and Day: 04/09/2021, Saturday (Week Off for users)
- **Auto Run Daily Process:** Enabled
- The system will run the daily process on 05/09/2021, Sunday at 12:00 AM.
- The attendance status of 04/09/2021, Saturday will be updated as WO.

### Attendance Process Calibration

These Attendance processing parameters can be calibrated to determine how a punch is posted in the COSEC system. These can be set by the administrator as per organizational preferences in terms of recording attendance behavior of employees. The parameters are as follows:

- **Max Early-IN Allowed (Hrs):** Maximum number of hours before shift-start time during which a punch should be considered as an Early-IN punch. Default value is 02:00 hours.
- **Max Late-OUT Allowed (Hrs):** Maximum number of hours after shift-end time during which a punch should be considered as a Late-OUT punch. Default value is 02:00 hours.
- **Priority:** This parameter assigns posting priority to an intermediate punch between two shifts. The administrator can determine whether such a punch is to be posted as an Early-IN punch for the next shift or a Late-OUT punch for the previous shift.
- **Max Working Hours Per Day (Hrs):** The maximum number of working hours to be considered per day for punch posting. All punches falling within this duration will be posted for the same day as per shift-based priority (if any). Default value is 16:00 hours.



If Attendance Process Calibration parameters are defined on both the Global Policies page and Attendance Policy page of Time and Attendance module, then only the Attendance Policy will be considered for a user.

The working of the Attendance Calibration parameters is explained below:

Assume the shift timing of an employee for the night shift from 19:30 hrs to 04:00 hrs.

Employee is entering the organization on 18<sup>th</sup> February at 19:31hrs and leaving at 04:30 hrs on 19<sup>th</sup> February, thus total working hours is 08:59 hrs.

**Scenario1:** With default parameters, The Punch 2 is in the Late out duration of the shift. So it will be posted on the same day(18th Feb).

**Scenario2:** If Late Out allowed is changed to 00:00 hrs, then the punch at 04:30 hrs comes under maximum working hrs. So OUT punch will be posted on the same day(18th Feb).

**Scenario3:** Now with Late Out allowed as 00:00 hrs and Max working hrs changed to 08:00 hrs, So according to the priority, punch at 04:30 hrs will be posted on next day(19th Feb) as IN punch.

If here, priority is changed to Late out, then punch at 04:30 hrs will be posted as OUT punch for same day(18th Feb).



When the user is assigned non-FB/RD shifts that end on FB/RD day, then in that case, process considers global policy parameters Max Early IN, Max Late OUT, Max Work Hours and priority with respect to Shift start-end time.

## Reports Policy

This page allows to define policies for reports.

To configure Reports Policy, go to **Admin module > System Configuration > Global Policy > Reports** and the following screen appears.



These report policies except 'Report Export Output in PDF only' will not have impact on the customized reports generated from Report builder.

If the checkbox "Report Export Output in PDF only" is enabled; then only PDF export option will be available in Report builder Export options.

**Sorting Field In Reports:** Select the option based on which the listing in the reports will be sorted in ascending order. The options available are: User ID and Name.

**Report Print Output:** Specify whether the report output is to be **Printed** on paper or as a **PDF** document.

**Report Font:** Select the font style from the drop down options in which the report is to be generated. If the selected font is not available then report will be generated in default “Courier New” font.



*Depending on the font style selected, the report may overlap or get misaligned.*

*In case of multi-lingual content, unsupported characters will be displayed as garbage values.*

**Report Export Output in PDF Only:** Select to restrict exporting reports to the PDF format only. This will prevent risks of data manipulation using any other output format.

**Show Company Logo:** Select to allow the “Company Logo” uploaded in “Enterprise Profile” page to be shown in the Reports.

For details go to *Admin Module > System Configuration > Enterprise Profile*.

## Visitor Management Policy

This page allows to define policies for managing visitors.

To configure Visitor Management Policy, select **Admin module > System Configuration > Global Policy > Visitor Management** and the following screen appears.

The screenshot shows the 'Global Policy' configuration window with a sidebar on the left containing various system settings. The main area is titled 'Visitor Management' and contains several sections: 'Authorization For Visitor Pre-Registration' (dropdown: Not Required), 'Authorization For Visitor Initiated Visit' (dropdown: Not Required), 'Send OTP For Verification' (checkbox: unchecked), 'Security Approval For Visitor E-Pass' (checkbox: unchecked), 'Required Visitor Acceptance' (checkbox: unchecked), 'Allow E-Pass Generation Before Duration' (input field), 'Alert for Pass Expiration After Duration' (input field), 'Dynamic PIN On Pass Creation' (checkbox: unchecked), 'PIN Length' (input field: 4), 'Access via QR' (checkbox: unchecked), 'Auto Profile Assignment' (checkbox: unchecked), 'Matching Level' (dropdown: Organization), 'Auto Device Assignment' (checkbox: unchecked), 'Visit Creation Restriction' (Minimum Days Before Allowing Visit: input field, Maximum Days Before Allowing Visit: input field, Apply Restriction On: dropdown: Both), 'Default Host User' (Host User: input field), 'Custom Fields' (Visitor Custom Fields: ID Proof 1, ID Proof 2).

- **Authorization For Visitor Pre-Registration:** When Visitor Pre-Registration request is initiated by host, it will be sent to the host's RIC for authorization.

Select the desired option from the dropdown list — Always, Not Required or When Visit Outside The Shift.

- **Always:** Select this option to always send all the Visitor Pre- Registration requests initiated by the host to the RIC for authorization.

All visit applications must be approved by the RIC irrespective of the visit time. That is, whether it is within or outside the shift timing of the host.

- **Not Required:** Select this option if you do not wish to send the Visitor Pre- Registration requests initiated by host to the RIC for authorization.
- **When Visit Outside The Shift:** Select this option to send all the Visitor Pre- Registration requests having visit time outside the shift timing of the host, to RIC for authorization.

If you select this option, Pre-registration requests within the shift timing of the host do not require approvals from the RIC.



An example with different cases is explained below for Visitor Pre-Registration initiated by both Host and Visitor. Refer [“Examples”](#).

For Visit Pre-Registrations, refer [“Pre-Registration”](#).

- **Authorization for Visitor Initiated Visit:** When a visit application is initiated by a visitor, it will be sent to the authorized host (of the visitor) for approval.

Once the host approves the visit application, this application will be sent to the host's RIC for authorization which depends on the option selected from the dropdown list.

Select the desired option from the dropdown list — Always, Not Required or When Visit Outside The Shift.

- **Always:** Select this option to always send all the visitor initiated visit applications (after the host authorizes) to the RIC for authorization.

All the visit applications must be approved by RIC irrespective of the visit time if it is within or outside the shift timing of the host.

- **Not Required:** Select this option if you do not wish to send the Visit application initiated by the Visitor for authorization to the RIC.
- **When Visit Outside the Shift:** Select this option to send all the visit requests having visit time outside the shift timing of the host to the RIC for authorization.

If you select this option, visitor initiated visit requests within the shift timing of the host do not require approvals from the RIC.

An example with different cases is explained below for Visitor Pre-Registration initiated by both Host and Visitor. Refer [“Examples”](#).

- **Send OTP for Verification:** If this checkbox is enabled, OTP will be sent to the visitor's mobile number for verifying the number provided by the visitor.

This is to verify that the visitor is genuine and the mobile number available in the system matches with the number of the visitor.



*The OTP Verification will be applicable only when Pass is created from VMS Utility.*

1. For Sending OTP to visitor, SMS configuration must be done in Admin module> System Configuration > SMS Configuration.
2. The OTP message alert must be configured from Alert Message Configuration by selecting “OTP Visitor Verification” event.
3. Visitor Service and Alert Service must be running for sending OTP.

Once this verification is done, visitor pass can be created from the VMS utility.

- **Security Approval for Visitor E- Pass:** Enable this Check-box if the Security Approval For Visitor E-Pass generation is required.
- **Required Visitor Acceptance:** Select this checkbox if the Visitor Acceptance is required.

If this checkbox is enabled then after approval of an appointment from RIC or system account user, appointment will be forwarded to visitor associated with appointment for the approval & Visitor Pre-Registration Alert will be dispatched to Visitor with approval links.

- **Allow E-Pass Generation Before Duration:** Enter the duration in minutes i.e. the duration before the system allows to generate Visit E-Pass. Only numeric value is allowed to enter upto 3 digits. Max Limit is 999 minutes.
- **Alert for Pass Expiration After Duration:** Enter the duration in minutes i.e. the duration after which the system generates an alert for visitor pass expiration. Only numeric value is allowed to enter up to 3 digits. Max Limit is 999 minutes.
- **Dynamic PIN On Pass Creation:** Select this checkbox to auto-generate a unique Dynamic PIN on Pass Creation for Visitor during his/her visit and assign this PIN to a Visitor Profile.

When **Dynamic PIN On Pass Creation** is enabled, then

- a. define the length of Dynamic PIN in **PIN Length**.
- b. during check-in, when Visitor Profile is assigned to a Visitor, then a Dynamic PIN as per set length will be auto-generated for the Visitor Profile.
- c. visitor will gain access to the devices assigned to that Visitor Profile via entering the Dynamic PIN.

If disabled, then PIN configured on Visitor Profile will be assigned to the Visitor during check-in.

To manually configure the PIN for Visitor Profile, refer "[Credentials](#)" under Visitor Profile.

- **Access via QR:** Select **Access via QR** checkbox to permit the visitor to access via QR Code.

During the check-in time of a visitor, when a Visitor Profile is assigned to a visitor, the Dynamic ID will be auto-generated and that Dynamic ID will be inserted in the QR Code which will be further added in the Visitor Pass Alert Message as well as in the visitor e-pass.

Dynamic ID will be set as the **Access Card 2** value for that Visitor Profile.

Once the Dynamic ID value is set in the **Access Card 2**, the **Access Card 2** will not be configurable from *Visitor Management> Visitor Profile> Credentials* and the **Card 2** will not be configurable from *Visitor Management> Utilities> Set and Sync Credentials> Credentials*.

When the visitor displays the QR Code in front of the device (with a Wiegand reader), the device scans the QR Code and check for the Dynamic ID inserted in the QR Code. If the Dynamic ID matches then the access is granted, else the access is denied.

Access will be denied if the visitor tries to access the device before/after the visit duration.

In any case, if the Dynamic ID is not generated or the **Access via QR** checkbox is disabled, then the Appointment ID will be generated and inserted in the QR Code.



*It is recommended not to change the Access Card 2 value from the Device Module to avoid overwriting the Dynamic ID value set as the Access Card 2.*

- **Auto Profile Assignment:** Visitor Profiles can be assigned to the visitors automatically. To do so, make sure the Visitor Profiles are created beforehand as per your requirement. To know more about the Visitor Profile, refer "[Visitor Profile](#)" in *Visitor Management> Visitor Profile*.

The system assigns these pre-configured profiles to the visitors as per certain matching criteria.

For Auto Assignment of Visitor Profiles, follow the steps given below:

- Select the **Auto Profile Assignment** checkbox. Once enabled, then configure **Matching Level**.
- To set the matching criteria for selection of the visitor profile which is to be assigned to the visitor, select the desired parameters' checkboxes in **Matching Level**.

Matching Level consists of different Groups such as Organization, Branch, Department etc. These are also configured for the Hosts.

The system will compare the selected criteria for the Visitor with the Groups assigned to the Host (in *User > User Configuration > Group*) and assign the best matched Visitor Profile to the Visitor automatically.

Along with the Profile, the visitor will also be granted access to the devices configured in the respective profile.

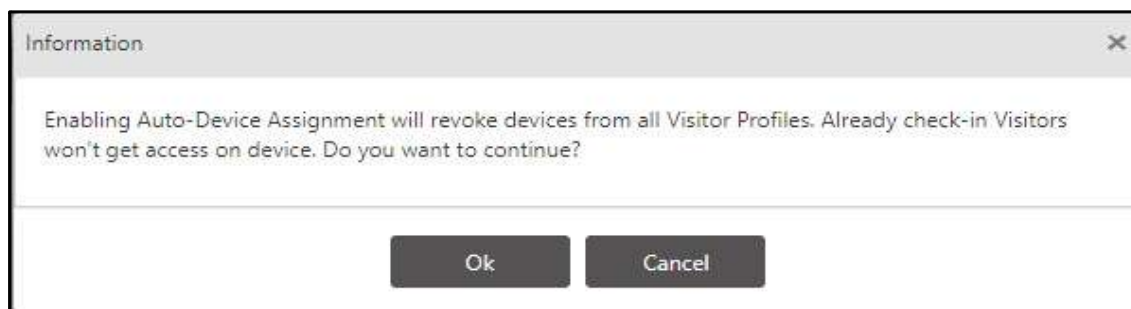
If **Auto Profile Assignment** is disabled, then the system will assign the first free Visitor Profile to the Visitor.

To understand this feature with the help of an example, refer Example 2 under [“Examples”](#).

- **Auto Device Assignment:** Select this checkbox to provide access to the devices assigned to the Host of a visitor, instead of the devices configured in the Visitor Profile (assigned to the visitor).

You can provide access to the devices assigned to the Host from the *User > User Configuration > Visitor Management*. For more information, refer [“Visitor Management”](#).

When you enable this feature, a pop-up will be displayed with an information as shown below:



Click **OK** if you want to continue, else click **Cancel** to discard the changes.

Once you click **OK**, all the devices will be revoked from the free as well as from the occupied Visitor Profiles.

If **Auto Device Assignment** is disabled, then the Visitor will be assigned devices configured in *Visitor Management > Visitor Profile > Devices*.

To understand this feature with the help of an example, refer Example 3 under [“Examples”](#).

## Visit Creation Restriction

You can impose restriction on the Host/Visitor for Visit creation application by configuring minimum or maximum days as per your requirement.

Visit creation restriction will also be applied to rescheduled visits as well as inviting visitors via Invite Link, refer Reschedule Visit in [“Visit Approval”](#) and [“Invite Visitor”](#).

Configure the following parameters to impose restriction.

Visit Creation Restriction	
Minimum Days Before Allowing Visit	<input type="text" value="Days"/>
Maximum Days Before Allowing Visit	<input type="text" value="5"/>
Apply Restriction On	<input type="text" value="Both"/>

- **Minimum Days before Allowing Visit Creation:** Enter the minimum number of days before which the Host/Visitor needs to apply for the Visit creation.

For example: If **Minimum Days before Allowing Visit Creation** value is set to 2 and current date is 01/11/2020, then the visit start date cannot be before 03/11/2020.

If minimum days are not configured, then Visit creation will not be restricted.

- **Maximum Days Before Allowing Visit Creation:** Enter the maximum number of days before which the Host/Visitor needs to apply for the Visit creation.

For example: If **Maximum Days Before Allowing Visit Creation** is set to 10 and current date is 01/11/2020, then visit start date cannot be after 11/11/2020.

If maximum days are not configured, then Visit creation will not be restricted.

- **Apply Restriction On:** Apply the above configured restrictions on Host and/or Visitor which will be effective during a visit creation.

Select the desired option from the dropdown list — Both, Host only or Visitor only.

- **Host Only:** The restriction will be applied only when Host is creating the visit.
- **Visitor Only:** The restriction will be applied only when Visitor is creating the visit.
- **Both:** The restriction will be applied on both Visitor and Host while creating the visit.



*The values for these parameters set in Global Policy will be considered as default values while creating a new user/worker. For more information refer [“Visitor Management”](#) and [“Worker Profile-Visitor Management”](#).*

Visit creation application can also be created for the current date. To know more, refer Visit Creation on Current Date in [“Station Location”](#).

## Default Host User

Select the authorized host user from the picklist.

## Visitor Custom Fields

- **ID Proof1 & ID Proof2:** Enter the name of ID Proof which will be printed on the visitor pass. The availability of these proofs need to be verified before the Visitor enters the premises. The ID Proofs specified here will appear in VMS Utility.
- **Custom Field 1 - 5:** These are fields that can be customized as per your requirements (e.g. ID Proof, Security Number etc.) which will be printed on the Visitor Pass from VMS Utility. These fields will be available for visitor configuration in the Visitor Management module of COSEC Web as well as for VMS Utility.

**Visitor Custom Fields**

ID Proof 1 \*   
ID Proof 2 \*

Field No.	Active	Field Name	Type	Upload	Mandatory	
1	Yes	Security Number	Textbox	Yes	No	
2	Yes	Address Proof	Textbox	Yes	No	
3	Yes	Custom Field 3	Textbox	Yes	No	
4	Yes	Custom Field 4	Textbox	Yes	No	
5	Yes	Custom Field 5	Textbox	Yes	No	


- **Field No:** It displays the serial number and order of the field.
- **Active:** Select this check box, if you wish to display this field in Visitor Profile.
- **Field Name:** Enter the desired Field Name. For example: Security Number.
- **Type:** Select the desired type to be assigned to the field—Textbox and Date.
- **Upload:** Select the check box, if the configured field requires a provision to upload a document.
- **Mandatory:** Select the check box to mandate this field.

You can always edit this custom field by clicking **Edit**

**Visitor Custom Fields**

ID Proof 1 \*   
ID Proof 2 \*

Field No.	Active	Field Name	Type	Upload	Mandatory	
1	<input checked="" type="checkbox"/>	<input type="text" value="Spouse Name"/>	Textbox	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
2	Yes	Spouse Birthdate	Date	Yes	No	
3	Yes	Custom Field 3	Textbox	Yes	No	
4	Yes	Custom Field 4	Textbox	Yes	No	
5	Yes	Custom Field 5	Textbox	Yes	No	

Click **OK**  and the pop-up appears.

Confirmation

Changing the 'Type' of the custom field will result in permanent loss of custom field data of all Users. Field will be set to default values. Do you want to continue?

Yes

No

Click **Yes** to save the configuration else click **No**.






The configured Visitor Custom Fields here will be displayed in **VMS Utility> New Visitor> Additional Details** and in **VMS Utility> Visitor Details> Additional Details** on the home page of VMS Utility.

The configured custom fields for Visitor will be visible in the **Visitor Management> Visitor Template> Details**.





The configured custom fields for Visitor will be visible in the **Visitor Management> Utilities> Frequent Visitor> Additional Details**.

The configured custom fields for Visitor will be visible in the **Visitor Management> Utilities> Watchlist> Additional Details**.

## Visit Custom Fields

Visit Custom Fields						
Field No.	Active	Field Name	Type	Upload	Mandatory	
1	Yes	Field 1	Textbox	Yes	No	
2	Yes	Field 2	Textbox	Yes	No	
3	Yes	Field 3	Textbox	Yes	No	
4	Yes	Field 4	Textbox	Yes	No	
5	Yes	Field 5	Textbox	Yes	No	

1 - 5 of 10 records

  1 2  

- **Custom Field 1-10:** These fields can be customized as per your requirement. For detailed information, refer ["Visitor Custom Fields"](#).

The configured Visit Custom Fields here will be displayed in **VMS Utility> Home Page> Visit Details**.

The configured custom fields for Visitor will be visible in the **Visitor Management> Visit Template> Additional Details**.

The configured custom fields for Visitor will be visible in the **Visitor Management> Pre- Registration> Visit Details**.

The configured custom fields for Visitor will be visible in the **Visitor Management> Utilities> Visitor History**.

## Examples

### Example 1: Visitor and Host initiated Visit Requests

- Consider following data for Shift: GS  
Shift Start Time:08:00  
Shift End Time:17:00
- Consider following data for Shift: ES  
Shift Start Time:18:00  
Shift End Time:02:00
- Consider following data for host: H1  
Date:12/10/2020  
Shift:GS

#### Case 1: Visitor Initiated Visit Request

- Consider that visitor, V1 initiates a visit request as follows:  
Visit Date:12/10/2020  
Visit Start Time:18:00  
Visit End Time:19:00  
Host: H1
- This visit request when initiated successfully will be sent to the host for visit approval.
- Once the host approves this visit, then based on one of the following selected value for **Authorization For Visitor Initiated Visit** in *Admin> System Configuration> Global Policy > Visitor Management*, the request should proceed —
  - *Always*

This request application will be sent for RIC Approval.

- *Not Required*

This request application will not be sent for RIC Approval.

- *When Visit Outside The Shift*

This request application, for the above case, is outside the host's shift timings. Hence, as per the host's Reporting Group configurations it will be considered for RIC Approval.

Ex- RIC can approve from *Visitor Management > Visit Approval* page

#### • Case 2: When Host's Shift is changed

- Now, let us consider that in the above example the **Authorization For Visitor Pre-Registration** is selected as *When Visit Outside The Shift*, and shift for H1 is changed from GS to ES.
- Then only for upcoming visit request applications, ES will be applicable. No changes in previous Visitor Pre-Registration request applications.

- **Case 3: When either Visitor/Host Reschedules the Visit**

Visit can be rescheduled by —

1. *Visitor*

- If rescheduled by the visitor, then the request application will be sent to the host for acceptance.
- Once the host approves, then based on **Authorization For Visitor Initiated Visit** value, the application will be considered for RIC Approval.

2. *Host*

- If rescheduled by the host, then it will be sent to the visitor for acceptance and once the visitor accepts (depends on the value of the option **Required Visitor Acceptance**), then it should be considered for RIC approval based on the value set in **Authorization For Visitor Pre-Registration**.

3. *SA*

- Rescheduled visit by SA will be pre-approved.

- **Case 4: When Visit Transfer is done**

On visit transfer to another host can be done by —

1. *Visitor*

- If the visit is transferred by the visitor, then the request application will be sent to the new host for acceptance. (Host changed by Visitor)
- Once this new host approves, then based on **Authorization For Visitor Pre-Registration** dropdown value, the application will be considered for RIC Approval.

2. *Host itself*

- If the visit is transferred by the host, then it should be sent to the new host for acceptance. Once this new host approves the application, then it will be considered for RIC approval (of this new host) based on the value set in **Authorization For Visitor Pre-Registration**.

3. *SA*

- Visit transferred by SA will be pre-approved.

- **Case 5: Values of Authorization For Visitor Pre-Registration and Authorization For Visitor Initiated Visit change**

- When **Authorization For Visitor Pre-Registration** and/or **Authorization For Visitor Initiated Visit** value is changed then it will be applicable for upcoming visit request applications. There will be no change in previous Visitor Pre-Registration applications.



## Example 2: Auto Profile Assignment

### Case 1:

- A Visitor creates a visit for Host 1 and checks-in
- **Auto Profile Assignment** = Enabled
- **Matching Level** = Organization, Department, Section

	Host 1	Visitor Profile 1	Visitor Profile 2	Visitor Profile 3
<b>Organization</b>	Matrix	Matrix	Matrix	Matrix
<b>Branch</b>	R&D	HO	R&D	HO
<b>Department</b>	PMT	MKTG	PMT	PMT
<b>Section</b>	TL	TL	Member	TL
<b>Category</b>	C1	C1	C1	C4
<b>Grade</b>	G1	G2	G1	G4
<b>Designation</b>	D1	D2	D1	D4

- Here, as Matching Level is set as Organization, Department and Section, the Visitor Profile's groups should be matching with the values of host's groups.
- Hence, the profile Visitor Profile 3 will be assigned to the visitor.

### Case 2: Multiple Profiles Match

- A Visitor creates a visit for Host 1 and checks-in
- Auto Profile Assignment = Enabled
- Matching Level = Department
- As per the configurations of Table 1, two profiles would be available for the visitor i.e. Visitor Profile 2 and Visitor Profile 3.
- In this case, any one of the profiles will be selected randomly for the visitor.

### Case 3: No Profile Matches

- A Visitor creates a visit for Host 1 and checks-in
- Auto Profile Assignment = Enabled
- Matching Level = Section

	Host 1	Visitor Profile 1	Visitor Profile 2	Visitor Profile 3
<b>Organization</b>	Matrix	Matrix	Matrix	Matrix

	Host 1	Visitor Profile 1	Visitor Profile 2	Visitor Profile 3
<b>Branch</b>	R&D	HO	R&D	R&D
<b>Department</b>	PMT	MKTG	PMT	PMT
<b>Section</b>	TL	Member	Member	Member
<b>Category</b>	C1	C1	C1	C4
<b>Grade</b>	G1	G2	G1	G4
<b>Designation</b>	D1	D2	D1	D4

- As per the configurations of Table 2, no profile would be available for the visitor.
- In this case, no profile would be assigned to the visitor.

#### ***Case 3: No Profile Available***

- A Visitor creates a visit for Host 1 and checks-in.
- Auto Profile Assignment = Enabled
- Matching Level = Department
- In this case, no profile would be available to assign to the visitor if all the profiles are occupied.

#### ***Case 4: Auto Profile Assignment is Disabled***

- When **Auto Profile Assignment** is disabled, the first free visitor profile will be assigned to the visitor.

### **Example 3: Auto Device Assignment**

#### **Case 1:**

- A Visitor creates a visit for Host 1 and checks-in.
- Auto Device Assignment = Enabled
- Then the devices assigned to the Host in the *Users> User Configuration> Visitor Management* will be assigned to the visitor.

#### **Case 2: No Device Assigned**

- A Visitor creates a visit for Host 1 and checks-in.
- Auto Device Assignment = Enabled
- When no device is assigned to the Host in the *Users> User Configuration> Visitor Management*, the Visitor visiting the host won't be allotted any device.

#### **Case 2: Auto Device Assignment is disabled**

- When Auto Device Assignment is disabled, the devices configured for a Visitor Profile from *Visitor Management> Visitor Profile> Devices* page will be assigned to the visitor.

## CWM

This page allows to define policies for managing contract workers.

To configure CWM Policy, go to **Admin module > System Configuration > Global Policy > CWM** and the following screen appears.

The screenshot displays the 'Global Policy' configuration window for 'CWM'. On the left is a sidebar menu with options: Basic, User, Login, Password Policy, Device, Access Control, Time Attendance, Reports, Visitor Management, CWM (selected), Job Costing, Field Visit Management, ESS, SSIO Configuration, and Face Recognition. The main content area is divided into several sections: 'Worker Assignment From CSS' (checked), 'Assignment Approval' (Direct), 'Approval Scheme' (Serial), and 'Approval Required For Existing Workers' (unchecked). The 'Generate Worker ID' section includes 'Auto Generate Worker ID' (unchecked), 'ID Format' (text input), 'Numeric Value Length' (0), 'Zero Padding is required' (unchecked), and 'Worker ID Range' (CWM, 1, 9999999). The 'Minimum Age Requirement for Workers' section has 'Date of Birth Mandatory' (unchecked) and 'Minimum Age' (0, Year(s), Month(s)). At the bottom is a 'Custom Fields for Contractors' section with a dropdown arrow.

- **Worker Assignment from CSS:** Enable to provide rights to Contractors for adding workers or assigning work orders using their Contractor Self Service (CSS) account.
- **Assignment Approval:** Select a Worker Approval type from the dropdown list to determine the process by which workers assigned by a Contractor can be approved by an organization. There are two options:
  - **Direct** - Approval Requests are directly sent to the system administrator.
  - **Approval Stage** - Approval Requests are sent to all the assigned *Approving In-Charges* either serially, or in a Parallel order (as per the *Approval Stage*). To set an approval scheme, select **Approval Stage** and select **Serial** or **Parallel** option from **Approval Scheme** dropdown list.



*For more information on the Worker Approval process, go to: Contract Worker Management > Work Order > Approval Stages.*

- **Approval Required For Existing Workers:** Select this check box if an existing worker is also required to go through the configured approval process, when assigned to a new work order. If unchecked, the worker assignment will be directly approved.

### Generate Worker ID

You can configure the required format of the Worker ID and accordingly, the Worker ID will be generated automatically while configuring a new/temporary worker. The format can be configured as shown below.

**Generate Worker ID**

Auto Generate Worker ID ☐

ID Format \*

Numeric Value Length \*

Zero Padding is required ☐

Worker ID Range \* CWM

- **Auto Generate Worker ID:** Select the check box to be generate the Worker ID automatically for the configuration of new/temporary workers from the Contract Worker Module. If disabled, then you need to enter the Worker ID manually.
- **ID Format:** Configure the required format of the ID by selecting the 'Numeric Value Format' and/or other Value Formats in any order as per the requirement. You can also enter the fixed value which will always be displayed along with the other components of the Worker ID for every user.

To select the different format for the ID, enter \* in **ID Format** box and the drop-down list containing different Value formats appears as shown below. Select the desired format from the drop-down list.

**Generate Worker ID**

Auto Generate Worker ID ☒

ID Format \*

Numeric Value Length \*

Zero Padding is required ☐

Worker ID Range \*

Minimum Age Requirement for Workers

Date of Birth Mandatory

Minimum Age

Custom Fields for Contractors

**Generate Worker ID**

Auto Generate Worker ID ☒

ID Format \*

Numeric Value Length \*

Zero Padding is required ☐

Worker ID Range \* CWM



*The NUMVAL (Numeric Value) is mandatory to be selected.*

The drop-down list contains different formats for; Branch Code (BRCCODE), Organization Code (ORGCODE), Branch ID (BRCID), Department ID (DPTID), Numeric value (NUMVAL) etc. You can select the multiple formats, each time you need to enter \* and then select the desired format.


Example: As shown in above image, the fixed value 'MATRIX' is entered as a company name, BRCID and DPTCODE is selected which can vary as per the assigned 'Branch' and 'Department' for new configured users. The NUMVAL is selected which will provide a unique 'Numeric number' at the end of the ID.

Now, on the user configuration page while configuring the new user, the Branch is assigned as 4 (Waghodia) and the Department is assigned as Documentation.

So, once the user is configured and saved, the unique User ID “**MATRIX4DOC1**” will be generate and assigned automatically. Here, **MATRIX4DOC1**, that is **Fixed Value**, **Branch ID**, **Department Code**, **Numeric Value**.



*Numeric Value for each User ID will generate as per the next available number.*

Click **Copy ID Format Same as User**  , if you wish to copy the format as configured for User ID.

- **Numeric Value Length:** Enter the desired number of digits from 1 to 15 till which the ‘NUMVAL’ must be generated. For example: 4
- **Zero Padding Required:** Select this check box to allow the prefixing zeros before the ‘NUMVAL’ value. For example, if the Numeric value length is configured as 4 and the number assignment starts from a single digit then as explained in above example, the new user id to be generated is ‘MATRIX4DOC1’ if Zero Padding is enabled, it will be generated as ‘MATRIXDOC0001’.
- **Worker ID Range:** This is applicable only if you have disabled **Auto Generate Worker ID**.

Enter a range for Worker IDs to define new/temporary workers in COSEC. The range can be from 1 to 9999999. Any prefix defined here will be added before all system-generated Worker IDs by default. For example, if prefix defined is “CWM”, Worker IDs will appear as shown below.

CWM35	Ramesh Pai
CWM32	Anil Aggarwal
CWM31	Ranjan Parmar
CWM3	Raju R.






## Minimum Age Requirement for Workers

Minimum Age Requirement for Workers			
Date of Birth Mandatory	<input checked="" type="checkbox"/>		
Minimum Age	<input type="text" value="0"/>	Year(s)	<input type="text" value="0"/>
		Month(s)	<input type="text"/>

- **Date of Birth Mandatory:** Select the check box if you wish to make the configuration of Date of Birth parameter compulsory in the Worker Configuration page.
- **Minimum Age:** If you select Date of Birth Mandatory check box, configure the Minimum Age limit in years and months. Any Worker Profile below this age will not be created.







## Custom Fields For Contractors

- **Field Name 1 - 10:** These are fields that can be customized as per your requirements. (e.g. ID Proof, Security Number etc.). These field names will later be available for Contractor configuration on the COSEC Web as well as for CSS application. These can also be used for third party integration purposes. The Field Names can be upto 20 alphanumeric characters (space, -, . and “comma” allowed).

Custom Fields for Contractors						
Field No.	Active	Field Name	Type	Upload	Mandatory	
1	Yes	Security Number	Textbox	No	No	
2	No	Field 2	Textbox	No	No	
3	No	Field 3	Textbox	No	No	
4	No	Field 4	Textbox	No	No	
5	No	Field 5	Textbox	No	No	

- **Field No:** It displays the serial number and order of the field.
- **Active:** Select the check-box for this field to be visible in Contractor Profile.
- **Field Name:** Enter the desired Name. For example: Security Number.
- **Type:** Select the desired type of the field—Textbox and Date.
- **Upload:** Select the check-box if the configured field requires a provision to upload a document.
- **Mandatory:** Select the check-box for this field to be mandatory.

You can always edit this custom field by clicking the **Edit**  button.

Custom Fields for Contractors						
Field No.	Active	Field Name	Type	Upload	Mandatory	
1	<input checked="" type="checkbox"/>	<input type="text" value="Security Number"/>	Textbox	<input type="checkbox"/>	<input type="checkbox"/>	 
2	No	Field 2	Textbox	No	No	
3	No	Field 3	Textbox	No	No	
4	No	Field 4	Textbox	No	No	
5	No	Field 5	Textbox	No	No	

Click on the **Ok**  button and the pop-up appears.

Confirmation

Changing the 'Type' of the custom field will result in permanent loss of custom field data of all Users. Field will be set to default values. Do you want to continue?

Click the **Yes** button to save the configuration else click the **No** button.

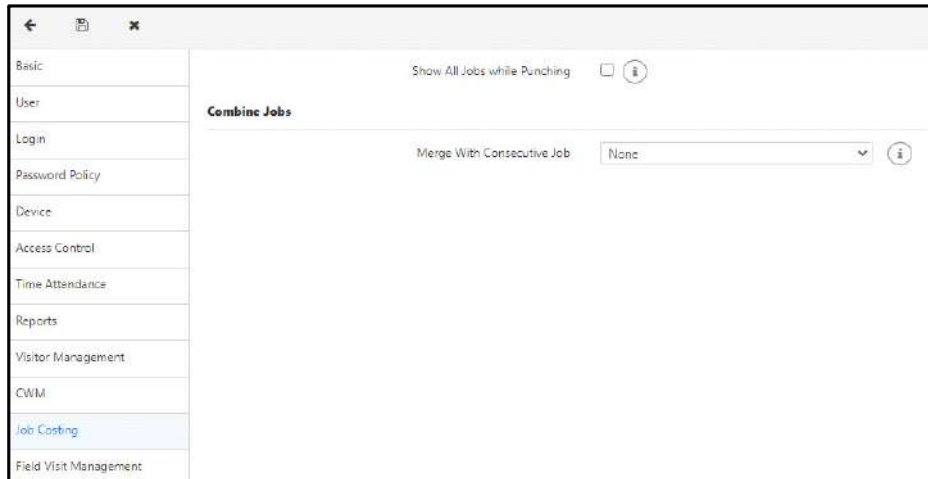
The configured custom fields for Contractor will be visible in the **CWM> Contractor> Contractor Profile> Details**.

Click on the **Save** button to save the configuration.

## Job Costing

When a user shifts from one site to another, the hours spent in the transition are to be added in the **Preceding** or **Succeeding** Job transaction.

To access Job Costing, go to **Admin module > System Configuration > Global Policy > Job Costing** and the following screen appears.



**Show All Jobs while Punching:** Select this check box if you want all the jobs present in the system to be displayed to the users. All jobs will also be displayed in **ESS login /APTA** Jobs drop-down when a user wants to punch.



The **ESS Assignment** check box at the following locations will not be displayed:

- User Module > Multi-User Options > User Configuration > Multi-User Configuration > Job Costing > Default Jobs
- User Module > Multi-User Options > User Configuration > Multi-User Configuration > Job Costing
- Enterprise Structure > Enterprise Groups > Job Costing
- Contract Worker Management > Worker Profile > Job Costing > Default Jobs

## Combine Jobs

**Merge with Consecutive Job:** Select the desired option — None, Preceding, Succeeding.



If few transactions were made and then value in **Merge With Consecutive Job** drop-down is changed, its reflection in existing transactions will be made once “Daily Process” has been done.

## Field Visit Management

This page allows to define policies for managing field visits.

To configure Field Visit Management Policy,

Click **Admin > System Configuration > Global Policy > Field Visit Management** and the following page appears.



The screenshot shows a web application interface for 'Field Visit Management'. On the left is a sidebar with a list of menu items: Basic, User, Login, Password Policy, Device, Access Control, Time Attendance, Reports, Visitor Management, CWM, Job Costing, and Field Visit Management (which is highlighted). The main area contains two fields: 'Scheduling Reporting In-Charge' with a dropdown menu currently showing 'Group In-Charge 2', and 'Schedule Lock Out Period' with a text input field containing the number '2' and a '(Days)' label to its right.

**Scheduling Reporting In-Charge:** Select the Scheduling Reporting In-Charge from the drop down list—Group In-Charge1, Group In-Charge 2, Group In-Charge 3, Group In-Charge 4 or Group In-Charge 5 to give the rights for creating the Field Visit Schedule. The selected Reporting In-Charge can create/modify/ import/export the field schedules whereas the other Reporting In-Charges can only view the schedule.

**Schedule Lock Out Period:** Select the time duration (days) after the Schedule Date, for which the editing of the past schedules will be allowed.

If Lock Out Period is set as 0, then schedule can be edited on the schedule date only.

Example:

Consider Schedule Lock Out Period = 20 days

Current Date = 30/09/2015

If Schedule Date = 15/09/2015, field schedule will be in Edit Mode.

If Schedule Date = 05/09/2015, field schedule will be in View Mode.

## ESS

To access ESS, go to **Admin module > System Configuration > Global Policy > ESS** and the following screen appears.

**Global Policy**

Basic | User | Login | Password Policy | Device | Access Control | Time Attendance | Reports | Visitor Management | CWM | Job Costing | Field Visit Management | **ESS** | SSO Configuration | Face Recognition

Refresh & Run Monthly Process ☒

**Special Functions Configuration**

Allowed Special Functions

- ☒ Regular IN
- ☒ Official Work IN
- ☐ Short Leave IN
- ☒ Break End
- ☐ Overtime IN
- ☒ Regular OUT
- ☒ Official Work OUT
- ☐ Short Leave OUT
- ☒ Break Start
- ☐ Overtime OUT

**Refresh & Run Monthly Process:** Select this checkbox for Refresh icon to be visible at “Current Month” and “Previous Month” section of ESS dashboard.

You can disable this checkbox to prevent the ESS users from refreshing or processing the monthly attendance period which creates ambiguities in attendance data of user.

**Allowed Special Functions:** Select the desired special functions for allowing ESS users to configure these special functions while punch marking.

## SSO Configuration

To access SSO Configuration, go to **Admin module > System Configuration > Global Policy > SSO Configuration** and the following screen appears.



*Make sure you have enabled Login via SSO, refer to [“Login Policy”](#).*

**Relaystate URL:** Enter the relaystate URL.

**IDP Profile Details:** Specify the Details of IDP Profile by selecting Identity provider from drop-down list from options- OKTA, Pingone, ADFS and Azure. For Custom IDP, select *other* option from the drop-down list.



*The dimensions of the Logo for IDP should be 32 x 32 pixels with its size less than or equal to 100kb.*

**COSEC Connections:** Specify the details related to service provider by mentioning SP Identity ID. You may download COSEC Public certificate on click of **Signing Certificate** icon.

If the 'Sign Authentication Request' check-box is enabled for IDP profile as ADFS then, the COSEC Public certificate is mandatory to be uploaded at the ADFS. The User will be notified with an error; 'SSO Login Failed' while login with IDP, if the certificate is not found at the ADFS.



*If the certificate is expired then in that case login response from IDP will be failure and user needs to re new or upload new certificate.*

COSEC Connection

SP Identity ID \*

Signing Certificate

Sign Authentication Request

IDP Configuration

Attribute Mapping

**IDP Configuration:** Configure IDP in this collapsible panel by adding ACS Endpoint, ACS Logout Endpoint, SSO Login and SSO Logout URLs.

For SSO based login to work, make sure you have configured the:

- **ACS (Assertion Consumer Service) Endpoint:** Enter the Domain URL for COSEC Login. The SSO Token will be sent to this location.
- **ACS (Assertion Consumer Service) Logout Endpoint URL:** Enter the Domain URL for COSEC Logout. The logout requests will be sent to this location.
- **SSO Login URL:** The URL entered in the SSO Login URL must be the URL where the user should be redirected.
- **SSO Logout URL:** The URL entered in SSO Logout URL must be the URL that should hit just after the user logout from COSEC.
- **IDP Entity ID:** The URL entered in the IDP Entity ID must be the URL which should be used to identify the IDP to which the SSO request to be send.



*Make sure the IDP Entity ID is configured properly to ensure proper functioning of SSO login.*

- **Upload the IDP Certificate:** Click **Browse** to select the certificate to be uploaded from the local PC.



*If any of the URL or certificate uploaded are invalid or does not exist then SSO should fail.*

IDP Configuration

ACS Endpoint <Domain URL for COSEC Login>/Login/ReceiveSSO

ACS Logout Endpoint <Domain URL for COSEC Login>/Login/ReceiveSLO

SSO Login URL \*

Enable Logout From IDP

SSO Logout URL \*

IDP Entity ID \*

Upload IDP Certificate \* Browse... No file selected.

**Attribute Mapping:** To identify which user wants to access COSEC from the respective IDP, Attribute Mapping is used. Map the Attribute such as User ID, Email, User Name and AD ID to be received in SSO Response.

The image shows a window titled "Attribute Mapping". Inside, there are two columns: "COSEC User Profile Attribute" and "IDP Profile Attribute". The "COSEC User Profile Attribute" column has a dropdown menu that is open, showing the following options: "Select", "Select", "UserID", "Email", "User Name", and "AD ID". The "IDP Profile Attribute" column is currently empty.

After successful SSO Configuration, the Login page will be have additional option under Log in with as shown in figure below:

The image shows a login page. At the top, there is a language dropdown menu set to "English". Below it is a text input field for "User ID, Email or Mobile". To the right of this field is a toggle switch for "Password" and "OTP". Below the input field is a "Password" label and a text input field for the password. To the right of the password field is a toggle switch for "Remember Me" and a link for "Forgot Password?". Below these fields is a "LOGIN" button. At the bottom, there is a section titled "Or log in with:" followed by a button with the "okta" logo and the text "OKTA".

## Face Recognition

To access Face Recognition, go to **Admin module > System Configuration > Global Policy > Face Recognition**, and the following screen appears.

The screenshot shows the 'Global Policy' configuration window with the 'Face Recognition' tab selected. The left sidebar lists various policy categories, with 'Face Recognition' highlighted. The main content area is divided into several sections:

- Conflict Matching Threshold:** A text input field set to '93' with a '%' symbol.
- Group FR:** A checkbox labeled 'Group FR' is unchecked. Below it, 'Matching Threshold (Face) for Group Attendance' is set to '98' with a '%' symbol and an information icon.
- Unidentified Face:** Contains several settings: 'Capture Face of Unidentified User' (unchecked), 'Unidentified Face Clustering Threshold' (set to '98' with '%'), 'Unidentified Face On Device Per Cluster' (set to '5' with a dropdown arrow), 'Show Feedback for Unidentified Face' (unchecked), and 'Generate Unidentified Face Event' (unchecked).
- Mask Coverage:** Contains 'Face Mask Coverage' (set to '98' with '%') and 'Visible Face' (set to '99' with '%').
- Adaptive Face Enrollment:** 'Adaptive Face Templates Per User' is set to '5' with a dropdown arrow.
- APTA Anti-Spoofing:** 'APTA Face Anti-Spoofing Mode' is set to 'Advance' with a dropdown arrow, and 'APTA Face Anti-Spoofing Threshold' is set to '62' with a '%' symbol.

A note at the bottom states: 'Note: For Group FR/ Capture Face of Unidentified User feature to work, ensure that Identification Service is defined in Cosec Admin > License and Service'.

- **Conflict Matching Threshold:** Enter the desired Conflict Matching Threshold value in percentage.

The system will consider this value while comparing the face with the face templates already present in the database.

If a conflict is found, that is, if the system detects a face template in the database similar to the new face, then a conflict error will be displayed.

Make sure a higher value is set for this parameter, as it will result in less equivalent matches with the face templates available in the database.



**Make sure the *Conflict Matching Threshold* is set lower than *Matching Threshold* in *Admin module > System Configuration > Identification Server Configuration*.**

### Example: Face Enrollment of Suresh

- **Conflict Check** checkbox is selected.
- **Conflict Matching Threshold** is set as 93%.

Now during the face enrollment of Suresh, the system will check in its database if his face matches with faces of other users available in the database.

- **Case 1:** If Suresh's face matches 92% with Ram, then the system will allow to enroll Suresh's face.
- **Case 2:** If Suresh's face matches 94% with Shyam, then the system will display the conflict error while enrolling Suresh's face.

## Group FR



For Group FR ("[Mark Group Attendance](#)") Capture Face of Unidentified User and Face Enrollment via Web feature to work, ensure that Identification Service is defined in COSEC Admin > License and Service. For more details refer Admin Management Portal User Manual.

- **Group FR:** Select this checkbox to enable face recognition feature for multiple users for marking attendance at the same time.
- **Matching Threshold (Face) for Group Attendance:** Enter the matching threshold value, which will be used by the COSEC Server to match faces of users from the uploaded group image (having faces of different users) for group attendance. Image can be uploaded by Admin as well as by RIC. To know how to upload a group image, refer "[Mark Group Attendance](#)".

## Unidentified Face

- **Capture Face of Unidentified User:** During face recognition, if a user is not identified by his/her face credential, the system will consider that face as an unidentified face.

Unidentified faces can be found in the following cases:

1. User and face both are not enrolled
  2. User is enrolled but face is not enrolled
  3. User and face are enrolled
- Then the system will capture this unidentified face image and send it to the Admin.
  - Admin will authorize these unidentified face images and once authorized, Admin can enroll the face against the respective user manually or discard it.
  - In case the unidentified face image received is of a new user, then the Admin can create a new user profile and enroll that image against that profile. For more information refer "[Unidentified Face Authorization](#)" in Users> Utilities.
  - Select this checkbox to enable **Capture Face of Unidentified User**.



If you have enabled the **Capture Face of Unidentified User** feature then make sure that you schedule a task of **Delete Unidentified Face** in Admin > System Utilities> Task Scheduler to avoid storage of excess data in the database.

*If you are using Cogniface EBS, make sure you have a centralized IDS installed for this feature to function.*

- **Unidentified Face Clustering Threshold:** Multiple unidentified faces of a single user can be recognized by the system. Such faces will be saved in a cluster for a user.
  - Enter the Unidentified Face Clustering Threshold value which is basically a matching threshold based on which the system will identify whether two unidentified faces recognized, belong to the same user or not.
  - These two unidentified faces will be kept in the same cluster if matching threshold between them is equal to or greater than the value entered by the Admin.

- **Unidentified Face On Device Per Cluster:** Select the number of unidentified faces of an unidentified user that should be received from each device available in a cluster.

Select the number of unidentified faces to be received from each device present in a cluster



*When the number of unidentified faces received from a device in a cluster exceeds the value you entered, then before adding a new unidentified face from the same device, the unidentified face with the highest matching threshold from that device needs to be removed.*

Let's understand with the help of an example:

Value set for **Unidentified Face On Device Per Cluster** = 5

Cluster ID = 1

Unidentified faces from device 1 = 4

Unidentified faces from device 2 = 5

- Case 1: A new unidentified face from device 1 is matched with cluster 1. So new face should be directly added in cluster 1.
- Case 2: A new unidentified face from device 2 is matched with cluster 1. So here new unidentified face should be matched with all 5 unidentified faces. The face having highest matching threshold should be replaced by the new unidentified face from device 2 in cluster 1.
- **Show Feedback for Unidentified Face:** Select this check box, if you wish to display a message on the Device display screen to user's whose face is not identified.



*If you wish that events should be generated for Unidentified Face, enable **Generate Unidentified Face Event**.*

*If you have enabled **Group FR**, **Show Feedback for Unidentified Face** feature will not be functional.*

- **Generate Unidentified Face Event:** Select this check box, if you wish to generate events when a user's face is unidentified.



***Generate Unidentified Face Event** is applicable for **Face** credentials only. To generate events for all other credentials, make sure **Generate Invalid User Events** is enabled under Device Configuration > Advanced > Settings for the desired device.*

*If you wish that a message should be displayed on the device display screen for Unidentified Face, enable **Show Feedback for Unidentified Face**.*

These events can be viewed from **Admin Module > View/Logs > Event View** as well as **Device Module > Reports > Invalid Events**.

If you wish to view the snapshots in the Events/Logs, make sure you have configured Visual Tagging for the desired devices.

## Mask Coverage

- **Face Mask Coverage:** Enter the minimum percentage required for considering face mask in Face Mask Compulsion at the time of user identification.

Set higher percentage values for accurate face mask detection.



- **Visible Face:** Enter the maximum percentage required for the face to be visible during user enrollment/identification.

Set higher percentage value to identify or enroll face without mask accurately.

Setting lower value will increase false acceptance.

This parameter is applicable for Face Enrollment from Enroll Utility, Adaptive Face Enrollment and identification when Face Mask Compulsion is enabled.



*Make sure you have selected the Enable FR checkbox in **Device Configuration> Identification Server> Face Recognition**.*

*If Face Mask Compulsion is disabled in **Device Configuration> Advanced> Settings> Face Mask Compulsion**, then Face Mask Coverage will not be applicable.*

## Adaptive Face Enrollment

- **Adaptive Face Templates Per User:** Select the desired number of Adaptive Face Templates that can be enrolled against a user from the drop-down list.

## APTA Anti-Spoofing

- **APTA Face Anti-Spoofing Mode: Face Anti-Spoofing** feature prevents false face verification by using a photo, video, mask or a different substitute for an unauthorized person's face.

Along with the configurations to be done for Face Anti-Spoofing you also need to take care of the recommended settings for liveness verification and for face recognition, refer [“Recommendations for Liveness Verification”](#) and [“Recommendations for Face Recognition”](#).

Select the desired Face Anti-Spoofing Mode for liveness detection via COSEC APTA Application from the following:

1. **Moderate:** This mode analyzes the texture of face. Select this option when the distance between Camera and Face is less than 2 feet
  2. **Advance:** Select this option when the distance between Camera and Face is more than 1 feet and less than 2 feet.
- **APTA Face Anti-Spoofing Threshold:** Enter the Face Anti-Spoofing threshold value in percentage within the range from 1.00 to 99.99 to identify user's face liveness via COSEC APTA Application for considering him/her as a genuine person.

# Identification Server

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Identification Server is a server which enables to identify the credentials (Finger/Palm/Face) faster in comparison to local identification. COSEC Device do not have heavy storage capacity for credential templates so Identification Server (IDS) can be used which can be installed on 64 bit PC with high storage capacity.

The Identification Service must be installed from the COSEC Setup and configured with Master Server Settings.

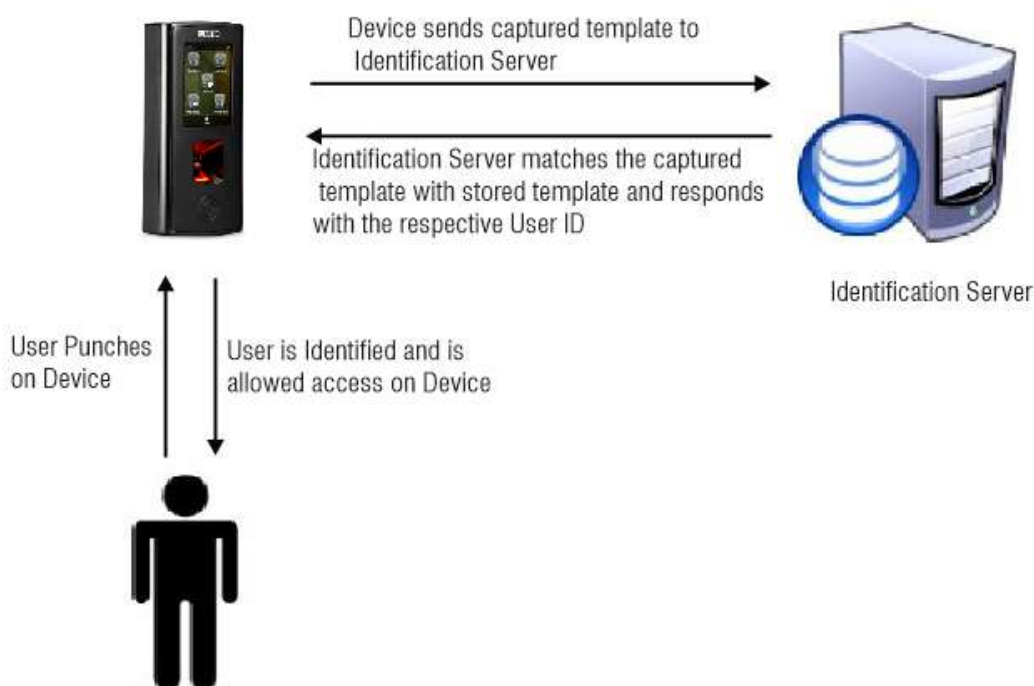


*For Identification Server to work smoothly, ensure that ports specified in Master Service and Identification Service are opened in the Firewall settings.*

When you start the Identification Service; then Identification Server Configuration will be added in Admin module > System Configuration with the IP address and MAC address of the PC where Identification Service is installed.

## Identification of Credential

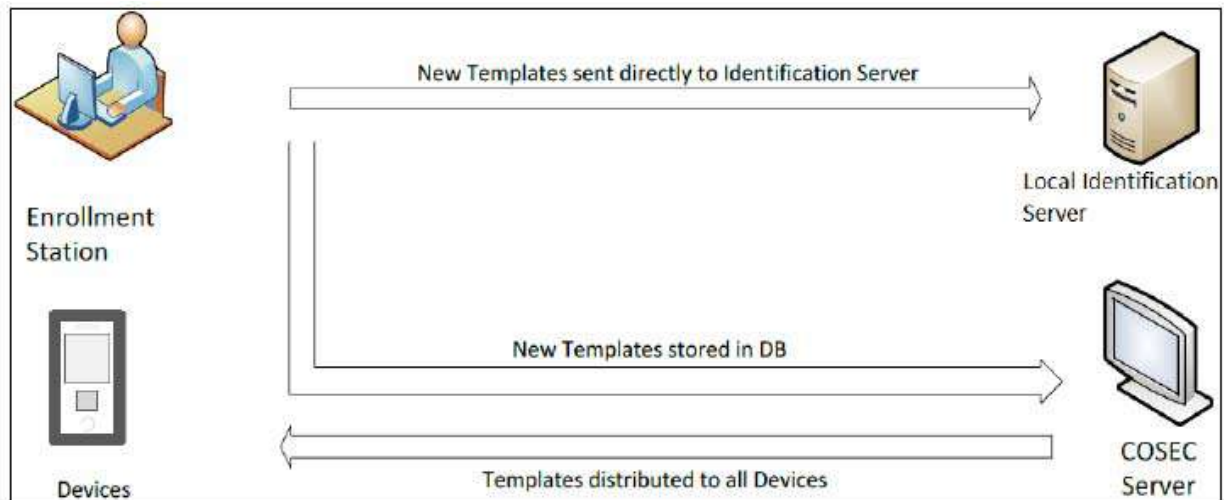
The Identification Server runs as a service of the COSEC Application and enables the COSEC server to perform both centralized as well as localized finger, palm and face template identification across a multi-site installation. Multiple Identification servers can be configured at multiple locations for a single COSEC installation where credentials are maintained locally based on enterprise group assignment. This ensures a faster identification process as matching of credentials is performed only against locally stored templates on each identification server.



Each Identification Server can be configured for a specific location and assigned specific devices and enterprise groups for which it will perform local identification. This will ensure that only the templates of users at this location are available with the Identification Server. You can configure the Identification Server parameters from **Identification Server Configuration** page in the Admin module. For details, refer [“Identification Server Configuration”](#).

On completion of Identification Server configuration, whenever an enrollment is performed at an Enrollment station (or at a door controller), the enrolled templates shall be sent both to the COSEC database as well as the local identification server configured for the site. Now, when a user shows a palm or swipes a finger at any of the

assigned door controllers, the local Identification Server shall respond with a User ID for which the template is matching.



To assign a device to an Identification Server, go to **Devices > Device Configuration > Identification Server**

A local Identification Server will have two databases for storing finger/palm/face templates:

- A **local** database - This stores only the templates of local users and will be used for location-based user identification. This can be set up at the time of server configuration.
- A **global** database - This stores the templates of all COSEC users and will be used at the time of finger/palm enrollment of all COSEC users from an enrollment station.



*For Group FR ("Mark Group Attendance"), Capture Face of Unidentified User, Manual Group Attendance and Face Enrollment via Web feature to work, ensure that Identification Service is defined in COSEC Admin > License and Service. For more details refer Admin Management Portal User Manual.*

The following process enables you to collaboratively setup and configure the Identification Service:

- "Installing Identification Server"
- "Starting Identification Service"
- "Identification Server Configuration"

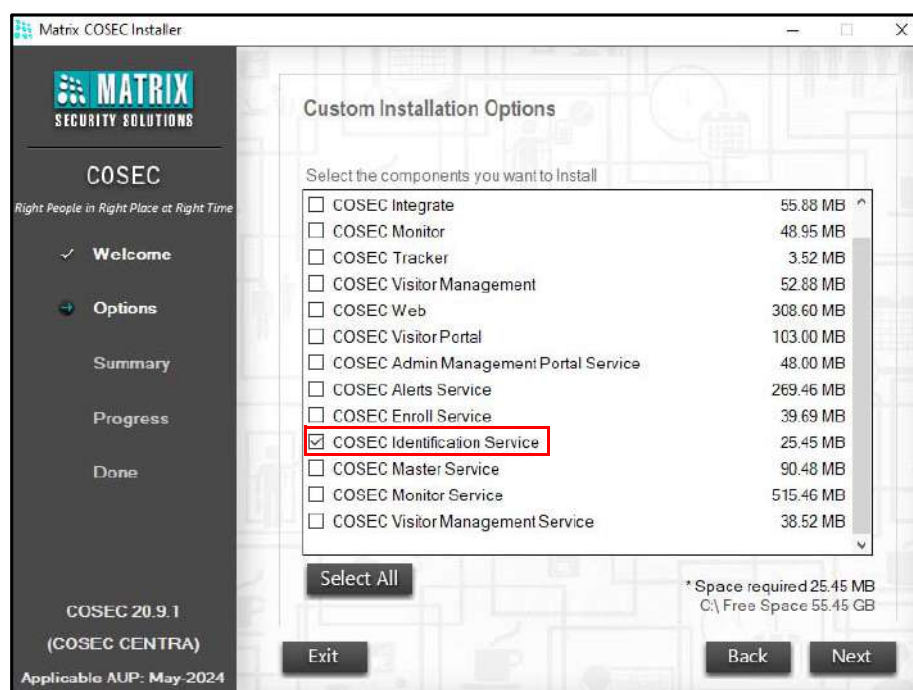
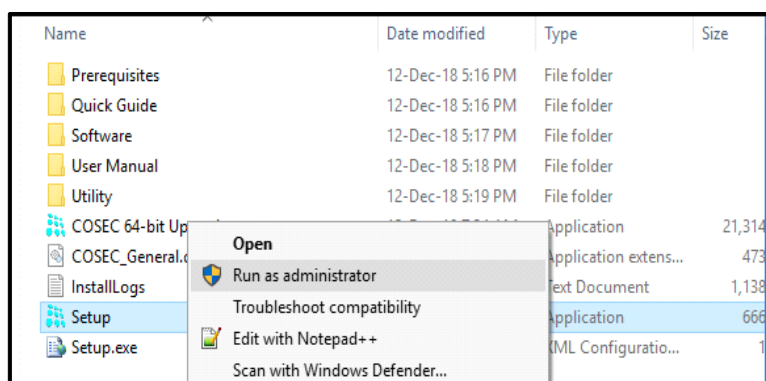
## Installing Identification Server

The Identification Server runs as a service of the COSEC Application. You can install the Identification service from the Custom Installation of COSEC Installer directly or from the COSEC Setup> Software> COSEC\_Identification.

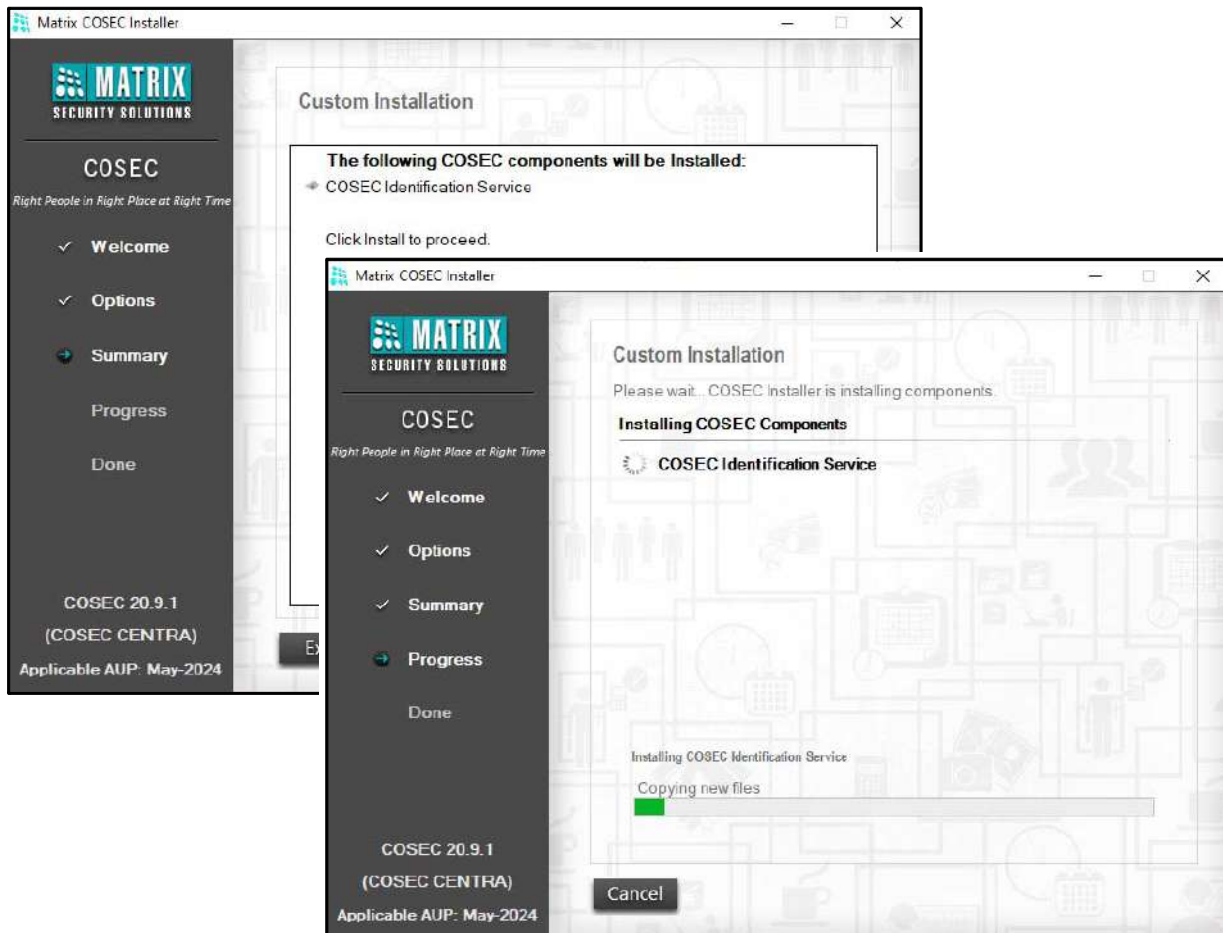
To install the Identification Service right click on the **Setup** and click **Run as Administrator** option as shown in the screen below.



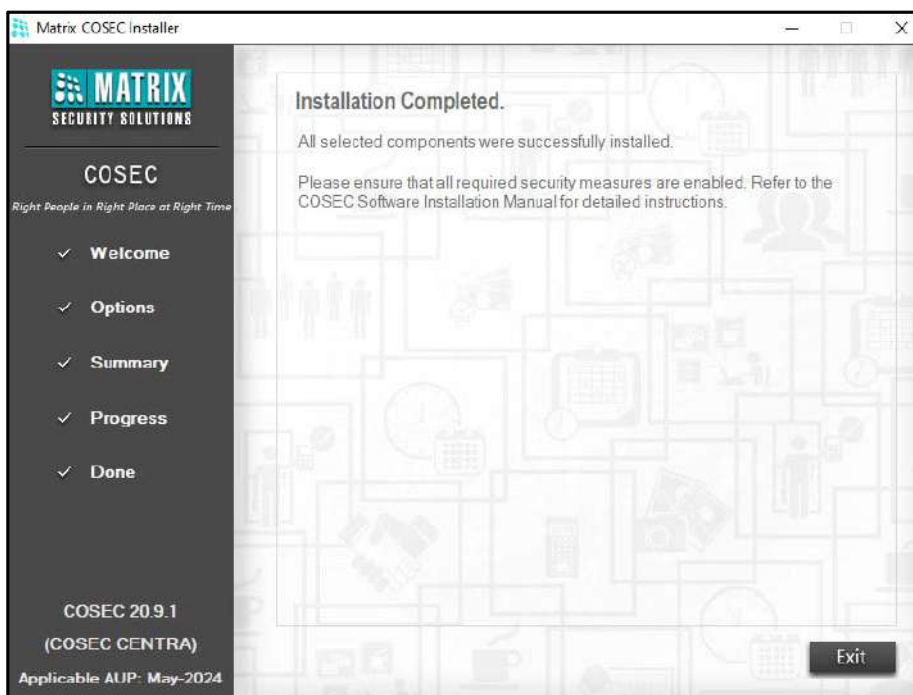
*The Identification Service must be installed on 64 bit computer with high configuration.*



Select **COSEC Identification Service** and proceed for installation.




Once the installation gets over the following screen appears.




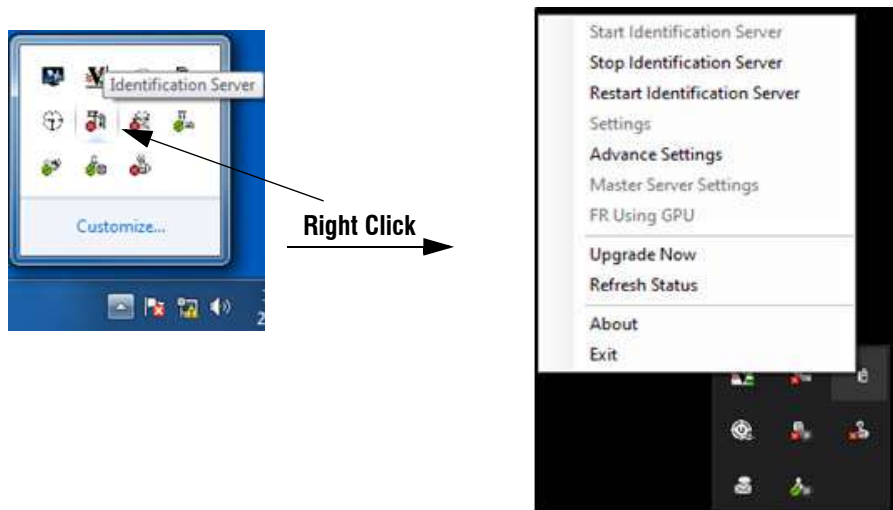
The Identification Server is installed successfully and click **Close** button to exit the wizard. Now, you need to start the service which is described in the following section.

## Starting Identification Service

After the installation, you can start the COSEC Identification Service Application by browsing the folder from **C:\Program Files (x86)\Matrix\COSEC Identification Service**

When Identification Service starts, Identification Service's  icon will be displayed in the System Tray (Notification area) on the right side of the taskbar.

Right click on the  icon.



The options displayed are — Start Identification Service, Stop Identification Service, Restart Identification Server, Settings, Advance Settings, Master Server Settings, FR Using GPU, Version Up-To Date, Refresh Status, About and Exit.

- To start this service through the Service Manager Tray, click on **Start Identification Service**.
- To configure the settings of Identification Service, first stop this service by clicking **Stop Identification Service**, and then click **Settings**. To know more, refer [“Settings”](#).
- To restart this service, click **Restart Identification Service**.
- To configure the settings of logs and tenants in the Identification Service, click **Advance Settings**. To know more, refer [“Advance Settings”](#)
- To configure the settings of Master Service, first stop the Identification Service, then click **Master Service Settings**. To know more, refer [“Master Service Settings”](#)
- To run FR with GPU, you require a graphic card installed in your PC, then click **FR with GPU**. If the graphic card is not available, then the system will continue the FR process without GPU.
- To upgrade the version of Identification Service, click **Version Up-To-Date**.
- To refresh the status of this service, click **Refresh Status**.

- To view the service details, click **About**.
- To close the Service Manager Tray window, click **Exit**.



*When service is running and Admin database loses connectivity or is unavailable then the service will keep running for 24 hours by default after which it will stop.*

*The maximum hours allowed for service is given as the configurable tag in Settings.xml file from **C:\Program Files (x86)\Matrix\COSEC Identification Service**.*

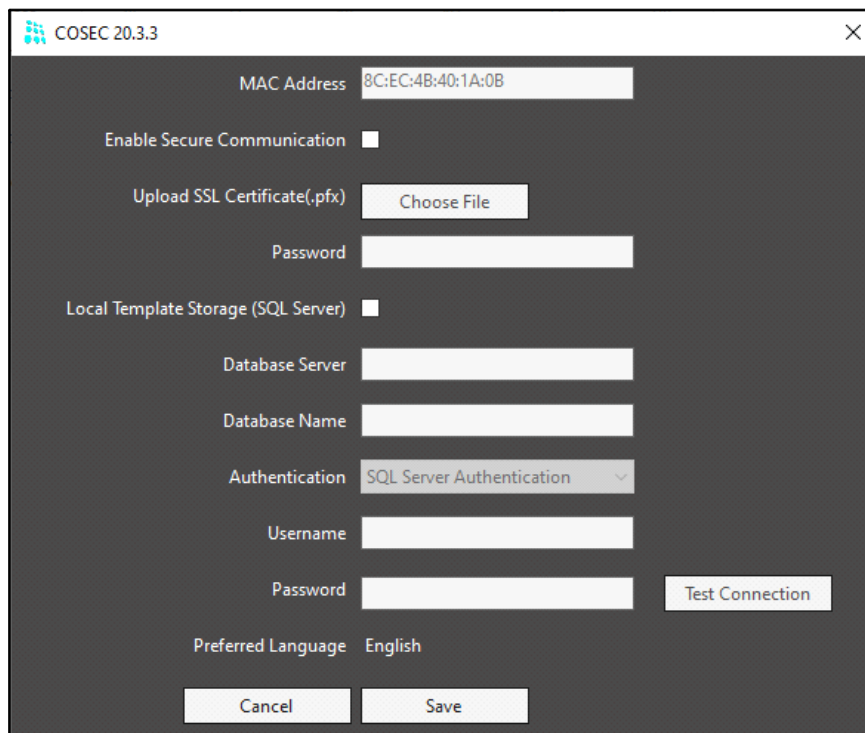
## Settings

To configure the settings of Identification Service, first stop this service, then click on **Settings** from the Service Manager Tray option.

**Login** page appears.

- Enter the **Login ID** and **Password** same as configured in the COSEC Web.
- Click **OK**.

Identification Service's Settings window appears as shown below.



Configure the following parameters:

- **MAC Address:** It displays the MAC address of the system corresponding to the IP address selected from the Tenant Settings screen.
- **Enable Secure Communication:** Select this checkbox to enable secure communication with the COSEC database.
- **Upload SSL Certificate (.pfx):** For secured communication, SSL Certificate is to be uploaded.
- **Password:** Enter the password for accessing SSL Certificate file.
- **Local Template Storage (SQL Server):** Select this checkbox to allow the template storage in the local database for the retention of stored templates when the service gets restarted.
- **Database Server and Database Name:** Enter the server address of the database and its name.



*The Database Server name should be specified using the following syntax:  
Server IP Address\instance name of SQL Server.*

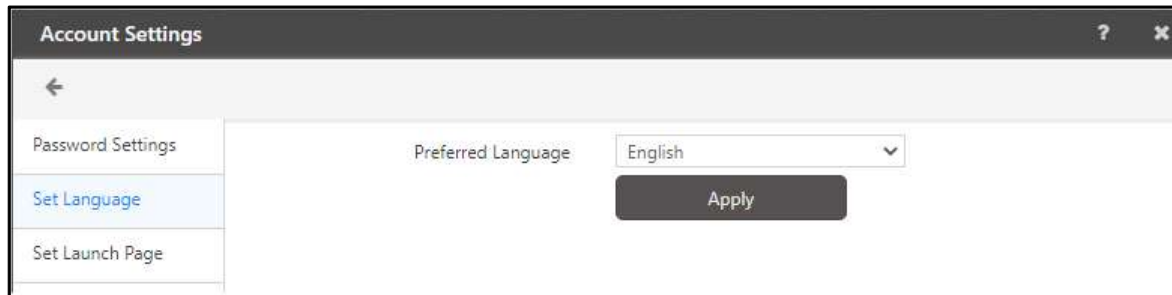
**E.g.** 192.168.104.24\sqlexpress. Here, IP Address is of the system on which the Database Server is installed and sqlexpress is the instance name given to the SQL Server.

- **Authentication:** Select the desired authentication mode — SQL Server Authentication or Windows Authentication.
- **Username and Password:** Enter the user name and the password of the database.

Click **Test Connection** to test the connection of Identification Service with the database.



- **Preferred Language:** It displays the language selected for the COSEC Web for a specific System Account User.

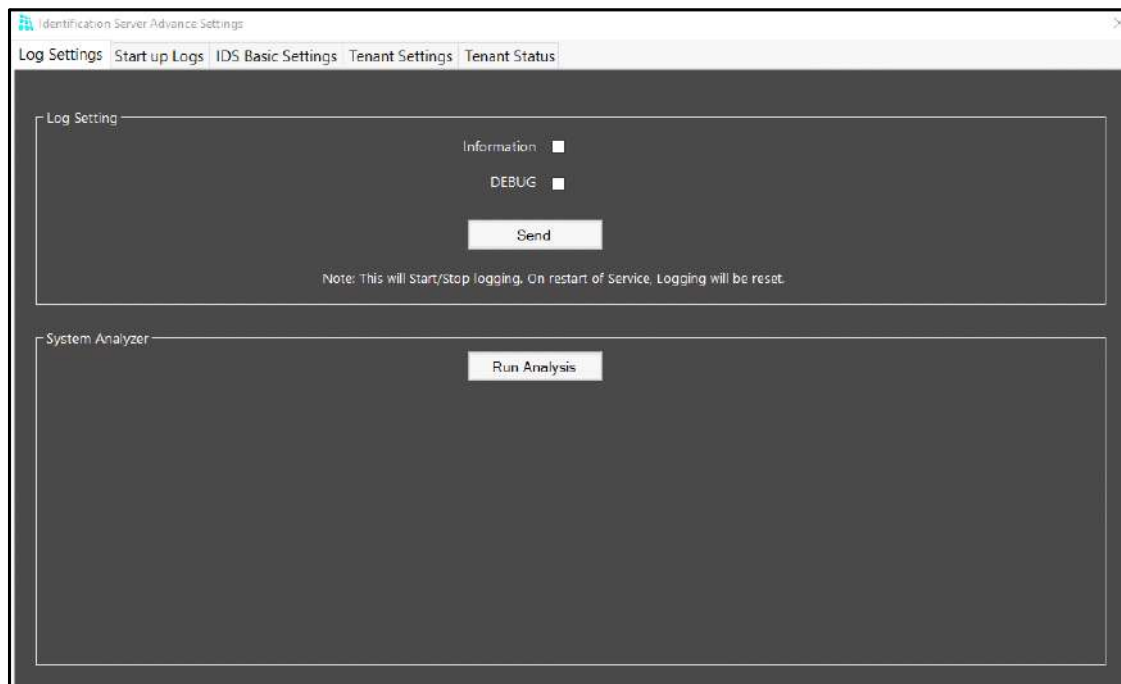


The screenshot shows a dialog box titled "Account Settings" with a dark header bar containing a question mark and a close button. Below the header is a light gray bar with a back arrow. On the left is a sidebar with three items: "Password Settings", "Set Language" (highlighted in blue), and "Set Launch Page". The main area displays the "Preferred Language" label next to a dropdown menu currently set to "English". Below the dropdown is a dark "Apply" button.

- Click **Save** to save the settings or click **Cancel** to discard.

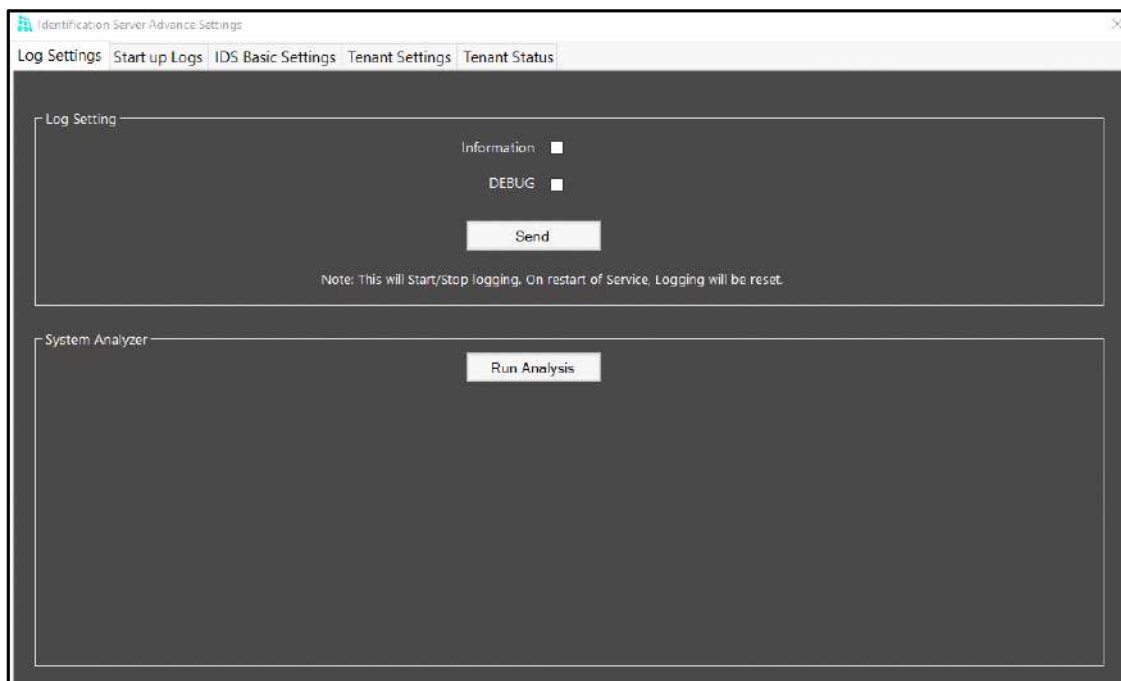
## Advance Settings

In order to configure the settings of logs and tenants in the Identification Service, click **Advance Settings** from the Service Manager Tray option. The **Identification Server Advance Settings** page appears as below:

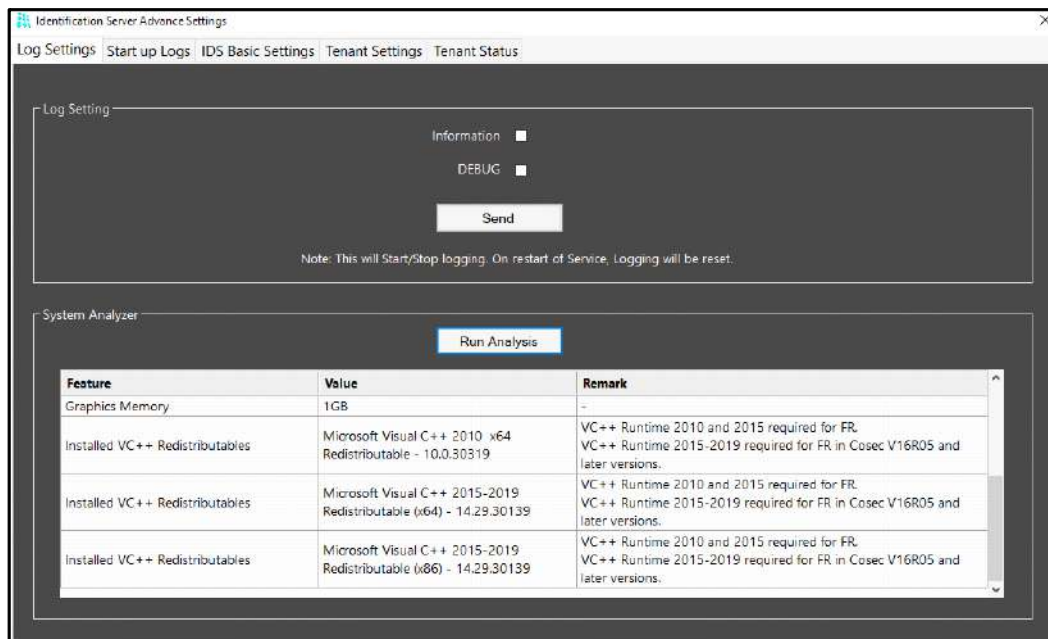
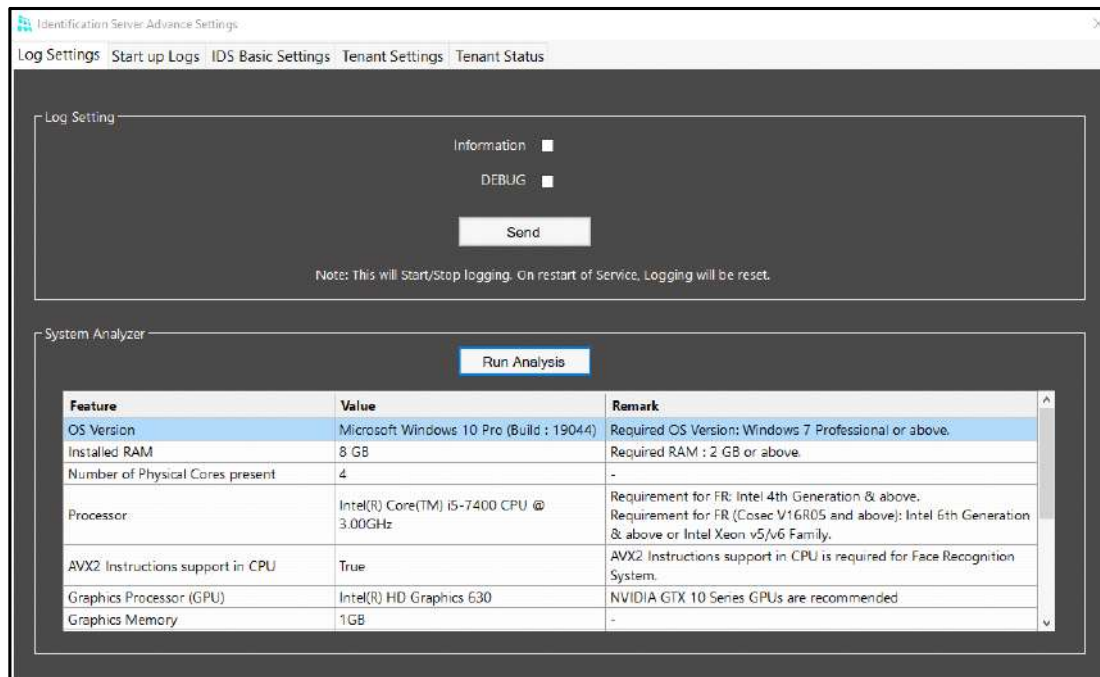


Before you start the configurations, you can check if your PC is compatible and the required pre-requisites for the installation of the Identification Server are fulfilled.

- To check the compatibility,
- In the System Analyzer section, click **Run Analysis**.



- After the process completes, it displays a table with the three columns Feature, Value and Remarks.
- Value mentions the current systems details for each Feature and the Remark column displays what is required for the IDS to function.



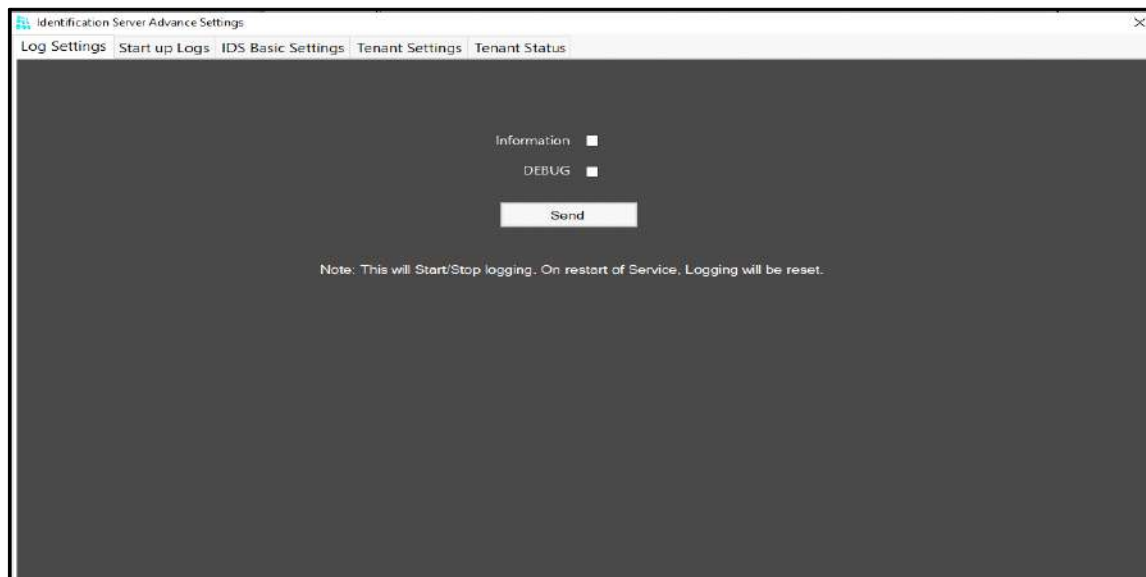
- If all Values are as per the Remarks the IDS will be functional. If not you need to update the system as per the Remarks.

Now, you can continue with the configuration, the screen displays the following tabs:

- “Log Settings”
- “Start up Logs”
- “IDS Basic Settings”
- “Tenant Settings”
- “Tenant Status”

## Log Settings

Click the **Log Settings** tab to enable logs of the IDS Service.



Select the check box of the desired option — **Information**, **DEBUG**.

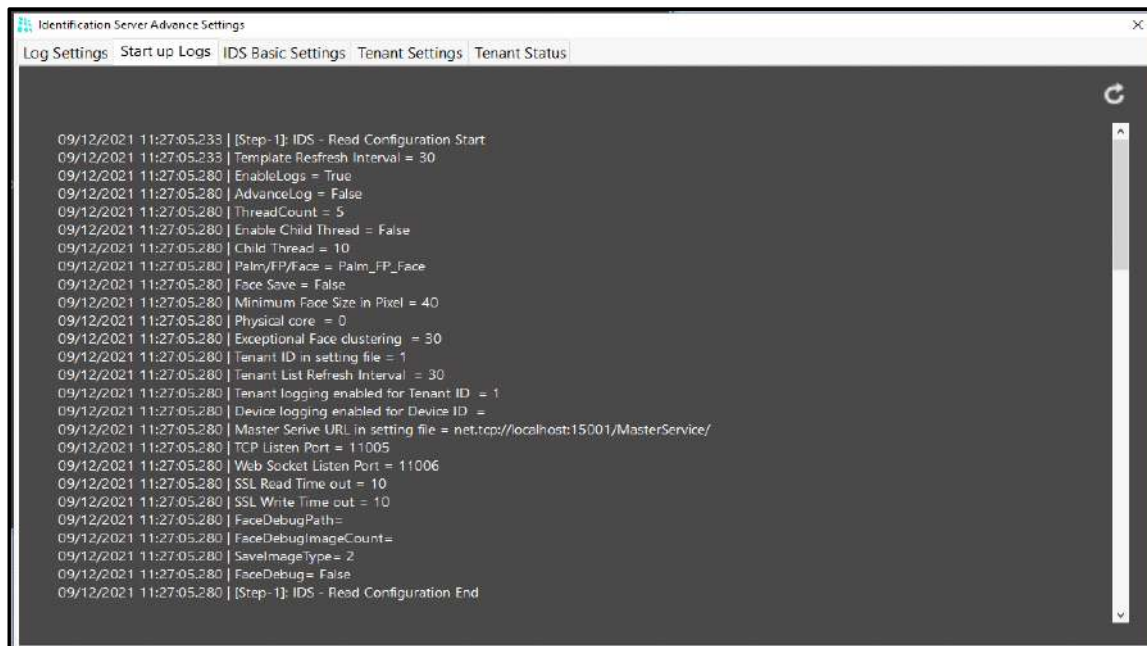
Click **Send** and the respective logs will be stored in the COSEC Identification Server in the Logs folder. These logs can be used for troubleshooting issues related to IDS by the Support Team.




*If in case you restart the Identification Service, the configured log settings will be reset. You need to configure it again.*

## Start up Logs

Click the **Start up Logs** tab if you desire viewing the previous start-up logs of the identification Service. The **Start up logs** page appears as below:



If you stop and then start the IDS, the previous logs will be replaced with the current logs.

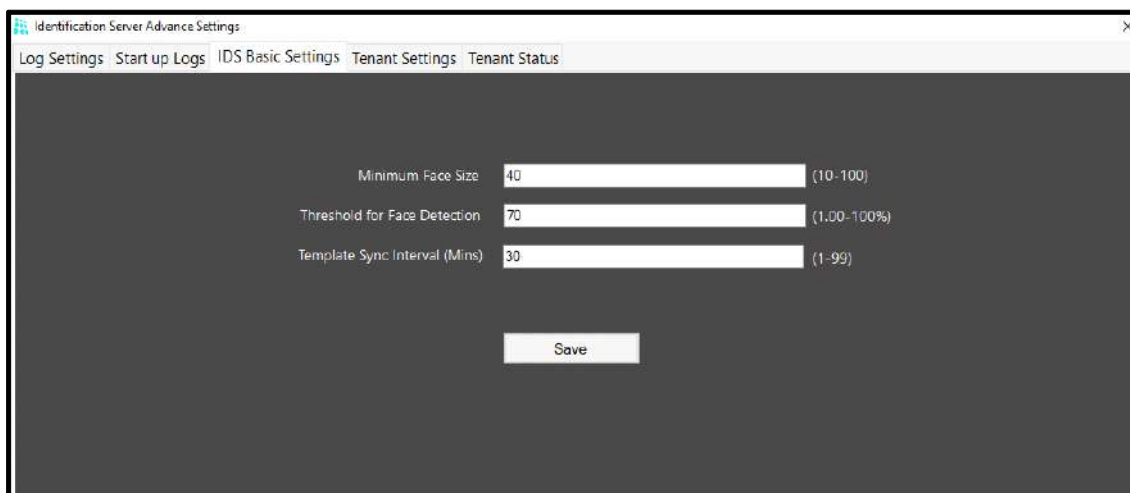
Click **Reload**  , to refresh the logs on the page.



*In the event, when user stops IDS and starts immediately, logs may not be displayed because, before IDS could complete its stopping task, the start command was executed in that case the user will have to reload logs after some time.*

## IDS Basic Settings

Click the **IDS Basic Settings** tab, in order to configure the basic settings of the Identification Service. The page appears as below:

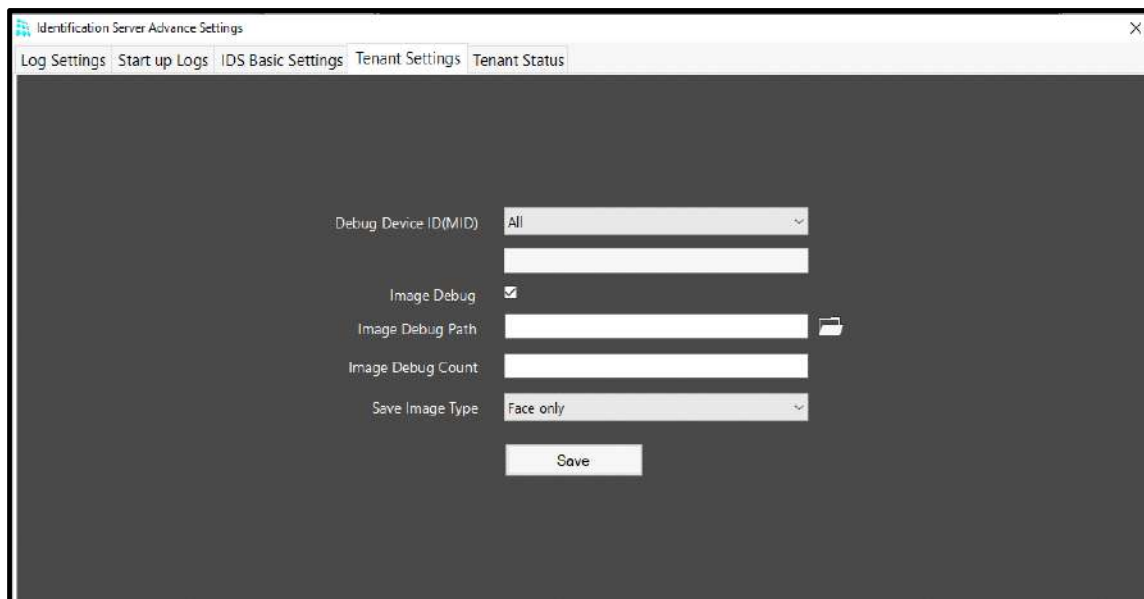


Configure the parameters:

- **Minimum Face Size:** Specify the minimum percentage value of face mandatory in the frame, for the face to be detected.
- **Threshold for Face Detection:** Specify the desired threshold value in percentage to detect a face.
- **Template Sync Interval:** Specify the desired time after which the Identification Service will request the Enroll Service to sync the face template.

## Tenant Settings

Click **Tenant Settings** tab, to configure the parameters of the tenant. The **Tenant Settings** page appears as shown below.



Configure the parameters:


- **Debug Device ID(MID):** You can select the desired device/s from which you intend to get logs as well as face images.

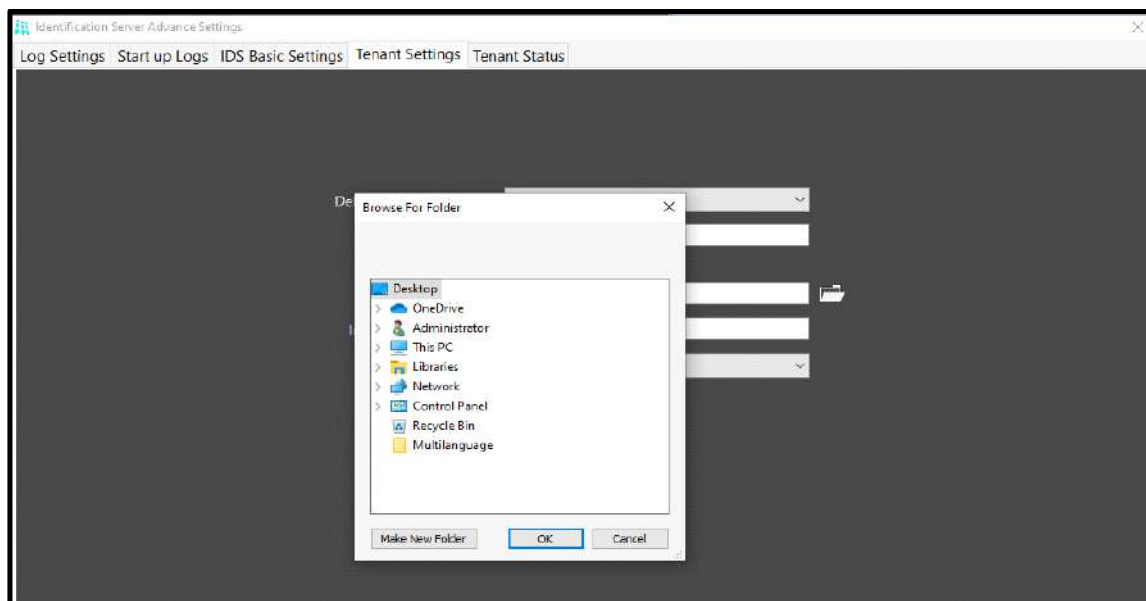
From the dropdown list:

- Click **All** if you desire logs from all the devices.
- Click **Selected** if you desire logs from a specific device. Enter the Device ID in the text box.



*To debug multiple devices make sure you specify Device ID as comma-separated values. For example, if you desire logs/image templates of three devices, that is, 15, 05, 44 then select **Selected** as the Debug Device ID (MID) option and in the text box enter the values as 15, 5, 44.*

- **Image Debug:** Select the checkbox to enable image debugging.
- **Image Debug Path:** If you have enabled the **Image Debug** checkbox, mention the path where you wish to store the images. Click on the icon  and a pop up appears, browse and select the respective folder. Click **OK**.

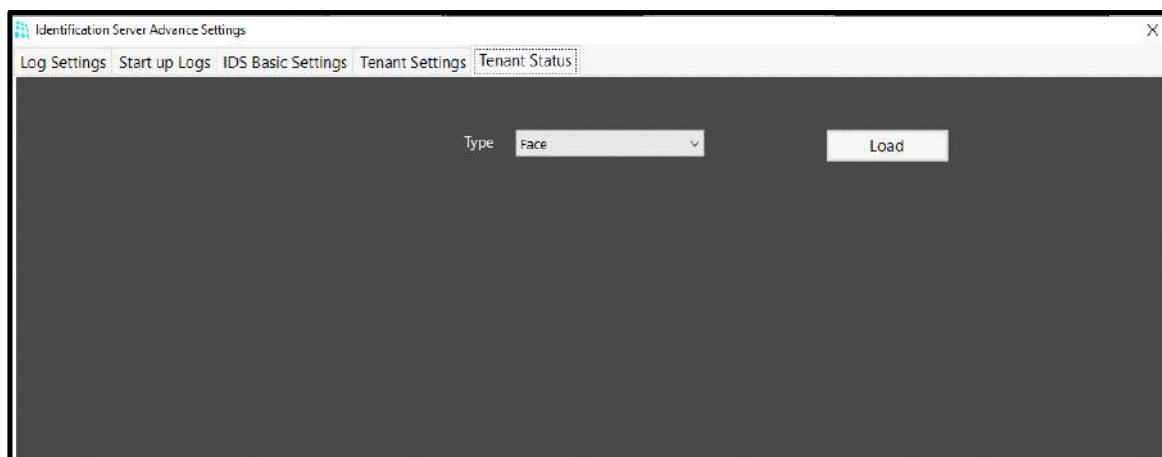


- **Image Debug Count:** Specify the desired number of images you wish to store in the folder on the above mentioned path.
- **Save Image Type:** Select the image type from the drop down list.
  - Select **Face only** if you desire saving only images with face.
  - Select **All** if you desire saving all images, that is, with or without face.

Click **Save** to save the configured parameters.

### Tenant Status

Click the **Tenant Status** tab in order to configure the type of tenant status. The **Tenant Status** page appears as shown below:



- **Type:** From the drop down list select the desired type of tenant status —**Face**, **Palm** or **FP**.

Type

Face

Face

Palm

FP

- Click **Load**. According to the **Type** selected the information regarding the tenant will be displayed. The following screen appears.

Identification Server Advance Settings

Log Settings

Start up Logs

IDS Basic Settings

Tenant Settings

Tenant Status

Type

Face

Load

STAGE

Running

STARTUP DATE TIME

09/12/2021 11:27:34

QUEUE IN

→

1

→

0

THREAD

NAME	STATE	LAST ACTIVITY TIME
FACEPT_1_1	Idle	-
FACEPT_2_1	Idle	-
FACEPT_3_1	Idle	-
FACEPT_4_1	Idle	-
FACEPT_5_1	Idle	-

QUEUE OUT

→

1

→

0

0

User Face Template

09/12/2021 05:51:23

0

Visitor Face Template

09/12/2021 05:51:23

0

All Face Template

09/12/2021 05:51:23

0

Palm Template

09/12/2021 11:20:30

0

Finger Template

09/12/2021 11:20:30

## Master Service Settings

Master Server Settings

Tenant ID

1

Master Service Address

192.168.103.155:15001

IP Address

192.168.103.155-Ethernet

↻

Login ID

sa

Password

\*\*\*\*\*

OK



Configure the following parameters of Master Service:

- **Tenant ID:** Enter the COSEC Tenant ID.
- **Master Service Address:** Enter the IP Address or URL of the Master Service.
- **IP Address:** If your PC is having multiple network connections, the IP Addresses of these networks will be displayed in the drop down list.

Select the desired IP Address.

The IP Address of the enabled network will be set as the default IP Address for this service.



*If none of the network connections are enabled, then IP Address of the running service will get updated to 127.0.0.1 - Localhost and the services will continue running.*


*To restore the IP Address to the desired one, you must first enable the connection from network connections and then select its IP Address from the drop down list manually.*



*As the Windows10 PC boots up fast, so services will check and retry for the availability of assigned IP address before finally moving to 127.0.0.1*

*If more than one network connections are enabled then the first enabled network connections IP Address will be assigned to all the services on service startup after installation.*

*If the PC is assigned a DHCP Addressing scheme, then whenever the IP Address changes, the same will be updated against every service.*

Click **Refresh IP List**  to update the list of all network adapters (network connections).

- **Login ID and Password:** Enter the Login ID and Password same as configured in the COSEC Web.

Click **Save** to save the settings.



*Existing COSEC users must upgrade to COSEC V9R3 for the Identification Service feature to function as expected. On upgrading to COSEC V9R3, any Identification Server configuration performed from the device Web page shall be reset and will require to be re-configured from the COSEC Web application. It is recommended that all Identification Server configuration be performed from the COSEC Web application only.*

## Identification Server Configuration

This page enables the administrator to configure multiple Identification Servers and assign devices and enterprise groups to each of them. An Identification Server can be assigned to multiple enterprise groups (i.e. department, branch etc.) at a time. However a device can be assigned to only one Identification Server at a time.



*For Group FR ("[Mark Group Attendance](#)"), Capture Face of Unidentified User, Manual Group Attendance and Face Enrollment via Web feature to work, ensure that Identification Service is defined in COSEC Admin > License and Service. For more details refer Admin Management Portal User Manual.*

To configure an Identification Server,

Go to **Admin module > System Configuration > Identification Server Configuration** and the following screen appears.

**Identification Server Configuration**

← + ✎ 🗑️ 💾 ✕ ↺

ID \* 1 Identification - 4CCC6A15649C

MAC Address \* 8C : EC : 4B : 4C : 53 : CC

Server Address 192.168.103.27

Support Global Identification ☐

Enable Secure Communication ☐

Matching Threshold(Face) \* 94.00 %

Biometric Group Based Identification ▼

Assign Groups ▼

Assign Devices ▼

- When an Identification Server and the COSEC Server both are installed on the same system, then the identification server will get automatically added on the Identification Server Configuration page.
- You only need to configure other required parameters. But if an identification server is installed on the other system then you need to configure it manually by clicking **New** button and providing the following parameters as described below.
- **Name:** Enter a suitable name for the Identification Server.
- **MAC Address:** Enter MAC Address of the PC where Identification Server is installed.
- **Server Address:** Enter IP Address of the system where Identification Server is installed.
- **Support Global Identification:** Select the check-box to enable identification of all the COSEC users whose finger/palm has been enrolled from an enrollment station.
  - If not selected then templates of only those users will be identified which are stored locally.
- **Enable Secure Communication:** Select the check-box to establish secure communication with server.
- **Matching Threshold (Face):** Enter the Matching Threshold in percentage for Face identification. It also accepts upto two decimal points.

*Example: If you set Matching threshold as low (e.g.: 20%) then your Face may match with other person. But if you set matching at high percentage (e.g.: 90%) then more accurate matching of your template will be done and accordingly access will be granted or denied.*

## Biometric Group Based Identification

In the Biometric Group Based Identification panel, configure the required parameters for minimizing the search time of template by classifying the templates based on user's biometric group number. Also, configure parameters for handling Roaming Users template.



*The firmware (V10R2) of Identification Server and Devices must be upgraded to work in sync for searching templates in threads.*

- **Enable:** Select the checkbox to activate the biometric group based identification feature. If enabled, Identification Server will maintain the biometric group wise user templates.
- **Extended Search:** Select the checkbox to do extended search, if the user's biometric group specific template match is below the configured matching threshold.
- **Extended Search In:** If extended search is enabled, select the group for which Extended Search In should be done, i.e. Roaming Group or All.
- **Matching Threshold Palm/FP:** Enter the Matching Threshold in percentage for Palm identification. Also, select the Matching Threshold (FP) for finger print to be configured for matching the FP template.

If you set Matching threshold as low (Example: 20%) then lose matching may be found. i. e. your template may match with other person. But if you set matching at high percentage (Example: 70%) then more accurate matching of your template will be done and accordingly access will be granted or denied.

### Example:

The Biometric group number of Device at R&D is 1 and HO is 2. The default Biometric group number of users belonging to R&D is 1 and those of HO is 2.

A user Ashish (roaming user) belonging to HO (biometric group no.2) when regularly punches on device at HO, then his templates are searched from thread handling group number2. The Identification server stores the Roaming user templates at 0.

When Ashish punches at R&D then his template is searched from group1. If you have enabled Extended search and selected Roaming group, then the template will specifically search from Roaming user templates. This will reduce the time for identification. If you select option for extended search to All, then templates will be searched from all the threads.

## Assign Groups

In the **Assign Groups** panel, select enterprise groups to be assigned to the Identification Server. For e.g. Admin can select the Group “Branch” in User Filter and select users of Branch-1 to be assigned to the current Identification Server. Similarly all users of Branch-2 can be assigned to a different Identification Server.

The screenshot shows the 'Assign Groups' panel. It includes a 'Select Users' dropdown set to 'Group Wise', a 'Select Group' dropdown set to 'Organization', and an 'Organization' field with a red asterisk. Below these are input fields for 'ID' and 'Name', and a search bar. A table lists groups with columns for ID, Name, and Group. The first row shows ID '1', Name 'Organization-1', and Group 'Organization'. There are trash icons for each row.

ID	Name	Group
1	Organization-1	Organization

## Assign Devices

Similarly, in the **Assign Devices** panel, select one or multiple devices to be assigned using the picklist button.

The screenshot shows the 'Assign Devices' panel. It has two main sections: 'Face Recognition' and 'Other Biometric Credentials'. Each section has a search bar, a 'Device' label, and input fields for 'ID' and 'Name'. The 'Face Recognition' section contains a table with columns for MID, Name, and Type. The first row shows MID '1', Name 'ARGO-Device-1', and Type 'ARGO'. The 'Other Biometric Credentials' section shows a table with columns for MID, Name, and Type, but it is currently empty, displaying 'No Data'.

MID	Name	Type
1	ARGO-Device-1	ARGO

No Data

- **Face Recognition:** Click the Device picklist, to select and assign these to the Identification Server. This is where the Face templates will be saved.

- Click the **Device** picklist. The **Picklist For Direct Doors** pop-up appears.

Picklist For Direct Door

Total Selected: 0 Records

Search  [Show Selected](#)

☐ Select All

<input type="checkbox"/>	Door No ▲	Name	Type
<input type="checkbox"/>	59	RnD1 BOOM BARRIER IN	Vega Controller
<input type="checkbox"/>	60	RnD1 BOOM BARRIER OUT	Vega Controller
<input type="checkbox"/>	88	Factory Admin FMX	Door FMX
<input type="checkbox"/>	113	RnD1 GF MODE TRIPOD RIGHT OUT	MODE
<input type="checkbox"/>	125	RnD1 GF MODE TRIPOD LEFT IN	MODE

OK Cancel

- You can either select particular devices or can select all the devices at once.
- To select particular devices, select the check boxes of the desired devices.

Picklist For Direct Door

Total Selected: 2 Records

Search  [Show Selected](#)

☐ Select All

<input type="checkbox"/>	Door No ▲	Name	Type
<input type="checkbox"/>	59	RnD1 BOOM BARRIER IN	Vega Controller
<input checked="" type="checkbox"/>	60	RnD1 BOOM BARRIER OUT	Vega Controller
<input checked="" type="checkbox"/>	88	Factory Admin FMX	Door FMX
<input type="checkbox"/>	113	RnD1 GF MODE TRIPOD RIGHT OUT	MODE
<input type="checkbox"/>	125	RnD1 GF MODE TRIPOD LEFT IN	MODE

OK Cancel

OR

- To select all the devices at once, select the **Select All** check box. The devices on all the pages will be selected.

Picklist For Direct Door

Total Selected: 5 Records

Search

☒ Select All

<input checked="" type="checkbox"/>	Door No ▲	Name	Type
<input checked="" type="checkbox"/>	59	RnD1 BOOM BARRIER IN	Vega Controller
<input checked="" type="checkbox"/>	60	RnD1 BOOM BARRIER OUT	Vega Controller
<input checked="" type="checkbox"/>	88	Factory Admin FMX	Door FMX
<input checked="" type="checkbox"/>	113	RnD1 GF MODE TRIPOD RIGHT OUT	MODE
<input checked="" type="checkbox"/>	125	RnD1 GF MODE TRIPOD LEFT IN	MODE

OK Cancel

- Click **OK**.
- The selected devices appears in the grid.

Assign Devices

Face Recognition

Device  ID  Name

Search

MID	Name	Type	
59	RnD1 BOOM BARRIER IN	Vega Controller	
60	RnD1 BOOM BARRIER OUT	Vega Controller	
88	Factory Admin FMX	Door FMX	
113	RnD1 GF MODE TRIPOD RIGHT OUT	MODE	
125	RnD1 GF MODE TRIPOD LEFT IN	MODE	

- You can also delete the desired devices. To do so, click the **Delete** icon of the respective device.
- **Other Biometric Credentials:** Click the Device picklist, to select and assign these to the Identification Server. This is where the Other Biometric credentials will be saved.

- Click the **Device** picklist. The **Picklist For Direct Doors** pop-up appears.

Picklist For Direct Door

Total Selected: 0 Records

Search  [Show Selected](#)

☐ Select All

<input type="checkbox"/>	Door No ▲	Name	Type
<input type="checkbox"/>	59	RnD1 BOOM BARRIER IN	Vega Controller
<input type="checkbox"/>	60	RnD1 BOOM BARRIER OUT	Vega Controller
<input type="checkbox"/>	88	Factory Admin FMX	Door FMX
<input type="checkbox"/>	113	RnD1 GF MODE TRIPOD RIGHT OUT	MODE
<input type="checkbox"/>	125	RnD1 GF MODE TRIPOD LEFT IN	MODE

OK Cancel

- You can either select particular devices or can select all the devices at once.
- To select particular devices, select the check boxes of the desired devices.

Picklist For Direct Door

Total Selected: 2 Records

Search  [Show Selected](#)

☐ Select All

<input type="checkbox"/>	Door No ▲	Name	Type
<input type="checkbox"/>	59	RnD1 BOOM BARRIER IN	Vega Controller
<input checked="" type="checkbox"/>	60	RnD1 BOOM BARRIER OUT	Vega Controller
<input checked="" type="checkbox"/>	88	Factory Admin FMX	Door FMX
<input type="checkbox"/>	113	RnD1 GF MODE TRIPOD RIGHT OUT	MODE
<input type="checkbox"/>	125	RnD1 GF MODE TRIPOD LEFT IN	MODE

OK Cancel

OR

- To select all the devices at once, select the **Select All** check box. The devices on all the pages will be selected.

Picklist For Direct Door

Total Selected: 5 Records

Search  Show Selected

☒ Select All

<input checked="" type="checkbox"/>	Door No ▲	Name	Type
<input checked="" type="checkbox"/>	59	RnD1 BOOM BARRIER IN	Vega Controller
<input checked="" type="checkbox"/>	60	RnD1 BOOM BARRIER OUT	Vega Controller
<input checked="" type="checkbox"/>	88	Factory Admin FMX	Door FMX
<input checked="" type="checkbox"/>	113	RnD1 GF MODE TRIPOD RIGHT OUT	MODE
<input checked="" type="checkbox"/>	125	RnD1 GF MODE TRIPOD LEFT IN	MODE

OK Cancel

- Click **OK**.
- The selected devices appears in the grid.

Other Biometric Credentials

Device  ID  Name

Search

MID	Name	Type	
57	RnD1 GF TRIPOD LEFT OUT	PVR Door	
94	RnD1 GF TRIPOD RIGHT IN	PVR Door	
102	RnD2 3rd Floor PVR	PVR Door	
103	RnD2 2nd Floor PVR	PVR Door	
104	RnD2 4th Floor PVR	PVR Door	

1 - 5 of 15 records


« < 1 2 3 > »

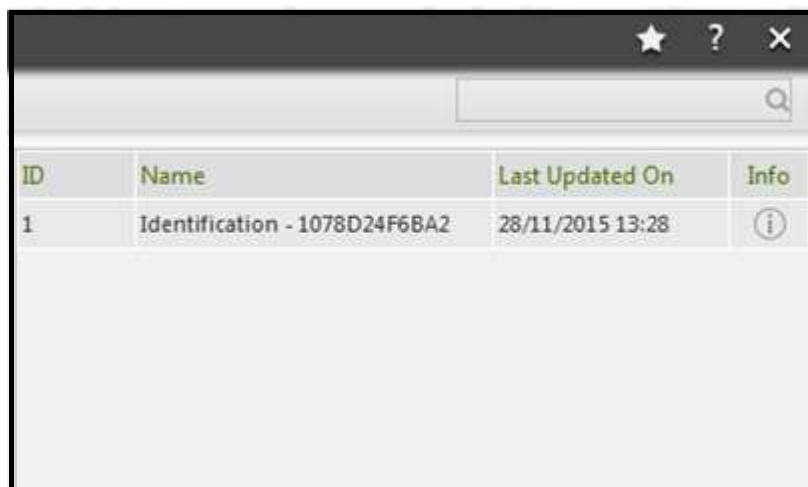
- You can also delete the desired devices. To do so, click **Delete** of the respective device.




The configuration done in Assign Devices for Face Recognition and Other Biometric Credentials will also be updated into the Device Configuration > Identification Server section.



Click **Save** . The new Identification Server will appear in the grid list on the right hand side of the page as shown below.

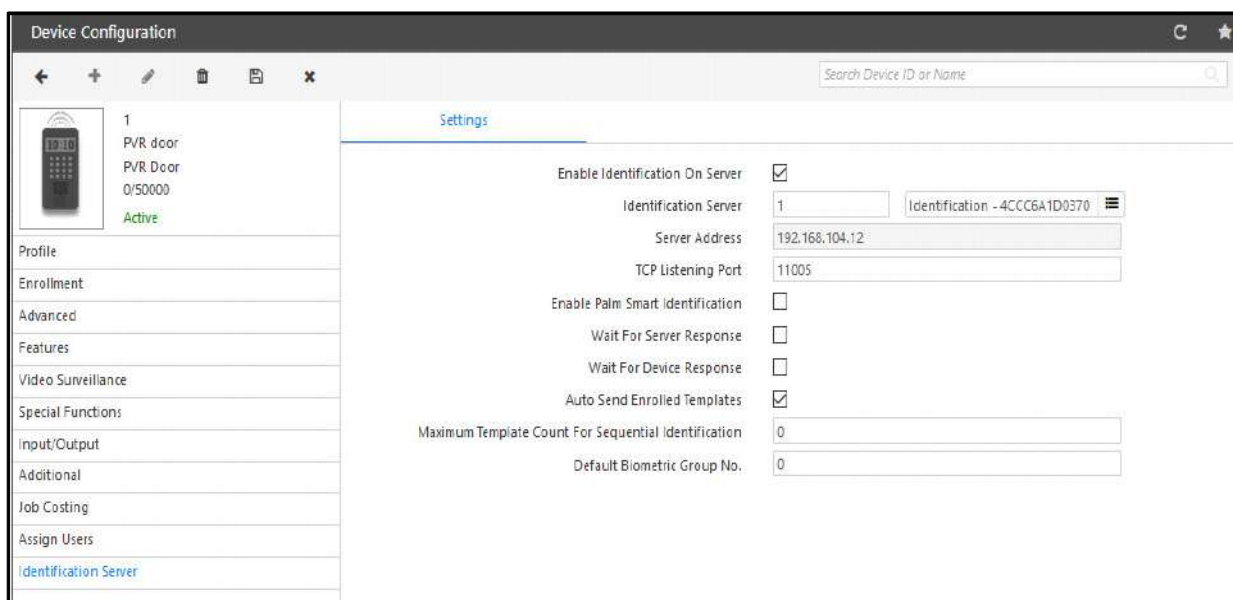


ID	Name	Last Updated On	Info
1	Identification - 1078D24F68A2	28/11/2015 13:28	

The **Last Updated On** column displays the date and time at which the server last came online. Hover your mouse on the **Info** icon to view the time duration since the server last came online.

After the IDS configuration has been done in System Configuration, you now need to configure the parameters in the desired devices.

The COSEC device (Eg: PVR door) on which identification of user is to be done through IDS; must be assigned the IDS settings from Device Configuration> Identification Server.



1

PVR door

PVR Door

0/50000

Active

Profile

Enrollment

Advanced

Features

Video Surveillance

Special Functions

Input/Output

Additional

Job Costing

Assign Users

Identification Server

Settings

Enable Identification On Server

☒

Identification Server

1

Identification - 4CCC6A1D0370

Server Address

192.168.104.12

TCP Listening Port

11005

Enable Palm Smart Identification

☐

Wait For Server Response

☐

Wait For Device Response

☐

Auto Send Enrolled Templates

☒

Maximum Template Count For Sequential Identification

0

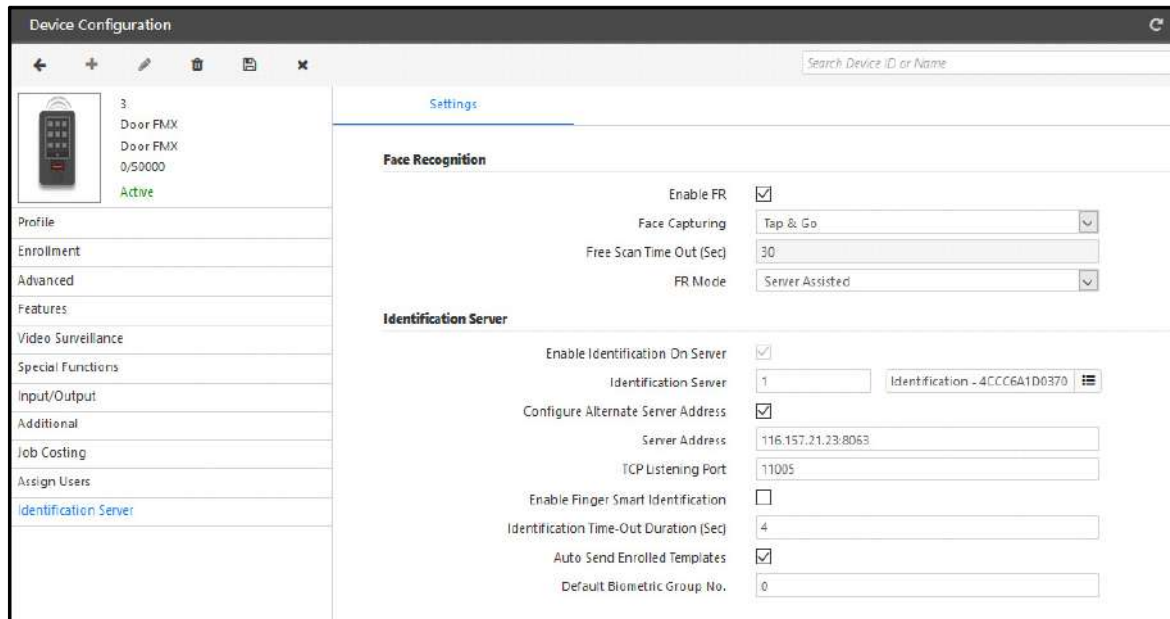
Default Biometric Group No.

0

The enrolled templates of user are stored in Identification server.

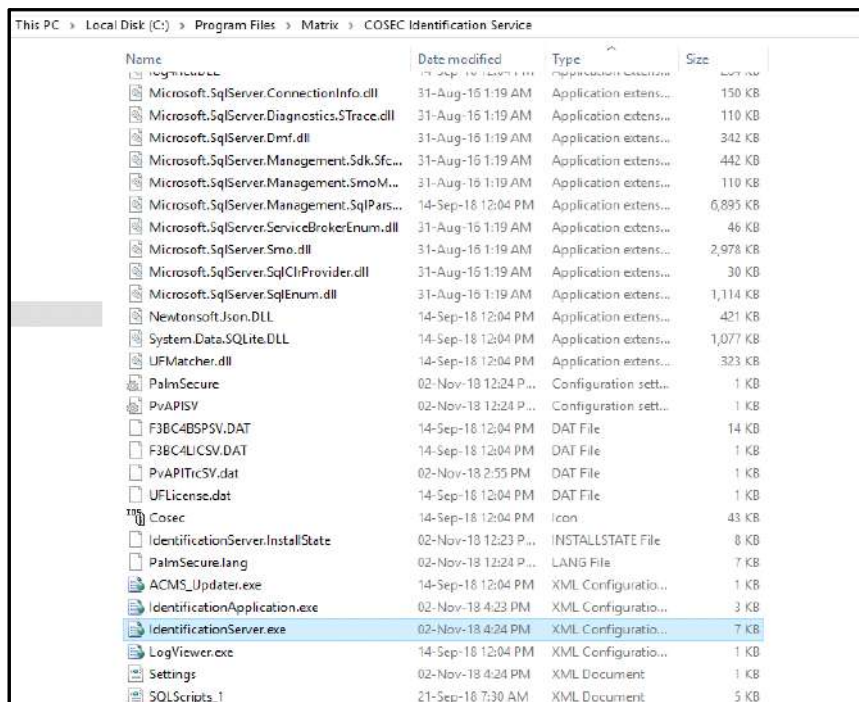
Now when a user punches on PVR door, his palm template will go to Identification server for matching. The Identification server matches the palm template with the stored templates and gives the response to device and hence user is identified/rejected accordingly.

When new template of user is enrolled, it can be sent to the identification server if “Auto Send Enrolled Templates” checkbox is enabled. Also Identification server automatically checks for new templates after every 2 minutes (by default).



For Devices such as FMX, Vega, ARGO and MODE, the identification of Face can be done through Local as well as Server Assisted Mode. For Server Assisted Mode; FR server must be installed and its IP address and Port must be specified in the Configuration file as explained below.

The **Settings** File and **Configuration** File is available in Program files as shown below.



```

73 <appSettings>
74 <add key="DBRetryInterval" value="10" />
75 <add key="ListenPort" value="11005" />
76 <add key="EnableIdsLogs" value="true" />
77 <add key="EnableLogs" value="false" />
78 <add key="AdvanceLog" value="false" />
79 <add key="ThreadCount" value="5" />
80 <add key="EnableChildThread" value="false" />
81 <add key="ChildThreadCount" value="10" />
82 <add key="RefreshMinute" value="30" />
83 <add key="EnrollMinute" value="1" />
84 <add key="PopulationSource" value="1" />
85 <add key="GroupLimit" value="999" />
86 <add key="MaxFRRRequested" value="0" />
87 <add key="GuidedModeRefresh" value="60" />
88 <add key="PalmOrFP" value="2" />
89 <add key="FPGGroupLimit" value="500" />
90 <add key="FPSecurityLevel" value="4" />
91 <add key="FPFastMode" value="false" />
92 <add key="FPMaxResult" value="1" />
93 <add key="FPTemplateFormat" value="1" />
94 <add key="ClientSettingsProvider.ServiceUri" value="" />
95 <add key="RefreshOnContinuesSocketClose" value="false" />
96 <add key="SocketCloseCount" value="12" />
97 <add key="SocketCloseMinut" value="2" />
98 <add key="SocketLogExe" value="false" />
99 <add key="SocketLog" value="false" />
100 <add key="log4net.internal.Debug" value="false" />
101 <add key="IsInternal" value="true" />
102 <add key="HttpEnable" value="0" />
103 <add key="IsSSL" value="false" />
104 <add key="TenantID" value="1" />
105 <add key="MasterUrl" value="net.tcp://localhost:15001/MasterService/" />
106 <add key="FaceServerIP" value="" />
107 <add key="FaceServerPort" value="" />
108 <add key="FaceTCPorHTTTP" value="" />
109 </appSettings>

```

You can edit the tag as per your requirement. The description of tag can be viewed in **Parameter Description** comments when the particular tag is selected.

Some of the tags are described here:

**DBRetryInterval:** When Identification service loses connectivity with database server; then it is required to connect again so Identification service will retry to connect with Database after every 10 seconds of interval. You can edit this interval.

**ThreadCount:** It is the number of Identification requests handled by Identification server at once. The default is 5 i.e. at a time identification can be done through 5 devices.

**EnrollMinute:** When new enrollment is done; then after every 2 minutes (default) the templates will be updated in Identification server. You can edit this time for updating the enrolled templates to identification server.

**GroupLimit:** When there are more than 4000 Palm templates in Identification server then templates can be grouped which will reduce the time for identification. Suppose there are 10,000 templates in a server and the algorithm can run for 3999 templates at once so the templates will be divided into 3999,3999 and 2002 for faster identification in group. The default grouping is for 999 templates.

**PalmOrFP:** The default value is 2 = Palm+ FP. To include Face credential change this parameter to 6 = Palm + FP + Face.

**FPGGroupLimit:** When there are more than 50000 FP templates in Identification server then templates can be grouped which will reduce the time for identification. The default grouping is for 500 templates.

**FPSecurityLevel:** Default is 4, max is 7 and minimum is 1

**FPTemplateFormat:** FP Template Format(0-Proprietary , 1- ISO) : Default is 0

**FaceServerIP:** IP address of face server. The Face server must be installed for identification to be done through FR Mode as Server Assisted.

**FaceServerPort:** Port number of the face server.

**FaceTCPorHTTP:** 0=TCP, 1=HTTP

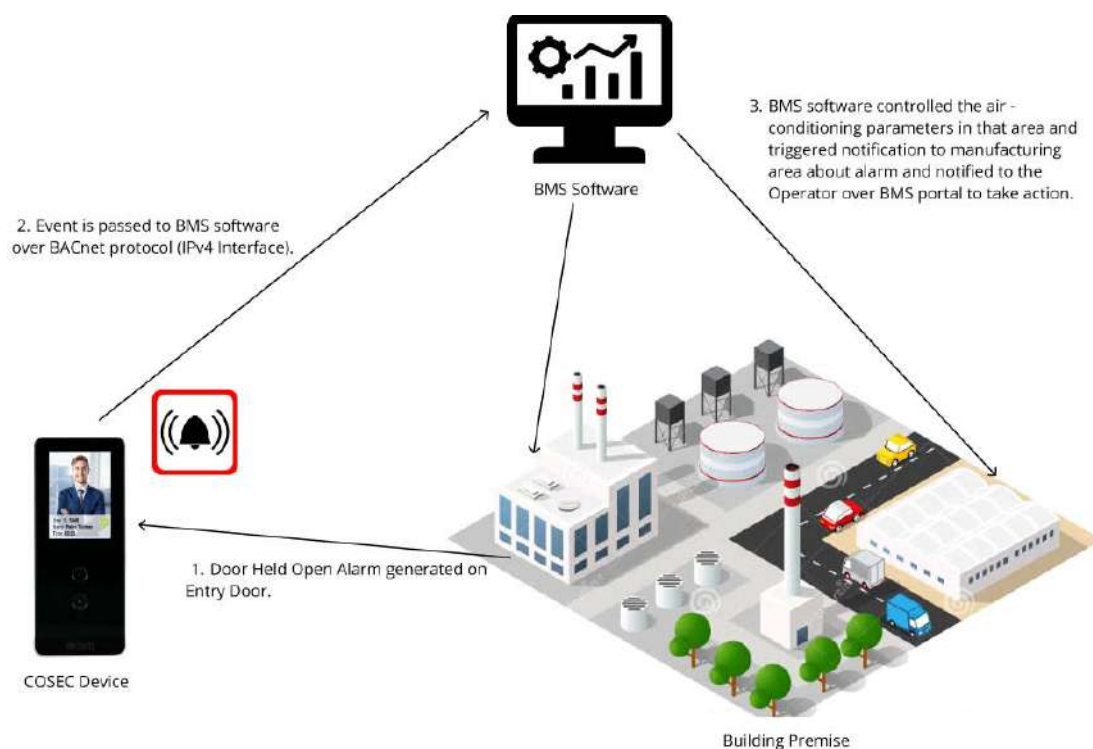
# BACnet Configuration

BACnet (Building Automation and Control Network) is an industry-standard protocol that is specifically used in Building Automation Systems. BACnet provides a standard framework for communication, management, monitoring and control of various automation functions specific to buildings, such as Lighting, HVAC, Fire Safety, Access Control and Energy Management Systems. BACnet supports multiple communication protocols, including Ethernet, TCP/IP, and RS-485, allowing for the integration of devices from different manufacturers and technologies.

Various Building Management Systems (BMS) rely on BACnet to communicate with each other for the exchange of data and to control devices and automation systems within a building.

Integration of BACnet with COSEC enhances its capability to integrate with 3rd party Building Management Systems. With this integration, COSEC Devices and their Events can be used to control various automation functions.

Let us understand this with the help of an example as depicted in the diagram below.



- In the above diagram there are two premises — Manufacturing and Office — wherein BMS is installed.
- The BMS and COSEC communicate using BACnet.
- When the Door Held Open Alarm is generated by COSEC Device at the Manufacturing premise, COSEC sends this event to the BMS over BACnet.
- The BMS software controls the air-conditioning parameters in that premise, hence it triggers a notification to the Manufacturing area about the Alarm.
- The BMS software also notifies the Operator over BMS Portal to take action.

BACnet supports various types of services for data exchange. There are selected services that are supported by COSEC. For details, refer to [“Services supported by BACnet Server”](#).

To integrate BACnet with COSEC, you need to:

- Configure the BACnet Server in COSEC Integrate. For details, refer to BACnet Server Configuration in the COSEC Integrate User Guide.
- Assign devices to the configured BACnet Server. For details, refer to [“BACnet Server Configuration”](#)
- Configure the BACnet Client List parameters. For details, refer to [“BACnet Client List Configuration”](#).

## BACnet Server Configuration

The BACnet Server parameters as configured in COSEC Integrate appear here. The grid on the right side of the page displays the multiple BACnet Servers if configured in COSEC Integrate. However, you can select the devices that you wish to assign to each BACnet Server.

For each Server, you need to configure Client IP Address/es with which it will communicate. The list of such clients is displayed here.

To configure the parameters,

- Click **Admin module > System Configuration > BACnet Configuration > BACnet Server Configuration**.

The screenshot shows the 'BACnet Server Configuration' page. On the left is a sidebar with 'Admin' selected. The main area has a form with the following fields: BACnet Server ID (1), BACnet Server IP Address (192.168.103.237), BACnet Server Port Number (47808), BACnet Instance ID (1234), BACnet Instance Name (1), Network Number (1), Select Device (Randomly), and Device (Name). Below the form is a 'BACnet Client IP List' table with columns: BACnet Client IP Address, BACnet Client List ID, and BACnet Client List Name. The table is empty, showing 'No Data'.

Click the desired BACnet Server from the right grid. The details will be displayed on the left.

This screenshot shows the same 'BACnet Server Configuration' page, but with the form fields populated. The values are: BACnet Server ID: 1, BACnet Server IP Address: 192.168.103.237, BACnet Server Port Number: 47808, BACnet Instance ID: 1234, BACnet Instance Name: 1, Network Number: 1, Select Device: Randomly, and Device: Name. The 'BACnet Client IP List' table remains empty with 'No Data'.

- **ID:** This displays the auto-generated ID assigned to the BACnet Server.
- **BACnet Server IP Address:** This displays the BACnet Server IP Address as configured in COSEC Integrate.
- **BACnet Server Port Number:** This displays the BACnet Server Port Number as configured in COSEC Integrate.
- **BACnet Instance ID:** This displays the BACnet Instance ID as configured in COSEC Integrate.
- **BACnet Instance Name:** This displays the BACnet Instance Name as configured in COSEC Integrate.
- **Network Number:** This displays the Network Number as configured in COSEC Integrate.
- **Select Device:** Select the desired option — All or Randomly.

If you select **All**, all the devices will be selected.

If you select **Randomly**, click the **Device** picklist. The **Select Device** pop-up appears.

<input type="checkbox"/>	Name	Type
<input type="checkbox"/>	ARGO FACE	ARGO FACE
<input type="checkbox"/>	ARGO FACE PD	Panel200 Door
<input type="checkbox"/>	ARGO PD	Panel200 Door
<input type="checkbox"/>	Panel200	Panel200
<input type="checkbox"/>	VEGA PD	Panel200 Door
<input type="checkbox"/>	ARGO	ARGO
<input type="checkbox"/>	VEGA	Vega Controller

- You can either select particular device or select all the devices at once.
- To select particular devices, select the check boxes of the desired devices. You can also search for the desired device using the search bar.

Select Device

Total Selected: 3 Records

Search  [Show Selected](#)

☐ Select All

<input type="checkbox"/>	Name	Type
<input type="checkbox"/>	ARGO FACE	ARGO FACE
<input checked="" type="checkbox"/>	ARGO FACE PD	Panel200 Door
<input checked="" type="checkbox"/>	ARGO PD	Panel200 Door
<input type="checkbox"/>	Panel200	Panel200
<input checked="" type="checkbox"/>	VEGA PD	Panel200 Door
<input type="checkbox"/>	ARGO	ARGO
<input type="checkbox"/>	VEGA	Vega Controller

OK Cancel

OR

- To select all the devices at once, select the **Select All** check box. The devices on all the pages will be selected.

Select Device

Total Selected: 8 Records

Search  [Show Selected](#)

☒ Select All

<input checked="" type="checkbox"/>	Name	Type
<input checked="" type="checkbox"/>	ARGO FACE	ARGO FACE
<input checked="" type="checkbox"/>	ARGO FACE PD	Panel200 Door
<input checked="" type="checkbox"/>	ARGO PD	Panel200 Door
<input checked="" type="checkbox"/>	Panel200	Panel200
<input checked="" type="checkbox"/>	VEGA PD	Panel200 Door
<input checked="" type="checkbox"/>	ARGO	ARGO
<input checked="" type="checkbox"/>	panel litee	Panel Lite
<input checked="" type="checkbox"/>	VEGA	Vega Controller

OK Cancel

- Click **OK**.
- The selected devices appear in the grid.



BACnet Server Configuration

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BACnet Server ID

1

BACnet Server IP Address

192 · 168 · 103 · 237

BACnet Server Port Number

47808

BACnet Instance ID

1234

BACnet Instance Name

1

Network Number

1

Select Device

Randomly ▾

Device

Name

Search

🔍

Name ▲	Type	
ARGO FACE	ARGO FACE	
ARGO FACE PD	Panel200 Door	
ARGO PD	Panel200 Door	
Panel200	Panel200	
VEGA PD	Panel200 Door	

1 - 5 of 8 records

«


<

1

2

>

»

- You can also delete the desired devices. To do so, click **Delete**  of the respective device.



*If you select **All**, any new device added in COSEC Server will be added in the BACnet Server automatically.*

## BACnet Client IP List

The screenshot shows a window titled "BACnet Server Configuration". It contains several input fields for server settings: BACnet Server ID (1), BACnet Server IP Address (192.168.103.237), BACnet Server Port Number (47808), BACnet Instance ID (1234), BACnet Instance Name (1), Network Number (1), and Select Device (All). Below these fields is a section titled "BACnet Client IP List" which contains a table with three columns: BACnet Client IP Address, BACnet Client List ID, and BACnet Client List Name. The table lists four entries: 192.168.110.23 (ID 1, Name Client1), 192.168.110.24 (ID 1, Name Client1), 192.168.115.25 (ID 2, Name Client2), and 192.168.118.90 (ID 3, Name Client3).

BACnet Client IP Address	BACnet Client List ID	BACnet Client List Name
192.168.110.23	1	Client1
192.168.110.24	1	Client1
192.168.115.25	2	Client2
192.168.118.90	3	Client3

The list displays the list of BACnet Client Lists associated with the configured BACnet Server.

The BACnet Client details displayed are BACnet Client IP Address, BACnet Client List ID, BACnet Client List Name

The list will be displayed as well as updated, only if it has been configured from ["BACnet Client List Configuration"](#).

## Services supported by BACnet Server

### Who-Is and I-Am Services

The Who-Is service is used by a sending BACnet-user to determine the Device object identifier, the network address, or both, of other BACnet devices that share the same internetwork. The Who-Is service is an unconfirmed service. The Who-Is service may be used to determine the Device object identifier and network addresses of all devices on the network, or to determine the network address of a specific device whose Device object identifier is known, but whose address is not. The I-Am service is also an unconfirmed service. The I-Am service is used to respond to Who-Is service requests. However, the I-Am service request may be issued at any time. It does not need to be preceded by the receipt of a Who-Is service request. In particular, a device may wish to broadcast an I-Am service request when it powers up. The network address is derived either from the MAC address associated with the I-Am service request, if the device issuing the request is on the local network, or from the NPCI if the device is on a remote network.

### Who-Has and I-Have Services

The Who-Has service is used by a sending BACnet-user to identify the Device object identifiers and network addresses of other BACnet devices whose local databases contain an object with a given Object\_Name or a given Object\_Identifier. The I-Have service is used to respond to Who-Has service requests or to advertise the existence of an object with a given Object\_Name or Object\_Identifier. The I-Have service request may be issued at any time and does not need to be preceded by the receipt of a Who-Has service request. The Who-Has and I-Have services are unconfirmed services.

**ReadProperty Service**

The ReadProperty service is used by a client BACnet-user to request the value of one property of one BACnet Object. This service allows read access to any property of any object, whether a BACnet-defined object or not.

**ReadPropertyMultiple Service**

The ReadPropertyMultiple service is used by a client BACnet-user to request the values of one or more specified properties of one or more BACnet Objects. This service allows read access to any property of any object, whether a BACnet-defined object or not. The user may read a single property of a single object, a list of properties of a single object, or any number of properties of any number of objects. A 'Read Access Specification' with the property identifier ALL can be used to learn the implemented properties of an object along with their values.

**UnconfirmedEventNotification Service**

The UnconfirmedEventNotification service is used by a notification-server to notify a remote device that an event has occurred. Its purpose is to notify recipients that an event has occurred, but confirmation that the notification was received is not required. Applications that require confirmation that the notification was received by the remote device should use the ConfirmedEventNotification service. The fact that this is an unconfirmed service does not mean it is inappropriate for notification of alarms. Events of type Alarm may require a human acknowledgment that is conveyed using the AcknowledgeAlarm service. Thus, using an unconfirmed service to announce the alarm has no effect on the ability to confirm that an operator has been notified. Any device that executes this service shall support programmable process identifiers to allow broadcast and multicast 'Process Identifier' parameters to be assigned on a per installation basis.

# BACnet Client List Configuration


---



*Make sure the BACnet Server Configurations are done appropriately at the Client end to ensure smooth functioning of the feature.*

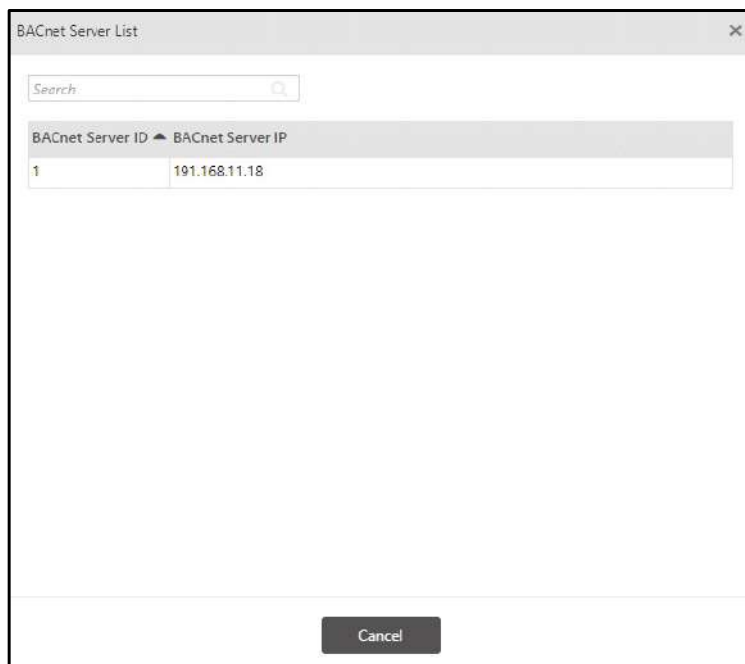
After you have configured the BACnet Server, you need to associate Clients with the BACnet Server.

To do so, you need to configure the following parameters,

- Click **Admin module > System Configuration > BACnet Configuration > BACnet Client List Configuration**.
- Click **Add**  to add a new Client List. You can add upto 100 Client Lists.
- **BACnet Client List**: Configure the desired name you wish to assign to the BACnet Client List. The ID is auto-generated.
- BACnet Client List Configuration includes the following:
  - “BACnet Server Selection”
  - “BACnet Client List Configuration”

## BACnet Server Selection

- Click the **BACnet Server Selection** collapsible panel and configure the following:
- **BACnet Server**: Click the BACnet Server picklist. The **BACnetServer List** pop-up appears.



The screenshot shows a window titled "BACnet Server List" with a search bar at the top. Below the search bar is a table with two columns: "BACnet Server ID" and "BACnet Server IP". The table contains one row with the ID "1" and the IP "191.168.11.18". At the bottom of the window is a "Cancel" button.

BACnet Server ID	BACnet Server IP
1	191.168.11.18

- Click to select the desired Server.
- **Devices:** Click the picklist. The **Select Device** pop-up appears.

All the devices associated with the selected Server appear. From this you can select the devices which you wish to associate with the Client/s.

You can select the particular devices or can select all the devices at once.

Select Device

Total Selected: 0 Records

Search  [Show Selected](#)

☐ Select All

<input type="checkbox"/>	Name	Type
<input type="checkbox"/>	Panel200	Panel200
<input type="checkbox"/>	ARGO FACE PD	Panel200 Door
<input type="checkbox"/>	ARGO PD	Panel200 Door
<input type="checkbox"/>	VEGA PD	Panel200 Door
<input type="checkbox"/>	PanelLite	Panel Lite

OK Cancel

- To select particular devices, select the check boxes of the desired devices. You can also search for the desired device using the search bar.

**OR**

- To select all the devices at once, select the **Select All** check box. The devices on all the pages will be selected.
- Click **OK**.

The events/alarms from these devices will be sent to the clients. Each device can be associated with one Client List only.

- The selected devices appear in the grid.

BACnet Client List 1 Client1


BACnet Server Selection

BACnet Server\* 1 192.168.103.237

Device Name

Search

Device Name	Type	
ARGO FACE PD	Panel200 Door	
ARGO PD	Panel200 Door	
VEGA PD	Panel200 Door	

- You can also delete the desired devices. To do so, click **Delete**  of the respective device.



Only those devices which are allocated to a BACnet Server will be displayed in the picklist to be assigned to the Client Lists.

Each Client List must have a unique list of devices from the BACnet Server, that is, one device can be assigned to a single Client List.


## BACnet Client List Configuration

- Click the **BACnet Client List Configuration** collapsible panel and configure the following:

BACnet Client List Configuration

SrNo	Client IP Address	Client Port	Network Number	Start Time	End Time	Days	Notification Type	Process Identifier	Event Selection
No Data									

+



- Click **Add**  to add a new Client configuration. You can add upto 10 clients in each BACnet Client List.


BACnet Client List Configuration



SrNo	Client IP Address	Client Port	Network Number	Start Time	End Time	Days	Notification Type	Process Identifier	Event Selection
	192.168.103.237	47808	0	00:00	00:00	Select	Unconfirm	0	Alarm

+

- Sr. No:** This is auto-generated by the system.

- **Client IP Address:** Configure the IP Address of the BACnet Client.
- **Client Port:** Configure the Port of the BACnet Client.
- **Network Number:** Configure the Network Number which will be used by BACnet to communication with the Client. This will be provided by the Client.
- **Start Time:** Configure the Start Time for the schedule when data is to be sent to the BACnet Client.
- **End Time:** Configure the End Time for the schedule when data is to be sent to the BACnet Client.
- **Days:** Click to select the desired days or select **Check All** to select all the days, for the schedule when data is to be sent to the BACnet Client.
- **Notification Type:** Un-editable, this displays Unconfirmed Notification Type.
- **Process Identifier:** Configure the Process Identifier using which the BACnet Server will read the data.
- **Event Selection:** Select the desired Event — Alarm, Event— whose data is to be sent to the BACnet Client.
- Click **Save**  to save the configuration or click **Cancel**  to discard. The Client appears in the grid.

BACnet Client List Configuration										
SrNo	Client IP Address	Client Port	Network Number	Start Time	End Time	Days	Notification Type	Process Identifier	Event Selection	
1	192.168.110.23	47808	1	09:00	18:00	Mo Tu We Th Fr Sa Su WO PH FB RD	Unconfirmed	1	Event	
2	192.168.110.24	47808	1	09:00	18:00	Mo Tu We Th Fr Sa Su WO PH FB RD	Unconfirmed	1	Event	

- Click **Edit**  to edit the configuration of the Client.
- Click **Delete**  to delete the Client.

Similarly, you can add other Clients. You can add a maximum of 10 Clients in each BACnet Client List.

The Client List associated with the selected Server will be displayed in the BACnet Server Configuration page. For details, refer to [“BACnet Client IP List”](#) in [“BACnet Server Configuration”](#).

## Changing the Association of the BACnet Server with the BACnet Client List

After you have configured the desired BACnet Client Configuration Lists and later if you wish to change the BACnet Server associated with the BACnet Client Lists, you can do the same. To do so,

- Click **Admin module > System Configuration > BACnet Configuration > BACnet Client List Configuration**
- Click the desired BACnet Client List.
- Click the **BACnet Server Selection** collapsible panel.
- Click **BACnet Server** picklist. The **Picklist For BACnetServer** pop-up appears and select desired Server.

The devices associated with the new BACnet Server will be displayed, however the BACnet Client List Configuration will remain the same.

- Click **Save**.

Now the configured BACnet Client List and their schedules will be associated with the new BACnet Server.



# SMS Configuration

This tab enables to configure parameters for sending SMS using one the selected SMS service providers.



For additional security and privacy while sending SMS, COSEC supports Proxy Server Configuration. For more details, refer to [“Proxy Server Configuration”](#)

To view SMS Configuration page, go to **Admin module > System Configuration > SMS Configuration** and the following screen appears.

The screenshot shows the 'SMS Configuration' window. It contains the following fields and controls:

- Service Provider:** A dropdown menu with 'SMS Lane' selected and an 'Add' (+) button.
- Active:** A checkbox that is currently checked.
- User Name:** A text input field containing 'ca'.
- Password:** A text input field with masked characters '\*\*\*\*\*'.
- Sender ID:** A text input field containing 'KUNAL'.
- Flash Message:** A checkbox that is currently unchecked.
- Account Type:** A dropdown menu with 'Promotional' selected.
- Alert Cycle:** A text input field containing '10', with a unit label 'Seconds [1-120]'.
- Retry Count:** A text input field containing '3', with a unit label '3-99'.
- Active Days:** A text input field containing '1', with a unit label '1-9'.
- Disable Sending SMS:** A checkbox that is currently unchecked.
- Buttons:** 'Save' and 'Cancel' buttons are located below the configuration fields.
- Test Message Section:** Located at the bottom, it includes a 'Phone Number' input field, a 'Template ID' input field, and a 'Send' button.

The page displays configurations for the added service providers. The pre-defined service providers are: SMS Gateway Center, SMS Lane, Business SMS, Bulk SMS, Smart Life Tech and SNOWEBS.

To set SMS configurations provide the following parameters:

- **Service Provider:** Select the service provider to be used for sending SMS from the dropdown list. One can also add a new Service Provider by clicking on **Add Service Provider** + button and the following API Configuration pop-up window appears.

Enter the following parameters as given in the API document of the service provider:



*The API Document of the service provider is mandatory for configuring the below parameters.*

- **Service Provider Name:** Enter the name of SMS service provider.
- **Service Provider URL:** Enter the url of the service provider. This url is displayed on the main SMS configuration page.
- **Base URL:** Enter the base url of the service provider. E.g: localhost/way2sms/login
- Click Add button to associate **API Arguments** with the **Argument value** selected from the dropdown list. These API arguments are available in the API document of the service provider.
- **Argument Separator:** Enter the argument separator to be used for firing a commmand. E.g.: & or ;. Also, select the method to be used for sending the message from the dropdown list.
- **Request Preview:** Displays the preview of the url with arguments.
- **Balance Check:** Select to allow balance check, if the service provider needs to use it.
- Click **Add** button and provide the **API Response** for failure or success of the COSEC response.

Click **Save** button to save the above API configurations and return to the main page where you need to configure the remaining below given parameters.

- **Active:** Enable to activate the selected service.
- **User Name:** Enter the username.
- **Password:** Enter the password.



*Contact the administrator to get user name and password for using the SMS service.*

- **Sender ID:** Enter the registered sender ID.
- **Flash Message:** Enable the checkbox to flash the message at the time of arrival.
- **Alert Cycle:** Specify the time in seconds between successive send attempts when the system tries to send the pending messages.
- **Retry Count:** Specify the number of times the system needs to try to send the message. The retry count can be from 3 to 99.
- **Active Days:** Specify the number of days till which the pending messages are treated as active in the event of the Alert service being temporarily stopped. Maximum 9 active days can be specified.
- **Disable Sending SMS:** Select to temporarily disable the SMS sending functionality.

The URL displayed is a link to the website of the selected service provider. Click on the link and login with your user-name and password to connect with service provider.

Click **Save**, once all the configurations are done. The created service provider gets displayed in the dropdown list as shown below.

### Test Message

- **Phone Number:** Enter the mobile number to send the test message for testing the settings.
- **Template ID:** As per TRAI Regulation, an enterprise which sends messages to customers like OTP, communication message, promotional messages via SMS, have to register their entity and the content template to avoid Spam, fake and fraudulent communication through SMS.

It is mandatory for an Admin to register the SMS content template prior with your Service Provider which will be verified before it is delivered to the users.

Once registered, the Service Provider will provide a Template ID against the registered SMS content.

Here, a test message content is pre-defined, which has to be registered with the Service Provider.

The test message which is to be registered is — **Hello this is a test message.**

The Service Provider will provide a Template ID against this test message.

Enter the Template ID provided by the Service Provider.



*If you have multiple Service Providers, then make sure the required templates are registered with all the desired Service Providers. Hence for each template you will have multiple Templates IDs. Also make sure you maintain a record of all the registered Message Templates with their respective Template IDs for reference.*

Click **Send** to link the phone number and the test template ID with the respective Service Provider.



*For each tenant, you can send upto 10 test messages in one minute. Thereafter the message “Maximum count reached. Please try after sometime” will be displayed.*

# Email Configuration

This tab enables to set email configurations. Before configuring ensure that an SMTP Server has been set up on the network.



For additional security and privacy while sending Emails, COSEC supports Proxy Server Configuration. For more details, refer to [“Proxy Server Configuration”](#)

To view Email Configuration page, go to **Admin module > System Configuration > Email Configuration** and the following screen appears.

Enter the following parameters:

- **SMTP Server:** Specify the IP Address or name of the configured SMTP server. Check the server availability with your network administrator.



You can use Gmail SMTP Server if Internet connection is available.

- SMTP server : smtp.gmail.com
- SMTP Port: 587(POP3)/993 (for imap)
- Email ID: gmail id of the user
- **SMTP Port Number:** Specify the TCP port for the SMTP service as set on the SMTP server.
- **Incoming Mail Protocol:** In the event of activating the approve/reject links in the leave application alerts the user needs to specify the mail protocol for the incoming mails.
- **POP3/IMAP Server:** Specify the IP Address or name of the configured POP3 or IMAP server.
- **POP3/IMAP Port Number:** Specify the appropriate incoming port for the SMTP service as set on the SMTP server.
- **Sender E-mail ID:** Mention the Email ID of the sender.
- **Sender Display Name:** Specify the user name as to be displayed in the emails.

- **Authentication:** Select a desired method of authentication from the drop down list — Basic Authentication and Modern Authentication.

- **Basic Authentication:** It provides a simple mechanism to perform authentication.

Basic Authentication works by prompting a web server user for a username and password.

It repeatedly sends username and password on each request which will be stored in the server to avoid constantly prompting the user for their credentials.

Also, all the information is sent over the network in an unencrypted format.

Any password sent using Basic Authentication can easily be decoded making it vulnerable to replay attacks which proves, it is not a secure method of authentication.

If you select Basic Authentication, configure the following:

- **User Name:** Specify the user name as set in the outlook account.
- **Password:** Specify the password as set in the outlook account.
- **Modern Authentication:** It is a combination of authentication and authorization between client and server.

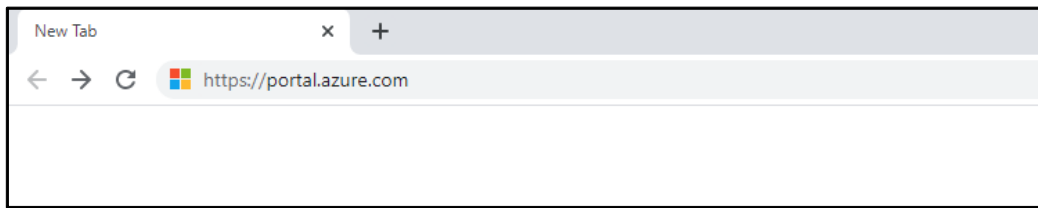
## Pre-requisites for Modern Authentication

### Microsoft 365 Configuration

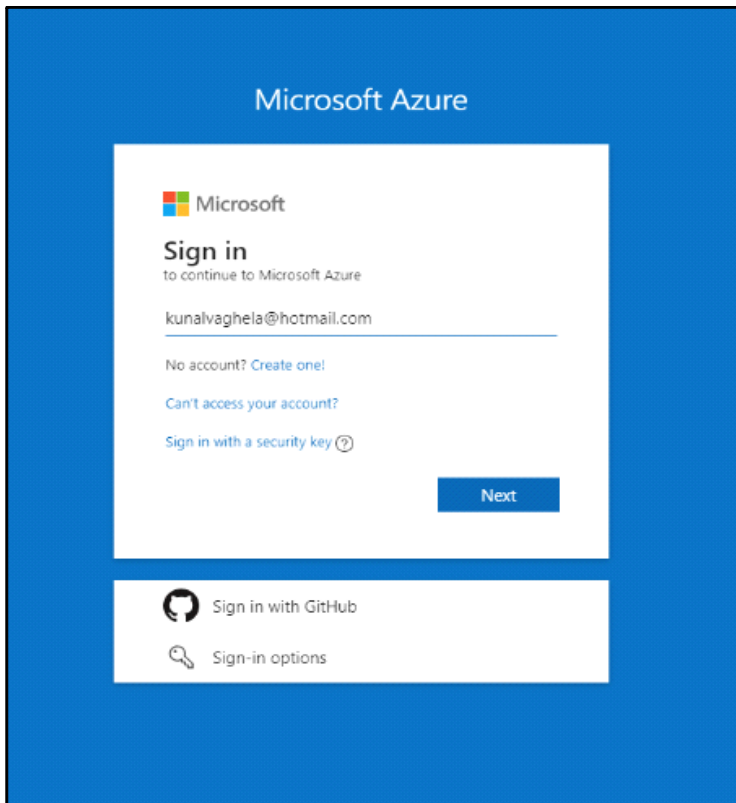


*Make sure you have Internet connectivity in your PC.*

- Enter the **portal.azure.com** in your Web Browser.



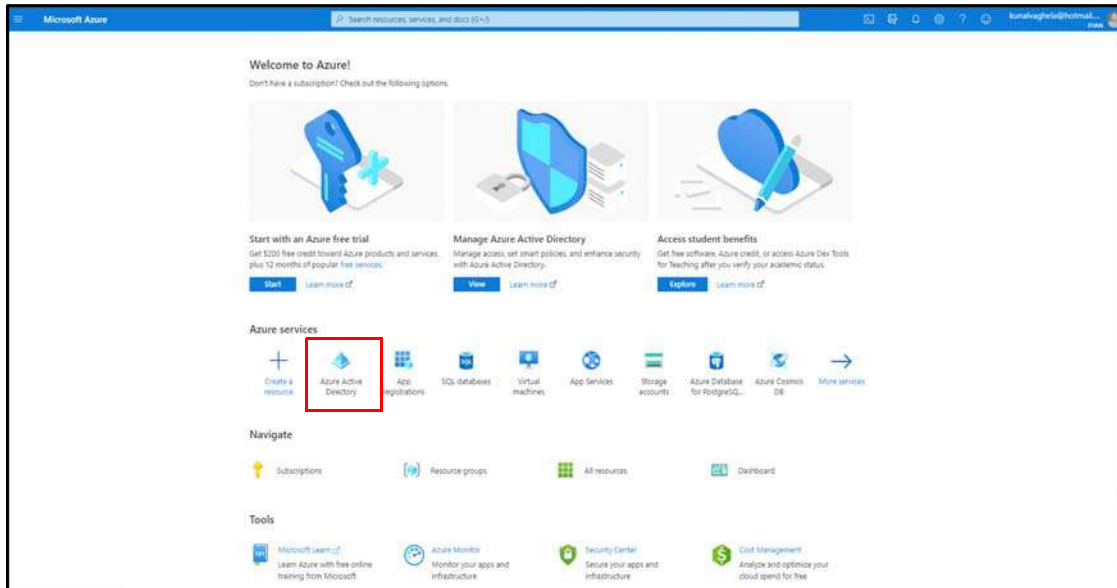
- Create Microsoft Azure Account.



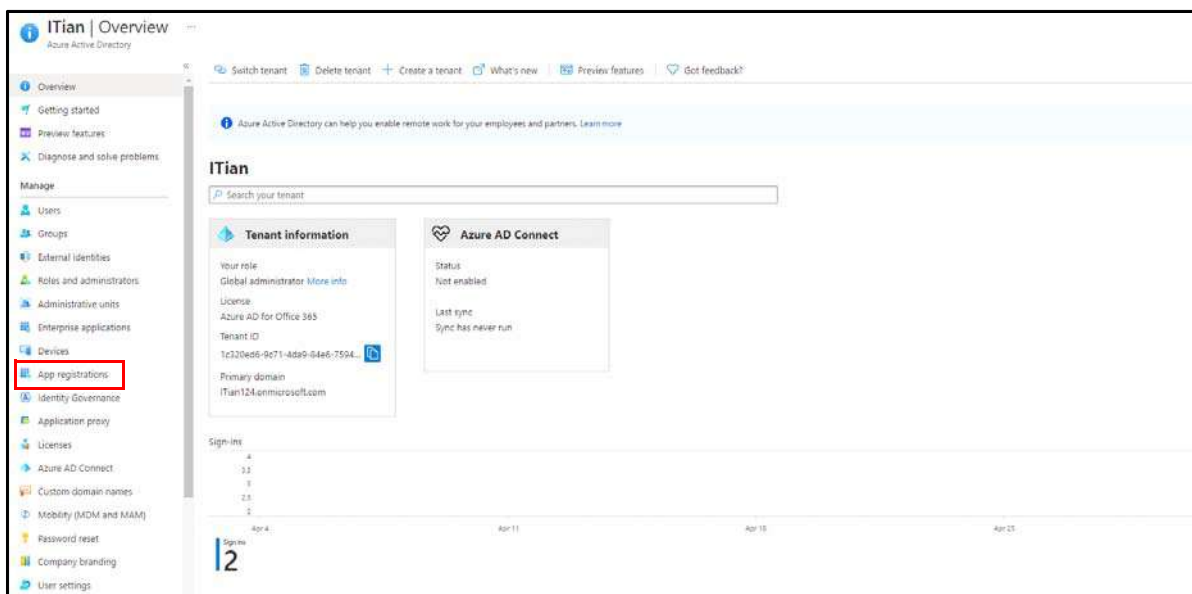
*Make sure the **Sender Email ID** in COSEC Server and the Microsoft Account Email ID are same.*

- Login in to Microsoft Azure Account.

- Click **Azure Active Directory**.

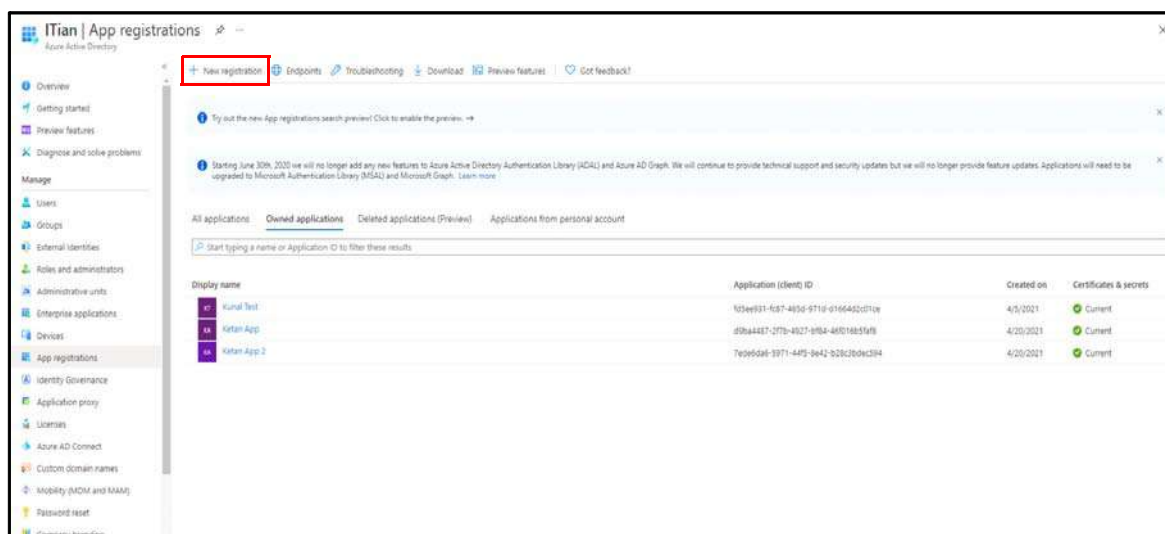


- Click **App Registration** on the left pane.



- Click **New Registration**.





Configure the parameters as mentioned below:

- In **Name**, enter the name you wish to assign.
- Under **Supported Account Types**, select the options **Accounts in any organizational directory (any Azure AD Directory + Multitenant)** and **personal Microsoft Account (eg. Skype, Xbox)**
- **Redirect URI (Optional)**, select the options **Public client/native (mobile & desktop)** and enter the IP Address/Domain Name of the Cossec Server in the format **https://172.16.2.175/cossec/login/ReceiveAuthorizationToken**.

Home > ITian >

## Register an application

\* Name

The user-facing display name for this application (this can be changed later).

Athira Application

Supported account types

Who can use this application or access this API?

☐ Accounts in this organizational directory only (ITian only - Single tenant)  
☐ Accounts in any organizational directory (Any Azure AD directory - Multitenant)  
☒ Accounts in any organizational directory (Any Azure AD directory - Multitenant) and personal Microsoft accounts (e.g. Skype, Xbox)  
☐ Personal Microsoft accounts only

[Help me choose...](#)

Redirect URI (optional)

We'll return the authentication response to this URI after successfully authenticating the user. Providing this now is optional and it can be changed later, but a value is required for most authentication scenarios.

Public client/native (mobile ... [^](#)) https://localhost/cosec/Login/ReceiveAuthorizationToken

Public client/native (mobile & desktop)  
Web  
Single-page application (SPA)

Register an app you're working on here. Integrate gallery apps and other apps from outside your organization by adding from [Enterprise applications](#).

By proceeding, you agree to the [Microsoft Platform Policies](#)

**Register**

- Click **Overview** in the left pane and the Client ID and Tenant ID is visible.

Athira Application

Search (Ctrl+G) Delete Endpoints Preview features

**Overview**

Got a second? We would love your feedback on Microsoft identity platform (previously Azure AD for developer). →

Essentials

Display name : Athira Application

Application (client) ID : ea51bb05-4865-4b16-b11d-2b60e350c34e

Directory (tenant) ID : 1c320e66-9c71-4da9-84e6-759492b6a834

Object ID : a0999c03-7967-4e7a-a27e-00a099eeec71

Supported account types : All Microsoft account users

Redirect URIs : 0 web, 0 spa, 1 public client

Application ID URI : Add an Application ID URI

Managed application in L : Athira Application

Welcome to the new and improved App registrations. Looking to learn how it's changed from App registrations (Legacy)? [Learn more](#)

- Click **Endpoints**.
- You can view the Access Token URL and Authorization URL

## Endpoints

OAuth 2.0 authorization endpoint (v2)

Authorization URL

https://login.microsoftonline.com/common/oauth2/v2.0/authorize

Copy to clipboard

OAuth 2.0 token endpoint (v2)

Access Token URL

https://login.microsoftonline.com/common/oauth2/v2.0/token

OAuth 2.0 authorization endpoint (v1)

https://login.microsoftonline.com/common/oauth2/authorize

OAuth 2.0 token endpoint (v1)

https://login.microsoftonline.com/common/oauth2/token

OpenID Connect metadata document

https://login.microsoftonline.com/common/v2.0/.well-known/openid-configuration

Microsoft Graph API endpoint

https://graph.microsoft.com

Federation metadata document

https://login.microsoftonline.com/6941876e-c5ea-4c83-a513-96698357096a/federationmetadata/2007-06/federationmetadata.xml

WS-Federation sign-on endpoint


https://login.microsoftonline.com/6941876e-c5ea-4c83-a513-96698357096a/wsfed

SAML-P sign-on endpoint

https://login.microsoftonline.com/6941876e-c5ea-4c83-a513-96698357096a/saml2

SAML-P sign-out endpoint

https://login.microsoftonline.com/6941876e-c5ea-4c83-a513-96698357096a/saml2

 If any user is having multiple tenants then replace the word **common** with the tenant ID in Authorization URL and Access Token URL.

- Click **API Permissions** in the left pane and then click **Add Permission**.

Athira Application | API permissions

Search (Ctrl+J)

Refresh

Got feedback?

Overview

Quickstart

Integration assistant

Manage

Branding

Authentication

Certificates & secrets

Token configuration

API permissions

Expose an API

App roles

Owners

Roles and administrators | Preview

Manifest

Support + Troubleshooting

Troubleshooting

New support request

Starting November 9th, 2020 end users will no longer be able to grant consent to newly registered multitenant apps without verified publishers. [Add MPA ID to verify publisher](#)

The "Admin consent required" column shows the default value for an organization. However, user consent can be customized per permission, user, or app. This column may not reflect the value in your org.

Configured permissions

Applications are authorized to call APIs when they are granted permissions by users/admins as part of the consent process. The list of configured permissions should include all the permissions the application needs. [Learn more about permissions and consent](#)

+

Add a permission

Grant admin consent for ITan

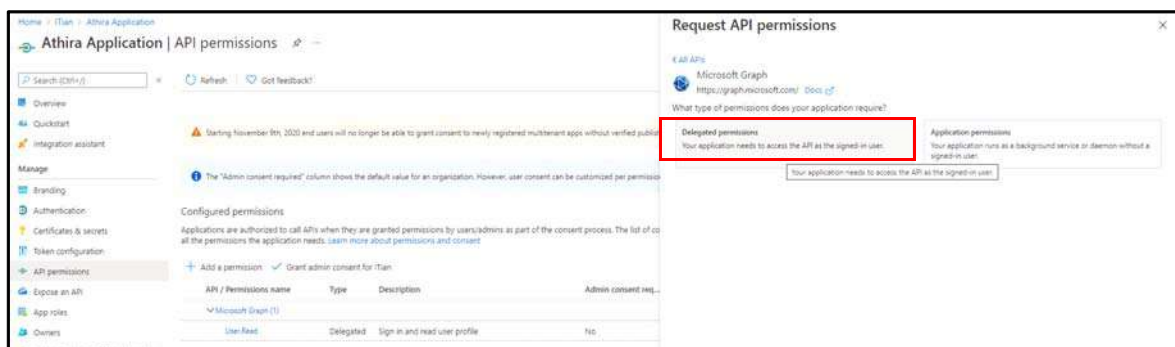
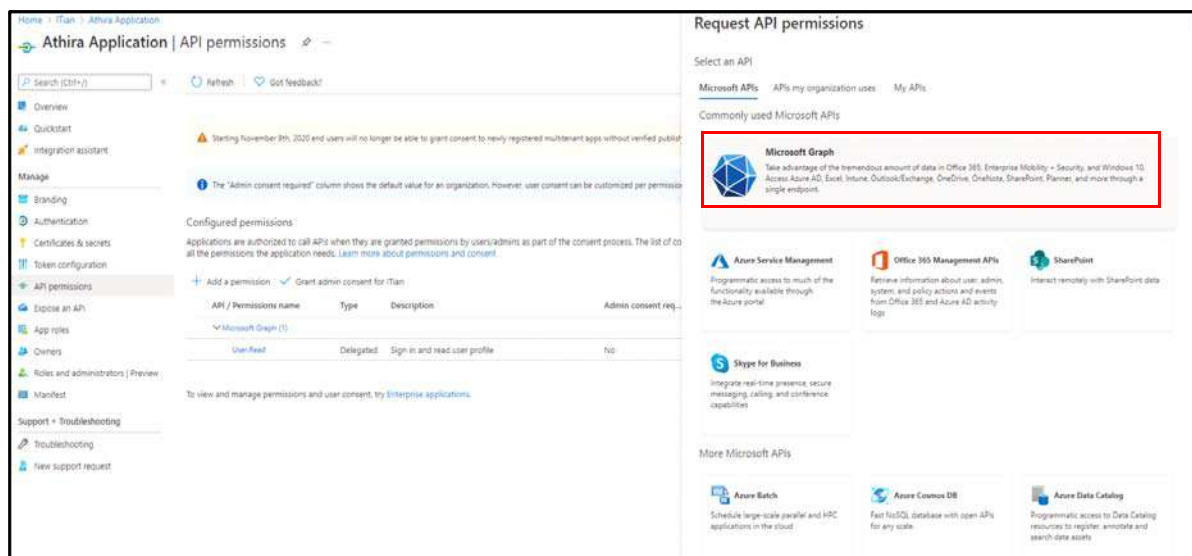
API	Type	Description	Admin consent req...	Status
Microsoft Graph (1)				...
UserRead	Delegated	Sign in and read user profile	No	...

To view and manage permissions and user consent, try [Enterprise applications](#).

Matrix COSEC System Manual

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- In Request API permissions window, click **Microsoft Graph**, then click **Delegated Permissions**.

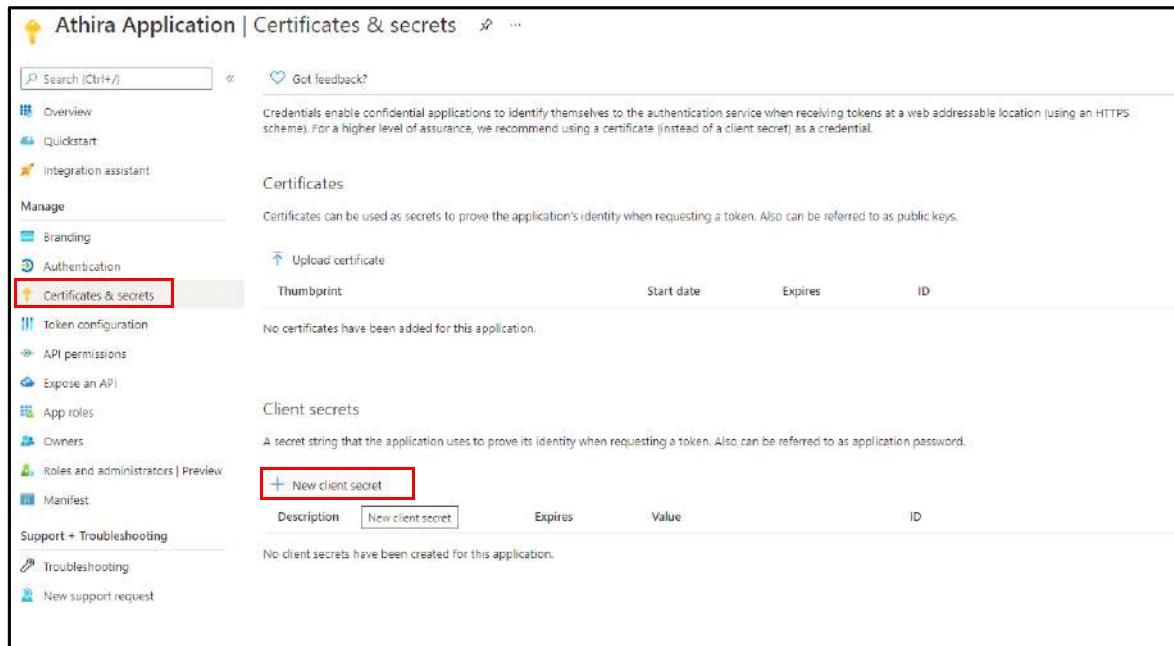


- Select the check boxes of the list of permissions displayed in the below screen.

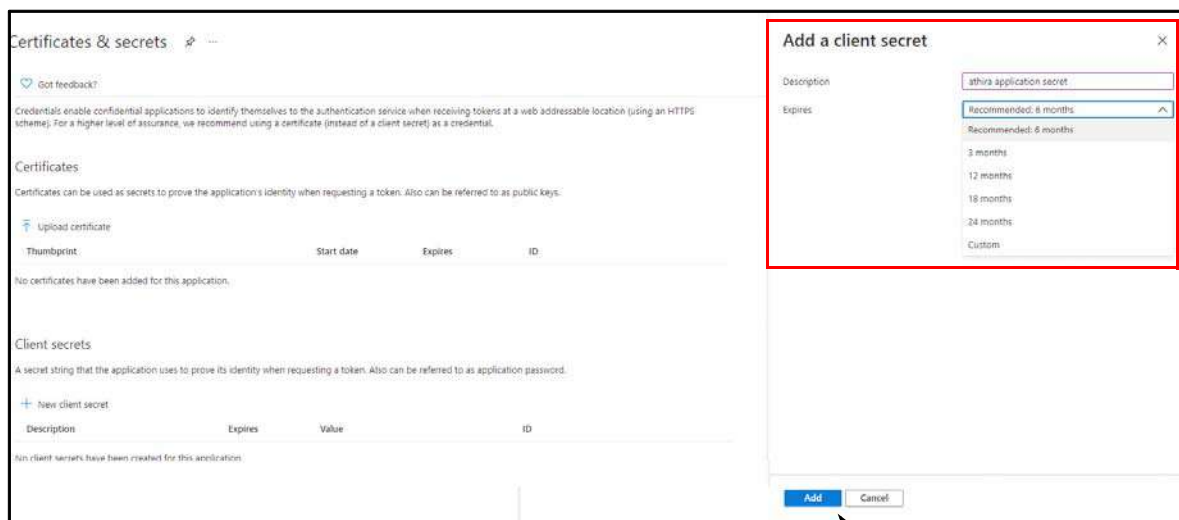
+ Add a permission ✓ Grant admin consent for matrix					
API / Permissions name	Type	Description	Admin consent req...	Status	
Microsoft Graph (10)					
email	Delegated	View users' email address	No	Granted for matrix	...
IMAP.AccessAsUser.All	Delegated	Read and write access to mailboxes via IMAP.	No	Granted for matrix	...
Mail.Send	Delegated	Send mail as a user	No	Granted for matrix	...
Mail.Send	Application	Send mail as any user	Yes	Granted for matrix	...
offline_access	Delegated	Maintain access to data you have given it access to	No	Granted for matrix	...
openid	Delegated	Sign users in	No	Granted for matrix	...
POP.AccessAsUser.All	Delegated	Read and write access to mailboxes via POP.	No	Granted for matrix	...
profile	Delegated	View users' basic profile	No	Granted for matrix	...
SMTP.Send	Delegated	Send emails from mailboxes using SMTP AUTH.	No	Granted for matrix	...
User.Read	Delegated	Sign in and read user profile	No	Granted for matrix	...

Once the permissions are added, click **Grant admin consent for matrix**.

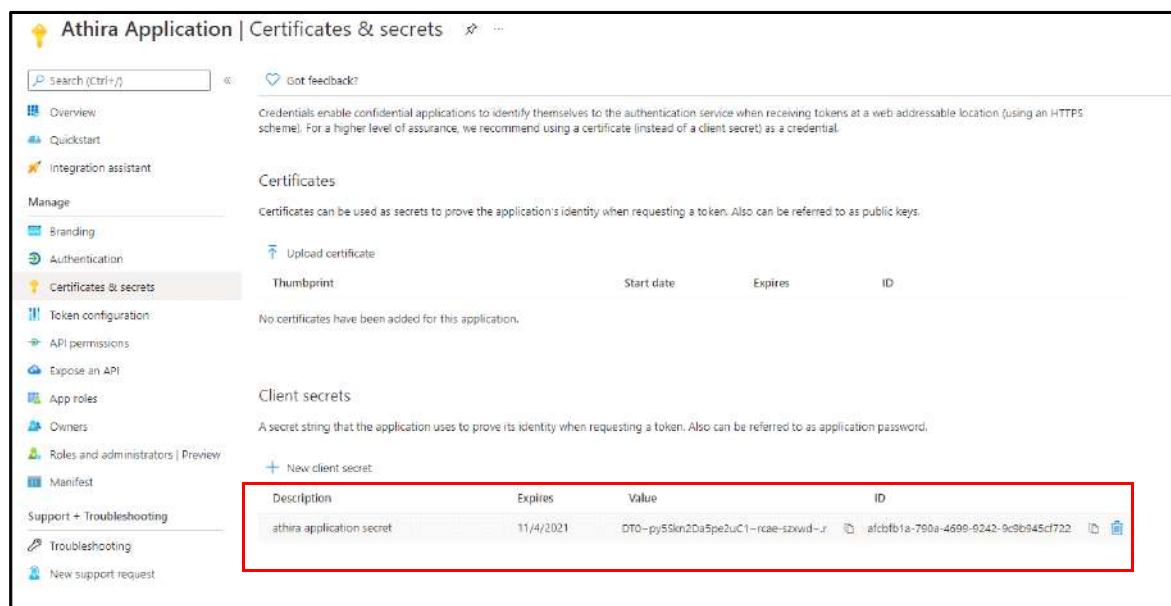
- Click **Certificates and secret** on the left pane. Then click **New Client secret**.



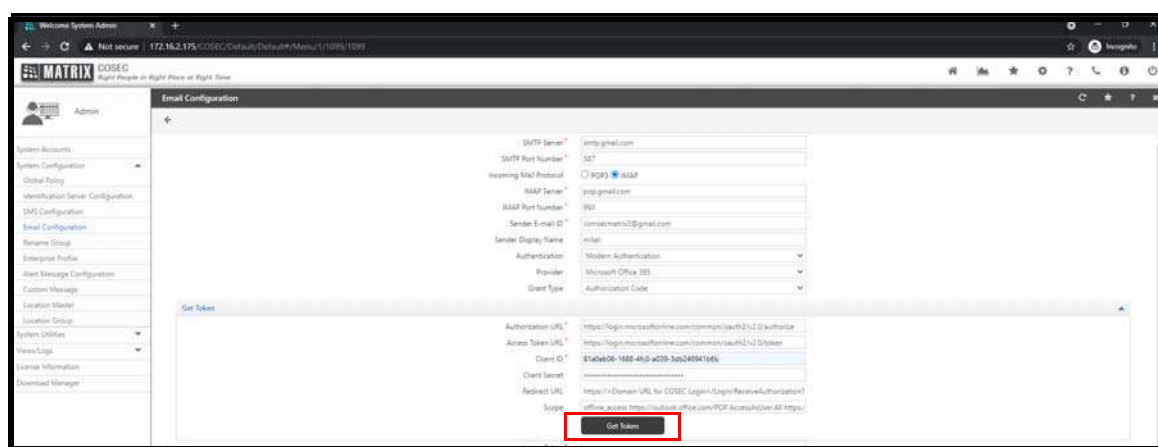
- Enter the **Client Secret description** and **Expires**. Then click **Add**.



- The secret will be visible short time period, hence make sure you copy the same.

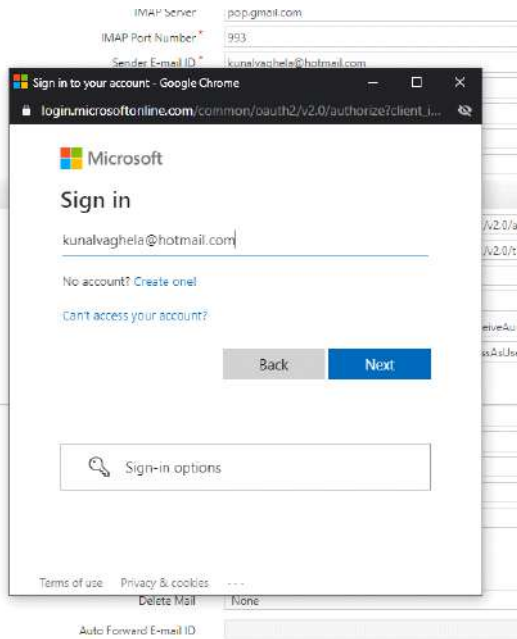


- Now, in the Cossec Server click **Admin module > System Configuration > Email Configuration** (refer ["Modern Authentication - Microsoft 365 Configuration"](#)) and enter the following details as displayed in the screen below:
  - Authorization URL
  - Access Token URL
  - Client ID
  - Client Secret
  - Redirect URL
  - Scope

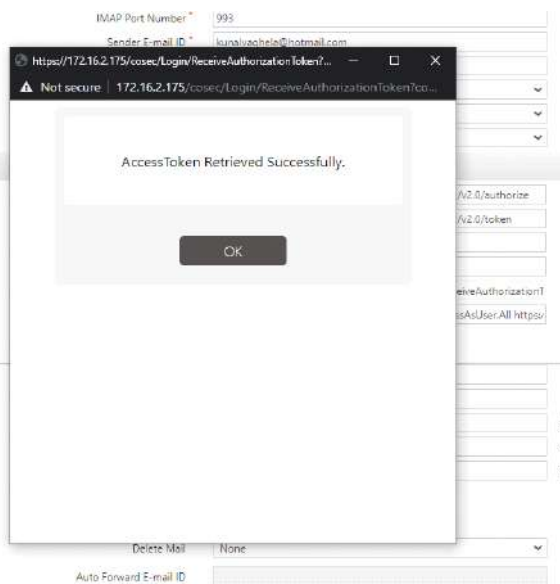


- Click **Get Token**.

- The **Microsoft Sign in** pop ups appears. Enter the **Microsoft Email ID** and then enter the **Password**.



- Click **Allow** (this is to grant the Read/Write Permission). Then the Access Token Retrieved Successfully pop up appears.



- Click **OK**.

The Access Token and Refresh Token will be updated automatically in the Email Configuration page in the Cossec Server.

## Modern Authentication - Microsoft 365 Configuration

Modern Authentication does not allow servers to save Microsoft 365 account details.

To authenticate, a user needs to log in to their account using standard Microsoft 365 login and accept the application's request to access the account.

Access is granted on the basis of tokens which gives a strictly defined permission scope which is accepted by the user.

User receives two tokens namely — Access Token and Refresh Token.

- **Access Token:** This is the most important Token, as on the basis of this, the third party application is allowed access to user data as well as gain access to O365 services.

This token needs to be sent by the client as a parameter or as a header in the request to the third party resource server.

It has a limited lifetime, which is defined by the authorization server.

It must be kept confidential to restrict its misuse by unauthorized entity.

- **Refresh Token:** This token is issued along with the Access Token but unlike the latter, it is not to be sent in each request from the client to the third party resource server.

When an Access Token expires, the Office client will present the Refresh Token to Azure Active Directory (Azure AD) and request for a new Access Token.



*We recommend you to use Modern Authorization to avoid any security breach.*

Configure the following parameters for Modern Authentication:

- **Provider:** It displays the name of the provider which is Microsoft Office 365.
- **Grant Type:** It refers to the way an application gets an Access Token.

This field is non-configurable and displays Authorization Code as the Grant Type.

Authorization Code is used only to be returned to exchange for an Access Token. It keeps this token hidden from the user client as it could be potentially exposed to the malicious agents trying to steal the token for nefarious means.

When you select Modern Authentication as a method of Authentication, you need to configure Get Token parameters.

## Get Token

- **Authorization URL:** This command sends the URL to the endpoint of the Authorization Server that authenticates user credentials.

Enter the URL of the authorization endpoint.

Format: *https://login.microsoftonline.com/common/oauth2/v2.0/authorize*

- **Access Token URL:** This command sends the URL to the endpoint of the Authentication Server that is used to exchange the Authorization Code for Access Token.

Enter the Access Token URL.



Format: *https://login.microsoftonline.com/common/oauth2/v2.0/token*

- **Client ID:** Enter the application's Client ID, issued during the client application registration provided by the Azure AD.
- **Client Secret:** Client Secret is a secret string that the application uses to prove its identity while requesting a token. It is also known as Application Password.

It ensures that the request to get the Access Token is made only from the application and not from a potential attacker that may have intercepted the authorization code.

Enter the application's Client Secret. The Client Secret is issued to the client during the Application registrations process.

It will be in an encrypted format like a Password field.

- **Redirect URL:** It tells the authorization server where to send the user back to after they approve the request.

It extracts the Authorization Code/ Access Token.

The Redirect URL will be displayed in this field. The authentication response will be returned to the configured URL after successfully authenticating the user.

Redirect URL: *https://<Domain URL for COSEC Login>/Login/ReceiveAuthorizationToken*

- **Scope:** It is one or more space-separated strings indicating the permissions, the application is requesting. The specific OAuth API you are using will define the scopes that it supports.

Scopes are set of permissions granted for each Client to access a specific data. It may have space-delimited values.

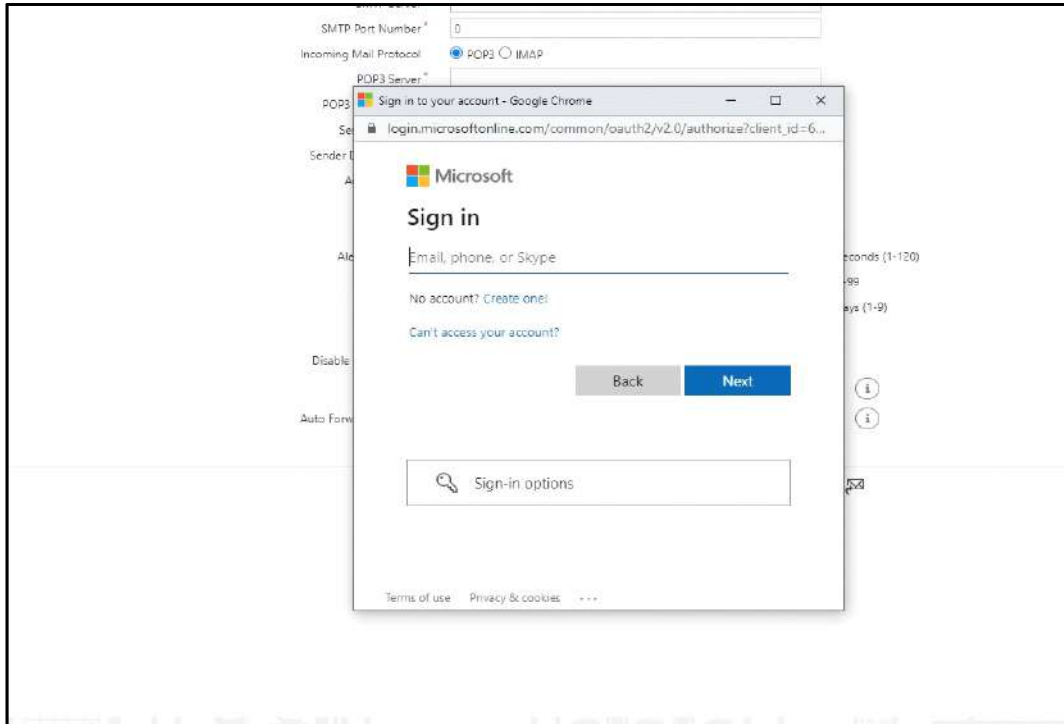
Enter Scope of the access request.

Format: *offline\_access https://outlook.office.com/POP.AccessAsUser.All https://outlook.office.com/IMAP.AccessAsUser.All https://outlook.office.com/SMTP.Send https://outlook.office.com/Mail.Read*

- **Client Credential:** It defines whether to send client credentials as basic authorized header or as a plain text in the request body.

Select a desired option from the drop down list — In Basic Auth Header or Request Text.

Click **Get Token**. Once you click this button, you need to sign in to your Microsoft account and then all the parameters in the request will be verified ensuring the Authentication Code has not expired and that the Client ID and Client Secret is a match.



After the verification process is completed, the Authorization Server will generate and return the Access Token and Refresh Token in the response.

- **Access Token:** It displays the Access Token received in the response received from the Authorization Server or Access Token Server. To know more about Access Token, refer Access Token under Modern Authentication on [page 246](#).
- **Refresh Token:** It is obtained in the response received from the Authorization Server or Access Token Server. To know more about Refresh Token, refer Refresh Token under Modern Authentication on [page 246](#).
- **Alert Cycle:** Specify the time in seconds between successive send attempts when the system tries to send the pending messages.
- **Retry Count:** Specify the number of times the system needs to retry to send the same Email message in the event of an unsuccessful attempt.
- **Active Days:** Specify the number of days the system needs to keep the unsent messages active in the event of the service being stopped.
- **Send Interval:** Specify the time in milliseconds between sending two consecutive emails.
- **Batch Size:** Specify the number of emails that system should send at a time.
- **Enable SSL:** If you are using an external SMTP server like Gmail, then select the check box to enable.
- **Disable Sending Mail:** Select the check box to temporarily disable the email sending functionality.
- **Email Reading Interval:** Specify the desired duration (in minutes). This is the duration after which the Alert Service to fetch the data from the database.


- **Delete Mail:** Select the desired option from the drop-down list. Options are **All**, **Server**, **None**.
  - Select **All** to delete all the mails related to the Server and personal. This is applicable if the set **Email Reading Interval** is less than or equal to 30 minutes.
  - Select **None** to delete none of the mails. This is applicable if the set **Email Reading Interval** is equal to 30 minutes.
  - Select **Server** to delete all the emails from the server as soon as they are downloaded by the client. This is applicable if the set **Email Reading Interval** is equal to 30 minutes.
- **Auto Forward Email Id:** If a user selects either delete mail as **All** or **Server**, before deleting the mails, it will be auto forwarded to the configured email ID.

If mail is successfully forwarded, then the mail will be deleted from the inbox of the Server & log will be added in Alert view in **Admin> Views/Logs> Alert view**.

If mail is not forwarded due to incorrect E-mail Id (with valid characters), then the mail will be deleted from the inbox of the Server & log will be added in Alert view in **Admin> Views/Logs> Alert view**.

Once the above settings are done click **Save** button.

#### Test Mail

- **E-mail ID:** Specify the email id on which the test mail can be sent. Click  **Send Test Mail** button to send the test mail.



*For each tenant, you can send upto 10 test emails in one minute. Thereafter the message "Maximum count reached. Please try after sometime" will be displayed.*

# WhatsApp Integration

---

In today's world as we move ahead with technology, WhatsApp has become an integral part of businesses and hence its integration with COSEC is the need of the hour.

Integrating WhatsApp with COSEC will enable you to send messages on WhatsApp.

To integrate WhatsApp with COSEC, you need to:

- Configure the WhatsApp parameters, refer to ["WhatsApp Configuration"](#) for details.
- Enable WhatsApp and Assign the same to Users in Alert Message Configuration, refer to ["Configuring Alert Messages"](#) for details.
- Configure the Mobile Numbers of Users, refer to ["Configuring Users"](#) for details.

If the registered WhatsApp mobile number and the mobile numbers to which Alerts need to be sent are in different countries, make sure you configure the country code along with those mobile numbers (to whom the Alerts are to be sent). If the registered WhatsApp mobile number is in India (country calling code 91) but the Alerts need to be sent to number outside India, then make sure the number is configured with the country code, for example country code of the mobile number on which alert is to be sent is 1 and mobile number is 631555XXXX, then the mobile number needs to be configured as 1631555XXXX. For more details refer to <https://developers.facebook.com/docs/whatsapp/cloud-api/reference/phone-number/>

- To view the details of the Alerts send via WhatsApp, refer to ["Alert View"](#).



*For additional security and privacy while sending WhatsApp messages, COSEC supports Proxy Server Configuration. For more details, refer to ["Proxy Server Configuration"](#)*

## WhatsApp Configuration

The WhatsApp Configuration includes two steps:

- Fulfilling the Pre-requisite requirements, for details refer to ["Pre-requisites"](#).
- Configuring the WhatsApp parameters, for details refer to ["Configuring WhatsApp Parameters"](#).

### Pre-requisites

To use WhatsApp for sending and receiving messages make sure you have completed the following:



*Make sure you have persistent Internet connectivity.*

*The details mentioned below are as per the current (Oct, 2023) updates available on the official website of Meta. These are subject to change. To know more visit their official website:*

***<https://developers.facebook.com>***

- Registered as a Meta Developer, refer to ["Register as a Meta \(Facebook\) Developer"](#).
- Enabled Two- Factor Authentication for your account, refer to ["Enable Two-Factor Authentication"](#).

- Created a Meta App, refer to [“Create an App”](#).
- Added a Phone Number in the Meta App, refer to [“Add a Phone Number”](#).
- Made the payment as per your requirement, refer to [“Add Payment Method”](#).
- Created a Permanent Token for usage, refer to [“Creating a Permanent Access Token”](#).

## Register as a Meta (Facebook) Developer

To register as a Meta Developer, following the steps given below:

- To start the registration process

Login into your Facebook Account.



*Make sure your Facebook Account is Meta verified and complies to all the Terms and Conditions of Meta. To do so, access your Facebook Account Setting & privacy > Meta Account Center > Meta Verified. Make sure you follow the instructions and fulfill all the necessary Meta requirements for the same.*

- Agree to the Terms and Policies.

Click **Next** to agree to the Platform Terms and Developer Policies.

- Verify your account

A confirmation code will be send to the phone number and email address that you provide in order to confirm that you have access to them. Your number and email will be used for important developer notifications of any changes that may impact to your app.

- Select your occupation

Select an occupation that most closely describes what you do for a living.

The registration process is completed.

## Enable Two-Factor Authentication

Two-factor authentication is a security feature that helps protect your Facebook account in addition to your password. If you set up two-factor authentication, you will be asked to enter a special login code or confirm your login attempt each time someone tries accessing Facebook from a browser or mobile device that Facebook does not recognize. You can also get alerts when someone tries logging in from a browser or mobile device that Facebook does not recognize.

### Turning-on/managing two-factor authentication:

- Go to your **Security and Login Settings**.
- Scroll down to **Use two-factor authentication** and click **Edit**.
- Choose the any one of the three security method that you wish to add and follow the on-screen instructions.
  - Tapping your security key on a compatible device.
  - Login codes from a third-party authentication app.
  - Text Message (SMS) codes from your mobile phone.

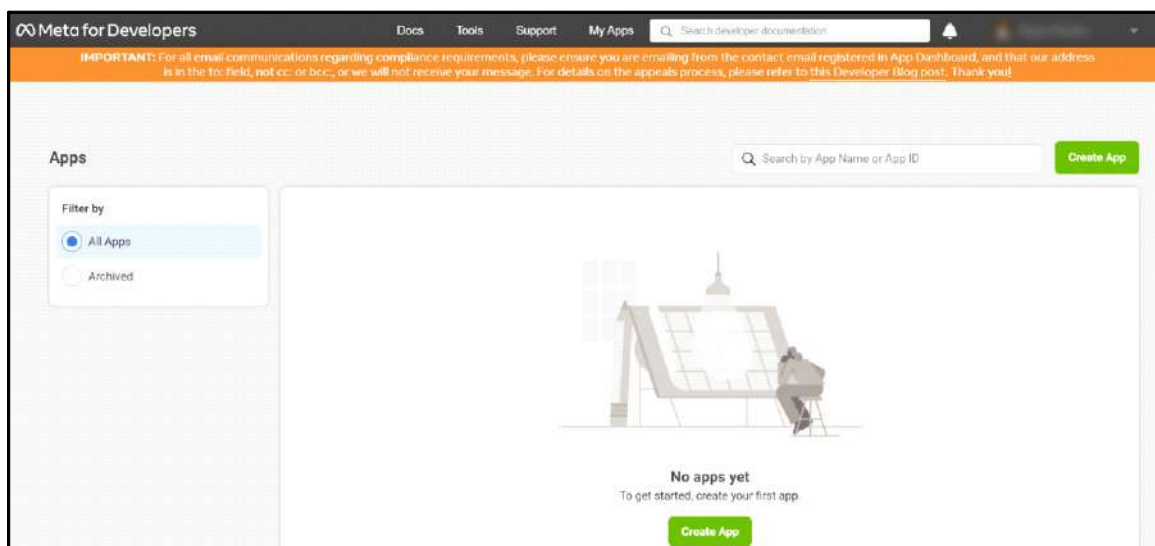
## Create an App



*Making sure you have a developer account on Meta for Developers. You also need WhatsApp installed on a mobile device to send test message.*

To create the App, following the steps mentioned below:

- Once you are signed in, you see the Meta for Developers App Dashboard. Click **Create App** to get started.



- Select **Business** as the **App Type**.

The screenshot shows the 'Create an App' dialog box with the 'Type' tab selected. On the left, there are two tabs: 'Type' (active) and 'Details'. The main area is titled 'Select an app type' with a note: 'The app type can't be changed after your app is created. [Learn more](#)'. There are four options, each with an icon and a radio button:

- Business**: Create or manage business assets like Pages, Events, Groups, Ads, Messenger, WhatsApp, and Instagram Graph API using the available business permissions, features and products.
- Consumer**: Connect consumer products and permissions, like Facebook Login and Instagram Basic Display to your app.
- Instant Games**: Create an HTML5 game hosted on Facebook.
- Gaming**: Connect an off-platform game to Facebook Login.

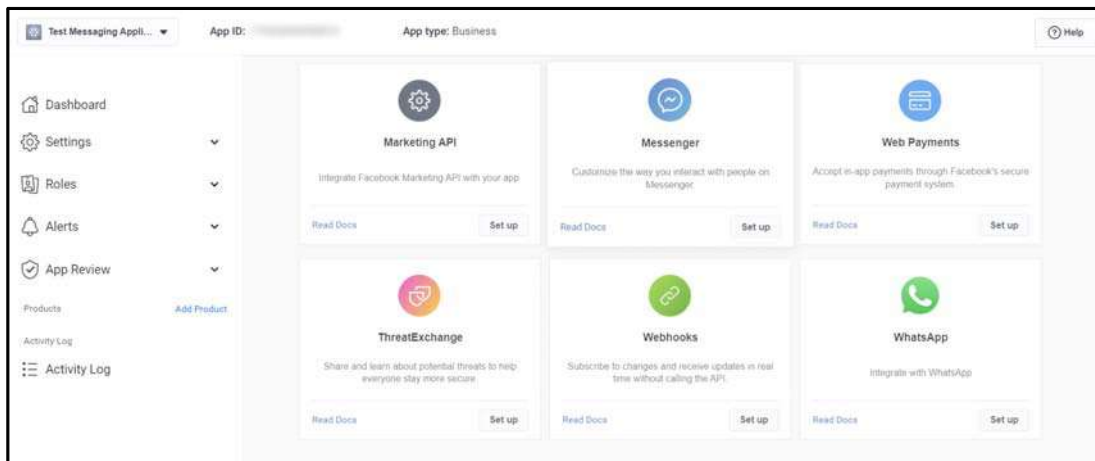
- Enter the **Display Name** for your App and an **Email Address** where you wish to receive any important developer notifications. The email address can be different from the email address associated with your Facebook account, just make sure it is valid and that you monitor it, since all important developer notifications will be sent there.

The screenshot shows the 'Create an App' dialog box with the 'Details' tab selected. The main area is titled 'Provide basic information'. It contains the following fields:

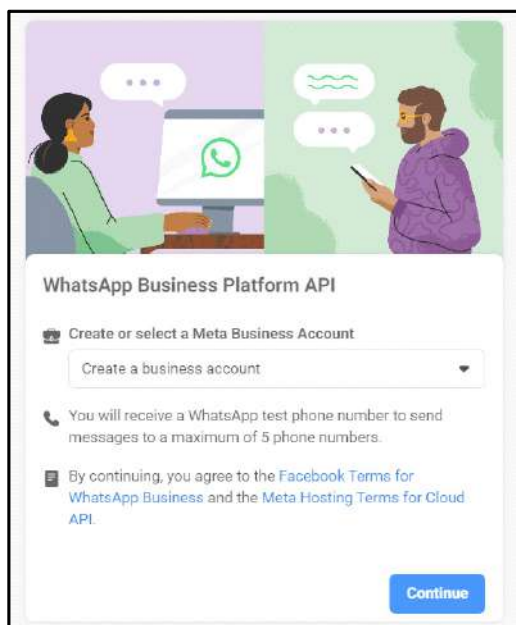
- Display name**: This is the app name associated with your app ID. You can change this later. The input field contains 'Test Messaging Application' and a character count '26/32'.
- App contact email**: This email address is used to contact you about potential policy violations, app restrictions or steps to recover the app if it's been deleted or compromised. The input field is empty.
- Business Account - Optional**: To access certain permissions or features, apps need to be connected to a Business Account. The dropdown menu shows 'No Business Manager account selected'.

At the bottom, there is a link: 'By proceeding, you agree to the [Facebook Platform Terms and Developer Policies](#)'. There are two buttons: 'Previous' and 'Create app'.

- You need to add products to your App. Scroll down until you see **WhatsApp** and click the **Set up**.

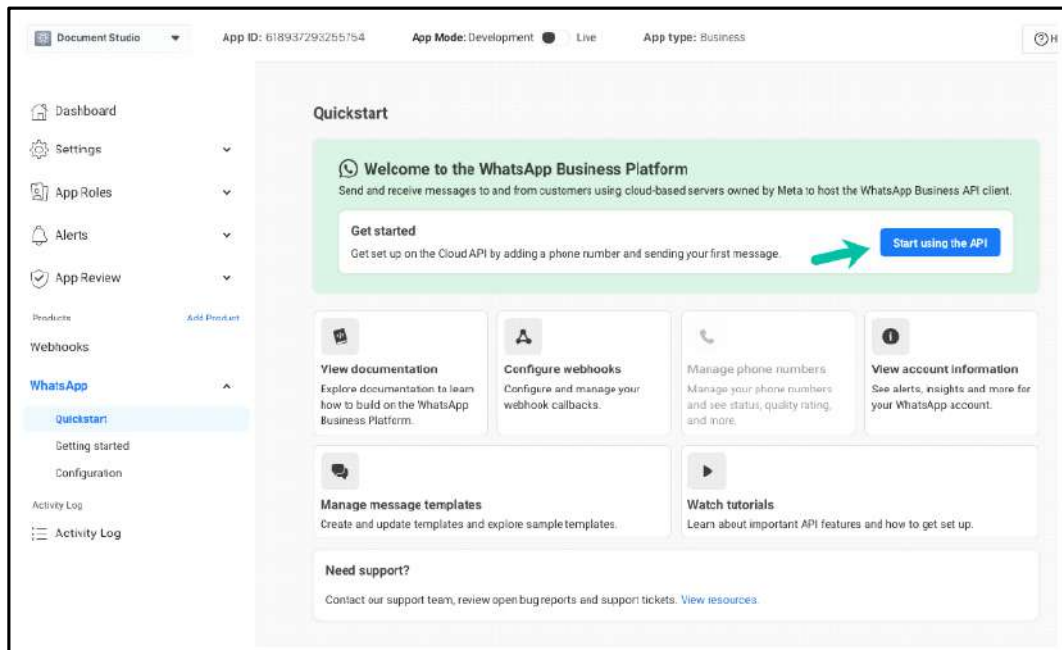


- Finally, choose an existing Meta Business Account or ask the platform to create a new one and click **Continue**.

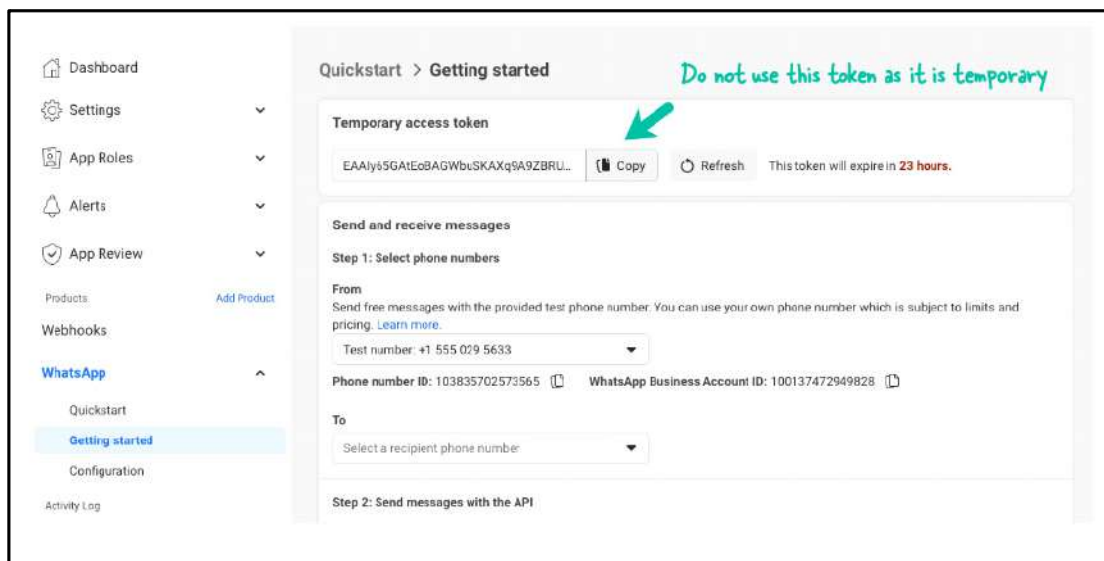




- Click on **Start using the API** on the next screen.



Facebook will now generate a temporary access token that allows you to test your WhatsApp Cloud API integration. However, we will not use this token since it expires after 24 hours. So instead, we will generate a permanent access token. For details, refer to [“Creating a Permanent Access Token”](#).

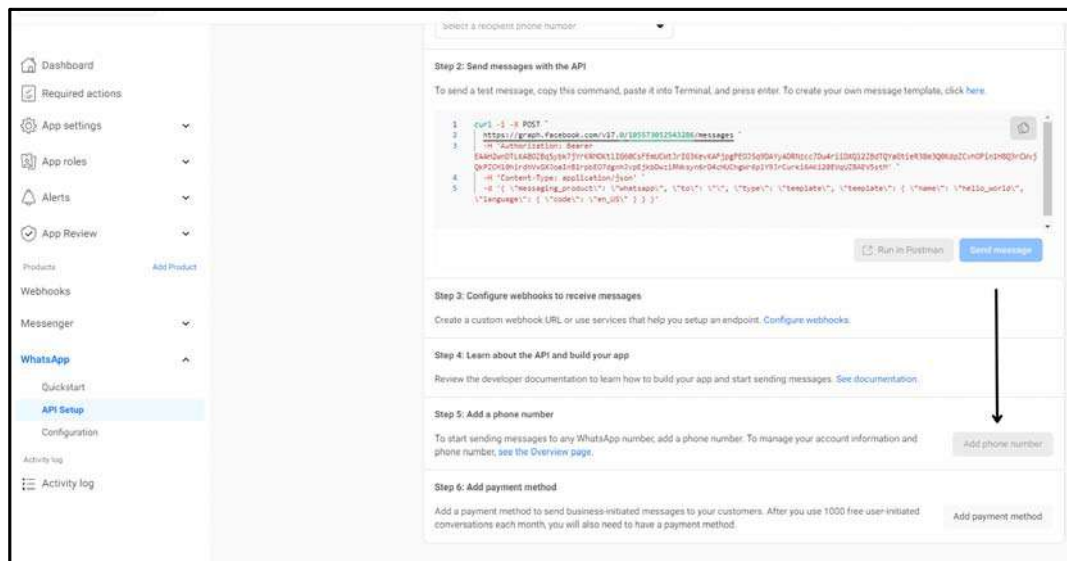


Send a message with the test number generated by WhatsApp to your Business WhatsApp number to test if your integration is a success.

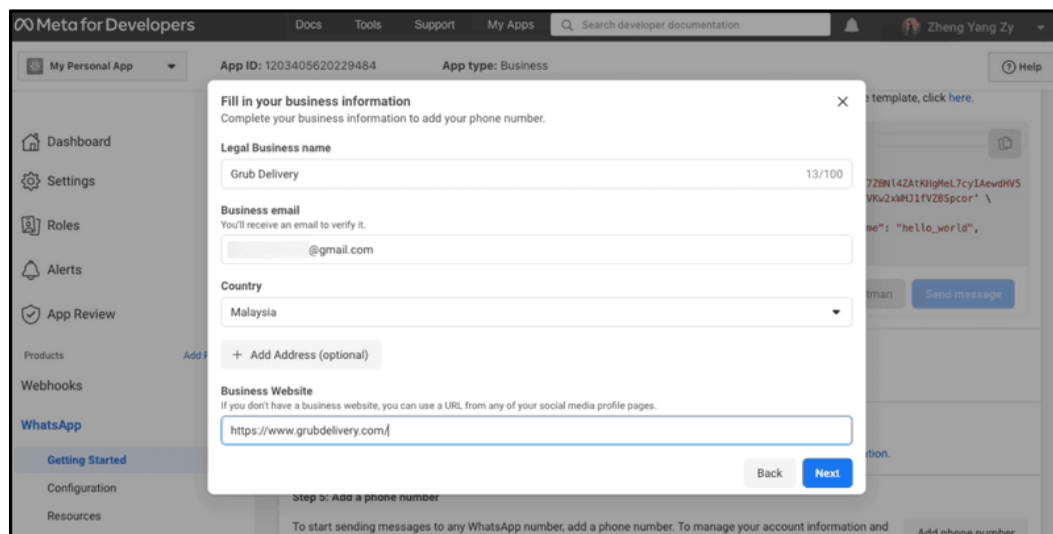
Next, you need to add your phone number to your WhatsApp Cloud API account.

## Add a Phone Number

- Scroll down on the page and click **Add phone number**. You need to associate a phone number with the WhatsApp API to send messages to any WhatsApp number.



- Fill in your business information and click **Next**.



- Fill in your WhatsApp Business profile information and click **Next**.

**Create a WhatsApp Business profile**  
Your profile information will be visible to people on WhatsApp.

WhatsApp Business profile display name  
Grub Delivery

Timezone  
(GMT+08:00) Asia/Shanghai

Category  
Food and Grocery

Business description - Optional  
Tell people about your business 0/512

Back Next

- Add a phone number for your WhatsApp Cloud API.

**Add a phone number for WhatsApp**  
This is the number people will see when they chat with you. [Learn how to use a number that's already on WhatsApp.](#)

Phone number  
US +1 (206) 70

You'll receive a code to verify this number.

Choose how you would like to verify your number:  
If you are using a landline number, choose phone call.

☒ Text message ☐ Phone call

Back Next

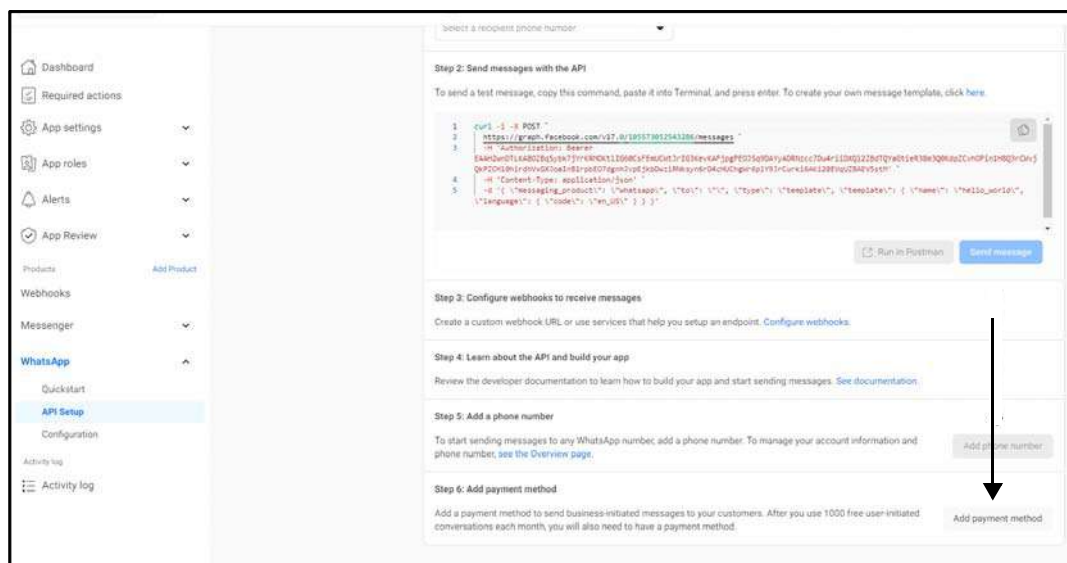


*Make sure that when you are adding a number it is a new number and has never been used in WhatsApp.*

- To verify the phone number you added, a 6-digit verification code will be sent to the number. Enter the verification code once you receive it.

## Add Payment Method

- Click **Add payment method**.



Follow the steps and complete the payment.

Next, copy and save the **WhatsApp Business Account ID** for this phone number.

## Creating a Permanent Access Token

Knowing that you need to use a bearer token in the Authorization Header of an HTTP request is helpful, but it is not enough. The only access token you have seen so far is temporary. Chances are that you want your App to access the API for more than 24 hours, so you need to generate a longer-lasting access token.

The Meta for Developers platform makes this easy. All you need to do is add a System User to your business account to obtain an access token that you can use to continue accessing the API.

To create a system user, following the steps:

- Go to **Business Settings**.
- Select the business account your app is associated with.
- Select **Users > System Users**.
- Click **Add**.
- Configure a **Name** for the system user, choose **Admin** as the user role, and click **Create System User** to continue.
- Select the **whatsapp\_business\_messaging** and **whatsapp\_business\_management** permission.
- Click **Generate New Token** to generate a permanent access token.
- Please copy the access token and save it in your notepad as it will not be visible again on your Facebook Dashboard.

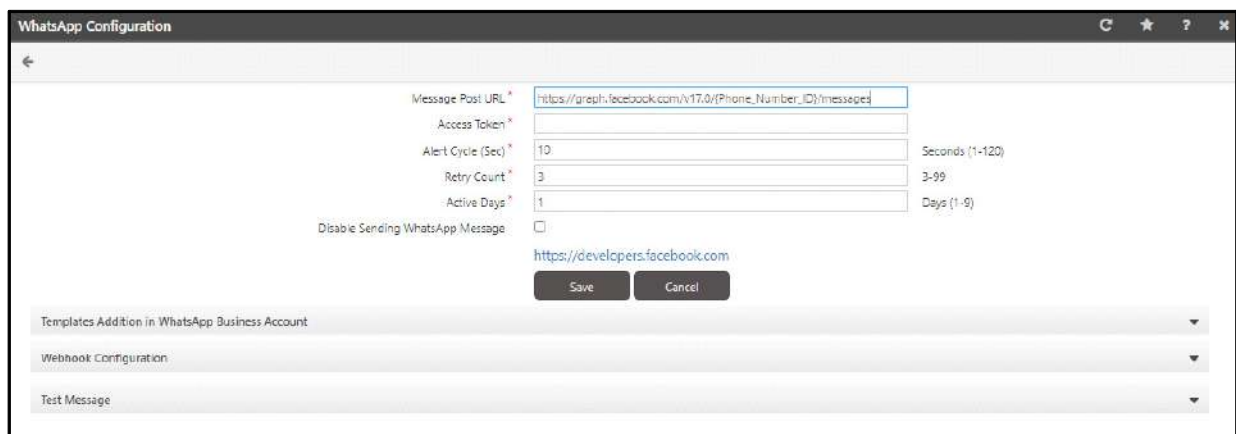
## Configuring WhatsApp Parameters

WhatsApp configuration includes the following:

- “WhatsApp Parameters”
- “Templates Addition in WhatsApp Business Account”
- “Webhook Configuration”
- “Test Message”

### WhatsApp Parameters

- Click **Admin module > System Configuration > WhatsApp Configuration** and the following screen appears.



The screenshot shows the 'WhatsApp Configuration' window. It contains the following fields and controls:

- Message Post URL**: `https://graph.facebook.com/v17.0/{Phone_Number_ID}/messages`
- Access Token**: (Empty field)
- Alert Cycle (Sec)**: `10` (Range: Seconds (1-120))
- Retry Count**: `3` (Range: 3-99)
- Active Days**: `1` (Range: Days (1-9))
- Disable Sending WhatsApp Message**: ☐
- Save** and **Cancel** buttons.
- Links at the bottom: [Templates Addition in WhatsApp Business Account](#), [Webhook Configuration](#), and [Test Message](#).

Configure the following parameters:

- **Message Port URL**: This is the URL that will be used for sending WhatsApp Messages.

**Default:** `https://graph.facebook.com/v17.0/{Phone_Number_ID}/messages`

You only need to change the `{Phone_Number_ID}` in the URL, with your actual Phone Number ID. The Phone Number ID can be taken from the WhatsApp Business Account you created.

You also need to check if the version mentioned in the URI, that is v17.0, is the same as your WhatsApp Business Account Version. If not, change it as per your account version.

For example, if your Phone Number ID is 123115956238956 and version is 18, then the URL will be:  
`https://graph.facebook.com/v18.0/123115956238956/messages`.



*The system will only consider the configured URL for sending messages. Make sure it is configured correctly.*

- **Access Token**: Enter the token number received after you have successfully created the WhatsApp Business Account.
- **Alert Cycle (Sec)**: Specify the time in seconds between successive send attempts when the system tries to send the pending messages. Valid Range: 1 to 120.
- **Retry Count**: Specify the number of times the system needs to retry to send the same message in the event of an unsuccessful attempt. Valid Range: 3 to 99.

- **Active Days:** Specify the number of days the system needs to keep the unsent messages active in the event of the service being stopped. Valid Range: 1 to 9.
- **Disable Sending WhatsApp Message:** Select the check box if you do not wish to send WhatsApp messages.

Click **Save** to save the configurations.

## Templates Addition in WhatsApp Business Account



Make sure you have visited their official website: <https://developers.facebook.com> and read the guidelines provided for the Templates.

Before you add any template to your WhatsApp Business Account make sure:

- you have updated/edited the templates as per your requirement from Alert Messages. For details, refer to “[Configuring Alert Messages](#)”. If you have sent the template/s to your WhatsApp Account and then modify the same from Alert Messages, you will have to manually update/edit/delete the templates from your WhatsApp Account. For smooth functioning of WhatsApp, make sure the content of the Alert Templates and the WhatsApp Templates are identical.
- you do not have any template/s with the same name/s already created in your WhatsApp Account. If same name template/s are found in your WhatsApp Account and you select the same here, then these templates will not be sent to your WhatsApp Account.
- you have checked the WhatsApp Business Policy. As per the WhatsApp Business Policy, you can create 100 templates per hour. The policies are frequently updated, hence refer to the policy details once before you move further.
- you have noted your WhatsApp Business Account ID. To check your WhatsApp Business Account ID, navigate to Business Manager > Business Settings > Accounts > WhatsApp Business Accounts. Click on the your account. A panel opens with the information of your account as well as ID.
- you have noted the App ID of your WhatsApp Business Account. To check your WhatsApp Business Account ID, navigate to Business Manager > Business Settings > Accounts > WhatsApp Business Accounts. Click on the your account. A panel opens with the information of your account as well as ID.

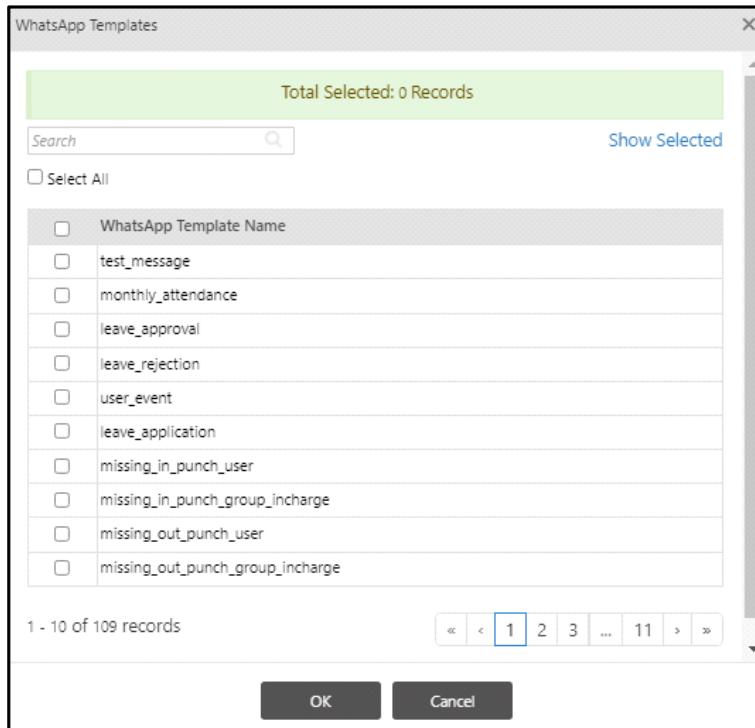
You can select the Templates that you wish to add in your WhatsApp Business Account. To do so,

- Click the **Templates Addition in WhatsApp Business Account** collapsible panel and configure the following:

- **Template Post URL:** The default value is :[https://graph.facebook.com/v17.0/{WhatsApp\\_Business\\_Account\\_ID}/message\\_templates](https://graph.facebook.com/v17.0/{WhatsApp_Business_Account_ID}/message_templates).

You need to replace the {WhatsApp\_Business\_Account\_ID} with your WhatsApp Business Account ID. While replacing the text make sure you remove the brackets and do not change the format. For example: [https://graph.facebook.com/v17.0/111000111100/message\\_templates](https://graph.facebook.com/v17.0/111000111100/message_templates)

- **App ID:** Enter the App ID of your WhatsApp Business Account.
- Click **Save** to save the configurations.
- **Select Templates:** Click the picklist. The **WhatsApp Templates** pop-up appears.



The names of the WhatsApp Templates appear as configured in Alert Messages. The Templates will be added to your WhatsApp Business Account in the language that you have selected in Alert Messages. For details refer to [“Configuring Alert Messages”](#).

After the Templates are sent to your WhatsApp Business Account, Alerts will be sent only after these templates are approved by WhatsApp.

If you are manually adding the Templates to your WhatsApp Account and the template has images/ document, then in the WhatsApp Template **Header** make sure you select **Media** and then select the relevant option. For the list of templates that have images/documents, refer to [“Templates with Images/ Documents”](#).


If you are manually adding Verdict Confirmation Alert Templates to your WhatsApp Account, that is when a Visitor Pre-registration Alert is sent, this has two options — Approve, Reject. If the receiver approves the request and you wish to send a verdict confirmation back to the receiver for the same, in such cases make sure you define the content as mentioned in [“Verdict Confirmation Alert Content”](#). But if you are exporting the same, then make sure the templates that have the word **system defined** in the default name are selected.

You can select the desired templates or can select all the templates at once.

To select the desired templates, select the check boxes of the desired templates.

**OR**

To select all the templates, select the **Select All** check box. The templates on all the pages will be selected.

- Click **OK**. Hover-over the **Info**  icon. It displays the number of templates selected.
- Click **Create Template** to create the templates in your WhatsApp Business Account. The templates will appear in your WhatsApp Account once these are approved by WhatsApp.

If you wish to abort, click **Cancel**.

If the template/s creation fails, the reasons for failure will be displayed under the Error List collapsible panel. For details, refer to [“Error List”](#).

## Webhook Configuration

You may have templates wherein certain actions are required to be taken by the receiver of the message, for example Approve/Reject a Leave Application.

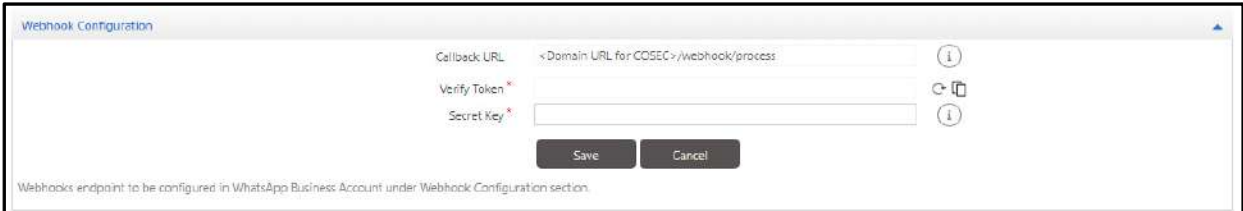
We can only send messages on WhatsApp, hence any action taken in response of the message needs to be communicated to COSEC. In such cases Webhook acts as a intermediary between COSEC and WhatsApp.



You need to configure:

- [“Configuring Webhook Parameters in COSEC”](#)
- [“Configuring Webhook Parameters in WhatsApp Business Account”](#)

## Configuring Webhook Parameters in COSEC

Configure the following Webhook parameters:

A screenshot of a 'Webhook Configuration' dialog box. It has a title bar 'Webhook Configuration'. Inside, there are three input fields: 'Callback URL' with a placeholder '<Domain URL for COSEC>/webhook/process', 'Verify Token' with a red asterisk, and 'Secret Key' with a red asterisk. To the right of each field is an information icon. Below the fields are 'Save' and 'Cancel' buttons. At the bottom, there is a small text note: 'Webhooks endpoint to be configured in WhatsApp Business Account under Webhook Configuration section.'

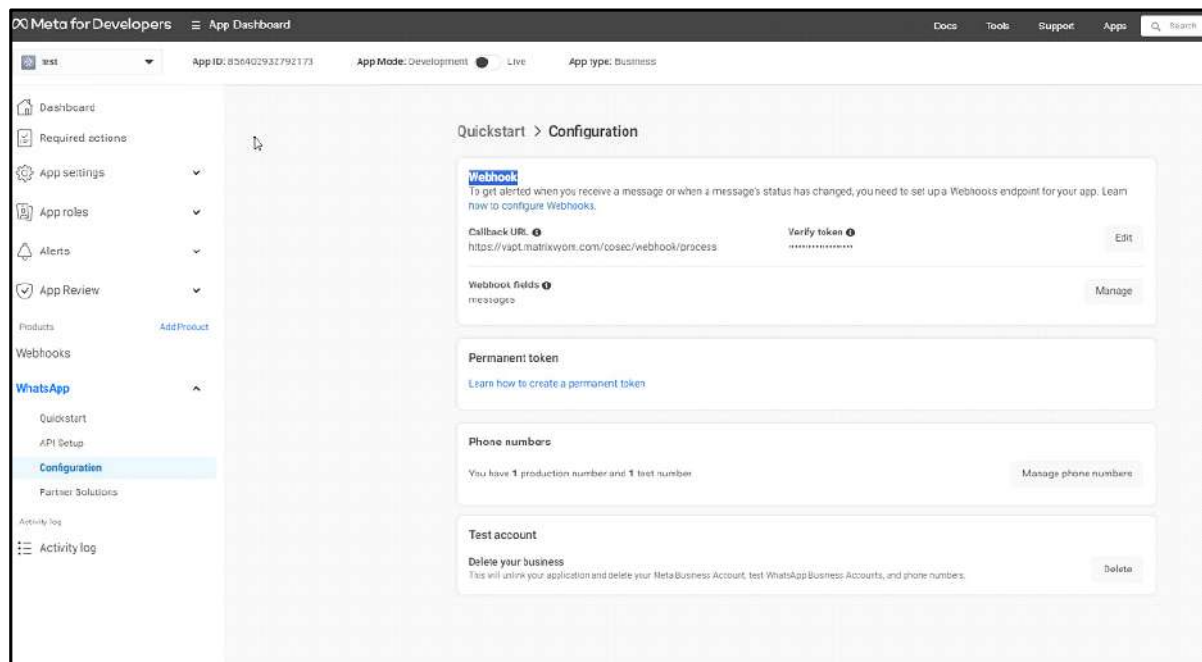
- **Callback URL:** By default it is <Domain URL for COSEC>/webhook/process. You need to replace <Domain URL for COSEC> with the URL of your COSEC.
- **Verify Token:** Click **Generate Token** . A token is generated by COSEC. Click **Copy**  to copy this token.
- **Secret Key:** Access your WhatsApp Business Account > App Settings > Basic > App Secret. Click **Show** and take a note of this value. Enter the same as the Secret Key here.

Click **Save** to save the configurations else click **Cancel**.



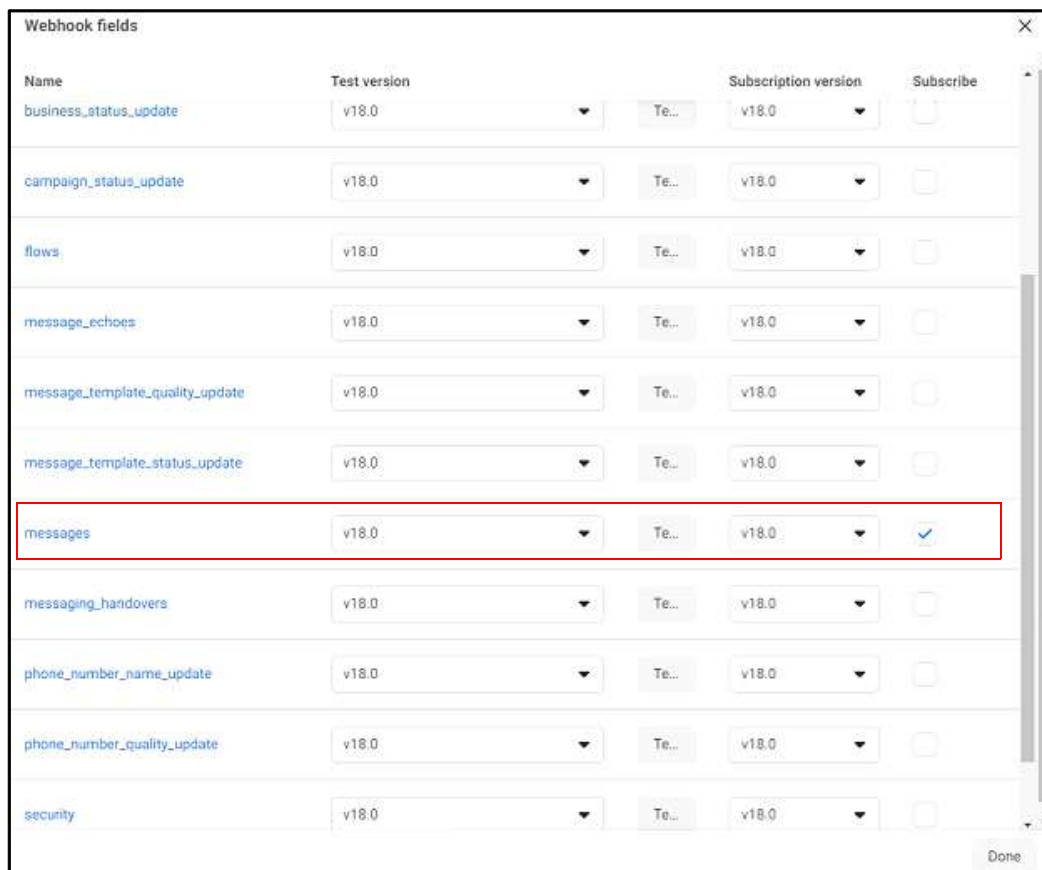
## Configuring Webhook Parameters in WhatsApp Business Account

Now, access your WhatsApp Business Account > Configuration.



Click **Edit**. Configure the **Callback URL** and **Verify Token** as configured in COSEC.

Click **Manage** against **Webhook fields**.



Click the corresponding **Subscribe** check box to enable.

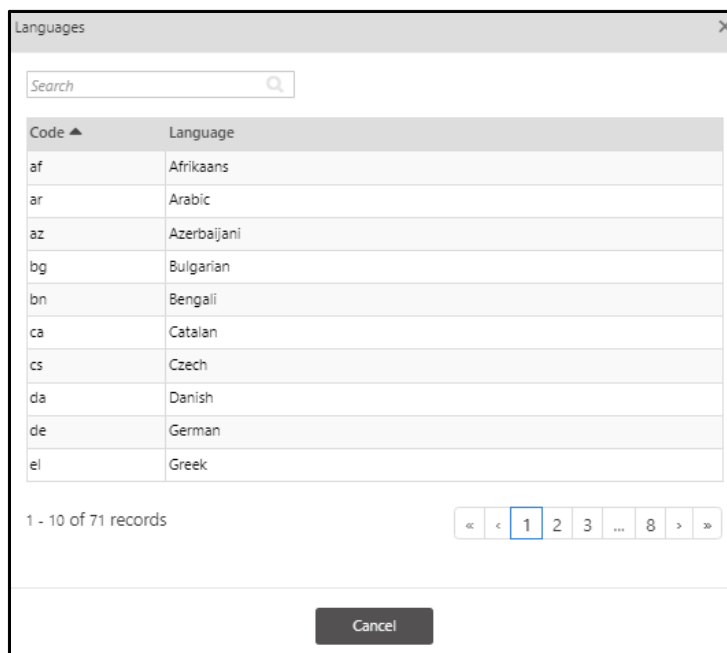
## Test Message

You can send a test message to check if your WhatsApp integration is successfully. To do so,

- Click the **Test Message** collapsible panel and configure the following:



- **Template Language:** Click the picklist. The **Languages** pop-up appears.



Code	Language
af	Afrikaans
ar	Arabic
az	Azerbaijani
bg	Bulgarian
bn	Bengali
ca	Catalan
cs	Czech
da	Danish
de	German
el	Greek

Select the language in which you wish to send the test message.

- **Template Name:** Enter the name of the template that you wish to send as the test message. The content of the template will be content of the test message.



**Make sure:**

- *the template you selected as the test message has only plain text and no variables.*
- *the template is registered and approved by WhatsApp.*
- **Phone Number:** Enter the phone number to which you wish to send the test WhatsApp message.

Click **Send**, to send the test message.

## Error List

Click the Error List collapsible panel the view the reason for the failure in sending the templates to your WhatsApp Business Account.

The name of the template/s along with the reason for failure are displayed.

## Templates with Images/Documents

Alerts with Documents/Images (ID - Name)
5- Leave Application
17- Visitor Pre-Registration
23- Leave Cancellation Application
31- Leave Modification Application
60-Visit Transfer
61- Visitor Pass
62- Visit State Change
71-APTA Auto Sign-In Configuration
72-Invite Visitor
74-Birthday Greetings
91- Invite User
99 - User Access - QR Credential

## Verdict Confirmation Alert Content

Default Template Name	Language	Content
application_already_processed_system_defined	English	Application is already been processed
application_proceessed_successfully_system_defined	English	Application Processed successfully
generic_error_occured_system_defined	English	Error in Application Processing

# Proxy Server Configuration

COSEC provides the provision for configuring the Proxy Server. A Proxy Server acts as a gateway between the end user and the internet. All the outbound internet traffic will flow through the Proxy Server on its way to the address requested. Proxy Servers encrypt the outbound web requests as well as the destination server would not know who actually made the original request. Hence using Proxy Servers enhances security as well as privacy.

COSEC provides the provision to select the services — SMS, Email, WhatsApp, Google API — for which you wish to use Proxy Server for outbound requests.



*Proxy Server Configuration is applicable to COSEC Centra and OEM.*

*Make sure there is persistent internet connection where the Proxy Server is installed.*

To configure the Proxy Server parameters,

- Click **Admin module > System Configuration > Proxy Server Configuration**.

- **Proxy Server:** Configure the IP Address of your Proxy Server. It can be a maximum of upto 50 characters. Default: Blank.
- **Proxy Port:** Configure the Port of your Proxy Server. It can be a maximum of upto 5 characters. Valid Characters: 0 to 9 and Valid Range: 1 to 65535. Default: Blank.
- **Proxy Auth:** By default, the Proxy Auth check box is selected, that is authentication is enabled and you need to configure the User Name and Password for the same. Clear the check box to disable.
- **User Name:** Configure the User Name that is to be used for logging into the Proxy Server. It can be a maximum of upto 50 characters.

Valid characters are ABCDEFGHIJKLMNOPQRSTUVWXYZ abcdefghijklmnopqrstuvwxyz  
1234567890/\_\.@:



*Rename Group will not be applicable to User Name.*

- **Password:** Configure the Password that is to be used for logging into the Proxy Server. It can be a maximum of upto 128 characters.

Valid characters are !\"#\$%&'()\*+,- 0123456789:;<=>?@ABCDEFGHIJKLMNOPQRSTUVWXYZ[\]^\_`abcdefghijklmnopqrstuvwxyz{|}~

## Use Proxy Server For

If you have configured the Proxy Server and Proxy Port, then you can select the services for which you wish to use the Proxy Server for outbound requests. To do so, configure the following:

- **SMS:** Select the check box to enable. Default: Disabled.
- **Email:** Select the check box to enable. Default: Disabled.
- **WhatsApp:** Select the check box to enable. Default: Disabled.
- **Google API:** Select the check box to enable. Default: Disabled.

Click **Save** to save the configurations.

# Renaming Groups

---

The COSEC application defines 7 enterprise groups with default group labels and 3 custom groups. These are:

- Organization
- Branch
- Department
- Section
- Category
- Grade
- Designation
- Custom Group1
- Custom Group2
- Custom Group3

However, COSEC administrators can rename these group labels as per the site requirements. For e.g. some sites would need to refer to the **Organization** group as 'Company' or 'Condominium'.

Administrators can also rename the following entities in COSEC :

## All modules

- User (e.g. "User" can be re-labelled as "Employee")

## Contract Worker Management module

- Worker
- Work Order
- Contractor

## Job Processing and Costing module

- Cost Centre
- Project
- Phase
- Job

Also **Quick Links** group can be renamed as required which will be reflected on the dashboard of modules.

To rename a group, Go to **Admin module > System Configuration > Rename Group** and the following screen appears.

**Rename Group**

Search

Rename Group: Organization

Rename As: Organization

Default Group Name	Renamed As
Organization	Organization
Branch	Branch
Department	Department
Section	Section
Category	Category
Grade	Grade
Designation	Designation
User	User
Worker	Worker
Work Order	Work Order
Contractor	Contractor
Cost Centre	Cost
Project	Project
Phase	Phase
Job	Job

1 - 15 of 16 records

« 1 2 »

**Rename Group:** Select a **Group** from the list view that is to be renamed. The selected Default Group Name appears in the field.

**Rename As:** Enter the new Group Name/label in the field.

Click the **Save** button.

The new Group name/label will appear in the list view under the **Renamed As** column as shown below.

**Rename Group** ✓ Saved Successfully

Search

Rename Group: User

Rename As: Employee

Default Group Name	Renamed As
Organization	Organization
Branch	Branch
Department	Department
Section	Section
Category	Category
Grade	Grade
Designation	Designation
User	Employee
Worker	Worker
Work Order	Work Order
Contractor	Contractor
Cost Centre	Cost
Project	Project
Phase	Phase
Job	Job

The updated label gets reflected all across the COSEC system.

# Setting Up the Enterprise Profile

The system administrator can define how the profile of an enterprise appears on the COSEC home page. This representative profile can be set up to display the company logo, the contact information as well as other descriptive details about the company.

To set up the enterprise profile, select **Admin module > System Configuration > Enterprise Profile** and the following screen appears.

The screenshot shows the 'Enterprise Profile' configuration window. It contains several sections: 'Company Name' with a text field containing 'Organization-1'; 'Logo' with a placeholder image; 'Show Company Logo in Title Bar' with an unchecked checkbox; 'I-Card Issuing Authority' with 'ID' and 'Name' fields; 'Contact Details' with a 'Show Details To Users' dropdown set to 'Matrix Details Only'; 'Address Info' with fields for 'Address 1', 'Address 2', 'Address 3', 'Phone No.', 'Fax No.', 'Email', and 'Website'; and 'Contact Info' with fields for 'Contact Details 1', 'Contact Details 2', and 'Contact Details 3'.

**Company Name:** Enter the name of the company in the field.

## Uploading Logo

**Logo:** Click to add an image for the company logo.

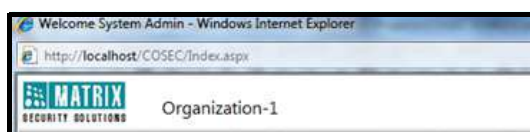
**Show Company Logo in Title Bar:** Select the box to show company logo in title bar.



*Company Logo with size 96 pixels in width and 48 pixels in height will display properly otherwise it is possible that logo will not fit properly. If image with transparency has been uploaded as company logo then it will not be displayed properly in reports.*



The uploaded company logo will be shown in title bar when you login again.



**I-card Issuing Authority:** Select the User as the I-card Issuing Authority using the picklist.

## Contact Details


**Show Details To Users:** Select an option from the dropdown list to make the company profile information visible to the employees.

- **Matrix Details Only:** If this value is selected, the user will be able to view only the Matrix Details on the "Contact Us" page.
- **Enterprise Details Only:** "Only the details configured in the "Address Info" and "Contact Info" will be displayed.
- **Both:** If this option is selected, both the "Matrix Contact Details" and "Enterprise Contact Details" will be displayed.

In the **Address Info** section, enter the company's correspondence **address, phone no., fax no., email address** and **website** as per the fields requested.

In the **Contact Info** section, you can define additional contact information to be provided.

In the **About Company** Section, add a brief description about the company.

Click **Save** button. The saved information will be now be updated on the COSEC Web application home page as well as the **Contact**  page.

# Sending Messages from COSEC

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The COSEC system can be configured to send preset alerts or customized messages to its users in response to certain predefined user events. If such a predefined user event occurs, it will trigger off an alert message to be sent to the relevant user or users via SMS or e-mail. A system administrator may also choose to send custom messages to selected users. COSEC allows you to configure both alert messages and custom messages.

- [“Configuring Alert Messages”](#)
- [“Configuring Custom Messages”](#)

# Configuring Alert Messages

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Alert Messages can be sent for various events to the desired users. For sending alerts for events, make sure the **Alert Message** check box is enabled while configuring the desired device. For details, refer to [“Device List”](#).

Alerts can be sent as SMS messages, Emails, WhatsApp messages as well as PUSH notifications.

Make sure the pre-requisites are configured to ensure the Alerts are sent. Refer to [“Pre-requisites”](#).

For sending Alert Messages, each Alert Message Template has a default content that will be sent. You can edit this content if required. For details refer to [“Alert Message Parameters”](#).

For SMS Alerts, make sure the desired Alert Message Templates are registered with your Service Provider, who will verify the contents and then provide a Template ID for the same. Prepare the list of registered Alert Messages with their respective Template IDs as these are required while configuring the Alert Message parameters.

Each Alert Message Template is assigned a unique WhatsApp Template Name so that the templates can be added to your WhatsApp Business Account. If you wish to edit the Alert Message Templates, it should be done before sending the templates to your WhatsApp Business Account, else you will have to manually edit the templates from your WhatsApp Business Account. For smooth functioning of WhatsApp, make sure the content of the Alert Templates and the WhatsApp Templates are identical. If you edit the name of the template, make sure it is unique, as same name templates cannot be added to your WhatsApp Business Account. For adding the Templates to your WhatsApp Business Account, refer to [“Templates Addition in WhatsApp Business Account”](#).

For PUSH Notifications details, refer to [“PUSH Notification - APTA Application”](#) and [“PUSH Notification - VMS Application”](#).

You can view the status of the Alerts. Refer to [“Alert View”](#) for details.



*If the user is situated in a time zone other than Alert Service's time zone; Alert Service will take tenant's time zone into consideration while processing scheduled tasks or generating scheduled reports.*



*Multi-language is not supported in Alert Messages sent via Email/SMS/WhatsApp/App Notification.*

## Pre-requisites

Before you configure the Alert parameters, make sure:

- you have configured the SMS parameters, refer to [“SMS Configuration”](#).
- you have configured the Email parameters, refer to [“Email Configuration”](#).
- you have configured the WhatsApp parameters, refer to [“WhatsApp Integration”](#).
- you have enabled the Alert Messages checkbox in Device Configuration >Profile> Basic of the desired devices, refer to [“Device List”](#).
- you have configured the Mobile number and Email ID of the desired users as well as enabled the desired Receive Alert On options, refer to [“Configuring Users”](#).

- ensure Alert Service is running so that alert messages can be sent to the assigned users.
- users have installed and configured the desired applications — APTA/VMS— for PUSH Notifications.

To configure an Alert Message, you need to configure the following

- “Alert Message Parameters”
- “Additional Message Parameters”
- “Message Preview”
- “Assign Alert”

## Alert Message Parameters

Click **Admin module > System Configuration > Alert Message Configuration**.

ID	Event
1	Monthly Attendance
2	Leave Approval
3	Leave Rejection
4	User Events
5	Leave Application
6	Missing In Punch - Users
7	Missing In Punch - Group Incharge
8	Missing Out Punch - Users
9	Missing Out Punch - Group Incharge
10	User Allowed
11	User Denied
12	Door Force Open
15	New Joining - Confirmation
16	Visitor Arrival
17	Visitor Pre-Registration

1 - 15 of 89 records

By default, **All** is selected as the **Alert Filter** and the grid on the right side displays all the events for which alert messages can be configured. You can directly click on the desired event and configure its parameters.

If you wish to configure alert message for an event of a particular module, then configure the following:

**Alert Filter:** Select the desired module. The modules appear as per the available licenses. Based on the selected module the various Events will be displayed.

**Event:** Select an event from the drop-down list for which the alert message is to be configured. The events appear as per the Module selected in Alert Filter and the available licenses.

**Header Message:** Enter the required text to be displayed in the header of the message, for example: Dear User.

**SMS/Email Footer Message:** Enter the required text to be displayed in the footer of the SMS/Email message, for example: From COSEC Software.

**WhatsApp Footer Message:** Enter the required text to be displayed in the footer of the WhatsApp message, for example: From COSEC Software.

## Additional Message Parameters

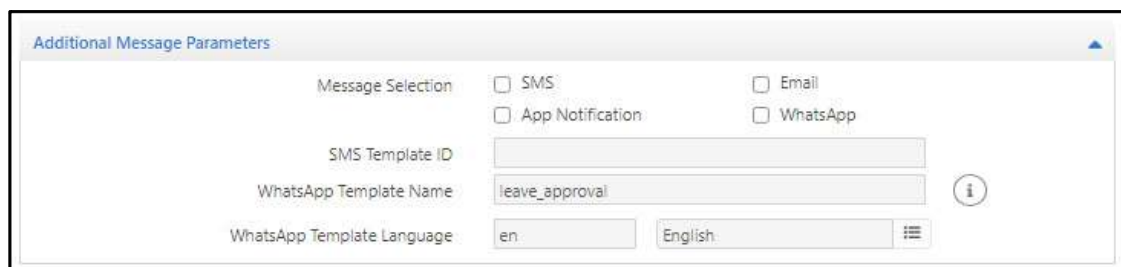
As per the selected Event the Additional Message Parameters may vary.

You need to configure the following:

- “Common Additional Parameters”
- “Specific Additional Parameters”

The Common Additional Parameters are applicable to all the Alerts, whereas the Specific Additional Parameters are differ as per the event.

Click the **Additional Message Parameters** collapsible panel and configure the following parameters:



### Common Additional Parameters

The following Additional Parameters are common for all the Alerts.

- **Message Selection:** Select the desired check boxes — **SMS, Email, App Notification, WhatsApp** — to determine the type of message/s to be sent. If you select the **App Notification** check box, PUSH Notifications will be sent on the APTA/VMS mobile applications for the related events. To know more about the Events for which PUSH Notifications will be received by the mobile applications, refer to “[PUSH Notifications](#)”.



*The options available in Message Selection vary as per the selected Event.*

*If you are upgrading COSEC to V20R08, make sure all the APP Notifications have been sent before you upgrade. If the App Notifications are in-progress and you initiate the upgrade, the Notifications will not be sent.*

- **SMS Template ID:** As per TRAI Regulation, an enterprise which sends messages to customers like OTP, communication message, promotional messages via SMS, have to register their entity and the content template to avoid spam, fake and fraudulent communication through SMS.



*There can be multiple SMS Template ID's such as SMS Template ID - User, SMS Template ID - Reporting In-charge, SMS Template ID-Host/Security, SMS Template ID-Visitor, SMS Template ID-Security, SMS Template ID-Contractor. These SMS Template ID may vary as per the Event selected. Each Template has a different content and the same needs to be registered with the Service provider.*

It is mandatory for an Admin to register the SMS content template beforehand with their Service Provider which will be verified before it is delivered to the users.

Once registered, the Service Provider will provide a Template ID against the registered SMS content. For every different Alert messages, a unique Template ID will be provided by the Service Provider.

Make sure **SMS** check box is enabled in **Message Selection** to configure SMS Template ID. Enter the respective Template ID for the configured Alert message which is to be send to users via SMS.



*If you have multiple Service Providers, then make sure the required templates are registered with all the desired Service Providers. Hence for each template you will have multiple Templates IDs. Also make sure you maintain a record of all the registered Message Templates with their respective Template IDs for reference.*

- **WhatsApp Template Name:** Make sure **WhatsApp** check box is enabled in **Message Selection**. The default name assigned to this alert template is displayed. You can change the same if required. If you opt to add the alert templates to your WhatsApp Business Account then this same name will be displayed in the WhatsApp **Select Templates** picklist. Make sure you have checked the contents of the template before the same are added to your WhatsApp Business Account. For details, refer to [“Templates Addition in WhatsApp Business Account”](#).
- **WhatsApp Template Language:** Click the picklist. The **Language** pop-up appears. Select the desired language in which you wish to send the WhatsApp message. When you add the templates to your WhatsApp Business Account these will be added in the selected language. For details, refer to [“Templates Addition in WhatsApp Business Account”](#).

## Specific Additional Parameters

There are parameters under Additional Parameters that differ as per the selected Events. Refer to the respective module link for the configurations:



*Alerts having only Common Parameters in the respective Modules have not been mentioned separately.*

- “Users Module”
  - “Event: User Events”
  - “Event: Missing In Punch - Users/Missing In Punch - Group Incharge”
  - “Event: Missing Out Punch - Users/Missing Out Punch - Group Incharge”
  - “Event: User Allowed / User Denied”
  - “Event: New Joining - Confirmation”
  - “Event: Validity / Expiry Date”
  - “Event: Birthday Greetings”
  - “Event: Health Declaration Pending”
  - “Event: Exceeding Health Declaration Parameters/ User Allowed - Threshold Temperature Exceeded/ User Denied - Threshold Temperature Exceeded / User Allowed - Face Mask Not Detected / User Denied - Face Mask Not Detected”
  - “Event: Invite User”
  - “Event: User Onboarding - Schedule Time”
- “Devices Module”
  - “Event: Door Force Open / Door Abnormal”
  - “Event: Door Offline”
  - “Event: Door Online”
- “Access Control”
  - “Event: Guard Tour Completion”
  - “Event: Access Route Violation / Anti-Pass Back Rule Violation / Guard Tour Violation”
  - “Event: Access Route Timer Violation”

- “Time and Attendance”
  - “Event: Attendance Correction Application / Short Leave/ Official Hours Application / Event Authorization / Advance Overtime Application / Shift Change Application”
  - “Event: Monthly Attendance”
  - “Event: Shift Change”
  - “Event: Overtime/C-Off Authorisation”
  - “Event: Overtime Limit Exceeded - User / Overtime Limit Exceeded - Group Incharge”
  - “Event: Attendance Exception”
  - “Event: Attendance Correction Approval/Rejection / Short Leave/Official Approval/Rejection / Advance Overtime Approval/Rejection”
- “Leave Management”
  - “Event: Leave Application / Leave Cancellation Application / Leave Modification Application”
  - “Event: Leave Credit/Debit”
  - “Event: Leave Approval/ Leave Rejection”
- “Visitor Management”
  - “Event: Visitor Pre-Registration / Visit Transfer”
  - “Event: Visitor Pass Expiry Reminder / Visitor Pass Expired”
  - “Event: Visitor Pass Expired”
  - “Event: Security Clearance / Visitor Pre-Registration Approval/Rejection”
  - “Event: Visitor Pass”
  - “Event: Visit State Change”
  - “Event: Visitor - Login without OTP”
  - “Event: Visit Reminder”
  - “Event: Create Visit - Watchlist/Blacklist / Visitor Form Execution”
  - “Event: Visit Request Approval / Rejection”

Also refer to “Visitor Pre-registration Requests and Approvals”
- “Contractor Worker Management”
  - “Event: Worker Assignment”
  - “Event: Worker Approval”
  - “Event: Work Order Expiry”
  - “Event: Contractor Validity”
  - “Event: Worker Assignment”
- “Job Processing and Costing”
  - “Event: Award/Penalty Application”
- “Field Visit Management”
  - “Event: Schedule Unavailable -Users / Schedule Unavailable - Group Incharge”
- “System”
  - “Event: Identification Server Inactive”
  - “Event: Pending Application for Approval”

## Users Module

### Event: User Events

- **Event Selection:** Select the desired option — First, All.

If you select First then only the first event will be considered. If you select all then all events will be considered.

### Event: Missing In Punch - Users/Missing In Punch - Group Incharge

- **Post Shift Start (Min):** Configure the time after the shift start time which you wish to consider for sending the Alert. After this time the system will trigger the Alert.

### Event: Missing Out Punch - Users/Missing Out Punch - Group Incharge

- **Pre -Shift End (Min):** Set the time period in minutes prior to the shift end time that the system should consider to trigger the Alert.
- **Post Shift End (Min):** Set the time period in minutes after the shift ends that the system should consider to trigger the Alert.  
Example: If the shift ends at 18:00 P.M. and you have not marked the out punch.


Consider the following configurations:



**Pre -Shift End:** 60 min




**Post Shift End:** 60 min

In this case an alert of **Missing Out Punch** will be triggered between the time interval 17:00 - 19:00.


### Event: User Allowed / User Denied

- **Event Check Period:** Click  and configure the following. Maximum **99** Event Check Periods can be configured.
- **Start Time** and **End Time:** Define the time period for checking the event by configuring the start and end time in HH: MM format.
- **Active Days:** Select the days on which you wish the events should be checked. To select all the days, select **Check All**.

Event Check Period		
<div></div>		
Start Time	End Time	Active Days
09:00	18:00	Mon Tue Wed Thu Fri  

- Click **OK**  to save the configurations or click **Cancel**  to discard.
- Click **Edit** , to make changes.



- Click **Delete**  , to remove the configured Event Check Period.

#### **Event: New Joining - Confirmation**

##### **Confirmation Period (Days)**

- **Confirmation:** Specify the days after joining for which alert is to be sent.


##### **Reminder Period (Days)**



- **Set Reminder (Days before Confirmation):** Specify the number of days before confirmation on which the alert is to be sent.
- **Reminder Time:** Time at which Alert is to be sent.

#### **Event: Validity / Expiry Date**

- **Send Alert To:** Select the check box to enable the desired option — User, Reporting In-Charge — to send the alert.

##### **Reminder Period (In Days)**

Click **Edit**  of the desired entry and configure the following:

- **Send Alert For:** Select the check box to enable. The Alert will be sent as a notification.
- **Document:** This field displays the name of the documents for which Alert can be configured. Custom fields with **Type** as **Date** will also appear in this grid. For configuring Custom Fields refer to ["Custom Fields"](#).
- **Days Before Expiry:** Configure the number of days before which the user will get notified about the expiry of documents validity. You can enter the days from 1 to 99. For Example:5
- **Reminder Time:** Define the Time of the reminder in 24hrs format, when the alert will get generated. For Example: 15:30
- **Repeat Reminder:** Select the check box to enable, that is if you wish to repeat the configured reminder.
- **Repeat Interval (In days):** Configure the number of days (1 to 99). The alert will be repeated every-time after those number of days. For example if 1 is configured, then the reminder alert will be sent every alternate day.
- Click **OK**  to save the configurations or click **Cancel**  to discard.

#### **Event: Birthday Greetings**

- **Send Alert To:** Select the check box to enable the desired option — User, Reporting In-Charge, Group — to send the alert.
- **Select Group:** If you select **Group** as the **Send Alert To** option, select the check boxes of the desired Groups.

- **Additional Recipients:** If you wish this alert to other people as well, configure their Email IDs here. For multiple IDs use comma as a separator. Maximum characters supported are 1000.
- **Schedule Time:** Configure the time at which Alert is to be sent.
- **Upload Card:** To upload a card, click on the image of the card, The Change Photo pop-up appears.

Click **Browse** and select the file from the desired path.

Click **Update**. This card will be sent in the alert message.

#### ***Event: Health Declaration Pending***

- **Send Alert To:** Select the check box to enable the desired option — User, Reporting In-Charge, System Account — to send the alert.
- **Send Alert As Per:** Select the desired option — Shift Start Time, Schedule Time.
- **Post Shift Start (Minutes):** If you select Shift Start Time as the Send Alert As Per option, configure the time after the start time that you wish to consider before sending the alert.
- **Schedule Time:** If you select Schedule Time as the Send Alert As Per option, configure the time at which you wish to send the alert.
- **Schedule Days:** If you select Schedule Time as the Send Alert As Per option, select the check boxes of the desired days on which you wish to send the alert.

#### ***Event: Exceeding Health Declaration Parameters/ User Allowed - Threshold Temperature Exceeded/ User Denied - Threshold Temperature Exceeded / User Allowed - Face Mask Not Detected / User Denied - Face Mask Not Detected***

- **Send Alert To:** Select the check box to enable the desired option — Reporting In-Charge, System Account — to send the alert.

#### ***Event: Invite User***


- **Days Before Link Expiry:** Configure the number of days before which the user will get notified about the expiry of link. You can enter the days from 1 to 99. For Example:5
- **Reminder Time:** Define the Time of the reminder in 24hrs format, when the alert will get generated. For Example: 15:30

#### ***Event: User Onboarding - Schedule Time***

- **Schedule Time:** Configure the time at which the Aler is to be sent.
- **Schedule Days:** Select the check boxes of the desired days on which you wish to send the alert.

### **Devices Module**

#### ***Event: Door Force Open / Door Abnormal***

- **Event Check Period:** Click  and configure the following. Maximum **99** Event Check Periods can be configured.

- **Start Time** and **End Time**: Define the time period for checking the event by configuring the start and end time in HH: MM format.
- **Active Days**: Select the days on which you wish the events should be checked. To select all the days, select **Check All**.

Event Check Period

+

Start Time	End Time	Active Days
09:00	18:00	Mon Tue Wed Thu Fri

- Click **OK** to save the configurations or click **Cancel** to discard.
- Click **Edit** , to make changes.
- Click **Delete** , to remove the configured Event Check Period.

#### Event: Door Offline

- **Event Reminder**: Select the check box to enable the Event Reminder.
- **Reminder Interval (Min)**: Define the time interval in minutes between sending two consecutive reminders.
- **Event Reminder Count**: Define the number of reminders to be sent after the initial alert is sent.

The calculation of Time Period for sending reminders will be (Reminder Interval x Current Reminder Count)+ Tolerance Period.

Let us understand this with the help of an example,

Door Offline Time = 08:30:00 AM  
 Reminder Interval = 1 min  
 Event Reminder Count = 2  
 Tolerance Period = 1 min



Consider a device, say ARGO FACE, went offline on 08:30:00 AM, then the initial alert will be sent at 08:31:00 AM. Now, the first reminder will be sent at 08:32:00 AM [1 (Reminder Interval) x 1 (Current Reminder Count)+ 1 (Tolerance Period)]. Similarly, the second reminder will be sent at 08:33:00 AM [1 (Reminder Interval) x 2 (Current Reminder Count)+ 1 (Tolerance Period)].





- **Event Check Period**: Click and configure the following. Maximum **99** Event Check Periods can be configured.
- **Start Time** and **End Time**: Define the time period for checking the event by configuring the start and end time in HH: MM format.

- **Active Days:** Select the days on which you wish the events should be checked. To select all the days, select **Check All**.


Event Check Period

+

Start Time	End Time	Active Days	
09:00	18:00	Mon Tue Wed Thu Fri	 



- Click **OK**  to save the configurations or click **Cancel**  to discard.
- Click **Edit** , to make changes.
- Click **Delete** , to remove the configured Event Check Period.
- **Tolerance Period (Sec):** Configure the time to be considered before sending the alert.





#### Event: Door Online

- **Event Check Period:** Click  and configure the following. Maximum **99** Event Check Periods can be configured.
- **Start Time** and **End Time:** Define the time period for checking the event by configuring the start and end time in HH: MM format.
- **Active Days:** Select the days on which you wish the events should be checked. To select all the days, select **Check All**.

Event Check Period

+

Start Time	End Time	Active Days	
09:00	18:00	Mon Tue Wed Thu Fri	 

- Click **OK**  to save the configurations or click **Cancel**  to discard.
- Click **Edit** , to make changes.
- Click **Delete** , to remove the configured Event Check Period.
- **Tolerance Period (Sec):** Configure the time to be considered before sending the alert.

## Access Control

### *Event: Guard Tour Completion*

- **Schedule Time:** Configure the time at which Alert is to be sent.

### *Event: Access Route Violation / Anti-Pass Back Rule Violation / Guard Tour Violation*

- **Send Alert To:** Select the check box to enable the desired option — Reporting In-Charge, User— to send the alert.

### *Event: Access Route Timer Violation*

- **Send Alert To:** Select the check box to enable the desired option — Reporting In-Charge, User — to send the alert.
- **Send Alert For Event:** Select the check box to enable the desired option — Allowed, Denied.

## Time and Attendance

### *Event: Attendance Correction Application / Short Leave/ Official Hours Application / Event Authorization / Advance Overtime Application / Shift Change Application*

- **Email/WhatsApp Approval Links:** Make sure you have enabled the **Email/WhatsApp** check box as the Message Selection option. Now, select the **Email/WhatsApp Approval Links** check box to include particular links in the Email/WhatsApp message, enabling the user to take an action — Approve/Reject.
- **Email Approval Acknowledgment:** Make sure you have enabled the **Email/WhatsApp** check box as the Message Selection option as well as selected the **Email/WhatsApp Approval Links** check box to configure **Email Approval Acknowledgment**. Select this checkbox to get an Acknowledgment Email (reply) when an action is taken — Approval/Rejection — by respective user.

### *Event: Monthly Attendance*

- **Show Monthly Leave Balance:** Select this check box if you wish add the details of the Leave Balance in the message.

The leave details for the month — Opening Balance, Leaves CreditDebit, Leave Encashment, Availed Leaves, Closing Balance, Overflow — will be included in the alert message.

### *Event: Shift Change*

- **Alert for Normal Shift Update:** Select the check box to send alert for normal shift update.
- **Alert for Field Break Shift Update:** Select the check box to send alert for field break shift update.
- **Alert for Rest Day Shift Update:** Select the check box to send alert for f rest day shift update.
- **Send Alert To:** Select the **System Account** check box to send the alert to the System Admin/ On Behalf System Account User.

### *Event: Overtime/C-Off Authorisation*

- **Schedule Time:** Configure the time at which alert is to be sent.

**Event: Overtime Limit Exceeded - User / Overtime Limit Exceeded - Group Incharge**

- **Schedule Time:** Configure the time at which alert is to be sent.
- **Processing Period:** Select the desired processing period — Current, Previous.

**Event: Attendance Exception**

- **Send Alert To:** Select the desired check boxes — **User, Reporting In-Charge** — to send the alert.
- **Send Alert As Per:** Select the desired option — **Daily-Schedule Time, Daily-Shift End Time**, Weekly, Bi-Weekly, Monthly.

If you select **Daily-Schedule Time** as the Send Aler As Per option, configure the following:

- **Schedule Time:** Configure the time at which the Aler is to be sent.
- **Schedule Days:** Select the check boxes of the desired days on which you wish to send the alert.

If you select **Daily-Shift End Time** as the Send Aler As Per option, configure the following:

- **Post Shift End (Minutes):** Select this option to generate an alert after the shift ends. Specify the time after which the alert should be generated.

For example: Value of this parameter is set to 120. Shift of Ram ends at 18:00. If any exception occurs for Joy, its alert should be sent at 20:00.

If you select **Weekly** as the Send Aler As Per option, configure the following:

- **Schedule Time:** Configure the time at which the Aler is to be sent.
- **Schedule Days:** Select the check boxes of the desired days on which you wish to send the alert.

If you select **Bi-Weekly** as the Send Aler As Per option, configure the following:

- **Type of Week:** Select the desired option — Odd Weeks, Even Weeks— for which the Alert is to be sent.
- **Schedule Time:** Configure the time at which the Aler is to be sent.
- **Schedule Days:** Select the check boxes of the desired days on which you wish to send the alert.

If you select **Monthly** as the Send Aler As Per option, configure the following:

- **Day of the Month:** Select the desired day of the month, that is from 1 to 31 on which you wish to send the Alert.
- **Schedule Time:** Configure the time at which the Aler is to be sent.
- **Exceptions:** Select the check boxes of the desired exceptions, when these occur the alert will be sent to the RIC/User. Exceptions will be calculated separately for each user. For each exception, a different alert will be sent.

If you select **Send Alert To** as Reporting In-Charge, then only single message will be sent containing details about all the users for whom the same exception occurred.

- **Maximum Absence Allowed:** Configure the number of times user is allowed to be absent, after which the Alert is to be sent.

**Event: Attendance Correction Approval/Rejection / Short Leave/Official Approval/Rejection / Advance Overtime Approval/Rejection**

- **Send Alert To:** Select the **System Account** check box to send the alert to the System Admin/ On Behalf System Account User.

**Leave Management**

**Event: Leave Application / Leave Cancellation Application / Leave Modification Application**

- **Email/WhatsApp Approval Links:** Make sure you have enabled the **Email/WhatsApp** check box as the Message Selection option. Now, select the **Email/WhatsApp Approval Links** check box to include particular links in the Email/WhatsApp message, enabling the user to take an action — Approve/Reject.
- **Email Approval Acknowledgment:** Make sure you have enabled the **Email/WhatsApp** check box as the Message Selection option as well as selected the **Email/WhatsApp Approval Links** check box to configure **Email Approval Acknowledgment**. Select this checkbox to get an Acknowledgment Email (reply) when an action is taken — Approval/Rejection — by respective user.
- **Include Attachment:** Select this checkbox to send an attachment like Medical Certificate/Tour document along with the alert message to the RIC. Make sure you have enabled the **Email/WhatsApp** check box as the Message Selection option.

**Event: Leave Credit/Debit**

- **Alert Reporting In-Charge:** Select the check box if you wish to send the alert to the Reporting In-Charge.

**Event: Leave Approval/ Leave Rejection**

- **Send Alert To:** Select the **System Account** check box to send the alert to the System Admin/ On Behalf System Account User.

**Visitor Management**

**Event: Visitor Pre-Registration / Visit Transfer**

- **Calendar Invite:** Make sure **Email** is selected as the Message Selection option. Select this checkbox to attach icalender (.ics) file in the Email invitation along with the details of the scheduled visit to a visitor.

ICS file is an universal calender format which enables the users to publish and share calendar information over Email.

By attaching the .ics file in the Email invitation, all scheduled visit details will get imported directly in to the calendar of the invited visitors, provided it has an email reader with calendar application.

Recipients of the .ics file will get a notification from the calendar event for the scheduled visit before the start time of the visit.

An .ics file includes — Summary of the Visit, Visitor and Host Information, Date and Time of the Visit, Unique ID (UID), Location, Description of the Visit etc.

- **Email/WhatsApp Approval Links:** Make sure you have enabled the **Email/WhatsApp** check box as the Message Selection option. Now, select the **Email/WhatsApp Approval Links** check box to include particular links in the Email/WhatsApp message, enabling the user to take an action — Approve/Reject.

**Email Approval Acknowledgment:** Make sure you have enabled the **Email/WhatsApp** check box as the Message Selection option as well as selected the **Email/WhatsApp Approval Links** check box to

configure **Email Approval Acknowledgment**. Select this checkbox to get an Acknowledgment Email (reply) when an action is taken — Approval/Rejection — by respective user.

- **Send Alert To:** Select the desired check boxes — **Host, Visitor, Security** — to send the alert.

Security is applicable for Visit Transfer only.

#### ***Event: Visitor Pass Expiry Reminder / Visitor Pass Expired***

- **Send Alert To:** Select the desired check boxes — **Host, Visitor, Security** — to send the alert.
- **Expiry Reminder (Minutes):** Configure the time after which the alert is to be sent for reminder of the pass expiry.

#### ***Event: Visitor Pass Expired***

- **Send Alert To:** Select the desired check boxes — **Host, Visitor, Security** — to send the alert.
- **Reminder Period (Min):** Configure the time after pass expiry time after which the alert is to be sent.

#### ***Event: Security Clearance / Visitor Pre-Registration Approval/Rejection***

- **Email/WhatsApp Approval Links:** Make sure you have enabled the **Email/WhatsApp** check box as the Message Selection option. Now, select the **Email/WhatsApp Approval Links** check box to include particular links in the Email/WhatsApp message, enabling the user to take an action — Approve/Reject.
- **Email Approval Acknowledgment:** Make sure you have enabled the **Email/WhatsApp** check box as the Message Selection option as well as selected the **Email/WhatsApp Approval Links** check box to configure **Email Approval Acknowledgment**. Select this checkbox to get an Acknowledgment Email (reply) when an action is taken — Approval/Rejection — by respective user.

#### ***Event: Visitor Pass***

- **Scan Code:** Select the desired check box, QR and /or Barcode. The selected code will be sent in the alert.

#### ***Event: Visit State Change***

- **Calendar Invite:** Make sure **Email** is selected as the Message Selection option. Select this checkbox to attach icalender (.ics) file in the Email invitation along with the details of the changes in the visit to a visitor.

ICS file is an universal calendar format which enables the users to publish and share calendar information over Email.

By attaching the .ics file in the Email invitation, all scheduled visit details will get imported directly in to the calendar of the invited visitors, provided it has an email reader with calendar application.

Recipients of the .ics file will get a notification from the calendar event for the scheduled visit before the start time of the visit.

An .ics file includes — Summary of the Visit, Visitor and Host Information, Date and Time of the Visit, Unique ID (UID), Location, Description of the Visit etc.

- **Approval Links:** Make sure you have enabled the **Email** check box as the Message Selection option. Now, select the **Approval Links** check box to include particular links in the Email message, enabling the user to take an action — Approve/Reject.



**Email Approval Acknowledgment:** Make sure you have enabled the **Email** check box as the Message Selection option as well as selected the **Approval Links** check box to configure **Email Approval Acknowledgment**. Select this checkbox to get an Acknowledgment Email (reply) when an action is taken — Approval/Rejection — by respective user.

- **Send Alert To:** Select the desired check boxes — **Host, Visitor, Security**.

**Event: Visitor - Login without OTP**

- **Approval Links:** Make sure you have enabled the **Email** check box as the Message Selection option. Now, select the **Approval Links** check box to include particular links in the Email message, enabling the user to take an action — Approve/Reject.

**Email Approval Acknowledgment:** Make sure you have enabled the **Email** check box as the Message Selection option as well as selected the **Approval Links** check box to configure **Email Approval Acknowledgment**. Select this checkbox to get an Acknowledgment Email (reply) when an action is taken — Approval/Rejection — by respective user.

**Event: Visit Reminder**

- **Send Alert To:** Select the desired check boxes — **Host, Visitor, Additional Host** — to send the alert.
- **Reminder Prior Hours:** Configure the desired hours to send an alert before the configured time ends.
- **Reminder Prior Days:** Configure the desired days to send an alert before the configured time ends.

**Event: Create Visit - Watchlist/Blacklist / Visitor Form Execution**

- **Send Alert To:** Select the desired check boxes — **Host, Security** — to send the alert.

**Event: Visit Request Approval / Rejection**

- **Send Alert To:** Select the **System Account** check box to send the alert to the System Admin/ On Behalf System Account User.

Also refer to [“Visitor Pre-registration Requests and Approvals”](#).

**Contractor Worker Management**

**Event: Worker Assignment**

- **Schedule Time:** Configure the time at which the alert message should be sent.
- **Processing Period:** Select the desired processing period — Current, Previous.


**Event: Worker Approval**

- **Schedule Time:** Configure the time at which the alert message should be sent.

**Event: Work Order Expiry**

- **Send Reminder:** Select the desired option — Everyday, Once.
- **Set Reminder (Days before Validity End):** Configure the desired days to send an alert before the validity ends.
- **Reminder Time:** Configure the time at which the reminder alert should be sent.

#### **Event: Contractor Validity**

- **Send Alert To:** Select the desired check boxes — **User**, **Contractor**— to send the alert.
- **Reminder Period (Days):** Click **Edit**  to configure the parameters:
  - **Days Before Validity End Date:** Configure the number of days before the validity end date on which the alert reminder should be sent.
  - **Reminder Time:** Configure the time at which the reminder alert should be sent.
  - **Repeat Reminder:** Select the check box if you wish to repeat the reminder.
  - **Repeat Interval (Days):** Configure the number of days in between 1 to 99. The reminder will repeat till the entered number of days. For example: 10

#### **Event: Worker Assignment**

- **Email/WhatsApp Approval Links:** Make sure you have enabled the Email/WhatsApp check box as the Message Selection option. Now, select the Email/WhatsApp Approval Links check box to include particular links in the Email/WhatsApp message, enabling the user to take an action — Approve/Reject.
- **Email Approval Acknowledgment:** Make sure you have enabled the Email check box as the Message Selection option as well as selected the Email/WhatsApp Approval Links check box to configure Email Approval Acknowledgment. Select this checkbox to get an Acknowledgment Email (reply) when an action is taken — Approval/Rejection — by respective user.

#### **Job Processing and Costing**

##### **Event: Award/Penalty Application**

- **Email/WhatsApp Approval Links:** Make sure you have enabled the Email/WhatsApp check box as the Message Selection option. Now, select the Email/WhatsApp Approval Links check box to include particular links in the Email/WhatsApp message, enabling the user to take an action — Approve/Reject.
- **Email Approval Acknowledgment:** Make sure you have enabled the Email check box as the Message Selection option as well as selected the Email/WhatsApp Approval Links check box to configure Email Approval Acknowledgment. Select this checkbox to get an Acknowledgment Email (reply) when an action is taken — Approval/Rejection — by respective user.






#### **Field Visit Management**

##### **Event: Schedule Unavailable -Users / Schedule Unavailable - Group Incharge**

- **Set Reminder:** Select the desired option — Everyday, Once. The reminder will be sent as the selected option.
- **Reminder Time:** Configure the time at which you wish to sent the reminder alert.
- **Reminder Period (Days Before Schedule Date):** Configure the number of days prior to the schedule date for which users are not available, for which the alert need to be sent.

## System

### *Event: Identification Server Inactive*

- **Event Check Period:** Maximum 99 Event Check Periods can be configured. Click  and configure the following.
  - **Start Time and End Time:** Define the time period for checking the event by configuring the start and end time in HH: MM format.
  - **Active Days:** Select the days on which you wish the events should be checked. To select all the days, select Check All.
- Click **OK**  to save the configurations or click **Cancel**  to discard.
- Click **Edit** , to make changes.
- Click **Delete** , to remove the configured Event Check Period.
- **Tolerance Period (Min):** Configure the time that can be considered before sending the alert.

### *Event: Pending Application for Approval*

- **Set Reminder:** Select the desired option — Daily, Monthly, Weekly. The reminder will be sent as the selected option.
- **Reminder Time:** Configure the time at which you wish to sent the reminder alert.

## Visitor Pre-registration Requests and Approvals

Pre-registration requests can be initiated by Visitor, Host as well a SA.

For SA initiated requests, refer to [“Pre-Registration”](#) and [“Visit Registration Approval”](#).

Visitor can initiate requests from the Visitor Portal:

- The requests are sent to the Host for Approval.
- After the Hosts approval the request is sent to the RIC.

Host can initiate requests from his/her ESS login:

- This request is sent to the RIC for approval.

The following Alerts can be configured:

- When requests are initiated by the Visitor/Host for notifications select Alert Filer as Visitor Management, Event as Visit Pre-registration.
- When requests are Approved/Rejected if notifications are required, select Alert Filer as Visitor Management, Event as Visit Request Approval/Rejection.
- When Host user approves the request, then the request is sent to RIC as well as alert is sent to the RIC. For this select Alert Filer as Visitor Management, Event as Visit Pre-registration Approval/Rejection.

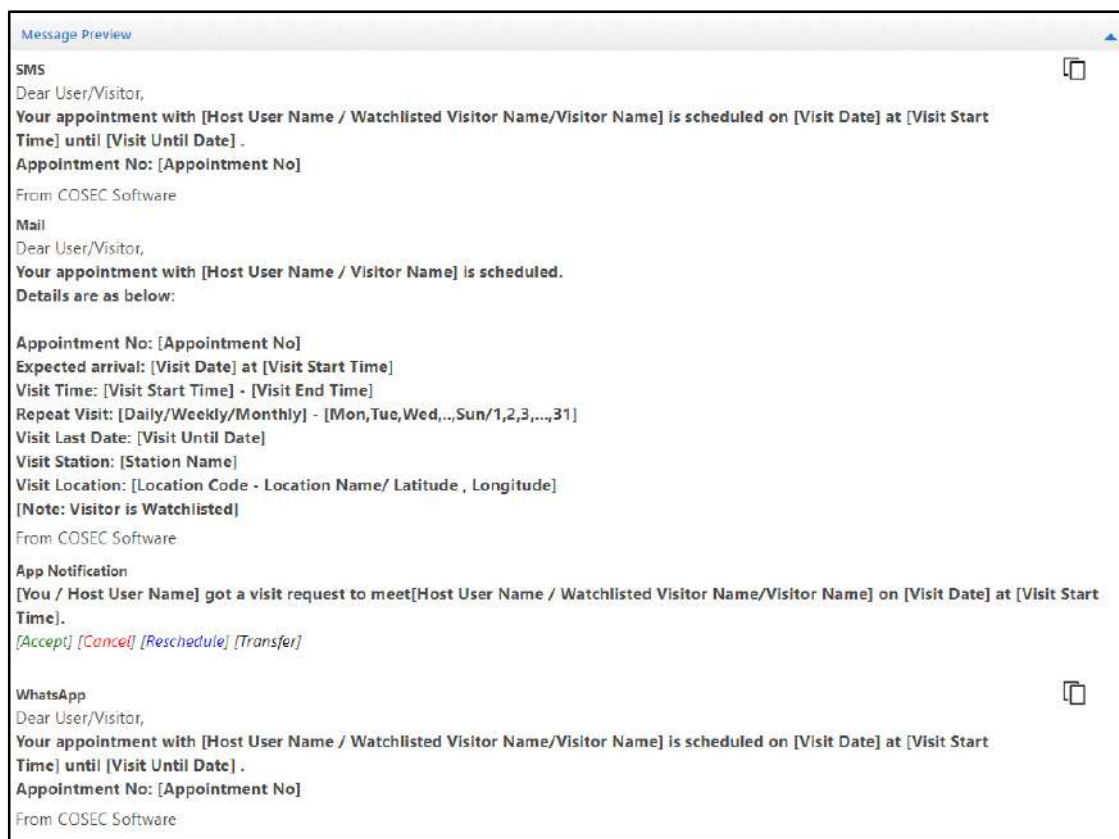
Visits can be transfered or rescheduled, in these cases the alerts will be sent to the Host/RICs accordingly.

## Message Preview

You can preview the alert message content as per the selected event. To do so,

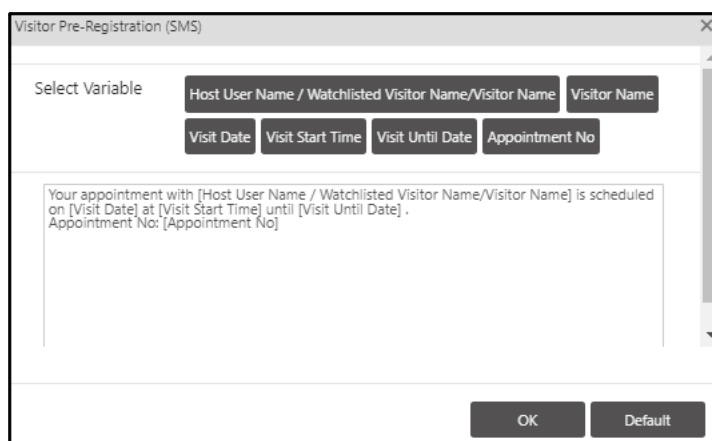
- Click the **Message Preview** collapsible panel.

The message details that will be sent to the recipient — SMS, Email, WhatsApp, App Notification — appear.



You can copy the content of the message — SMS, WhatsApp — if required. To do so, click **Copy** .

Messages may contain variables as well. For certain Events the variables as well as message text can be edited. The text and variables that can be edited appear in bold and when you hover-over the same, a hand icon appears. Click to edit. A pop-up appears wherein you can customize the message as per your requirements.



Click **OK** to save the changes.

After customization if you wish to set the template back to the default one, click **Default**.

If no customization is done, the default will be sent.



*As per the selected Event, the content (text) and variables differ and are editable.*

*The number of variables that can be added in a single template in any custom message depends on the TRAI regulations in India. Hence, make sure you customize your message according to the regulations prevailing in your country.*

## Assign Alert

Depending on the selected Event, the Assign Alerts parameters may differ. Refer to the desired link as per your requirement.

- “Option 1”
- “Option 2”
- “Option 3”
- “Option 4”
- “Option 5”
- “Option 6”

### Option 1

- **Select Users:** Select the desired option — All, Randomly.

User ID	Name	SMS	Email	App Notification	WhatsApp	
Nirali	Nirali	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	

If you select **All**, all the uses appear in the grid. The check boxes — SMS, WhatsApp, Email as well as App Notification — all are enabled. Clear the desired check boxes to disable.



*As per the selected Event, the SMS, WhatsApp, Email, App Notification options may vary.*

You can also remove any user from the grid. To do so, click **Delete** of the respective user.

If you select **Randomly**, click the **User** picklist.


- The **Picklist For All Users** pop-up appears.
- Select the check boxes of the desired users to whom you wish to assign the alert.

- Click **OK**.

The selected users appear in the grid. The check boxes — SMS, WhatsApp, Email as well as App Notification — all are enabled. Clear the desired check boxes to disable.

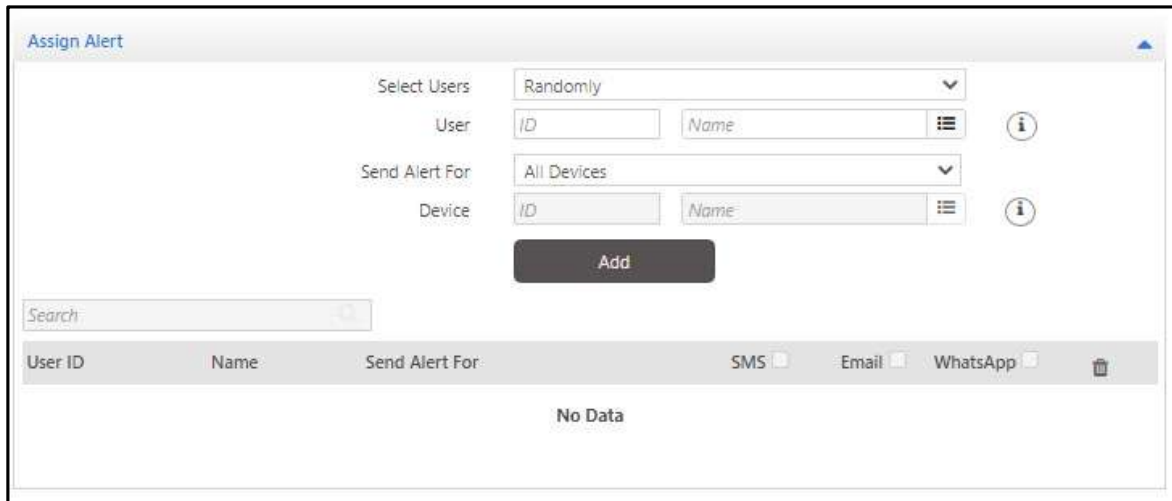



*As per the selected Event, the SMS, WhatsApp, Email, App Notification options may vary.*

You can also remove any user from the grid. To do so, click **Delete**  of the respective user.

## Option 2


- **Select Users:** Select the desired option — All, Randomly.




If you select **All**, all the users appear in the grid. The check boxes — SMS, WhatsApp, Email as well as App Notification — all are enabled. Clear the desired check boxes to disable. Hover over the Info  icon. It displays the number of selected users.



*As per the selected Event, the SMS, WhatsApp, Email, App Notification options may vary.*

You can also remove any user from the grid. To do so, click **Delete**  of the respective user.

If you select **Randomly**, click the **User** picklist.

- The **Picklist For All Users** pop-up appears.
- Select the check boxes of the desired users to whom you wish to assign the alert.
- Click **OK**. Hover over the Info  icon. It displays the number of selected users.
- **Send Alert For:** Select the desired option — All Devices, Selected Devices, Selected Device Groups.

If you select **All Devices**, hover over the Info  icon. It displays the number of devices selected.

If you select **Selected Device Groups**, click the **Device Group** picklist.

- The **Picklist For Device Group** pop-up appears.


DGID	Name
1	ACTA Devices
2	RnD1Visitor
3	Device Group 3
4	Device Group 4
5	Device Group 5
6	Device Group 6
7	Device Group 7
8	Device Group 8
9	Device Group 9
10	Device Group 10

- You can either select particular Device Groups or can select all the Device Groups at once.

- To select particular Device Groups, select the check boxes of the desired Device Groups.

**OR**

To select all the Device Groups at once, select the **Select All** check box. The Device Groups on all the pages will be selected.

- Click **OK**. Hover over the Info  icon. It displays the number of Device Groups selected.
- Similarly, if you select **Selected Devices**, click the **Device** picklist. The **Picklist for Devices** pop-up appears. To proceed follow the steps as mentioned under **Device Groups**.



The **Select All** check box is applicable for the following options only:

- Alert Filter selected is Device and Events selected are — Door Offline, Door Abnormal, Duress, Door Force Open.
  - Alert Filter selected is CWM and Event selected is Contractor Validity, Worker Induction Approval/ Rejection.
  - Alert Filter selected is System and Event selected is Identification Server Inactive.
  - Alert Filter selected is Access Control and Event selected is Guard Tour Violation.
- Click **Add**. The users along with the selected devices appear in the grid.

The screenshot shows the 'Assign Alert' window. At the top, 'Select Users' is set to 'Randomly'. Below it, the 'User' section shows 'ID' and 'Name' fields. The 'Send Alert For' section is set to 'All Devices', with 'Device' fields for 'ID' and 'Name'. An 'Add' button is present. Below these fields is a search bar. The main table has columns: User ID, Name, Send Alert For, SMS, Email, WhatsApp, and a delete icon. One user is listed: User ID 10, Name RAJENDRA GOSWAMI, Send Alert For Selected Devices (1), with all notification checkboxes (SMS, Email, WhatsApp) checked.

User ID	Name	Send Alert For	SMS	Email	WhatsApp	
10	RAJENDRA GOSWAMI	Selected Devices (1)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	

The check boxes — SMS, WhatsApp, Email as well as App Notification — all are enabled. Clear the desired check boxes to disable.



*As per the selected Event, the SMS, WhatsApp, Email, App Notification options may vary.*

You can also remove any user from the grid. To do so, click **Delete** of the respective user.

### Option 3

- **Select Users:** Select the desired option — All, Group Wise, Randomly.

The screenshot shows the 'Assign Alert' window with the same settings as the first image. However, the table below the search bar is empty, displaying 'No Data' in the center. The columns remain the same: User ID, Name, Send Alert For, SMS, Email, WhatsApp, and a delete icon.

User ID	Name	Send Alert For	SMS	Email	WhatsApp	
No Data						

If you select **All**, all the uses appear in the grid. The check boxes — SMS, WhatsApp, Email as well as App Notification — all are enabled. Clear the desired check boxes to disable. Hover-over the Info icon, it displays the number of selected users.




*As per the selected Event, the SMS, WhatsApp, Email, App Notification options may vary.*




If you select **Group Wise**, configure the following parameter:

- **Select Group:** Select the desired enterprise group from the drop-down list—Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1/2/3.

For each enterprise group — Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1/2/3, click the corresponding picklist to select the desired option/s.

Click **OK**. Hover-over the Info  icon, it displays the number of selected groups.

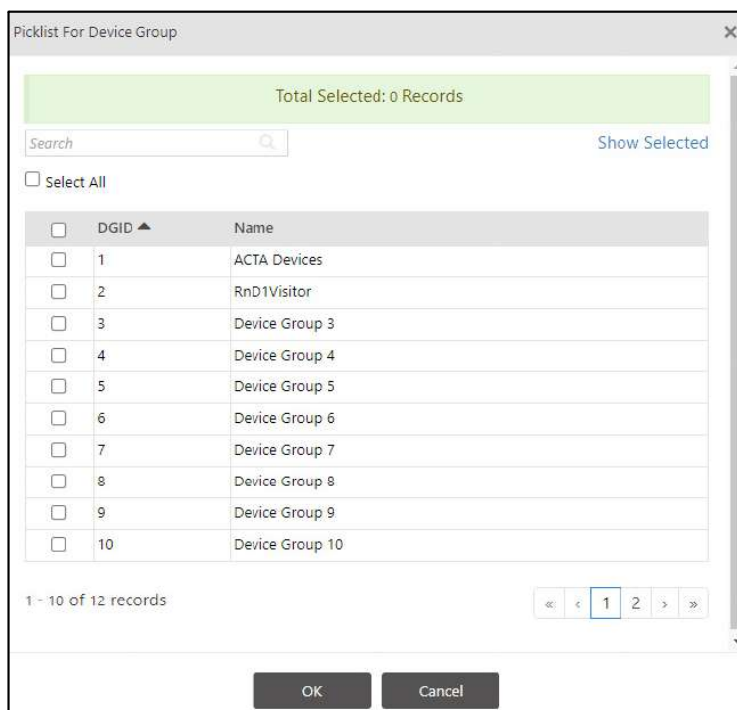
If you select **Randomly**, click the **User** picklist.

- The **Picklist For All Users** pop-up appears.
- Select the check boxes of the desired users to whom you wish to assign the alert.
- Click **OK**. Hover-over the Info  icon, it displays the number of selected users.
- **Send Alert For:** Select the desired option — All Devices, Selected Devices, Selected Device Groups.

If you select **All Devices**, hover-over the Info  icon, it displays the number of devices selected.

If you select **Selected Device Groups**, click the **Device Group** picklist.


- The **Picklist For Device Group** pop-up appears.



<input type="checkbox"/>	DGID ▲	Name
<input type="checkbox"/>	1	ACTA Devices
<input type="checkbox"/>	2	RnD1Visitor
<input type="checkbox"/>	3	Device Group 3
<input type="checkbox"/>	4	Device Group 4
<input type="checkbox"/>	5	Device Group 5
<input type="checkbox"/>	6	Device Group 6
<input type="checkbox"/>	7	Device Group 7
<input type="checkbox"/>	8	Device Group 8
<input type="checkbox"/>	9	Device Group 9
<input type="checkbox"/>	10	Device Group 10

- You can either select particular Device Groups or can select all the Device Groups at once.
  - To select particular Device Groups, select the check boxes of the desired Device Groups.
- OR**

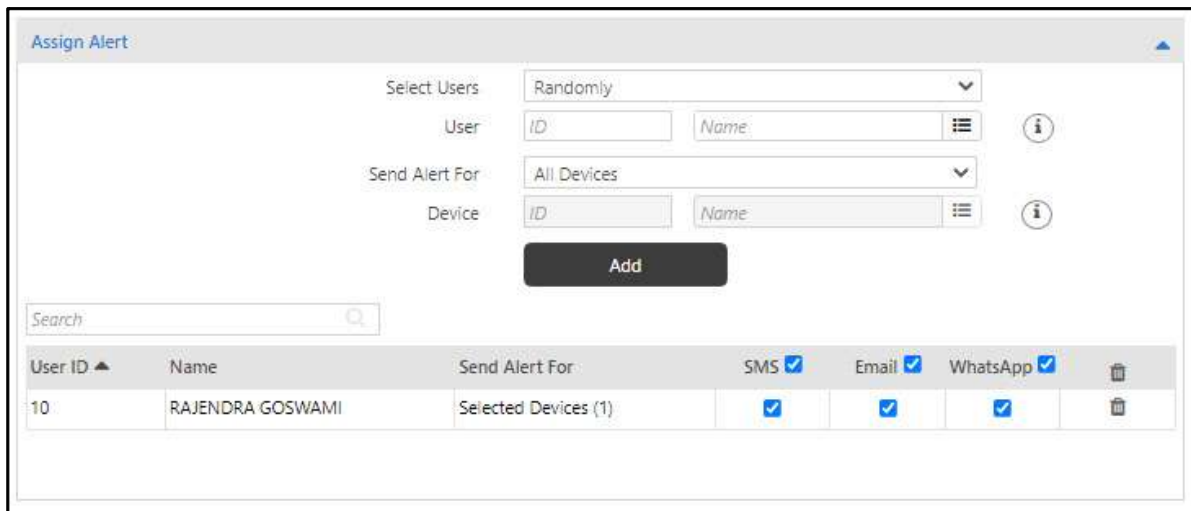
To select all the Device Groups at once, select the **Select All** check box. The Device Groups on all the pages will be selected.

- Click **OK**. Hover-over the Info  icon, it displays the number of Device Groups selected.
- Similarly, if you select **Selected Devices**, click the **Device** picklist. The **Picklist for Devices** pop-up appears. To proceed follow the steps as mentioned under **Device Groups**.



The **Select All** check box is applicable for the following options only:

- Alert Filter selected is Device and Events selected are — Door Offline, Door Abnormal, Duress, Door Force Open.
  - Alert Filter selected is System and Event selected is Identification Server Inactive.
  - Alert Filter selected is CWM and Event selected is Contractor Validity, Worker Induction Approval/ Rejection.
  - Alert Filter selected is Access Control and Event selected is Guard Tour Violation.
- Click **Add**. The users along with the selected devices appear in the grid.




The 'Assign Alert' dialog box contains the following elements:

- Select Users:** A dropdown menu set to 'Randomly'.
- User:** Two input fields for 'ID' and 'Name', each with an information icon.
- Send Alert For:** A dropdown menu set to 'All Devices'.
- Device:** Two input fields for 'ID' and 'Name', each with an information icon.
- Add:** A dark button to confirm the selection.
- Search:** A text input field with a magnifying glass icon.
- Table:** A table with columns: User ID, Name, Send Alert For, SMS, Email, WhatsApp, and a delete icon. The first row shows User ID 10, Name RAJENDRA GOSWAMI, Send Alert For Selected Devices (1), and all notification checkboxes (SMS, Email, WhatsApp) are checked.

The check boxes — SMS, WhatsApp, Email as well as App Notification — all are enabled. Clear the desired check boxes to disable.



As per the selected Event, the SMS, WhatsApp, Email, App Notification options may vary.

You can also remove any user from the grid. To do so, click **Delete**  of the respective user.

## Option 4

### Send Alert To

- **Users:** Click the Users picklist The **Picklist For User** pop-up appears.

Click to select the desired user.

### Send Alert Of

- **Select Users:** Select the desired option — All, Group Wise, Randomly.

The screenshot shows the 'Assign Alert' interface. It includes a 'Send Alert To' section with a 'User' picklist and 'ID'/'Name' fields. The 'Send Alerts Of' section has a 'Select Users' dropdown (set to 'Randomly') and another 'User' picklist with 'ID'/'Name' fields. A search bar is located below the dropdowns. At the bottom, a table with columns 'User ID', 'Name', 'SMS', 'Email', 'WhatsApp', and a trash icon is shown, currently displaying 'No Data'.

If you select **All**, all the uses appear in the grid. The check boxes — SMS, WhatsApp, Email as well as App Notification — all are enabled. Clear the desired check boxes to disable.




*As per the selected Event, the SMS, WhatsApp, Email, App Notification options may vary.*

If you select **Group Wise**, configure the following parameter:

- **Select Group:** Select the desired enterprise group from the drop-down list—Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1/2/3.

For each enterprise group — Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1/2/3, click the corresponding picklist to select the desired option/s.

Click **OK**. Hover-over the Info  icon, it displays the number of selected groups.

If you select **Randomly**, click the **User** picklist.

- The **Picklist For All Users** pop-up appears.
- Select the check boxes of the desired users to whom you wish to assign the alert.
- Click **OK**.

## Option 5

- **Select Users:** Select the desired option — All, Group Wise, Randomly.

The screenshot shows the 'Assign Alert' window. At the top, there are two sections: 'Select Users' and 'Select Contractors'. Each section has a dropdown menu set to 'Randomly', input fields for 'ID' and 'Name', and an 'Add' button. Below these is a search bar and a table with columns: User ID, Name, Contractor ID, Contractor Name, SMS, Email, and WhatsApp. The table currently shows 'No Data'. There are also info icons next to the dropdowns and the table header.

If you select **All**, all the uses appear in the grid. The check boxes — SMS, WhatsApp, Email as well as App Notification — all are enabled. Clear the desired check boxes to disable.




*As per the selected Event, the SMS, WhatsApp, Email, App Notification options may vary.*


If you select **Group Wise**, configure the following parameter:

- **Select Group:** Select the desired enterprise group from the drop-down list—Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1/2/3.

For each enterprise group — Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1/2/3, click the corresponding picklist to select the desired option/s.

Click **OK**. Hover-over the Info  icon, it displays the number of selected groups.

If you select **Randomly**, click the **User** picklist.

- The **Picklist For All Users** pop-up appears.
- Select the check boxes of the desired users to whom you wish to assign the alert.
- Click **OK**. Hover-over the Info  icon, it displays the number of selected users.
- **Select Contractors:** Select the desired option — All, Randomly

If you select **All**, all the Contractors appear in the grid. The check boxes — SMS, WhatsApp, Email as well as App Notification — all are enabled. Clear the desired check boxes to disable.


If you select **Randomly**, click the **Contractor** picklist.

- The **Picklist For Contractor** pop-up appears.
- You can select particular contractors or can select all the contractors at once.

To select particular contractors, select the check boxes of the desired contractors to whom you wish to assign the alert.


OR

To select all the contractors at once, select the **Select All** check box.

- Click **OK**. Hover-over the Info  icon, it displays the number of selected contractors.
- Click **Add**. The selected users along with the contractors appears in the grid. The check boxes — SMS, WhatsApp, Email as well as App Notification — all are enabled. Clear the desired check boxes to disable.



*As per the selected Event, the SMS, WhatsApp, Email, App Notification options may vary.*

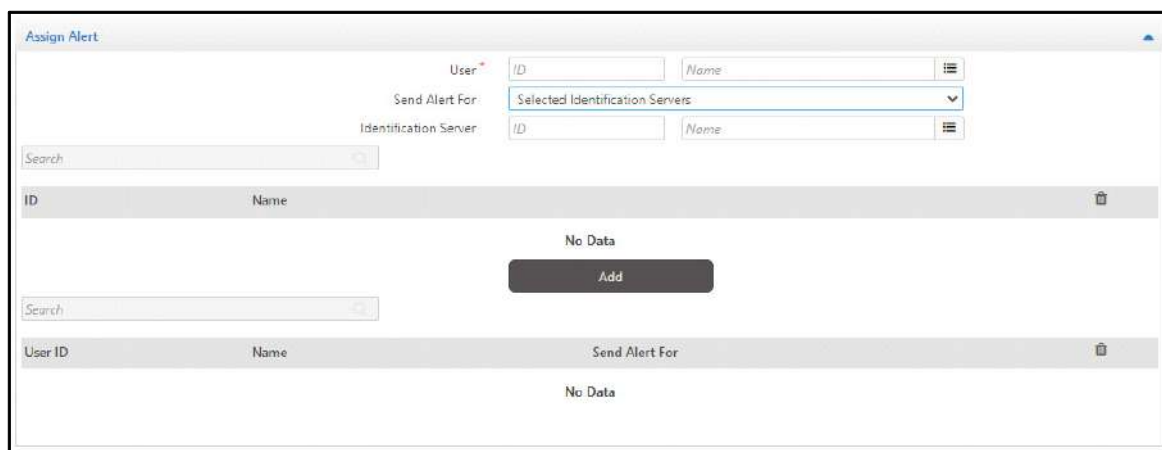
- You can also remove any entry from the grid. To do so, click **Delete**  of the respective entry.

## Option 6

- **Users:** Click the Users picklist The **Picklist For User** pop-up appears.

Click to select the desired user.

- **Send Alert For:** Select the desired option — All Identification Servers, Selected Identification Servers.



If you select **All**, all the identification servers will be selected.

Click **Add**.

If you select **Selected Identification Servers**, Click Identification Server picklist

The **Picklist For All Identification Servers** pop-up appears.

You can select all the servers at once or can select particular servers.


To select the particular servers, select the check boxes of the desired servers.

OR

To select all the servers at once, select the **Select All** check box.

Click **OK**.

Click **Add**. The Identification Servers appear in the grid.

You can also remove any entry from the grid. To do so, click **Delete**  of the respective entry.

## PUSH Notifications

### PUSH Notification - APTA Application

User can configure an alert to receive the Push notifications in the APTA Application in the user's smart-phone for the Alert Filter :**User**, **Leave Management** and **Time & Attendance** for the following events:

- Missing In/Out Punch
- Attendance Correction Application / Approval / Rejection
- Short Leave/Official Hours Application
- Short Leave/Official Hours Approval / Rejection
- Shift Change
- OT / C-OFF Authorization
- Event Authorization
- Leave Application / Approval / Rejection
- Leave Cancellation/Approval / Rejection
- Leave Credit / Debit
- Leave Modification Application / Approval / Rejection
- Overtime Limit Exceeded - Group-Incharge
- Overtime Limit Exceeded - User
- Visitor Added - Watchlist/Blacklist
- Create Visit - Watchlist/Blacklist
- Visitor Pass Expiry Reminder
- Visitor Pass Expiry Reminder
- Visitor Form Execution
- Visitor Pre-registration Approval/Rejection

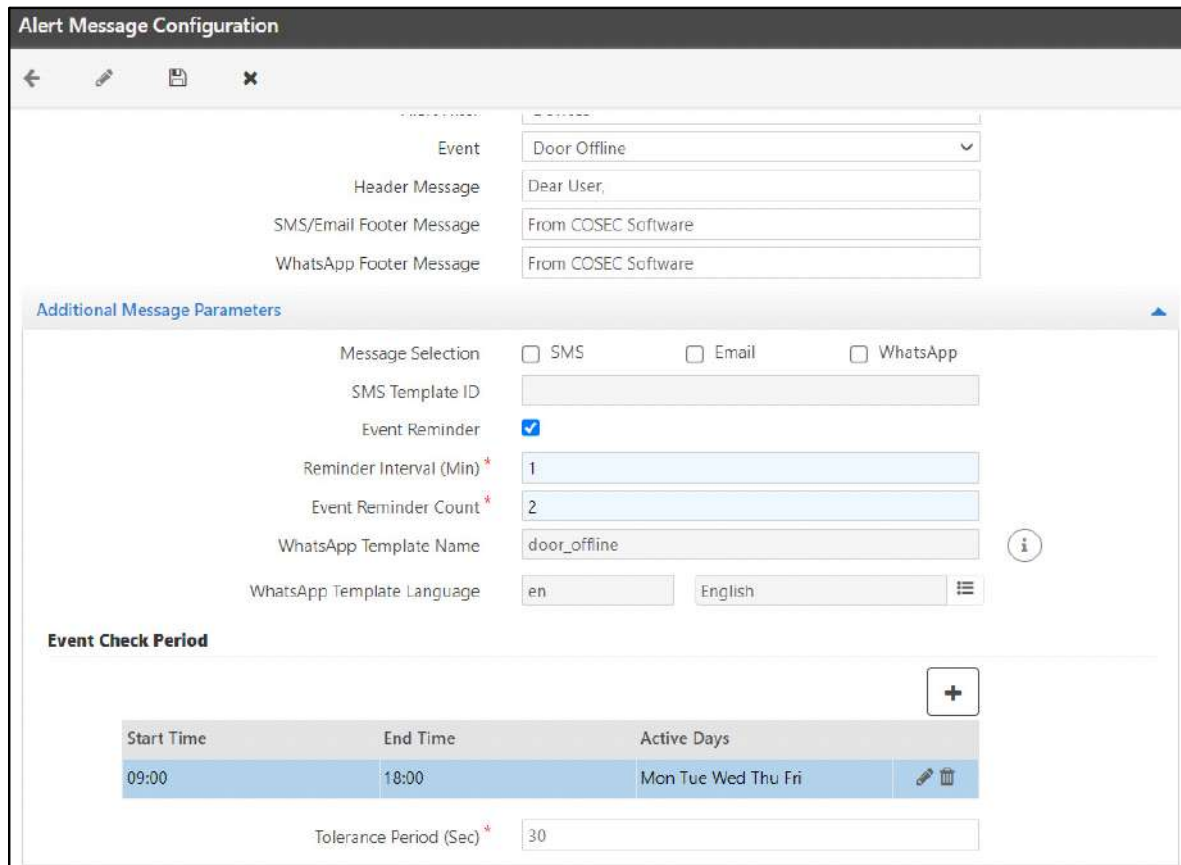
### PUSH Notification - VMS Application

User can configure an alert to receive the Push notifications in the VMS Application in the user's smart-phone for the Alert Filter: **Visitor Management** for the following events:

- Visitor Pre-Registration
- Visitor Pass Expiry Reminder
- Visit Request Approval/Rejection
- Security Clearance
- Visit Transfer
- Visitor Pass
- Visit State Change
- Visit Reminder
- Visitor Added - Watchlist/Blacklist
- Create Visit - Watchlist/Blacklist
- Visitor Form Execution

### Example 1: Door Offline Alert

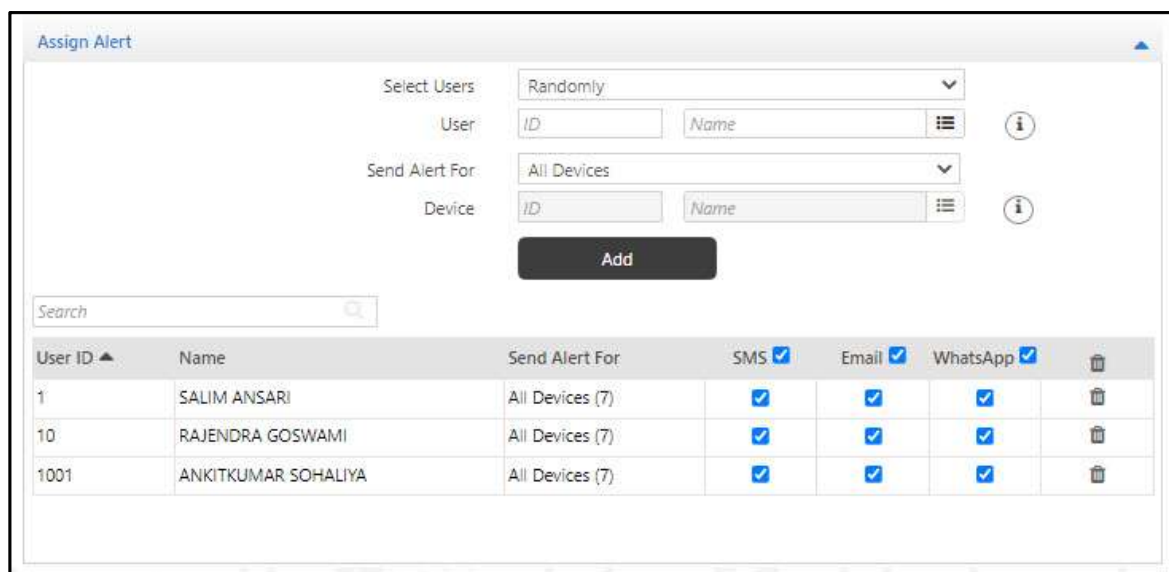
The Door Offline Alert is used to send alert through SMS, Email or WhatsApp when door is found offline at say 08:30:00 AM with Server or Panel within some defined timings say from 9:00 to 18:00 hours for tolerance duration (say 30 seconds) and on selected days (Monday to Friday). The Reminder Interval is set as 1 min with Event Reminder Count as 2.



The 'Alert Message Configuration' window shows settings for a 'Door Offline' event. The header message is 'Dear User,' and the footer for SMS/Email and WhatsApp is 'From COSEC Software'. Under 'Additional Message Parameters', 'Event Reminder' is checked with an interval of 1 minute and a count of 2. The WhatsApp template is named 'door\_offline' in English. The 'Event Check Period' table shows a start time of 09:00, end time of 18:00, and active days of Mon Tue Wed Thu Fri. The tolerance period is set to 30 seconds.

Start Time	End Time	Active Days
09:00	18:00	Mon Tue Wed Thu Fri

The alert is sent to the users who are assigned the alert by selecting the users from the picklist. You can select the devices from drop down options for which the alert is to be sent.



The 'Assign Alert' window allows selecting users and devices. 'Select Users' is set to 'Randomly'. 'Send Alert For' is set to 'All Devices'. Below is a table of assigned users with columns for User ID, Name, Send Alert For, and checkboxes for SMS, Email, and WhatsApp.

User ID	Name	Send Alert For	SMS	Email	WhatsApp
1	SALIM ANSARI	All Devices (7)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
10	RAJENDRA GOSWAMI	All Devices (7)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
1001	ANKITKUMAR SOHALIYA	All Devices (7)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

If Tolerance period is 0 seconds, alert will be sent immediately when the door offline event is generated. In this example, the alert will be sent at 08:30:30 AM, that is, 30 seconds after the door is offline. After the alert is sent, the first reminder will be sent at 08:31:30 AM. Similarly, the second alert will be sent at 08:32:30 AM. For calculation details, refer to **Event: Door Offline** under “[Devices Module](#)” under “[Specific Additional Parameters](#)”.

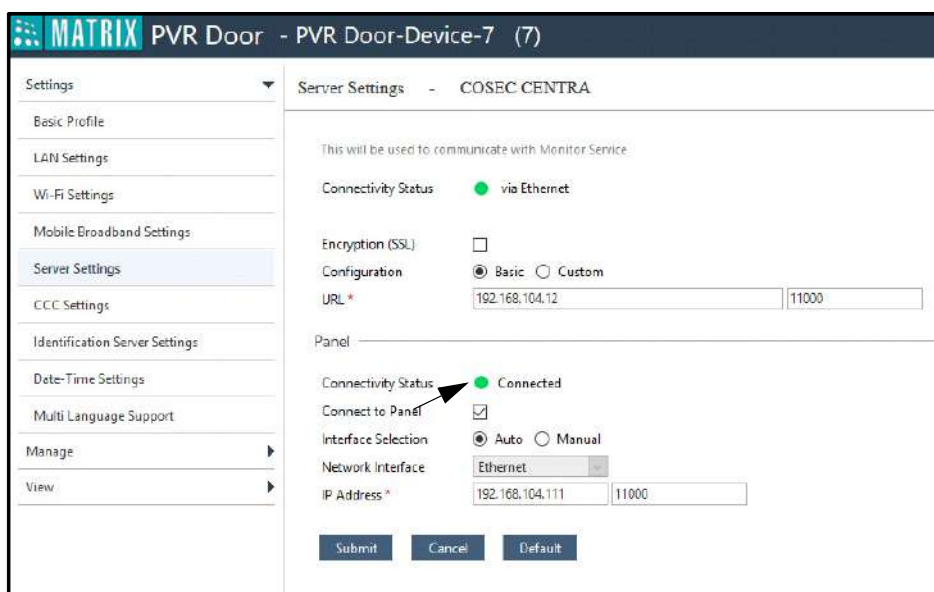
Once the alert is sent, its logs will be visible in Admin > View/Logs > Alert View page.

#### **Direct Door as Panel Door**

For generating the sequential In/Out events direct door can connect with server and panel simultaneously.

When **Connect to Panel** checkbox is enabled; device display reflects the connectivity status as per connectivity with panel.

When the Direct Door is connected to Server and Panel;



MATRIX PVR Door - PVR Door-Device-7 (7)

Settings

Basic Profile

LAN Settings

Wi-Fi Settings

Mobile Broadband Settings

Server Settings

CCC Settings

Identification Server Settings

Date-Time Settings

Multi Language Support

Manage

View

Server Settings - COSEC CENTRA

This will be used to communicate with Monitor Service

Connectivity Status: ● via Ethernet

Encryption (SSL): ☐

Configuration: ☒ Basic ☐ Custom

URL:

Panel

Connectivity Status: ● Connected

Connect to Panel: ☒

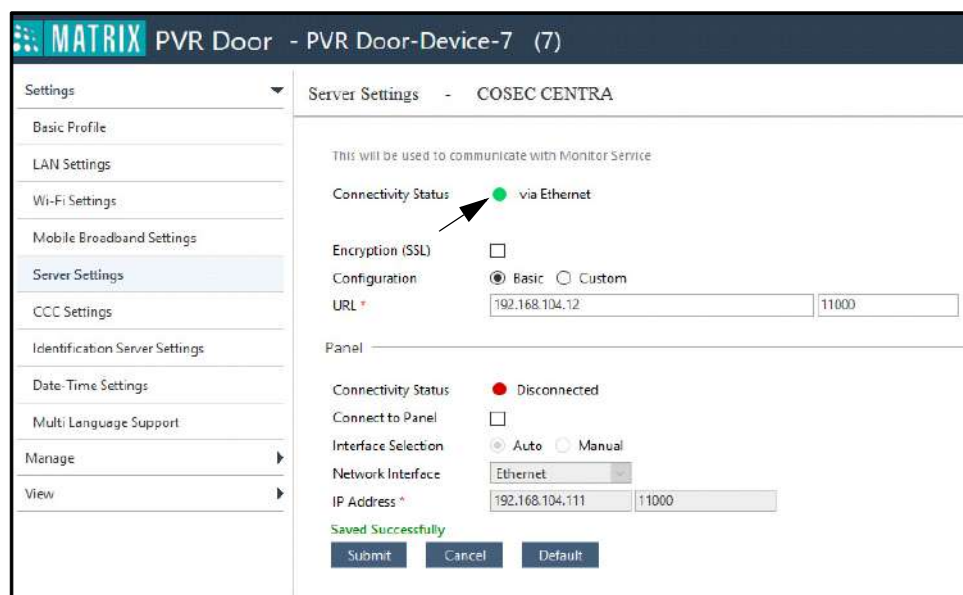
Interface Selection: ☒ Auto ☐ Manual

Network Interface:

IP Address:

Submit Cancel Default

And when **Connect to Panel** is disabled it reflects the connectivity status as per connectivity with server.



MATRIX PVR Door - PVR Door-Device-7 (7)

Settings

Basic Profile

LAN Settings

Wi-Fi Settings

Mobile Broadband Settings

Server Settings

CCC Settings

Identification Server Settings

Date-Time Settings

Multi Language Support

Manage

View

Server Settings - COSEC CENTRA

This will be used to communicate with Monitor Service

Connectivity Status: ● via Ethernet

Encryption (SSL): ☐

Configuration: ☒ Basic ☐ Custom

URL:

Panel

Connectivity Status: ● Disconnected

Connect to Panel: ☐

Interface Selection: ☒ Auto ☐ Manual

Network Interface:

IP Address:

Saved Successfully

Submit Cancel Default



This door offline alert will be sent as SMS, Email or WhatsApp to the selected users.

This event will be generated for Wireless door, NGT, FMX, Vega, ARGO, ARGO Face and PVR door.

Alert Log

←

Date \*

06/04/2018

06/04/2018

View

Filter

Alert

E-mail

E-mail ID

Search

E-mail ID	Message	Date Time	Error/Status
sheetal.raval@matrixrd.org	Dummy Door found Offline on 06/04/2018 03:04:13 PM sinc...	06/04/2018 15:04:23	
sheetal.raval@matrixrd.org	Dummy Door found Offline on 06/04/2018 03:04:13 PM sinc...	06/04/2018 15:04:23	
sheetal.raval@matrixrd.org	PVR Door-Device-7 found Offline on 06/04/2018 02:42:14 ...	06/04/2018 14:42:25	
sheetal.raval@matrixrd.org	PVR Door-Device-7 found Offline on 06/04/2018 02:42:14 ...	06/04/2018 14:42:25	

### Example 2: Alert for Validity/Expiry date of Documents

Whenever the ID proof documents such as Visa, Driving License, Passport etc. are going to be expired, the users must get notified in advance in order to renew them. By creating the **Validity/Expiry Date alert**, user will able to configure Reminder Period for important documents as explained below.

Select Alert Filter as a 'User', event as a 'Validity/Expiry Date' and update the Header-Footer if required.

**Alert Message Configuration**

Alert Filter: Users

Event: Validity/Expiry Date

Header Message: Dear User,

SMS/Email Footer Message: From COSEC Software

WhatsApp Footer Message: From COSEC Software

**Additional Message Parameters**

Message Selection: ☐ SMS ☒ Email ☐ WhatsApp

SMS Template ID-User:

SMS Template ID-Reporting In-Charge:

Send Alert To: ☒ User ☒ Reporting In-Charge

**Reminder Period (Days)**

Send Alert For	Document	Days Before Expiry	Reminder Time	Repeat Reminder	Repeat Interval(In Days)	
Yes	Visa	5	15:30	No	1	
No	Driving License	0	00:00	No	1	
<input checked="" type="checkbox"/>	Passport	0	15:30	<input checked="" type="checkbox"/>	10	

**WhatsApp Template**

Send Alert To	Template Name	Template Language
User	validity_expiry_date_user	en English
Reporting In-Charge	validity_expiry_date_ic	en English

Enable the 'Message Selection' and 'Send Alert to' check-boxes and configure **Reminder Period (In Days)** columns as described below.

- **Send Alert For:** Enable the check-box for which the Alert is to be send as a notification. For example: Visa and Passport.
- **Document:** This field shows the type of documents for which Alert is to be configured. The configured custom fields will also be available for the selection.

Only the custom fields which are configured with their **type; Date**, will be visible in the Document column. For the configuration of Custom Fields, [See "Custom Fields" on page 142.](#)

- **Days Before Expiry:** Enter the number of days before which the user will get notified about the expiry of documents validity. You can enter the days from 1 to 99. For Example:5
- **Reminder Time:** Define the Time of the reminder in 24hrs format at when the notification will get generated. For Example: 15:30
- **Repeat Reminder:** Enable the check box if the configured reminder is to be repeated again.
- **Repeat Interval (In days):** Define the number of days in between 1 to 99. The reminder will repeat till the entered number of days. For example: 10

Click on the **OK** button to Save and **Cancel** button to **Cancel** the Reminder Period configuration. Click on the **Edit** button to **Edit** the reminder.

Now, after previewing the Message and configure the assign Alert, click on the **Save** button to save the Alert message Configuration.

So, as per the above configuration, the reminder will get generated at 15:30 before 5 days of Visa and Passport expires and will repeat for next 10 days.

### Example 3: Login Account Locked Alert

When the user logs into COSEC with wrong password for a specified number of times; then his account can be locked for defined duration of time. When the account gets locked; the locked account alert will be generated.

The screenshot shows the 'Alert Message Configuration' window. It has a top bar with navigation icons. The main area contains several fields: 'Alert Filter' set to 'System', 'Event' set to 'Login Account Locked', 'Header Message' set to 'Dear User', 'SMS/Email Footer Message' set to 'From COSEC Software', and 'WhatsApp Footer Message' set to 'From COSEC Software'. Below these is an 'Additional Message Parameters' section with a 'Message Selection' row containing checkboxes for 'SMS' (checked), 'Email' (checked), and 'WhatsApp' (unchecked). Below this are fields for 'SMS Template ID', 'WhatsApp Template Name' (set to 'login\_account\_locked'), and 'WhatsApp Template Language' (set to 'en' and 'English'). At the bottom is a 'Message Preview' section.

This alert will be generated if

- Global Policy > Password Policy > **Lock Account For Invalid Login Attempts** is enabled.
- No. of Failed Login Attempts against user is equal to **Max. Invalid Login Attempts** count as specified in Password Policy.

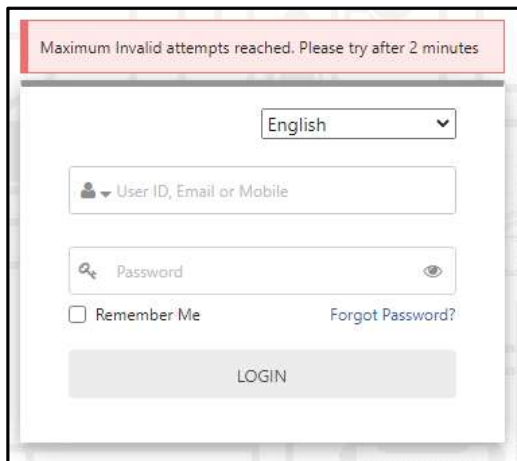
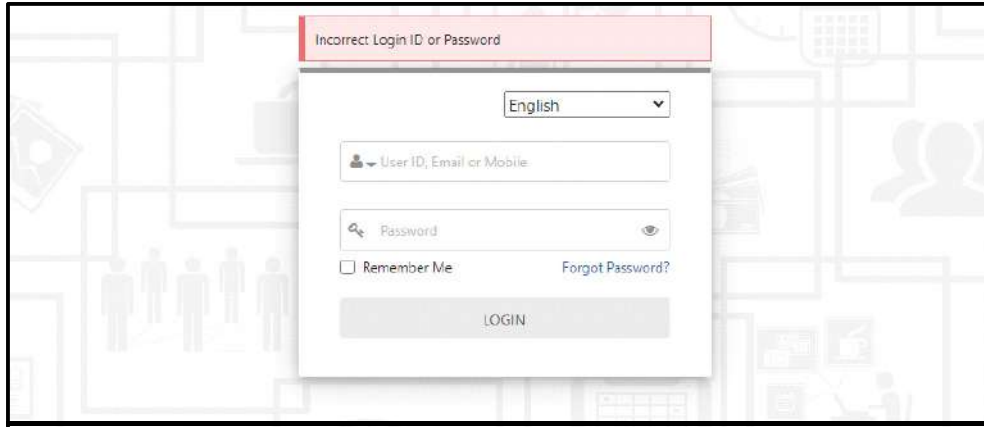
The screenshot shows the 'Global Policy' window with the 'Password Policy' section selected in the sidebar. The main area contains several settings: 'Password Security Policy' (unchecked), 'Password Reset Period (Days)' (0), 'Lock Account for Invalid Attempts' (checked), 'Maximum Invalid Attempts' (5), and 'Auto Unlock Timer (Min)' (15).

The alert can be sent to all the active users who are trying to login in COSEC. (Either as System Account User, ESS User or CSS User)

- **ESS User Login-** The **Receive Alerts On** for the user must be configured in User profile to send the SMS/ Email/WhatsApp to Personal/Official contact.
- **System Account User Login-** If a System Account has **Linked ESS User** configured, then alert will be sent to that ESS User's saved contact details considering all the conditions mentioned in ESS User Login section for ESS user satisfy.

- **CSS User Login-** The **Receive Alerts On** for the contractor must be configured in User profile to send the SMS/Email/WhatsApp to Personal/Official contact.

Here the ESS user 101 is trying to login into COSEC. When the number of attempts is equal to 3 as specified in Password Policy; then account will get blocked to 15 minutes as defined.

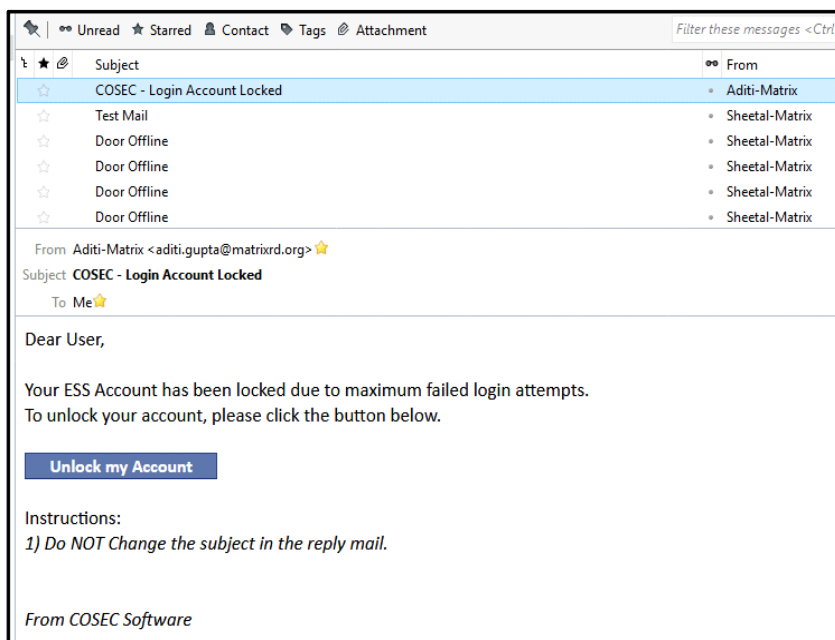


## Unlock My Account

The alert email will be sent as shown below. In the Alert mail; **Unlock My Account** button will be available. On click of this button, a reply mail will be sent to COSEC server with Subject as **Account-Locked-Date-Time** to unlock the account.



*A mail can be used only once to unlock the user's account. The same mail cannot be used multiple times to unlock a user's account.*



#### Example 4: OTP Generated Alert

OTP Generated Alert generates the alert for set/reset password, login authentication, pass creation and visitor registration verification.

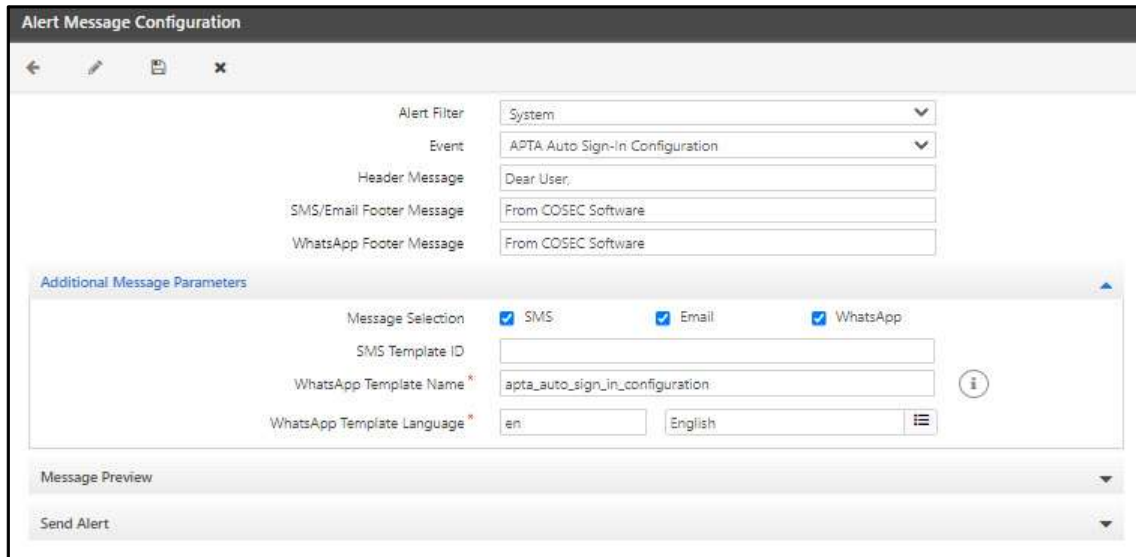
To view details on OTP alert for Set/Reset Password and Login Authentication refer to [“Launching the COSEC Application”](#).

The screenshot displays the 'Alert Message Configuration' window. It features several input fields and dropdown menus. The 'Alert Filter' is set to 'System' and the 'Event' is 'OTP Generated'. The 'Header Message' field contains 'Dear User'. The 'SMS/Email Footer Message' and 'WhatsApp Footer Message' fields both contain 'From COSEC Software'. Below these is a section for 'Additional Message Parameters' which includes 'Message Selection' (with checkboxes for SMS, Email, and WhatsApp), 'SMS Template ID', 'WhatsApp Template Name' (set to 'otp\_generated'), and 'WhatsApp Template Language' (set to 'en' and 'English'). At the bottom, there is a 'Message Preview' section.

#### Example 5: ‘Auto Sign-in’ Alert for COSEC APTA Mobile Application

User can configure the Alert for download and sign in to the COSEC APTA application. For this, an ESS rights must be allocated to the user.

Select the Alert filter as **All** or **System**, an event as **APTA Auto Sign-in Configuration** as shown below. Update the Header and Footer message if required.



The 'Alert Message Configuration' window contains the following fields and options:

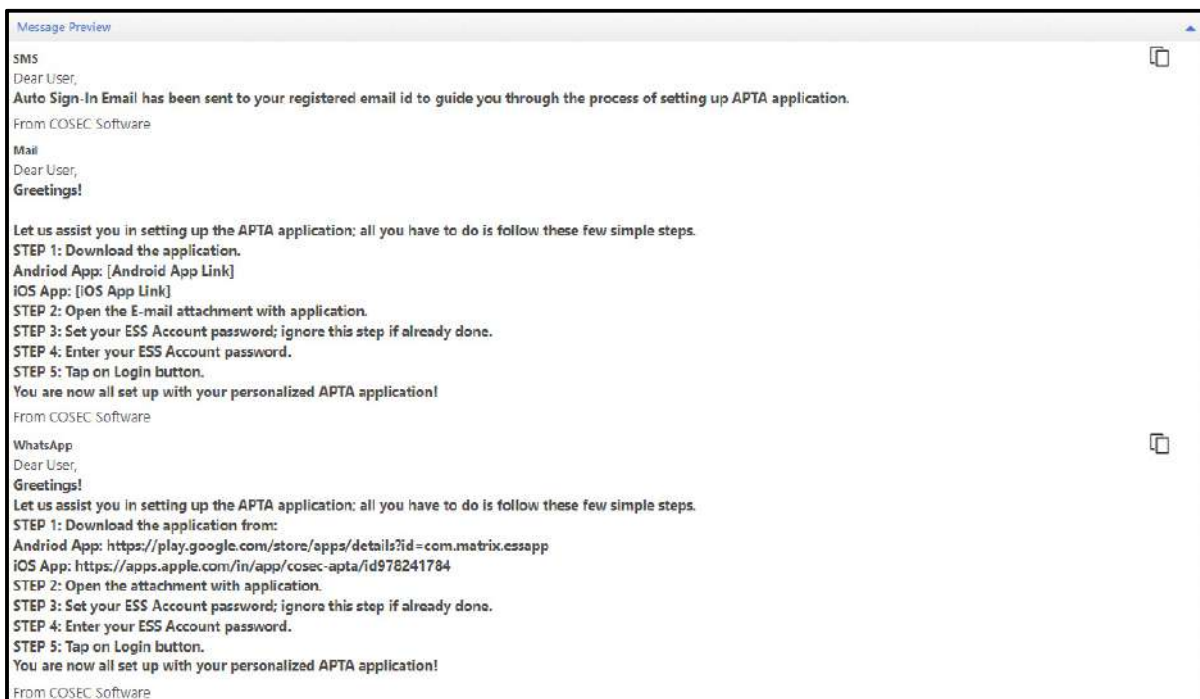
- Alert Filter:** System (dropdown)
- Event:** APTA Auto Sign-in Configuration (dropdown)
- Header Message:** Dear User, (text input)
- SMS/Email Footer Message:** From COSEC Software (text input)
- WhatsApp Footer Message:** From COSEC Software (text input)
- Additional Message Parameters:**
  - Message Selection:** SMS, Email, WhatsApp (all checked)
  - SMS Template ID:** (empty text input)
  - WhatsApp Template Name:** apta\_auto\_sign\_in\_configuration (text input)
  - WhatsApp Template Language:** en (dropdown), English (text input)
- Message Preview:** (dropdown menu)
- Send Alert:** (button)

Enable the respective checkbox for **SMS**, **Email** and/or **WhatsApp** through which the alert message is to be sent.



*The respective links to download the application and Auto Sign-In configuration file will be sent through the email.*

The Message preview with the necessary steps for downloading the APTA Application and Sign-In are as shown below.



The 'Message Preview' window displays the following content for SMS and Mail:

**SMS**  
Dear User,  
Auto Sign-In Email has been sent to your registered email id to guide you through the process of setting up APTA application.  
From COSEC Software

**Mail**  
Dear User,  
**Greetings!**  
Let us assist you in setting up the APTA application; all you have to do is follow these few simple steps.  
**STEP 1: Download the application.**  
Android App: [Android App Link]  
IOS App: [IOS App Link]  
**STEP 2: Open the E-mail attachment with application.**  
**STEP 3: Set your ESS Account password; ignore this step if already done.**  
**STEP 4: Enter your ESS Account password.**  
**STEP 5: Tap on Login button.**  
You are now all set up with your personalized APTA application!  
From COSEC Software

**WhatsApp**  
Dear User,  
**Greetings!**  
Let us assist you in setting up the APTA application; all you have to do is follow these few simple steps.  
**STEP 1: Download the application from:**  
Android App: <https://play.google.com/store/apps/details?id=com.matrix.essapp>  
IOS App: <https://apps.apple.com/in/app/cosec-apta/id978241784>  
**STEP 2: Open the attachment with application.**  
**STEP 3: Set your ESS Account password; ignore this step if already done.**  
**STEP 4: Enter your ESS Account password.**  
**STEP 5: Tap on Login button.**  
You are now all set up with your personalized APTA application!  
From COSEC Software

Click the **Send Alert** collapsible tab and select the users to whom the Auto Sign-In email is to be sent.

User ID ▲	Name	SMS <input checked="" type="checkbox"/>	Email <input checked="" type="checkbox"/>	WhatsApp <input checked="" type="checkbox"/>	
1	SALIM ANSARI	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
10	RAJENDRA GOSWAMI	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
1001	ANKITKUMAR SOHALIYA	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
1002	MEGHA H SHUKLA	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
1003	UMESH M TALANPURI	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	

1 - 5 of 11 records

« < 1 2 3 > »

Send

Click **Send** to send the configured Alert message to the selected users.



*An email will have a configuration file as an attachment. Open the file in COSEC APTA application to sign-in.*

#### **Example 6: Receive Push Notifications to the COSEC APTA Mobile Application**

User can configure an alert to receive the Push notifications on the APTA user's smartphone for the Alert Filter; User, Leave Management and Time & Attendance for below list of events.

- Missing In/Out Punch
- Attendance Correction Application / Approval / Rejection
- Short Leave/Official Hours Application
- Short Leave/Official Hours Approval / Rejection
- Shift Change
- OT / C-OFF Authorization
- Event Authorization
- Leave Application / Approval / Rejection
- Leave Cancellation/Approval / Rejection
- Leave Credit / Debit
- Leave Modification Application / Approval / Rejection
- Overtime Limit Exceeded - Group-Incharge
- Overtime Limit Exceeded - User

Alert Message Configuration

Alert Filter

Users

Event

Missing In Punch - Group Incharge

Header Message

Dear User,

SMS/Email Footer Message

From COSEC Software

WhatsApp Footer Message

From COSEC Software

Additional Message Parameters

Message Selection

☒ SMS
☒ Email
☒ App Notification
☐ WhatsApp

SMS Template ID

WhatsApp Template Name

missing\_in\_punch\_group\_incharge

WhatsApp Template Language

en

English

Post Shift Start (Min) \*

0

Message Preview

Assign Alert

Select the **App Notification** checkbox from the **Additional Message Parameters** to receive the Alert as a Push Notification on user's smartphone.

The Preview message for SMS, Email, WhatsApp and App Notification is as shown below.

Message Preview

SMS

Dear User,

In Punch not found for [User Count] User(s) of '[Shift ID]' Shift on [Date] till [time].

From COSEC Software

Mail

Dear User,

In Punch not found for below listed User(s) of '[Shift ID]' Shift on [Date] till [time].

No.	User ID	User Name	Designation
1	[UserID]	[UserName]	[Designation]

From COSEC Software

App Notification

In Punch not found for [User Count] User(s) of '[Shift ID]' Shift on [Date] till [time] .

WhatsApp

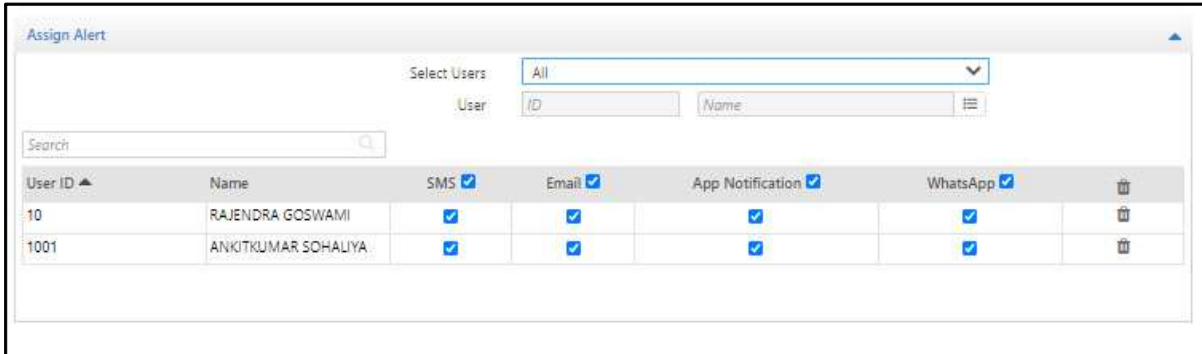
Dear User,

In Punch not found for [User Count] User(s) of '[Shift ID]' Shift on [Date] till [time].

From COSEC Software



Click the **Assign Alert** collapsible panel and select the required users to which the Alert is to be configured and, enable the App Notification checkbox for the respective one.



The screenshot shows the 'Assign Alert' window. At the top, there is a 'Select Users' dropdown menu set to 'All'. Below it, there are input fields for 'User ID' and 'Name'. A search bar is also present. The main part of the window is a table with the following columns: 'User ID', 'Name', 'SMS', 'Email', 'App Notification', 'WhatsApp', and a delete icon. Two users are listed in the table:

User ID	Name	SMS	Email	App Notification	WhatsApp	
10	RAJENDRA GOSWAMI	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
1001	ANKITKUMAR SOHALIYA	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	

Click **Save** to save the configuration.

#### **Example 7: Alert for Overtime Limit Exceeds for User/Group In-charge.**



*If for Authorizing Overtime, the Weekly/Monthly overtime option is enabled for WO, PH, WO/PH as well as Daily overtime is enabled for the same day, then in this case the Alert would be sent twice to the respective user.*

You can configure an Alert to notify a user/group in-charge about the Overtime Limit if it exceeds as described below.

Select the Alert Filter as a **Time and Attendance**, and Event as **Overtime Limit Exceeded-User/Overtime Limit Exceeded-Group In-charge** for which the alert is to be configured. Update the **Header** and **Footer** if required.

Select the respective checkbox for **SMS**, **Email**, **WhatsApp** and/or **App Notification** through which the alert is to be sent from the **Additional Message Parameters**.

Configure the **Template ID** only if you have enabled **SMS** as the **Message Selection** option.

Configure the **Schedule Time** to send the Alert.

**Alert Message Configuration**

Alert Filter: Time and Attendance

Event: Overtime Limit Exceeded - User

Header Message: Dear User.

SMS/Email Footer Message: From COSEC Software

WhatsApp Footer Message: From COSEC Software

**Additional Message Parameters**

Message Selection: ☐ SMS ☐ Email ☐ App Notification ☐ WhatsApp

SMS Template ID:

WhatsApp Template Name: overtime\_limit\_exceeded\_user

WhatsApp Template Language: en English

Schedule Time: 00:00

**Processing Period**

Processing Period: Previous

Message Preview

Assign Alert

- **Processing Period:** Select the processing period which is to be considered for the overtime calculation and generate an alert.

The Preview Message for **User** is as shown below.

**Message Preview**

**SMS**

Dear User,  
OT limit exceeded:  
Daily [Generated/Authorized] for [Attendance Date], Daily Permissible OT:[Daily AllowedOT], Daily Actual OT:[Daily ActualOT].  
Weekly [Generated/Authorized] for [WeekStartDate to WeekEndDate], Weekly Permissible OT:[Weekly AllowedOT], Weekly Actual OT:[Weekly ActualOT].  
Monthly [Generated/Authorized] for [MonthStartDate to MonthEndDate], Monthly Permissible OT:[Monthly AllowedOT], Monthly Actual OT:[Monthly ActualOT].  
From COSEC Software

**Mail**

Dear User,  
OT limit exceeded:  
Daily [Generated/Authorized] for [Attendance Date].  
Daily Permissible OT:[Daily AllowedOT].  
Daily Actual OT:[Daily ActualOT].  
  
Weekly [Generated/Authorized] for [WeekStartDate to WeekEndDate].  
Weekly Permissible OT:[Weekly AllowedOT].  
Weekly Actual OT:[Weekly ActualOT].  
  
Monthly [Generated/Authorized] for [MonthStartDate to MonthEndDate].  
Monthly Permissible OT:[Monthly AllowedOT].  
Monthly Actual OT:[Monthly ActualOT].  
From COSEC Software

**App Notification**

OT limit exceeded:  
Daily [Generated/Authorized] for [Attendance Date], Daily Permissible OT:[Daily AllowedOT], Daily Actual OT:[Daily ActualOT].  
Weekly [Generated/Authorized] for [WeekStartDate to WeekEndDate], Weekly Permissible OT:[Weekly AllowedOT], Weekly Actual OT:[Weekly ActualOT].  
Monthly [Generated/Authorized] for [MonthStartDate to MonthEndDate], Monthly Permissible OT:[Monthly AllowedOT], Monthly Actual OT:[Monthly ActualOT].

**WhatsApp**

Dear User,  
OT limit exceeded:  
Daily [Generated/Authorized], Daily Permissible OT:[Daily AllowedOT], Daily Actual OT:[Daily ActualOT].  
Weekly [Generated/Authorized], Weekly Permissible OT:[Weekly AllowedOT], Weekly Actual OT:[Weekly ActualOT].  
Monthly [Generated/Authorized], Monthly Permissible OT:[Monthly AllowedOT], Monthly Actual OT:[Monthly ActualOT].  
Kindly check ESS/Contact Administrator for more details.  
From COSEC Software

The Preview Message to the **Group In-charge** about users is as shown below.

Message Preview

SMS  
Dear User,  
Daily OT limit exceeded for [Daily UserCount] User(s). Weekly OT limit exceeded for [Weekly UserCount] User(s). Monthly OT limit exceeded for [Monthly UserCount] User(s).  
From COSEC Software

Mail  
Dear User,  
Overtime limit exceeded for below listed User(s):

Exceeded Daily Overtime						
No.	Date	User ID	User Name	Permissible OT	Actual OT	Type
1	<attendance-date>	<User-id>	<User-name>	<permissibleOT>	<actualOT>	<Generated/Authorized>
2	<attendance-date>	<User-id>	<User-name>	<permissibleOT>	<actualOT>	<Generated/Authorized>

Exceeded Weekly Overtime							
No.	Week Start Date	Week End Date	User ID	User Name	Permissible OT	Actual OT	Type
1	<week-start-date>	<week-end-date>	<User-id>	<User-name>	<permissibleOT>	<actualOT>	<Generated/Authorized>
2	<week-start-date>	<week-end-date>	<User-id>	<User-name>	<permissibleOT>	<actualOT>	<Generated/Authorized>

Exceeded Monthly Overtime							
No.	Month Start Date	Month End Date	User ID	User Name	Permissible OT	Actual OT	Type
1	<month-start-date>	<month-end-date>	<User-id>	<User-name>	<permissibleOT>	<actualOT>	<Generated/Authorized>
2	<month-start-date>	<month-end-date>	<User-id>	<User-name>	<permissibleOT>	<actualOT>	<Generated/Authorized>

From COSEC Software

App Notification  
Daily OT limit exceeded for [Daily UserCount] User(s). Weekly OT limit exceeded for [Weekly UserCount] User(s). Monthly OT limit exceeded for [Monthly UserCount] User(s).

WhatsApp  
Dear User,  
Daily OT limit exceeded for [Daily UserCount] User(s). Weekly OT limit exceeded for [Weekly UserCount] User(s). Monthly OT limit exceeded for [Monthly UserCount] User(s).  
From COSEC Software



The Alert includes information about exceeded Overtime for Daily, Weekly and/or Monthly will be as per the configuration done in an **Time and Attendance Module > Overtime Policies**.

Click the **Assign Alert** collapsible panel by selecting Users and the respective checkbox; **SMS/Email/WhatsApp/App Notification** for them through which they will be notified as shown below.

Assign Alert

Select Users: All

User: ID Name

Search

User ID	Name	SMS	Email	App Notification	WhatsApp	
1	SALIM ANSARI	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
10	RAJENDRA GOSWAMI	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
1001	ANKITKUMAR SOHALIYA	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
1002	MEGHA H SHUKLA	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
1003	UMESH M TALANPURI	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	

1 - 5 of 11 records

« 1 2 3 »

Click **Save** to save the configuration.

## Example 8: Seamless VMS

### a) Visitor Pre-Registration Alert

License required: Basic (For Alert Message Configuration page) & VMS (For Pre-Registration Alert)

The screenshot shows the 'Alert Message Configuration' interface. At the top, there are navigation icons (back, edit, save, close). The main configuration area includes:

- Alert Filter:** Visitor Management (dropdown)
- Event:** Visitor Pre-Registration (dropdown)
- Header Message:** Dear User/Visitor, (text input)
- SMS/Email Footer Message:** From COSEC Software (text input)
- WhatsApp Footer Message:** From COSEC Software (text input)

Below these is the 'Additional Message Parameters' section, which is expanded. It contains:

- Message Selection:** ☐ SMS, ☐ Email, ☒ App Notification, ☒ WhatsApp
- SMS Template ID:** (empty text input)
- WhatsApp Template Name:** visitor\_preregistration (text input)
- WhatsApp Template Language:** en (dropdown), English (dropdown)
- Calendar Invite:** ☐
- Email/WhatsApp Approval Links:** ☐
- Email Approval Acknowledgment:** ☐
- Send Alert To:** ☒ Host, ☒ Visitor

At the bottom, there is a 'Message Preview' section with a dropdown arrow.



*Make sure you configure SMS/Email for the visitors who will access the Visitor Portal so that the OTP can be sent on the Mobile number/Email Address entered by the visitor.*

If you wish to receive Push Notifications on the VMS Application, make sure you select the **App Notification** check box.

### b) Visitor Pre-Registration Approval/Rejection Alert

License required: Basic (For Alert Message Configuration page) & VMS (For Pre-Registration Alert)

The screenshot shows the 'Alert Message Configuration' interface for a different alert type. The configuration is as follows:

- Alert Filter:** Visitor Management (dropdown)
- Event:** Visitor Pre-Registration Approval/Rejection (dropdown)
- Header Message:** Dear User (text input)
- SMS/Email Footer Message:** From COSEC Software (text input)
- WhatsApp Footer Message:** From COSEC Software (text input)

The 'Additional Message Parameters' section is expanded and shows:

- Message Selection:** ☐ SMS, ☐ Email, ☐ App Notification, ☒ WhatsApp
- SMS Template ID:** (empty text input)
- WhatsApp Template Name:** visitor\_preregistration\_approval\_rejection (text input)
- WhatsApp Template Language:** en (dropdown), English (dropdown)
- Email/WhatsApp Approval Links:** ☐
- Email Approval Acknowledgment:** ☐

This alert will be sent to the Host user associated with respected pre-registration application.

App Notification will be sent to the Device ID mapped against the respective Host / Visitor and Security User through cloud messaging notification provider.

Mobile Device Token will be user's / visitor's App Notification Token mapped in User Master Table & VMS Visitor Master table respectively.

### c) Security Clearance Alert

The screenshot shows the 'Alert Message Configuration' window. At the top, there are navigation icons (back, edit, save, close). The main configuration area includes:

- Alert Filter:** A dropdown menu set to 'Visitor Management'.
- Event:** A dropdown menu set to 'Security Clearance'.
- Header Message:** A text input field containing 'Dear User'.
- SMS/Email Footer Message:** A text input field containing 'From COSEC Software'.
- WhatsApp Footer Message:** A text input field containing 'From COSEC Software'.

Below these fields is a section titled 'Additional Message Parameters' with a blue header and a collapse arrow. It contains:

- Message Selection:** Four checkboxes: 'SMS' (unchecked), 'App Notification' (checked), 'Email' (unchecked), and 'WhatsApp' (unchecked).
- SMS Template ID:** An empty text input field.
- WhatsApp Template Name:** A text input field containing 'security\_clearance'.
- WhatsApp Template Language:** A dropdown menu set to 'en', with a button labeled 'English' and a menu icon.
- Email/WhatsApp Approval Links:** An unchecked checkbox.
- Email Approval Acknowledgment:** An unchecked checkbox.

At the bottom of the window is a 'Message Preview' section with a downward arrow.

If you wish to receive Push Notifications on the VMS Application, make sure you select the **App Notification** check box.

#### d) Visitor Pass Expired Alert

The screenshot shows the 'Alert Message Configuration' window. The 'Alert Filter' is set to 'Visitor Management' and the 'Event' is 'Visitor Pass Expired'. The 'Header Message' is 'Dear User/Visitor,'. The 'SMS/Email Footer Message' and 'WhatsApp Footer Message' are both 'From COSEC Software'. Under 'Additional Message Parameters', 'Message Selection' has checkboxes for 'SMS', 'Email', and 'WhatsApp', all of which are unchecked. 'SMS Template ID-Visitor' and 'SMS Template ID-Host/Security' are empty. 'Send Alert To' has checkboxes for 'Host', 'Visitor', and 'Security', all of which are checked. 'Reminder Period (Min)' is set to '0'. Below this is a 'WhatsApp Template' section with a table:

Send Alert To	Template Name	Template Language
Visitor	visitor_pass_expired_visitor	en English
Host/Security	visitor_pass_expired_host_security	en English

At the bottom is a 'Message Preview' section.

For any appointment, if Visit State is other than Check-OUT and Pass Expiry Time is reached, then this alert will be sent to Host / Visitor / Security based on Send Alert To selection.

#### e) Visitor Pass Alert

The screenshot shows the 'Alert Message Configuration' window. The 'Alert Filter' is set to 'Visitor Management' and the 'Event' is 'Visitor Pass'. The 'Header Message' is 'Dear Visitor,'. The 'SMS/Email Footer Message' and 'WhatsApp Footer Message' are both 'From COSEC Software'. Under 'Additional Message Parameters', 'Message Selection' has checkboxes for 'SMS', 'Email', 'WhatsApp', and 'App Notification'. 'App Notification' is checked. 'SMS Template ID' is empty. 'WhatsApp Template Name' is 'visitor\_pass'. 'WhatsApp Template Language' is 'en English'. 'Scan Code' has checkboxes for 'QR' and 'Barcode', with 'QR' checked. At the bottom is a 'Message Preview' section.

Once visit request is approved then visitor can generate Pass by themselves. Hence, the alert Visitor Pass will notify visitors for Visit Pass via SMS/ Email.

If you wish to receive Push Notifications on the VMS Application, make sure you select the **App Notification** check box.



*Visitor Pass Alert will be sent only when Visitor has applied Check-IN from Mail, Generated E-Pass from Mobile Application or from COSEC Visitor Portal and if security has created Pass from the VMS Utility.*

This Visitor Pass alert includes Message, QR Code, Barcode and visit pass. Along with these, visitor will also get **Access PIN** of Visitor Profile which is assigned to the visitor while Pass creation.

#### f) Visit Transfer Alert

Alert Message Configuration

Alert Filter

Visitor Management

Event

Visit Transfer

Header Message

Dear User/Visitor/Security

SMS/Email Footer Message

From COSEC Software

WhatsApp Footer Message

From COSEC Software

Additional Message Parameters

Message Selection

☐ SMS
☐ Email
☒ App Notification
☐ WhatsApp

SMS Template ID-Host

SMS Template ID-Visitor

SMS Template ID-Security

Calendar Invite

☐ ⓘ

Email/WhatsApp Approval Links

☐

Email Approval Acknowledgment

☐

Send Alert To

☐ Host
☐ Visitor
☐ Security

WhatsApp Template ⓘ

Send Alert To	Template Name	en	Template Language	
Host	visit_transfer_user	en	English	⋮
Visitor	visit_transfer_visitor	en	English	⋮
Security	visit_transfer_security	en	English	⋮

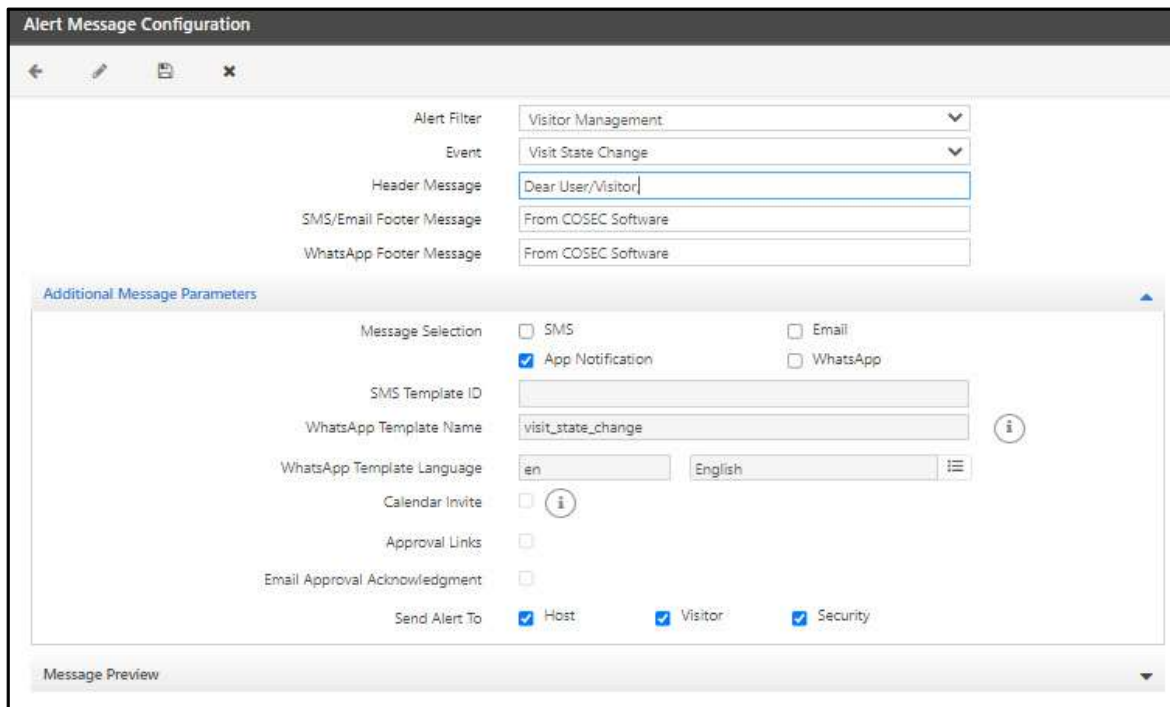
Message Preview

A host user can transfer his visit Request to another Host and new Host may now Accept/Reject visit request. The Visit Transfer Alert notifies the transferred host user about the transferred visit.

If you wish to receive Push Notifications on the VMS Application, make sure you select the **App Notification** check box.



## g) Visit State Change Alert



**Alert Message Configuration**

Alert Filter: Visitor Management

Event: Visit State Change

Header Message: Dear User/Visitor

SMS/Email Footer Message: From COSEC Software

WhatsApp Footer Message: From COSEC Software

**Additional Message Parameters**

Message Selection: ☐ SMS ☒ App Notification ☐ Email ☐ WhatsApp

SMS Template ID:

WhatsApp Template Name: visit\_state\_change

WhatsApp Template Language: en English

Calendar Invite: ☐

Approval Links: ☐

Email Approval Acknowledgment: ☐

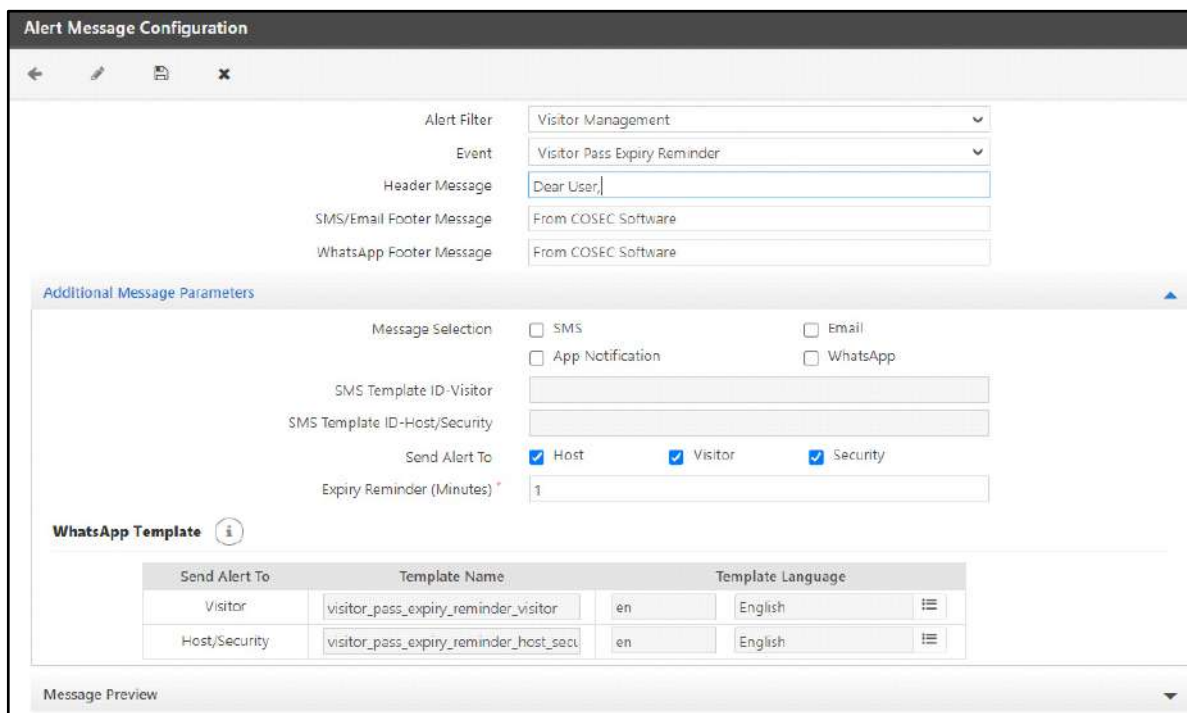
Send Alert To: ☒ Host ☒ Visitor ☒ Security

Message Preview

Once the visit is requested, then there can be various state of application (such as Host Approval/Rejection, Security Clearance, Check-In, Start, On Hold, Resume, Stop, Check-OUT) which can be provided by any Visitor, Host or Security. This state change is notified by Visit State Change alert.

If you wish to receive Push Notifications on the VMS Application, make sure you select the **App Notification** check box.

## h) Visitor Pass Expiry Reminder



**Alert Message Configuration**

Alert Filter: Visitor Management

Event: Visitor Pass Expiry Reminder

Header Message: Dear User,

SMS/Email Footer Message: From COSEC Software

WhatsApp Footer Message: From COSEC Software

**Additional Message Parameters**

Message Selection: ☐ SMS ☐ App Notification ☐ Email ☐ WhatsApp

SMS Template ID - Visitor:

SMS Template ID - Host/Security:

Send Alert To: ☒ Host ☒ Visitor ☒ Security

Expiry Reminder (Minutes) \*: 1

**WhatsApp Template**

Send Alert To	Template Name	Template Language
Visitor	visitor_pass_expiry_reminder_visitor	en English
Host/Security	visitor_pass_expiry_reminder_host_secu	en English

Message Preview



The Visitor Pass Expiry Reminder notifies the assigned Host/Visitor/Security when the Visitor Pass is about to expire.

If you wish to receive Push Notifications on the VMS Application, make sure you select the **App Notification** check box.

#### **Example 9: To get an alert for Worker Induction**

##### **(a) Worker Induction**

This alert allows user to get notified about the Induction Approval application, created by the contractor for respective workers. User can also **Approve/Reject** the Induction application from the notified email if configured.

Select the Alert Filter as CWM and Event as a **Worker Induction** and configure the Additional Message Parameters as shown below.

Select the required checkbox; **SMS, Email, WhatsApp** through which the user will get notified.

Select the **Email/WhatsApp Approval Links** checkbox to include particular links into email body by which user can Approve/Reject the application. Select the **Email Approval Acknowledgment** checkbox to get an Acknowledgment Email (*reply*) from the application if it is Approved/Rejected by respective user.



*To configure **Email/WhatsApp Approval Links** and **Email/WhatsApp Approval Acknowledgment**, make sure the Email option is enabled in Additional Message Parameter' as the link will be sent only on configured Email Address.*

The Preview of the message is as shown below.



By clicking on the respective link; **Approve / Reject** the application can be approved or rejected.

If the Application is approved by In-Charge 1, then the 2nd alert will be sent to In-Charge 2 for the verdict. If the In-charge 2 approves the application then it will be sent to the next In-charge and so on until the final verdict is not given by the last In-charge. This will however depend on the Approval Policy assigned to the user.

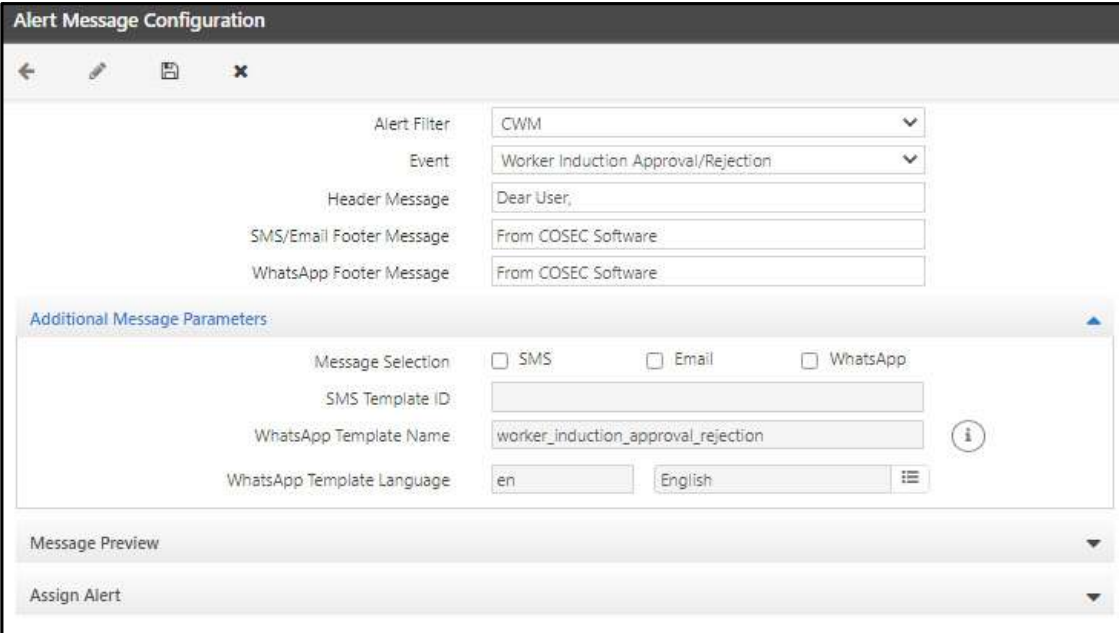
If the application is rejected by any of the In-Charge then, the final verdict will be considered as Rejected and alert will not be sent to the next In-Charge.

Click the **Assign Alert** collapsible panel and assign an alert to the users as explained in above examples.

Click **Save** to save the configured alert.

### (b) Worker Induction Approval/Rejection

You can create another Alert for the 'Approval' or 'Rejection' of worker Induction. For this, select the Alert filter as 'CWM' and an event as 'Worker Induction Approval/Rejection'.



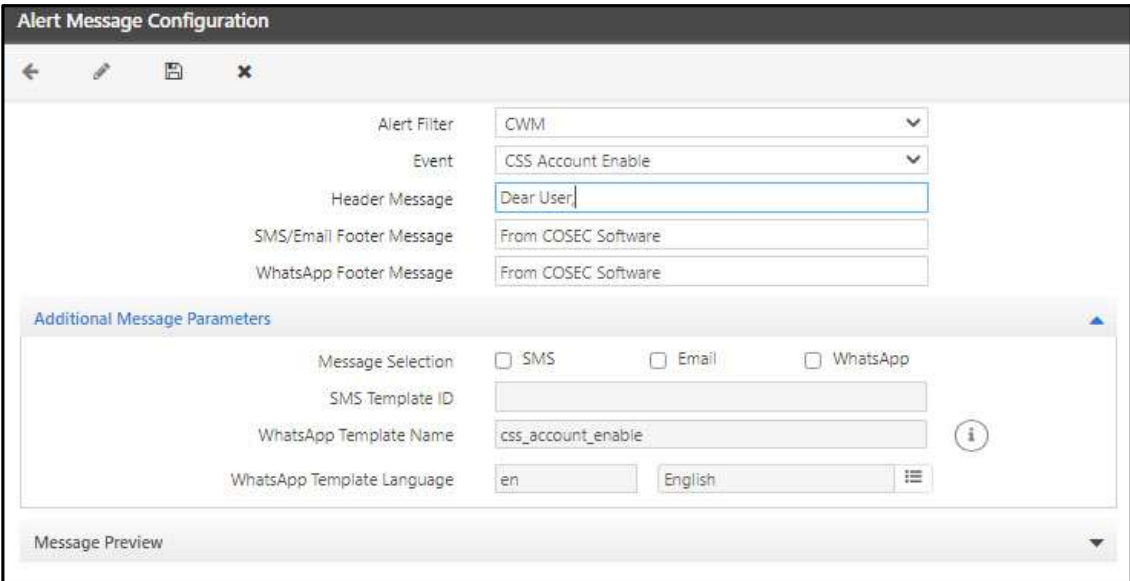
The screenshot shows the 'Alert Message Configuration' window. The 'Alert Filter' is set to 'CWM' and the 'Event' is 'Worker Induction Approval/Rejection'. The 'Header Message' is 'Dear User,'. The 'SMS/Email Footer Message' and 'WhatsApp Footer Message' are both 'From COSEC Software'. The 'Additional Message Parameters' section shows 'Message Selection' with checkboxes for 'SMS', 'Email', and 'WhatsApp'. The 'SMS Template ID' is empty. The 'WhatsApp Template Name' is 'worker\_induction\_approval\_rejection' and the 'WhatsApp Template Language' is 'en' with 'English' selected. At the bottom, there are sections for 'Message Preview' and 'Assign Alert'.

Configure the other parameters as explained above in (a) **Worker Induction**.

### Example 10: To get an alert for the CSS account enabled

This alert allows you to get a notification through SMS and Email, once the CSS Account is enabled for the contractor.

Select the Alert Filter as 'CWM' and Event as **CSS Account Enable** as shown below.



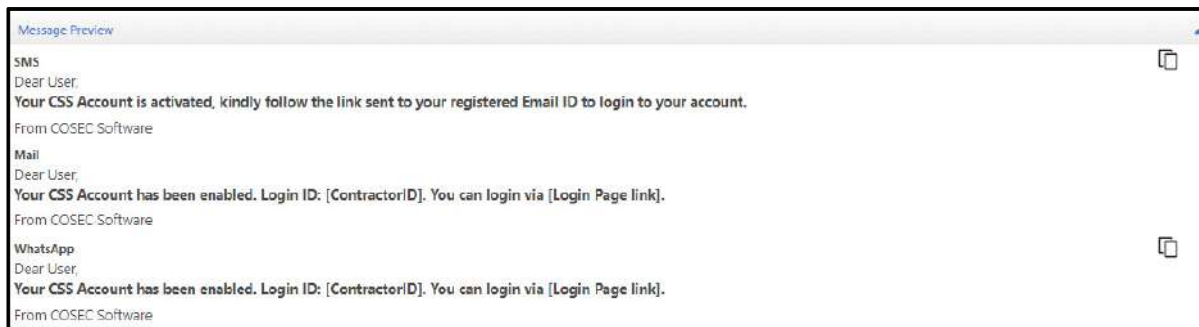
The screenshot shows the 'Alert Message Configuration' window. The 'Alert Filter' is set to 'CWM' and the 'Event' is 'CSS Account Enable'. The 'Header Message' is 'Dear User,'. The 'SMS/Email Footer Message' and 'WhatsApp Footer Message' are both 'From COSEC Software'. The 'Additional Message Parameters' section shows 'Message Selection' with checkboxes for 'SMS', 'Email', and 'WhatsApp'. The 'SMS Template ID' is empty. The 'WhatsApp Template Name' is 'css\_account\_enable' and the 'WhatsApp Template Language' is 'en' with 'English' selected. At the bottom, there is a section for 'Message Preview'.

Update the Header and Footer if required and configure the Additional Message Parameters by enabling the respective checkbox; **SMS**, **Email** and/or **WhatsApp** through which the user will get notified.



The Contractor Login ID and COSEC Login link can be sent to the user's Email ID.

The preview of the message is as shown below.



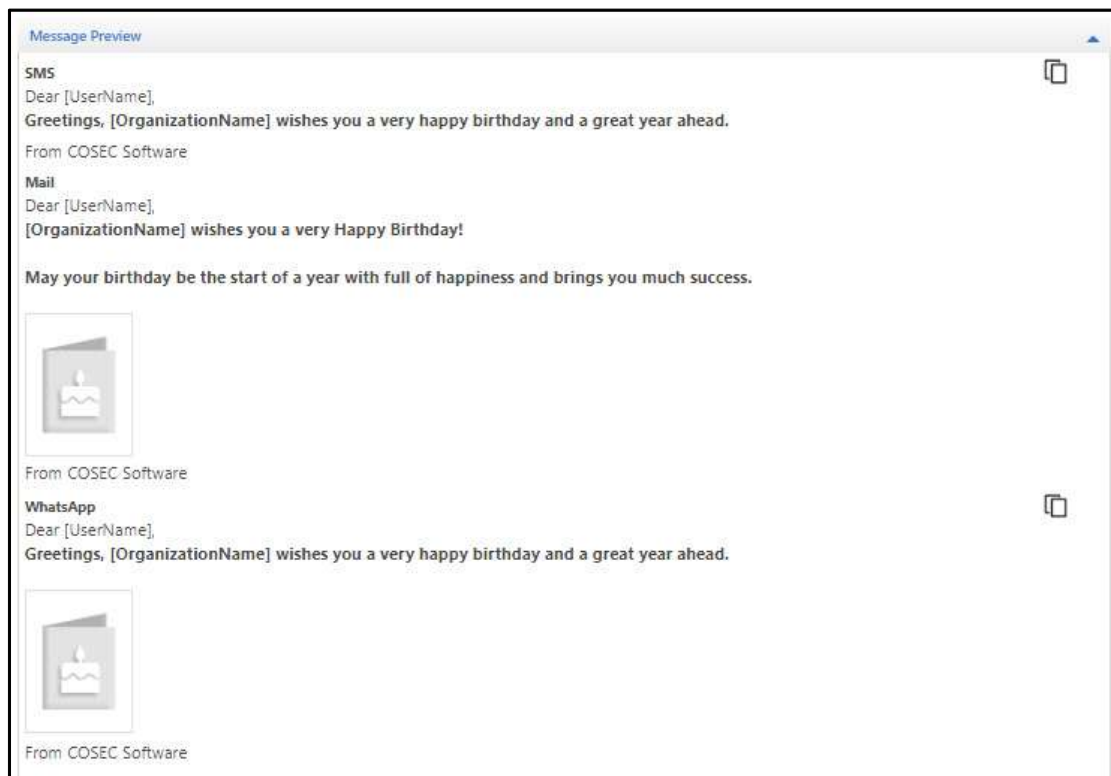
Click **Save** to save the configured alert.

### Example 11: Birthday Greeting

Birthday Greetings allows you to configure an Alert which will send birthday wishes to the user as well as notify the same to the Reporting In-charge and group through **SMS**, **Email** and/or **WhatsApp**.

Select the Alert Filter as User and Event as Birthday Greetings and configure Additional Message parameters as required.

The message preview is as shown below.



Also click the **Assign Alert** collapsible panel and configure the parameters as explained in above example.

Click **Save** to save.

### Example 12: Contractor Validity

This Alert is used to send alert message to both Users and Contractors, informing them about upcoming Contractor validity end date via SMS/Email/WhatsApp.

Select **Alert Filter** as ALL or CWM and **Event** as Contractor Validity.

The 'Alert Message Configuration' window is shown with a dark header and standard window controls. It contains several configuration fields: 'Alert Filter' is a dropdown menu set to 'CWM'; 'Event' is a dropdown menu set to 'Contractor Validity'; 'Header Message' is a text field containing 'Dear User,'; 'SMS/Email Footer Message' is a text field containing 'From COSEC Software'; and 'WhatsApp Footer Message' is a text field containing 'From COSEC Software'. At the bottom, there are three collapsible panels: 'Additional Message Parameters', 'Message Preview', and 'Assign Alert', each with a downward-pointing arrow.

## Additional Message Parameters

Click the Additional Message Parameters panel and select the respective check boxes; Message Selection and Send Alert according to which the alert will be generated. Also, set the **Reminder Period (In Days)** which will allow you to set a particular scheduled time to resend an alert message to the user and contractor regarding the expiry of Contractor's Validity.

Alert Message Configuration

Alert Filter

CWM

Event

Contractor Validity

Header Message

Dear User,

SMS/Email Footer Message

From COSEC Software

WhatsApp Footer Message

From COSEC Software

Additional Message Parameters

Message Selection

☐ SMS
☐ Email
☐ WhatsApp

SMS Template ID-User

SMS Template ID-Contractor

Send Alert To

☐ User
☐ Contractor

Reminder Period (Days)

Days Before Validity End Date	Reminder Time	Repeat Reminder	Repeat Interval (Days)
0	00:00	No	1

WhatsApp Template

Send Alert To	Template Name	Template Language
User	contractor_validity_user	en English
Contractor	contractor_validity_contractor	en English

## Message Preview

Message Preview

User:

SMS

Dear User,

Validity End Date is approaching for [Contractor Count] Contractor(s).

From COSEC Software

Mail

Dear User,

Validity End Date is approaching for following Contractor(s):

Sr. No.	Contractor Type ID	Contractor ID	Contractor Name	Validity End Date	Days Remaining
1	[ConTypeID]	[ConID]	[ConName]	[EndDate]	[days]

From COSEC Software

WhatsApp

Dear User,

Validity End Date is approaching for [Contractor Count] Contractor(s).

From COSEC Software

Contractor:

SMS

Dear User,

Your Validity End Date is approaching in [days] day(s).

From COSEC Software

Mail

Dear User,

Your Validity End Date is approaching in [days] day(s).

From COSEC Software

WhatsApp

Dear User,

Your Validity End Date is approaching in [days] day(s).

From COSEC Software

Click the **Assign Alert** collapsible panel and select the required users to which the Alert is to be configured and select the App Notification checkbox for the respective one.

User ID	Name	Contractor ID	Contractor Name	SMS	Email	WhatsApp	
1	SALIM ANSARI	CP	Contractor 1	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	

Click **Save** to save.

### Example 13: Guard Tour Violation

This alert is used to send a message regarding the violation occurred during Guard Tour.

### Additional Parameter

Additional parameter enables to select the modes of alert to be sent, namely SMS, Email, WhatsApp or/and App Notification. It also allows you to send configured alert to the User and/or Reporting In-charge if required on each guard tour violation.

## Message Preview

It shows the final message preview before sending it to the user and/or report-in-charge.

The Message Preview window displays four message templates for Guard Tour Violations. Each template includes a greeting, a violation message with placeholders for user information and door details, and a signature from COSEC Software.

**SMS**  
Dear User,  
**Guard Tour Violated by [Username] ([User ID]) on [Door Count] Door(s) at [date-time].**  
From COSEC Software

**Mail**  
Dear User,  
**Guard Tour Violated by [Username] ([User ID]) on below [Door Count] Door(s) at [date-time].**

Door ID	Name
[Door ID]	[Door Name]

From COSEC Software

**App Notification**  
**Guard Tour Violated by [Username] ([User ID]) on [Door Count] Door(s) at [date-time].**

**WhatsApp**  
Dear User,  
**Guard Tour Violated by [Username] ([User ID]) on [Door Count] Door(s) at [Date-time].**  
From COSEC Software

Message can also be edited by clicking on the message line as shown below.

The Guard Tour Violation (SMS) edit window allows users to modify the message content. It features a 'Select Variable' section with buttons for Username, User ID, Door Count, Date-time, and UserID-Username. The main text area contains the template: 'Guard Tour Violated by [Username] ([User ID]) on [Door Count] Door(s) at [date-time].'. At the bottom, there are 'OK' and 'Default' buttons.

Once the modifications are done, click **OK** to save or **Default** to reset the message.

## Assign Alert

Click the **Assign Alert** collapsible panel by selecting Users and the respective checkbox; **SMS**, **Email**, **App Notification**, **WhatsApp** through which they will be notified as shown below.

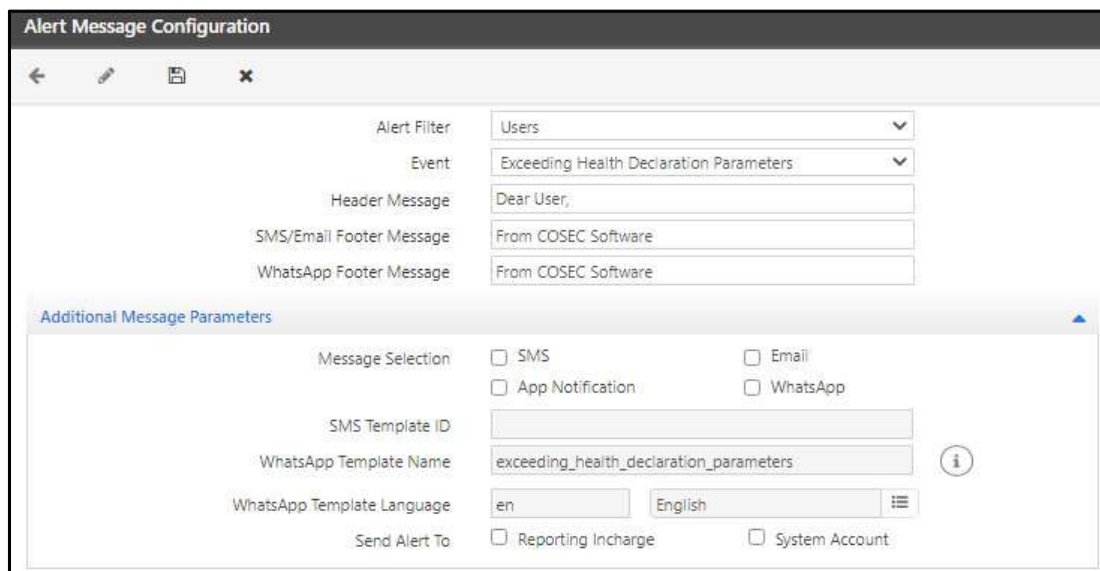
The Assign Alert window is used to configure notifications for specific users. It includes a 'Select Users' dropdown set to 'All'. Below, there are sections for 'User' and 'Guard Tour', each with 'ID' and 'Name' input fields and a list icon. A 'Send Alert For' dropdown is set to 'All Guard Tours'. An 'Add' button is located below these fields. At the bottom, there is a search bar and a table with columns for User ID, Name, Send Alert For, and notification methods (SMS, Email, App Notification, WhatsApp). The table currently shows 'No Data'.



Click **Save** to save or **Cancel** to cancel the Alert configuration.

#### **Example 14: Exceeding Health Declaration Parameters**

This alert is used to get notified about the health parameters of users if they are exceeding from their specified threshold value.

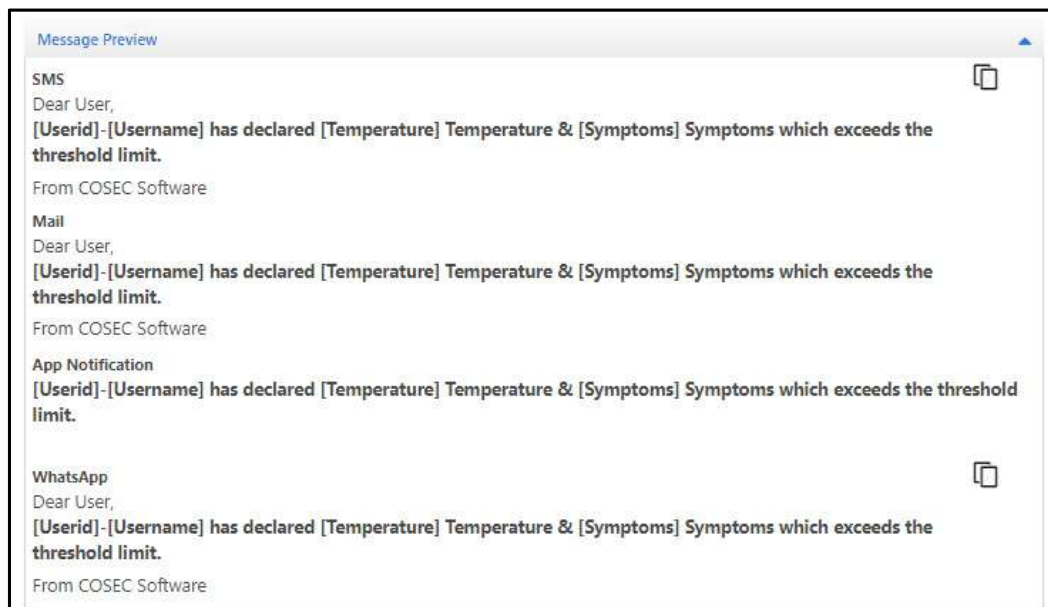


The 'Alert Message Configuration' window is used to set up alerts. It includes fields for 'Alert Filter' (set to 'Users'), 'Event' (set to 'Exceeding Health Declaration Parameters'), 'Header Message' (set to 'Dear User,'), 'SMS/Email Footer Message' (set to 'From COSEC Software'), and 'WhatsApp Footer Message' (set to 'From COSEC Software'). Below these is an 'Additional Message Parameters' section with checkboxes for 'SMS', 'Email', 'App Notification', and 'WhatsApp'. It also has fields for 'SMS Template ID', 'WhatsApp Template Name' (set to 'exceeding\_health\_declaration\_parameters'), 'WhatsApp Template Language' (set to 'en' and 'English'), and 'Send Alert To' (with checkboxes for 'Reporting Incharge' and 'System Account').

This alert can be sent to Reporting In-Charge and System Administrator.

In the same way alerts can be configured for the events like Health Declaration Pending, User Denied/allowed-Threshold Temperature Exceeded.

#### **Message Preview**



The 'Message Preview' window shows the alert message for different channels. For SMS, Mail, App Notification, and WhatsApp, the message is: 'Dear User, [Userid]-[Username] has declared [Temperature] Temperature & [Symptoms] Symptoms which exceeds the threshold limit. From COSEC Software'. Each channel preview has a copy icon in the top right corner.

The message can also be edited if required.

## Assign Alert

Assign Alert

Select Users: All

User ID: Name

Search

User ID	Name	SMS	Email	App Notification	WhatsApp	
10	RAJENDRA GOSWAMI	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
1001	ANKITKUMAR SOHALIYA	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	

Once the configurations are done, click **Save** to save the alert.

# Configuring Custom Messages

Custom messages unlike alert messages are not predefined in their formats. These are customizable messages that you can send to employees on the occurrence of events, other than those predefined for alert message configuration.



*Make sure:*

- you have configured the SMS parameters, refer to [“SMS Configuration”](#).
- you have configured the Email parameters, refer to [“Email Configuration”](#).
- you have configured the WhatsApp parameters, refer to [“WhatsApp Integration”](#).
- you have configured the Mobile number and Email ID of the desired users as well as enabled the desired Receive Alert On options, refer to [“Configuring Users”](#).
- ensure Alert Service is running so that alert messages can be sent to the assigned users.

*The Custom Templates are as per the user requirement, hence these needs to be created manually in your WhatsApp Business Account prior to sending the alert. Alert will be sent only after the same are created as well as approved by WhatsApp. For details regarding WhatsApp Pre-requisites and WhatsApp functionality, refer to [“WhatsApp Configuration”](#).*

To send a Custom Message configure:

- [“Custom Message Parameters”](#)
- [“Select Users”](#)

## Custom Message Parameters

Click **Admin Module > System Configuration > Custom Message**.

The screenshot shows the 'Custom Message' configuration screen. At the top, there's a title bar 'Custom Message' with a back arrow. Below it, the 'Send Message Via' section has three checkboxes: 'SMS', 'Email', and 'WhatsApp'. The 'Select Users' section is below, featuring a 'Select Users' dropdown menu set to 'User Wise'. Underneath, there are input fields for 'User ID' and 'User Name', and a 'Send' button.

- **Send Message Via:** Select the desired check boxes — SMS, Email and/or WhatsApp and configure the parameters:

The screenshot shows the 'Custom Message' interface. It includes a header bar with a back arrow. The main area contains the following elements:

- Send Message Via:** Three checkboxes for 'SMS', 'Email', and 'WhatsApp', all of which are checked.
- SMS/Email Message Header:** A text input field.
- SMS/Email Footer Message:** A text input field.
- Message \*:** A large text input area for the message body.
- Subject:** A text input field.
- WhatsApp Template Name \*:** A text input field with an information icon to its right.
- WhatsApp Template Language \*:** Two picklist menus labeled 'Code' and 'Language'.
- Select Users:** A section with a 'Select Users' dropdown menu currently set to 'User Wise'.
- User \*:** Two picklist menus labeled 'ID' and 'Name'.
- Send:** A dark button at the bottom center.

- **SMS/Email Message Header:** Configure the text that you wish to display in the header of the message, for example: Dear User. This is applicable for SMS/Email messages.
- **SMS/Email Footer Message:** Configure the text that you wish to display in the footer of the message, for example: From COSEC Software. This is applicable for SMS/Email messages.
- **Message:** Configure the text that you wish to display as the message body. This is applicable for SMS/Email/WhatsApp messages.
- **Subject:** Configure the text that you wish to display as the subject of the message. This is applicable for Email messages.
- **WhatsApp Template Name:** Configure a name for this customized template. If you opt to add this template to your WhatsApp Business Account then this same name will be displayed in the WhatsApp **Select Templates** picklist. For details, refer to [“Templates Addition in WhatsApp Business Account”](#). This is applicable for WhatsApp messages.
- **WhatsApp Template Language:** Click the picklist. The **Language** pop-up appears. Select the desired language in which you wish to send the WhatsApp message. When you add this template to your WhatsApp Business Account this will be added in the selected language. For details, refer to [“Templates Addition in WhatsApp Business Account”](#). This is applicable for WhatsApp messages.


## Select Users

**Select Users:** Select the desired option — All, Group Wise, User Wise — to whom this message is to be sent.

If you select **All**, the message will be sent to all the user. Click **Send** to send the message.

If you select **User Wise**. Click the **User** picklist.

- The **Picklist For All Users** pop-up appears.
- Select the check boxes of the desired users.
- Click **OK**. The selected users appear in a grid.

You can also remove any user from the grid. To do so, click **Delete**  of the respective user.

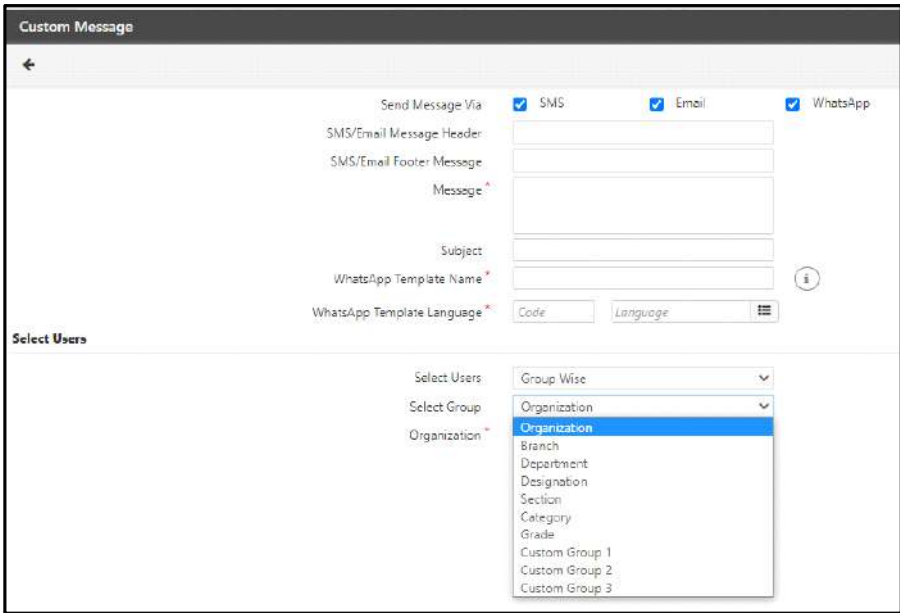
Click **Send** to send the message.

If the message was sent successfully, then you can check its details from [“Alert View”](#).

If the message is not sent, you can view the reason for the same. For details refer to [“Error List”](#).

If you select **Group Wise**,

- Select the desired enterprise group from the drop-down list — Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1/2/3.



The screenshot shows the 'Custom Message' form. At the top, there are checkboxes for 'Send Message Via' with 'SMS', 'Email', and 'WhatsApp' all selected. Below these are input fields for 'SMS/Email Message Header', 'SMS/Email Footer Message', 'Message', 'Subject', 'WhatsApp Template Name', and 'WhatsApp Template Language'. The 'Select Users' section is at the bottom, featuring a 'Select Users' dropdown set to 'Group Wise', a 'Select Group' dropdown set to 'Organization', and an 'Organization' picklist. The picklist is open, showing a list of options: Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group 1, Custom Group 2, and Custom Group 3. The 'Organization' option is highlighted in blue.

- For each enterprise group — Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1/2/3, click the corresponding picklist to select the desired option/s.

For example, Organization is select. Click the **Organization** picklist.

The **Picklist For Organization Master** pop-up appears.

<input type="checkbox"/>	ID ▲	Name
<input type="checkbox"/>	1	Organization-1
<input type="checkbox"/>	2	ORG2
<input type="checkbox"/>	3	ORG3

Select the check boxes of the desired organizations.

<input type="checkbox"/>	ID ▲	Name
<input type="checkbox"/>	1	Organization-1
<input checked="" type="checkbox"/>	2	ORG2
<input checked="" type="checkbox"/>	3	ORG3

Click **OK**.The selected group appear in a grid.

**Custom Message**

Send Message Via: ☒ SMS ☒ Email ☒ WhatsApp

SMS/Email Message Header:

SMS/Email Footer Message:

Message:

Subject:

WhatsApp Template Name:

WhatsApp Template Language:  Code  Language

**Select Users**

Select Users:  Group Wise

Select Group:  Organization

Organization:  ID  Name

Search:

ID	Name	Group	
2	ORG2	Organization	
3	ORG3	Organization	

**Send**

You can also remove any organization from the grid. To do so, click **Delete** of the respective organization.

Click **Send** to send the message.

If the message was sent successfully, then you can check its details from ["Alert View"](#).

If the message is not sent, you can view the reason for the same. For details refer to ["Error List"](#).

## Error List

If the message is not sent due to any reason, you can view the reason for the same. To do so,

- Click the Error List collapsible panel.
- It displays the User ID along with the reason of failure.

**Error List**

Search:

User ID	Status
1003	Mobile No. not configured
1004	Mobile No. not configured
1007	Mobile No. not configured
1008	Mobile No. not configured

# Configuring Locations

This feature enables COSEC to detect and record the source location for all punch events submitted from a mobile device using the ESS Application. This can be done by pre-configuring a set of locations on the Web Application. This will ensure that only punches entered by an employee from a pre-configured location radius are authenticated by the system as valid punches.

Geographical areas such as the office campus, branch offices, workshops, client offices etc. may be identified as valid locations for accepting attendance punches from employees. Hence, an employee who has entered the office campus area as per shift timings, may submit a punch from his current location, without having to physically approach the device.

To access configure locations on the COSEC Web Application,

Go to **Admin module > System Configuration > Location Master** and the following screen appears.

The screenshot shows the 'Location Master' configuration interface. On the left is a sidebar menu with the 'Admin' header and various system configuration options. The 'Location Master' option is highlighted. The main area contains a form with the following fields:

- Code \***: A text input field with a search icon, containing the value 'ID'.
- Location Name \***: A text input field with a search icon, containing the value 'Name'.
- Type**: A dropdown menu set to 'GPS'.
- BLE Code**: A text input field with a hint '4 characters. 1111 to 9999'.
- BLE Name**: A text input field with a hint 'BLE Name'.
- Latitude \***: A text input field with a hint '8 characters. -90.0000 to +90.0000' and a location pin icon.
- Longitude \***: A text input field with a hint '9 characters. -180.0000 to +180.0000'.
- Location Radius (Meters) \***: A text input field containing the value '0'.
- Wi-Fi MAC Address**: A text input field with a hint ': : : : : '.
- Address**: A large text input field.
- Mode**: A dropdown menu set to 'Attendance'.
- Device**: Two text input fields, 'ID' and 'Name', with a list icon.
- Alternate Address**: A text input field.
- Port No. (HTTPS)**: A text input field.
- Event Type**: A dropdown menu set to 'Entry'.

To add a new location click the **New** button.


Every location is configured with a **Code** and **Location Name**.

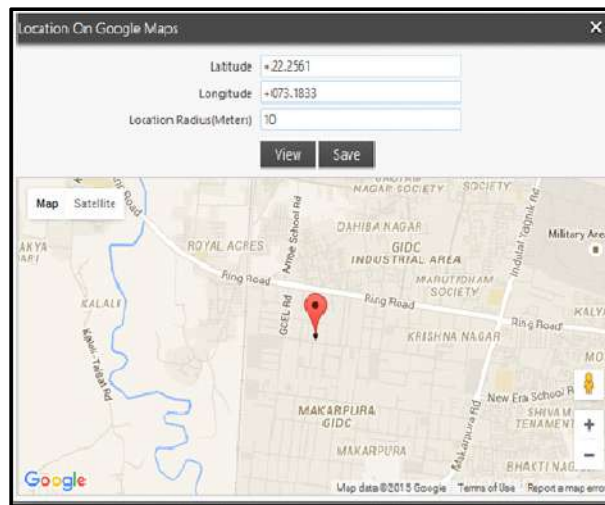
**Type:** Select the type from the drop down options based on which location is to be defined.

- **GPS:** Enter the Latitude, Longitude and location radius.
- **Wi-Fi:** Enter the Wi-Fi MAC address of a specific Wi-Fi access point to define the coverage area.
- **BLE- Beacon:** Enter the **BLE Code** for configuring location based on bluetooth enabled beacon. Select the Mode as Attendance and or Access Control.
- **BLE- Device:** Enter the **BLE Name**. Valid characters are maximum 10 alphanumeric characters. Mode will be set as Attendance automatically.



A location can be defined by recording its geographical details such a **Latitude**, **Longitude** and **Location Radius** i.e. the radius in meters over which the area would be spread.

Click the  button to view and edit the coverage area, as per requirement.



Navigate and click a location on the map to select its latitude and longitude. You can also manually enter the location details and click the **View** button to view the location. Edit the location radius, if required.

**Address:** You can specify the address of the location.

**Device:** When Mode is selected as Access Control or Both then you can select the direct doors and Panel200 doors from the picklist.

**Alternate Address:** It is the external network (public network) IP address of device.

If Door V3 is selected for Location1. The IP address (Internal Address) of Door V3 is 192.168.104.114. The Alternate Address of Door V3 is 173.183.4.11:43.

When the door is accessed from external network then alternate address will be used for communication.

If you are using APTA in the external network at Location1 and tries to access Door V3, then it will be accessed through 173.183.4.11:43. In Door API response to APTA, alternate IP address will be sent in response.

The communication between the device and the external network takes place via device port configured in **Port No. (HTTPS)**.

**Port No. (HTTPS):** Enter the Device Port number for secure communication between the device and the external network.



*The Device must be Wi-Fi enabled so that it can be accessed through external network.*

**Event Type:** Select the event type as **Entry** or **Exit** which will identify the events from the BLE-Beacon or BLE-Device based locations as Entry event or Exit event.



*The In-built bluetooth is supported in VEGA door only.*

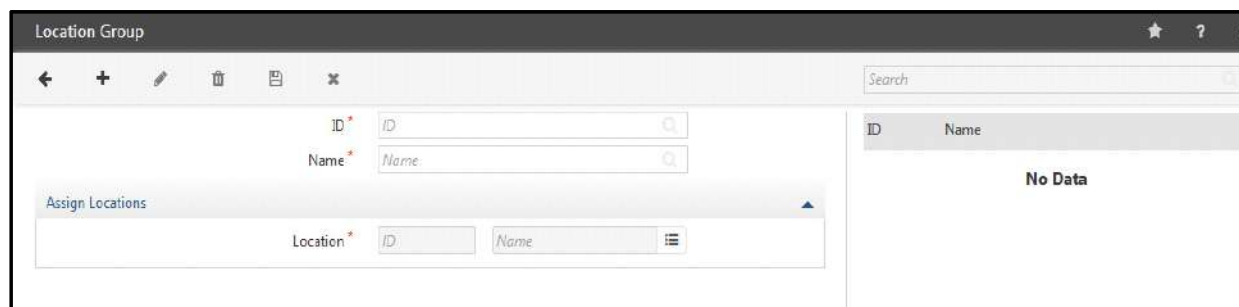
Click the **Save** button from the toolbar to save the Location Master configuration.

# Location Group

This page allows defining location groups as collection of multiple locations. Location group can then be used while defining Field Visit Schedule for users.

To create location group, Select the **Admin module > System Configuration > Location Group**.

The **Location Group** page appears as shown below.



ID	Name
No Data	

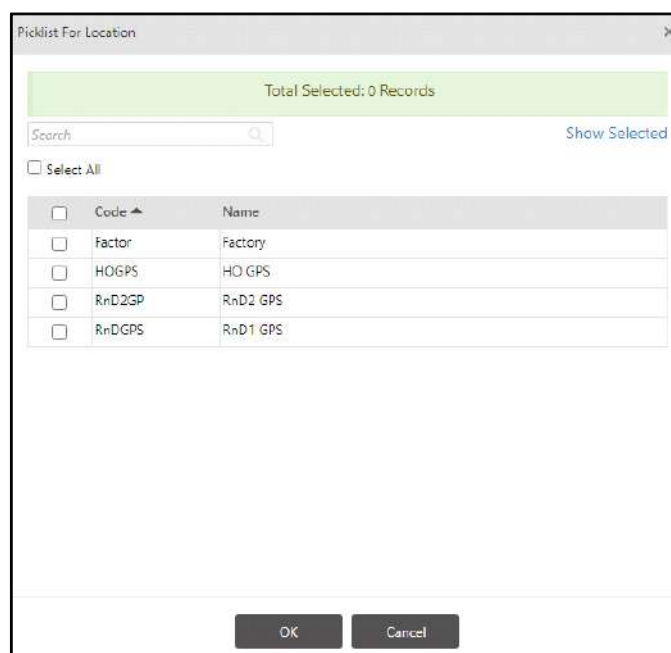
Click the **New** button to configure a new location group.

**ID:** The ID will be generated automatically after saving the location group.

**Name:** Specify a name of the location group.

**Location:** Click the picklist to select the locations to include them in the Location Group. Make sure the desired locations have been configured in the Location Master.

- Click the **Location** picklist. The **Picklist for Location** pop-up appears.



Code	Name
Factor	Factory
HOGPS	HO GPS
RnD2GPS	RnD2 GPS
RnD1GPS	RnD1 GPS

- You can either select particular Locations or can select all the Locations at once.

- To select particular Locations, select the check boxes of the desired locations.

The screenshot shows a dialog box titled "Picklist For Location". At the top, a green bar indicates "Total Selected: 2 Records". Below this is a search bar with the text "Search" and a magnifying glass icon, and a "Show Selected" link. A "Select All" checkbox is present and unchecked. The main area contains a table with two columns: "Code" and "Name".

<input type="checkbox"/>	Code	Name
<input type="checkbox"/>	Factor	Factory
<input checked="" type="checkbox"/>	HOGPS	HO GPS
<input checked="" type="checkbox"/>	RnD2GP	RnD2 GPS
<input type="checkbox"/>	RnDGPS	RnD1 GPS

At the bottom are "OK" and "Cancel" buttons.

**OR**

- To select all the Locations at once, select the **Select All** check box. The Locations on all the pages will be selected.

The screenshot shows the same "Picklist For Location" dialog box, but now the "Select All" checkbox is checked. The green bar at the top indicates "Total Selected: 4 Records". In the table, all four rows have their checkboxes selected.

<input checked="" type="checkbox"/>	Code	Name
<input checked="" type="checkbox"/>	Factor	Factory
<input checked="" type="checkbox"/>	HOGPS	HO GPS
<input checked="" type="checkbox"/>	RnD2GP	RnD2 GPS
<input checked="" type="checkbox"/>	RnDGPS	RnD1 GPS

At the bottom are "OK" and "Cancel" buttons.

- Click **OK**.
- The selected locations appear in the grid.

Location Group

←

+

✎

🗑

📄

✕

ID \*

1

Name \*

Matrix

Assign Locations

Location \*


ID

Name

☰

Search

Code	Name	🗑
Factor	Factory	🗑
HOGPS	HO GPS	🗑
RnD2GP	RnD2 GPS	🗑
RnDGPS	RnD1 GPS	🗑

- You can also delete the desired locations. To do so, click **Delete**  of the respective location.
- Click on **Save** button to save the configured location group.



1. You can assign multiple locations to one location group.
2. Same location can be added in multiple location groups.



System sends *Field Schedule Modified Alert to User* for schedule dates whose records have been affected by addition or removal of location from location group.

# Agreement Builder

---

The Visitor Portal is used for — creating visit by visitor, for checking-in and checking-out of visitors as well as maintaining visit logs of the visitors.

To enhance the utility of the Visitor Web Portal, the provision for displaying an Agreement and /or a Form (Questionnaire) has been added. To be able to use this functionality, you need to configure the Agreement and Form parameters in COSEC Web.

You can configure the content of the Agreements/Forms as per your requirement. You can also link any Agreement with a Form. You can determine the placement of the Agreement/Forms — Login, Check-in, Check-out. The Agreement/Forms configured here will be displayed in the Visitor Web Portal.

You can send Alert Messages when Forms are executed by Visitors. To do so, click **Admin Module > Alert Configuration**. In **Alert Filter** make sure you select **Visitor Management** and in the **Event** you select **Visitor Form Execution**. For details, refer to [“Configuring Alert Messages”](#).


To create the form, select the **Admin Module> System Configuration> Form Builder**. For details refer to, [“Form Builder”](#).

To determine the placement of the Agreement/Forms — Login, Check-in, Check-out of Visitor as per your requirement. For details refer to [“Station Location”](#).


## Agreement Builder

To create the agreement, select the **Admin Module> System Configuration> Agreement Builder**.

The **Agreement Builder** page appears.



To add a new Agreement,

- Click the **New**  icon. You can add upto 99 different agreements.
- **ID**: The ID is auto-generated by the system. It will be displayed after you save the agreement.
- **Name**: Assign a name to the agreement.

The Agreement is divided into — Agreement Content and Additional.

### Agreement Content

Click the **Agreement Content** collapsible panel to configure the parameters. This section is divided into three sub-sections — Header, Content and Footer.

- **Header:** This will be displayed on top before the Agreement Content. This is the Title you wish to provide. Maximum 100 characters.
- **Content:** You can add text or media here.

The text can be in the form of Terms and Conditions or any Contract requirements or Non Disclosure Agreements or any text as per your requirement. Maximum 5000 characters.

In Media, you can upload an image, pdf or video relevant to the agreement.



*You can either upload an image/pdf or video. Both cannot be uploaded.*

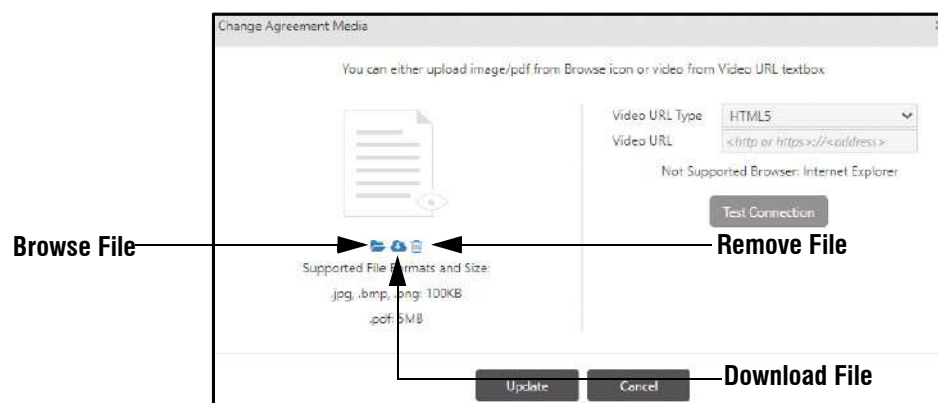
## Uploading Image/PDF

- Clicking **Upload**  . The **Change Agreement Media** pop-up appears.


- Click **Browse File**  .

To upload, select the desired file from your local PC.


Make sure the image size is not more than 100KB and the pdf is upto 5MB. The supported formats are .jpg, .bmp, .png, pdf




After uploading the file, if you wish to upload a different file instead of the current uploaded file, click

**Browse File**  again and select the desired file from your local PC. The previously uploaded file will get replaced with the new file.

To download the uploaded file, click **Download File** .

To remove the uploaded file, click **Remove File** .

Then click **Update**.

The document will be uploaded and you can preview it by clicking the **Preview**  icon.



*PDF can be viewed only after it is downloaded.*

## Uploading Video

You can also upload a relevant video. To do so,

- Select the desired option for uploading the **Video URL Type** — **HTML5, FTP, YouTube, Vimeo, Wistia, Custom Embed (iFrame)**.

If you select **FTP**, in **Video URL** enter the desired FTP URL from where the COSEC will fetch the video. To access the FTP URL, you need to enter the FTP credentials. Enter the **User Name** and **Password**. **User Name** can be a maximum of 40 characters and **Password** can be a maximum of 128 characters.

The screenshot shows the 'Change Agreement Media' dialog box. On the left, there is a 'Browse' icon and text indicating supported file formats and sizes: .jpg, .bmp, .png (100KB) and .pdf (5MB). On the right, the 'Video URL Type' dropdown is set to 'FTP'. Below it, the 'Video URL' field contains the placeholder '<ftp>//<address>'. Further down, there are fields for 'Username' and 'Password', and a note stating 'Not Supported Browsers: Internet Explorer'. A 'Test Connection' button is located below the password field. At the bottom of the dialog are 'Update' and 'Cancel' buttons.

If you select **YouTube**, **HTML5**, **Vimeo** or **Wista**, in **Video URL** enter the desired URL from where the COSEC will fetch the video.

This screenshot shows the same 'Change Agreement Media' dialog box, but with the 'Video URL Type' dropdown set to 'YouTube'. The 'Video URL' field now contains the placeholder '<Enter YouTube URL>'. The 'Test Connection' button remains visible below the URL field. The 'Update' and 'Cancel' buttons are at the bottom.

If you select **Custom Embed (iFrame)**, in **Video URL** enter the video URL which is the extracted URL from embed code which belongs to any video on web platform.

Follow the steps given below to extract the URL from the embed code, for example to extract the URL from a YouTube video:

- Click on the desired Video.

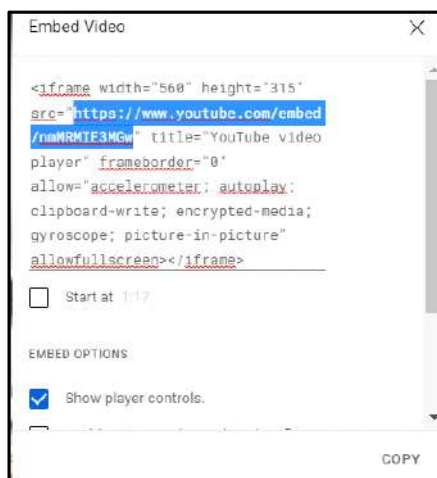




- Click **Share**.



- Click **Embed**.



- In the **Embed Video** pop-up select the link as shown above. Paste this link in the **Video URL**.

Similarly, you can copy the link from any other web video and paste the same in the Video URL.



- File formats supported for FTP/Web[HTML5, YouTube, Vimeo, Wistia, Custom Embed(iFrame)] are .mp4 and .mov.
- For a video to be displayed using the FTP link make sure the file size is 100MB.
- Make sure the Web Video URL's — HTML5, YouTube, Vimeo, Wistia, Custom Embed(iFrame) do not have any type of authentication.
- Click **Test Connection** to check the connectivity, to fetch the video data from the configured URL.



If the Test Connection is Successful, it only depicts that there is connectivity till the Video URL link. The video may or may not be functional.

- Click **Update**. The video will be uploaded.
- **Footer:** You can add the desired text. This will be displayed at the end of the Agreement, before the Signature. Maximum 100 characters.

## Additional

Click the **Additional** collapsible panel and configure the following parameters:

- **Signature:** Select the check box, if you want the user to add their signature along with their confirmation.
- **Confirmation Style:** This defines the way in which the confirmation to the drafted agreement would be provided. Select the desired **Confirmation Style** as **Agree Checkbox** or **Buttons (Accept/Decline)**.

If you select **Agree Checkbox**, a check box will be provided to agree with the Terms and Conditions.

If you select **Buttons (Accept/Decline)**, two buttons — 'Accept' and 'Decline' will be provided to agree with the Terms and Conditions.

Click **Save** to save the configuration. The Agreements you add appear in the right pane.

Sample of Agreement if you select **Agree Checkbox**, as displayed in the VMS Portal.

**MATRIX**

Check-In Form X

Profile

Exit

### Visit Form Agreement

Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Quis ipsum suspendisse ultrices gravida. Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Quis ipsum suspendisse ultrices gravida. Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Quis ipsum suspendisse ultrices gravida.

☒ I agree with terms and condition.

NEXT >

Sample of Agreement if you select **Buttons (Accept/Decline)** as displayed in the VMS Portal.

**MATRIX**

Check-In Form X

Profile

Exit


### Visit Form Agreement


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DECLINE ACCEPT


## Top Panel Functionality

After the Agreements have been created, you can perform the following:

Click **Add** , to add a new Agreement.

Click the desired agreement from the list of agreements in the right pane. Click **Edit** , if you wish to make modifications in the existing agreement.

Click the desired agreement from the list of agreements in the right pane. Click **Delete** , if you wish to delete the agreement.

Click the desired agreement from the list of agreements in the right pane. Click **Duplicate** , if you wish to replicate the agreement.

# Form Builder

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We all know that collecting feedback, opinions, data etc via Forms is an important aspect for every organization.

The Form Builder allows you to customize the design of the questionnaire in the form of different formats, convey messages as well as provide feedback. You can customize the content of the Forms as per your requirement. You can also link any Agreement with a Form. For details related to Agreements, refer to [“Agreement Builder”](#).

You can determine the placement of the Agreement/Forms — Login, Check-in, Check-out of Visitor as per your requirement. For details refer to [“Station Location”](#).

For displaying the Form and Agreement on Visitor Web Portal, you need to configure the Form and Agreement parameters in the COSEC Web.

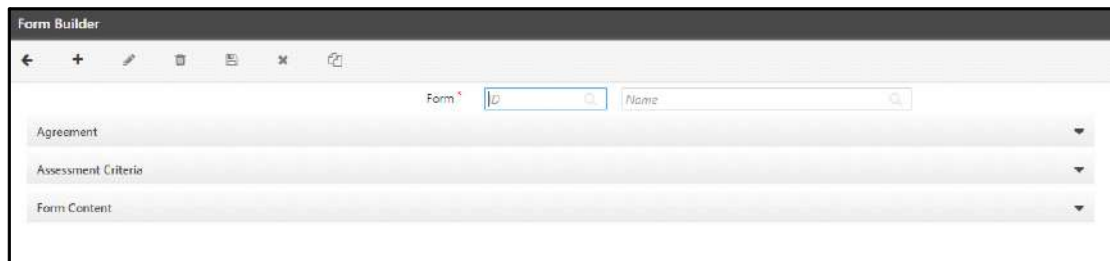
After the Form is submitted by the Visitor, the details are displayed in the Form Summary. For details refer to [“Form Summary”](#).

You can send Alert Messages when Forms are executed by Visitors, to do so click **Admin Module> System Configuration> Alert Message Configuration**. Select Visitor Event from the Alert filter drop-down list and Visitor Execution from the event drop-down list. For details, refer to [“Configuring Alert Messages”](#).


To configure the Form parameters:

Click **Admin Module> System Configuration> Form Builder**.

The **Form Builder** page appears.



To add a new Form,

Click the **New**  icon. You can add upto 99 different Forms.

- **ID:** The ID is auto-generated by the system. It will be displayed after you save the form.
- **Name:** Assign a name to the form.

The Form Builder is divided into three sections— **Agreement**, **Assessment Criteria** and **Form Content**.

## Agreement

Click the **Agreement** collapsible panel and configure the following parameters:

- **Agreement Selection:** Click the picklist to select and bind a pre-configured agreement with this form.
- **Position At:** Select the position — Starting, Ending — at which you want the agreement to be displayed.

If you select **Starting**, the agreement will be displayed before the form.

If you select **Ending**, the agreement will be displayed after the form is filled-in.

## Assessment Criteria

This defines the eligibility criteria on the bases of which the further functionality would be executed.

Click the **Assessment Criteria** collapsible panel and configure the following parameters:

- **Approve On:** Select the desired eligibility criteria for further action — All Correct, Minimum Percentage, Any Condition.

**All Correct:** If you select this option, the visitor will be allowed further course of action only if all the questions are answered correctly.

**Minimum Percentage:** If you select this option, the visitor will be allowed further course of action only when the defined percentage value cut-off score is achieved as the score after answering the questions.


**Any Condition:** If you select this option, the visitor will be allowed further course of action without fulfillment of any condition.

- **Display Score to User:** Select this check box if you wish to display the score to the visitor after the questionnaire is filled-in.

## Form Content

In the Form Content, you first need to add Sections. In each Section you can then add different types of questions as Multi-Choice, Single-Choice, Text Answer Only, Fixed Content, Rating.

Create a list of Sections and the questions to be added in each Section manually as after you have completed a Section and its questions and then add a new Section, you will not be able to add other questions in the previous Section.

If you still wish to do so, you will have to add the desired question in the current Section and then click Move  or drag and drop it to the desired Section.






Click the **Form Content** collapsible panel and configure the following parameters:

A screenshot of the 'Form Content' panel. It has a title bar 'Form Content' with a blue arrow icon on the right. The main area contains the text 'No data added yet. Click '+' to start.' and a plus icon in the bottom right corner.

## Section

To add a **Section**,

A screenshot of the 'Form Content' panel. It shows a section titled 'Section 1' with edit and delete icons. Below it is a question: '(1) Multiple Choice Question' with the text 'Which are the products of Matrix Comsec company?'. A context menu is open on the right with options: Multi-Choice, Single-Choice, Text Answer Only, Fix Content, Rating, and Section.


- Click **Add**  and select **Section**. The **Section** will be added. You can add upto 10 Sections.
- By default, the name assigned is Section 1. Click **Edit**  to assign the desired name to the Section you added. Click **Save**  to save the assigned name or click **Cancel** .
- Click **Merge**  if you wish to merge one section with another.



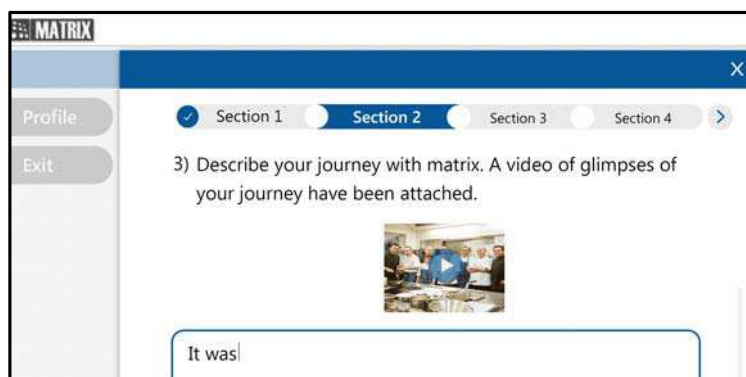
*Merge will be visible only when you add multiple Sections.*

*Merge is not applicable for individual questions.*

*If questions in current Section and questions in the Section to be merged exceeds 10, then sections cannot be merged.*

- Click **Discard**  if you wish to discard the complete Section along with its questions.


Sample of Sections as displayed in the VMS Portal.

A screenshot of the VMS Portal interface. It has a sidebar with 'Profile' and 'Exit' buttons. The main area shows a form with four sections: Section 1 (checked), Section 2 (active), Section 3, and Section 4. Section 2 contains a question: '3) Describe your journey with matrix. A video of glimpses of your journey have been attached.' Below the question is a video thumbnail and a text input field with the placeholder 'It was|'.



All of the samples are samples of Check-In Form as displayed in the VMS Portal. It will vary according to the configurations done by you in Station Location for Login, Check-In and Check-Out. For details refer to “Form” under Station Location.

## Adding Questions within Sections

- Click **Add**  again and select the type of question you wish to add — Multi-Choice, Single-Choice, Text Answer Only, Fixed Content, Rating in this Section. You can add upto 10 questions in each Section.

### Multi-Choice/Single-Choice

If you select Multi-Choice/Single-Choice, configure the following:




- Question:** Configure a **Question**. You can add the text and/or media —image, pdf or video.

The text can be a maximum of 100 characters.




You can either upload an image/pdf or video. Both cannot be uploaded.

To add media, click **Upload**  . Refer to “Uploading Image/PDF” and “Uploading Video”.

- Description:** Add a brief **Description** for the question if required. The text can be of maximum 100 characters.
- Options:** You can add text and/or media —image, pdf or video.

The text can be a maximum of 50 characters. You can add upto 10 options.

To add media, click **Upload**  . Refer to “Uploading Image/PDF” and “Uploading Video”.

To add another answer as an option, click **Add**  .



To remove an existing option, click **Remove** ✕ .

To change the sequence of the options, click **Move** ↕ .

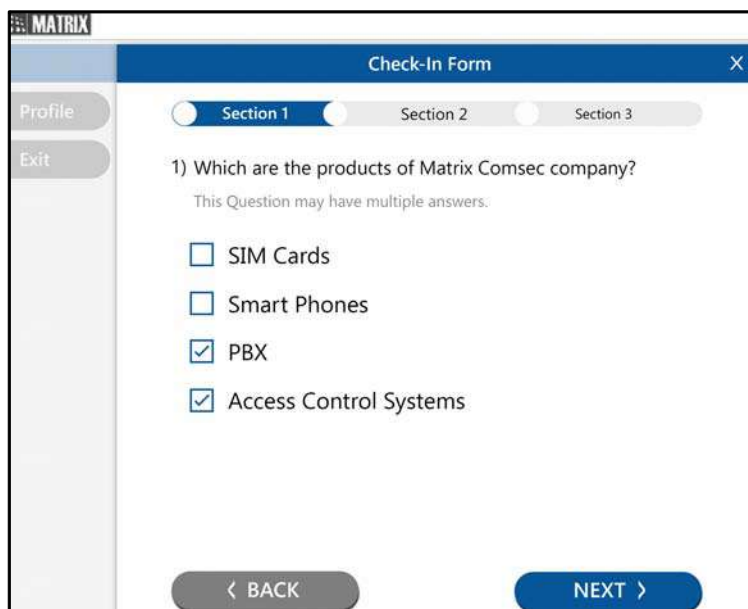
- **Answer:** For **Multi-Choice**, all the options added appear as answers in the drop-down list. You can select a single option or multiple options as the answer or to select all the options as the answer click **Check All**.

The  icon will display the correct option.

For **Single-choice**, all the options added appear as answers in the drop-down list. You can select only one option as the answer.

Click **Save** ✔ to save the configurations done or click **Cancel** ✕ to discard the changes.

Sample of Multi-Choice as displayed in the VMS Portal.



The screenshot shows a web application window titled "MATRIX" with a "Check-In Form" header. On the left is a sidebar with "Profile" and "Exit" buttons. The main content area has three tabs: "Section 1" (selected), "Section 2", and "Section 3". Below the tabs is a question: "1) Which are the products of Matrix Comsec company?". A note below the question states "This Question may have multiple answers." There are four options with checkboxes: "SIM Cards", "Smart Phones", "PBX", and "Access Control Systems". The "PBX" and "Access Control Systems" options are checked. At the bottom are two buttons: "< BACK" and "NEXT >".

Sample of Single-Choice as displayed in the VMS Portal.

## Text Answer Only

If you select this option the answers can be in text format only. Configure the following parameters:

- **Question:** Configure a **Question**. You can add the text and/or media —image, pdf or video.

The text can be a maximum of 100 characters.



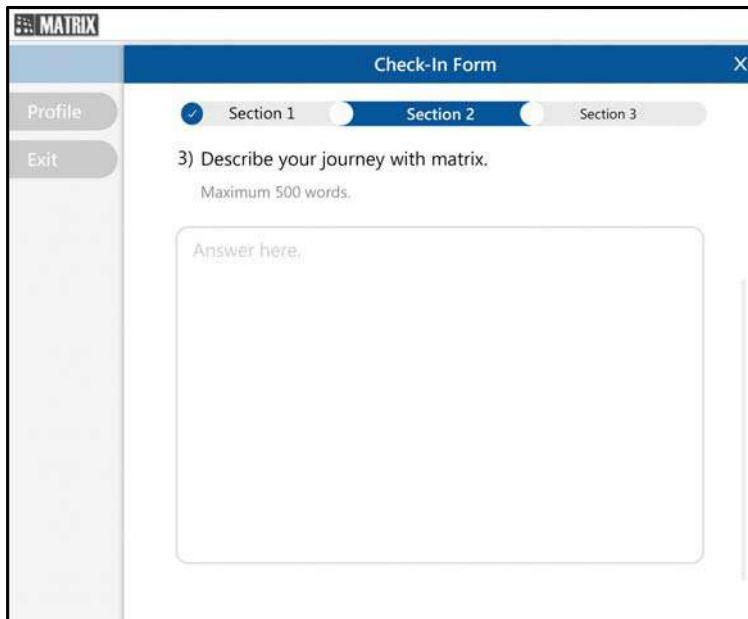
*You can either upload an image/pdf or video. Both cannot be uploaded.*

To add media, click **Upload** . Refer to [“Uploading Image/PDF”](#) and [“Uploading Video”](#).

- **Description:** Add a brief **Description** for the question if required. The text can be of maximum 100 characters.
- **Input Type:** Select the type of input — All Characters, Alpha Numeric or Numeric — you wish to allow.  
Valid characters for Alpha Numeric: - A-Z a-z 0-9 +  
Valid Range for Numeric - 0-9 +
- **Input Length:** This is the maximum input length to be allowed as the answer. Valid Range: 1 to 999.


Click **Save** to save the configurations done or click **Cancel** to discard the changes.

Sample of Text Answer Only as displayed in the VMS Portal.

The screenshot shows a web application titled 'MATRIX' with a 'Check-In Form' window. The form has a sidebar with 'Profile' and 'Exit' buttons. The main content area has three sections: 'Section 1' (checked), 'Section 2' (active), and 'Section 3'. Section 2 contains the question '3) Describe your journey with matrix.' with a note 'Maximum 500 words.' and a large text input area labeled 'Answer here.'.

## Fix Content

If you select this option, you can display fixed content along with a description. Configure the following parameter:

The screenshot shows a configuration window titled '(4) Fix Content'. It features a rich text editor with a toolbar containing options for Bold, Italic, Underline, Font Family (set to Verdana), Font Size (set to 13px), Text Color (A), Highlight Color (H), and various alignment and list options. The editor contains the following text: 'Welcome to Matrix Comsec. Before you enter the Matrix premises. Kindly view the Safety video below. The video below is of five minutes which describes the safety rules that are to be followed for entering in Factory- restricted Manufacturing zone. Kindly view the video carefully and provide the answers to the multiple choice questions configured below. Description if any...'.

- **Fix Content:** You can add the text and/or media —image, pdf or video for the question.

You can add text as well as format it as per your requirement.

You can add the text using different font, font- size, font color, highlight color and remove formatting. You can customize your content according to different font layouts like Bold, Italic, Underlined, Ordered List, Unordered List, Outdent and Indent.



All characters are allowed.



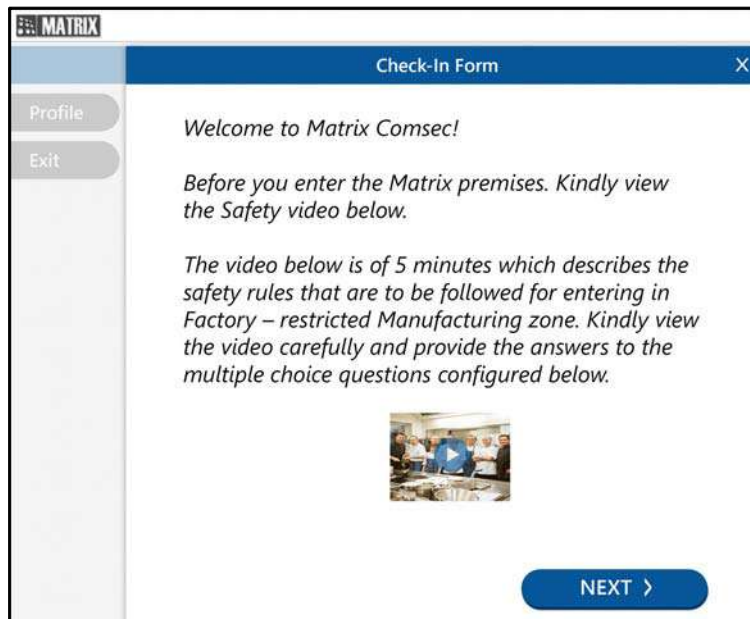
You can either upload an image/pdf or video. Both cannot be uploaded.

To add media, click **Upload** . Refer to [“Uploading Image/PDF”](#) and [“Uploading Video”](#).

- **Description:** Add a brief **Description** for the question if required. The text can be a maximum of 100 characters.

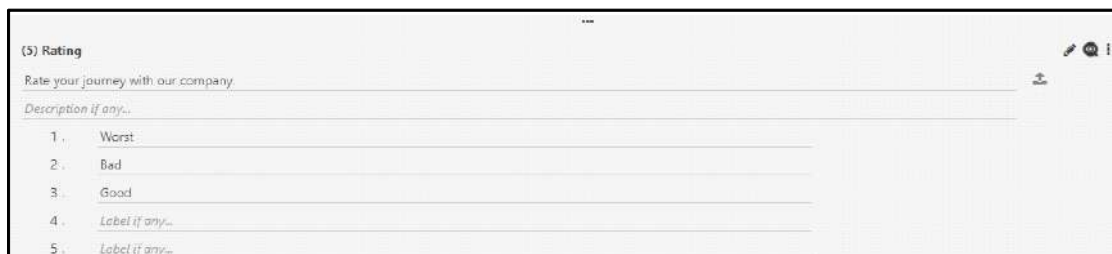
Click **Save**  to save the configurations done or click **Cancel**  to discard the changes.

Sample of Fix Content as displayed in the VMS Portal



## Rating

If you select this option, after the question and description, five Stars icons will be displayed to the visitor to provide the rating. Below each Star the Labels you configured will be displayed. Configure the parameters as per your requirement:



- **Question:** Configure a **Question**. You can add the text and/or media —image, pdf or video.

The text can be a maximum of 100 characters.




You can either upload an image/pdf or video. Both cannot be uploaded.



To add media, click **Upload** . Refer to [“Uploading Image/PDF”](#) and [“Uploading Video”](#).

- **Description:** Add a brief **Description** for the question if required. The text can be of maximum 100 characters.
- **Labels:** You can add upto 5 labels. Each label can be a maximum of 15 characters. This will be visible below each Star icon.

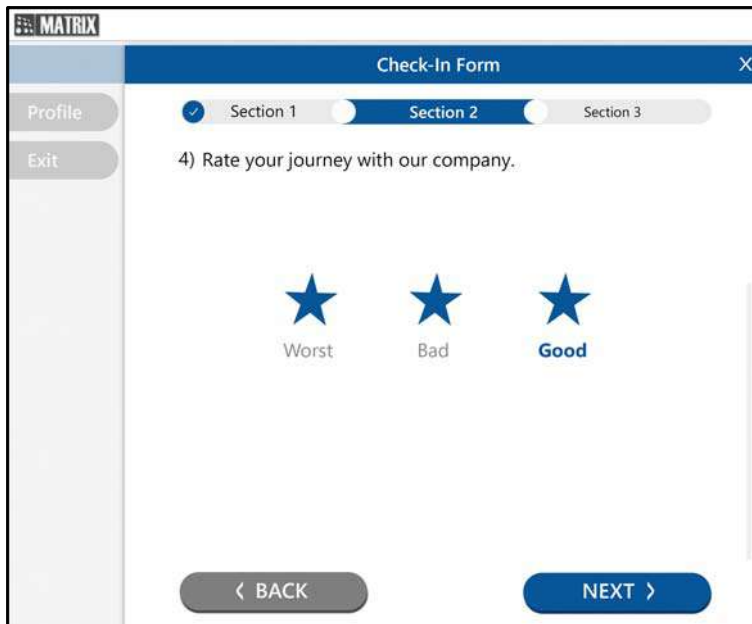


The five configurable labels are not mandatory.

- To change the sequence of labels, click **Move** .





Click **Save**  to save the configurations done or click **Cancel**  to discard the changes.

Sample of Rating as displayed in the VMS Portal.



## Common Functionality for all types of Questions


After you have saved the Question and Answer along with the Options, you can:


- Move:** You can re-arrange the sequence of the questions within a particular Section or across a Section, if required. To do so, click **Move**  or drag and drop the questions as per your the required sequence. The numbering will be changed automatically. Sections cannot be moved.
- Click **Edit** , if you wish to edit the details.
- Click **Hide** , if you wish to hide a question. This will not be visible to the visitor. Once you select **Hide** the available option will toggle to **Un-hide**.
- Click **Additional Options**  to view other options:
  - Set as Mandatory:** Select this option, if you wish to make this question compulsory. Once you select **Set as Mandatory** the available option will toggle to **Set as Non-Mandatory**.
  - Duplicate:** Select this option, if you wish to create a copy of the question along with the options.

- **Discard:** Select this option, if you wish to delete the question along with the options.


## Top Panel Functionality

After the Forms have been created, you can perform the following:

Click **Add** , to add a new Form.

Click the desired form from the list of forms in the right pane. Click **Edit** , if you wish to make modifications in the existing form.

After the form is edited and the response is submitted by the visitor, then if you edit the form, it will be considered as edit count 1. Such edits can be done upto 99 times.

Click the desired form from the list of forms in the right pane. Click **Delete** , if you wish to delete the form.

Click the desired form from the list of forms in the right pane. Click **Duplicate** , if you wish to replicate the form.

# Importing Data

The COSEC application has an inbuilt utility for enabling users to import data from excel files with predefined format. This would thus save the end user a lot of time and effort in having to make individual data entries at the application level.



*In the event of the **COSEC Application Basic Platform** license as well as the **Access Control add on module**, only the User data with some of the fields can be imported.*

*The parameter **Birth Date** will be mandatory in the Import sheet if set as mandatory in the “[Minimum Age Requirement for Users](#)” in “[User Policy](#)” and “[Minimum Age Requirement for Workers](#)” in “[CWM](#)”.*

To import data from a file follow the steps given below:

Select **Admin module > System Utilities > Import Data** and the following screen appears.

Configure the following parameters:

- **Import Data For** - Select the option from the drop-down list for which the data is to be imported. You can download sample import file by clicking on **Download Sample Import file** button. The downloaded import sheet displays the fields required for importing specific data.

	A	B	C	D	E
1	ID	CODE	NAME	EMAIL	DESCRIPTION
2	2323	A4	Anup		
3	6897	S5	Mahesh		
4	3553	F2	Mithesh		
5	3333	N5	Jithesh		


You can even refer to the Import Data Document Guidelines in the downloaded import sheet.

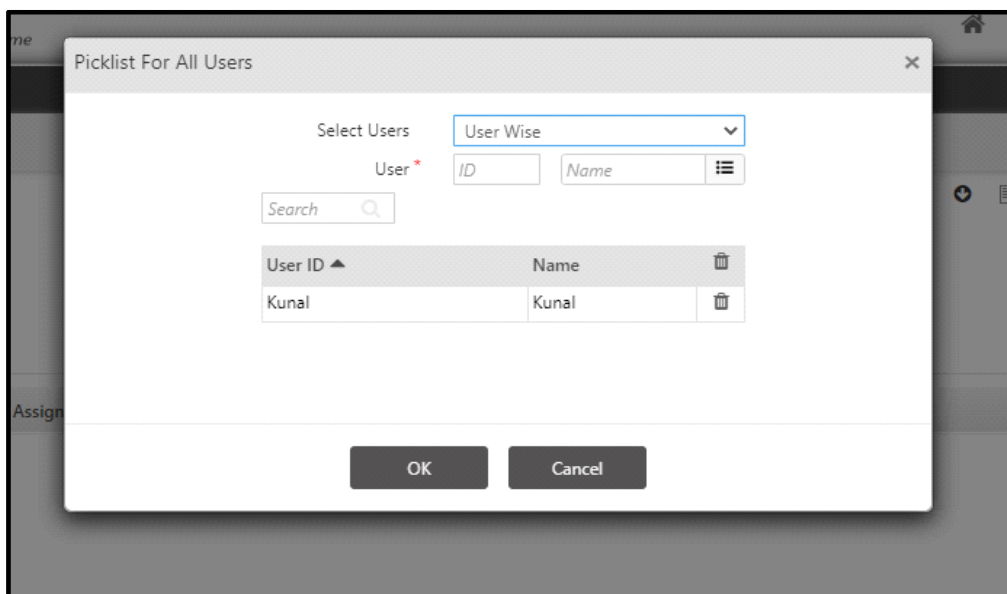


*If in Admin Module > System Accounts > Roles and Rights Configuration > Module (Admin) > Page Rights - > Import Data, if Auto Approve check box is disabled, and if you are Importing data for Shift Schedule with changes in shifts for users, then the Shift Change Applications will be sent to the RIC for approval.*

*Shifts are changed from multiple locations, then in such cases the last approved shift change will be taken into consideration. To know more refer to “[Shift Change Application/Approval](#)”.*

	Import Data Document Guidelines																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																
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If **Import Data For** is selected as User/Worker then you can download a detailed data sheet, to do so click on **Download Detailed Data Sheet**  button. On clicking this button, a pop-up will be displayed as shown below:



**Select Users:** Select the desired option — User Wise, Group Wise or All. If you select User Wise or Group Wise the select the desired users/groups from the picklist.

Click **OK** button to download the Data Sheet or click on **Cancel** button to abort the process.

The Detailed Data Sheet will be as per the selected option.

If the **Import Data For** option is selected as Visitor and Visit, then configure **Import Data Of**.



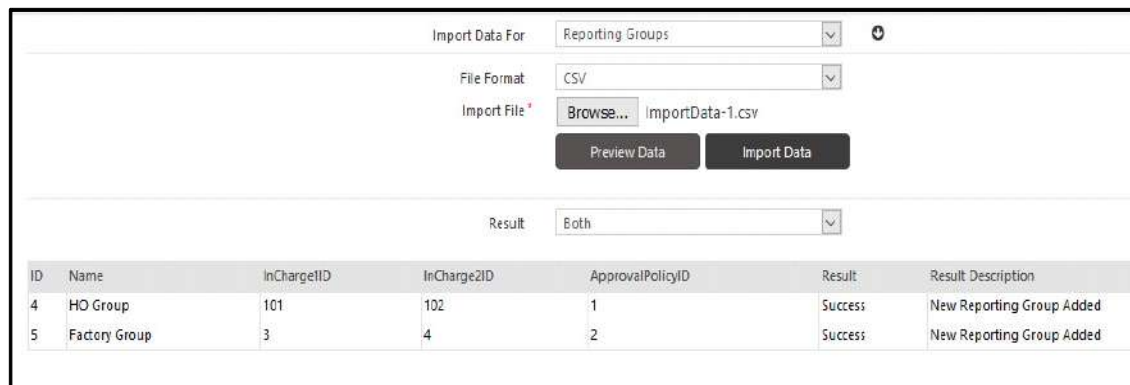
- **Import Data Of** - To import data of a Visitor and/or a Visit, select the desired option — Visitor Only, Visit Only or Both.
- **File Format** - Select the file format of the specific file from the dropdown list. The options available are XLS or CSV.
- **Import File** - Browse the path of the file from which the data is to be imported.

Click **Upload** button. The file will be saved and you can preview the data.

The Preview Data enables the administrator to view the uploaded data to confirm if it is in order before giving the import command. Click on **Preview Data** button. The preview data of reporting In-charge is shown as below.

Import Data				
←				
Import Data For		Reporting Groups		
File Format		CSV		
Import File *		Browse... ImportData-1.csv		
		Preview Data	Import Data	
ID	Name	InCharge1ID	InCharge2ID	ApprovalPolicyID
4	HO Group	101	102	1
5	Factory Group	3	4	2

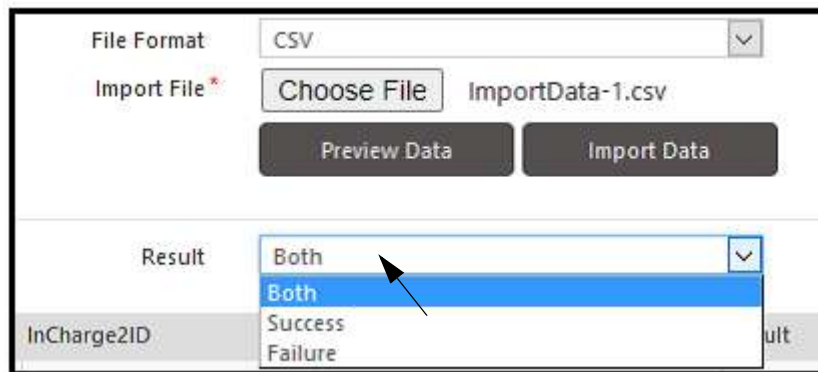
Now click on **Import Data** to start importing the uploaded data. The result of import is shown as Success or Failure along with result description as shown.



The screenshot shows the 'Import Data' interface. At the top, there's a dropdown for 'Import Data For' set to 'Reporting Groups'. Below it, 'File Format' is set to 'CSV'. The 'Import File' section shows a 'Browse...' button and the filename 'ImportData-1.csv'. There are 'Preview Data' and 'Import Data' buttons. Below this, a 'Result' dropdown is set to 'Both'. At the bottom, a table displays the import results.

ID	Name	InCharge1ID	InCharge2ID	ApprovalPolicyID	Result	Result Description
4	HO Group	101	102	1	Success	New Reporting Group Added
5	Factory Group	3	4	2	Success	New Reporting Group Added

You can also filter import result records on the basis of their Success, Failure or Both using the **Result** drop-down options.



This screenshot is a close-up of the 'Result' dropdown menu. The menu is open, showing three options: 'Both' (highlighted in blue), 'Success', and 'Failure'. An arrow points to the 'Both' option. The background shows parts of the 'File Format' (CSV) and 'Import File' (Choose File, ImportData-1.csv) sections.

Once the data is imported successfully, data will be added or updated in COSEC Web.



*Administrator needs to ensure that the ASP.NET user has full rights on the folder containing the Excel or .csv file for the import data operation.*

# Exporting Data

This functionality enables the user to export data to external applications based on the pre-configured data templates. The user has the flexibility to select the output formats and Type of Users. User can select Output formats from one of the following:

- Excel
- Text
- CSV
- XML

To access this functionality, go to **Admin Module > System Utilities > Export Data** and the following screen appears.

The screenshot shows the 'Export Data' application window. The sidebar on the left has two tabs: 'Export' and 'Templates'. The 'Export' tab is selected. The main content area contains a form with the following sections:

- Template Type:** A dropdown menu set to 'Custom'.
- Template:** A dropdown menu set to 'API\_Template\_Daily'.
- Export Fields List:** A table with the following columns: Name, UserID, UserName, ProcessDate, Punch1, and Punch2.
- 1 - 5 of 10 records:** A pagination control with buttons for '1' and '2'.
- Export Parameters:** An expandable section containing the following fields:
  - Date:** Two date pickers labeled 'From Date' and 'To Date'.
  - File Format:** A dropdown menu set to 'Excel Files'.
  - File Name:** A text input field.
  - Select Users:** A dropdown menu set to 'User Wise'.
  - User:** Two input fields labeled 'ID' and 'Name'.
  - Generate Export For:** A dropdown menu set to 'All Users'.
- Export:** A button at the bottom right of the form.

The page displays two tabs namely:

- "Export"
- "Templates"

## Export

To export data following are the configurations:

The screenshot shows the 'Export Data' window with the following configuration options:

- Template Type:** Custom
- Template:** API\_Template\_Daily
- Export Fields List:** API\_Template\_Daily, API\_Template\_Monthly, API\_Template\_ATDEvents, API\_Template\_ACSEvents, Template\_Daily, Template\_Monthly, Template\_ATDEvents, Template\_ACSEvents
- Export Parameters:** (Collapsible panel)
- Date:** From Date, To Date
- File Format:** Excel Files
- File Name:**
- Select Users:** User Wise
- User:** ID, Name
- Export:** (Button)

**Template Type:** Select the type of template to be used for exporting data from the dropdown list. There are two types of templates: Custom Templates and System Defined.

Before exporting the data based on Custom Template, it is required that the templates are pre-configured. [See "Templates" on page 364.](#)

**Template:** Based on template type, select the templates from the dropdown list for data export. For Custom Template type, select the template which is configured from section: [See "Templates" on page 364.](#)

**Export Fields List:** This displays the fields that are selected and added to the template from ["Export Field Configuration"](#)

### Export Parameters

Click on Export Parameters collapsible panel and configure the following:

The screenshot shows the 'Export Parameters' window with the following configuration options:

- Header:** 300 chars
- Export Date-Range:** ☐
- Export Generation Date-Time:** ☐
- Date:** From Date, To Date
- File Format:** Excel Files
- File Name:**
- Select Users:** User Wise
- User:** ID, Name
- Generate Export For:** All Users
- Export:** (Button)

**Header:** Enter header details which is to be displayed in Header of Export Sheet. It is a Custom header. You can enter alphanumeric characters in header.

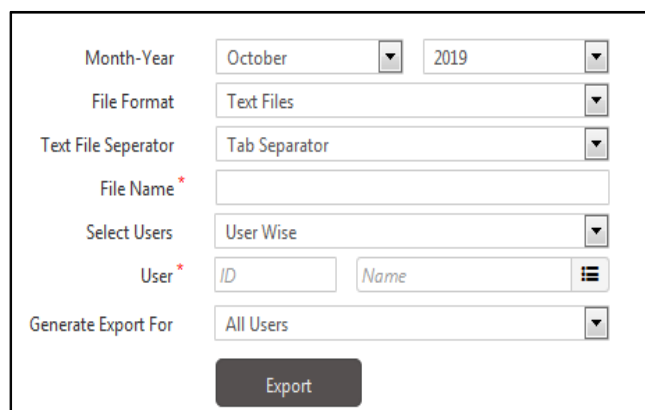
**Export Date-Range:** It allows to decide whether configured From Date & To Date is to be displayed in Export Sheet or not. This check-box is available when the selected Template is of Daily basis. If this check-box is checked, then the configured From Date & To Date will be displayed in Export sheet.

**Export Generation Date-Time:** This check-box is used for displaying details regarding when (at which date & time) the sheet is exported. If this check-box is checked, then the Date -Time of when the sheet is exported will be displayed in Export sheet.

**Date/ Month:** Select the date range or the month for the data that is to be exported based on the template selected. The Date and Month-Year field appears as per selection of template.

**File Format:** Select the format of the file to be exported from the options of **Excel**, **Text**, **CSV** and **XML** file formats.

**Text File Separator:** In the event of the **Text files** option being selected, specify the separator type. Based on the site requirements, select the **Text File Separator** as shown below:

A screenshot of a web-based export configuration form. The form contains several fields: 'Month-Year' with dropdowns for 'October' and '2019'; 'File Format' with a dropdown set to 'Text Files'; 'Text File Separator' with a dropdown set to 'Tab Separator'; 'File Name' with a text input field; 'Select Users' with a dropdown set to 'User Wise'; 'User' with two input fields labeled 'ID' and 'Name'; and 'Generate Export For' with a dropdown set to 'All Users'. An 'Export' button is located at the bottom of the form.

**Text File Separator** field will be available only when **File Format** is selected as **Text Files** format.

**File Name:** Specify a filename by which the exported data is to be saved.

**Event Selection:** Select the desired options — All, Allowed Events or Denied Events.

- Select **Both**, if you want all Allowed and Denied events to be exported.
- Select **Allowed Events**, if you want only Allowed events to be exported.
- Select **Denied Events**, if you want only Denied events to be exported.

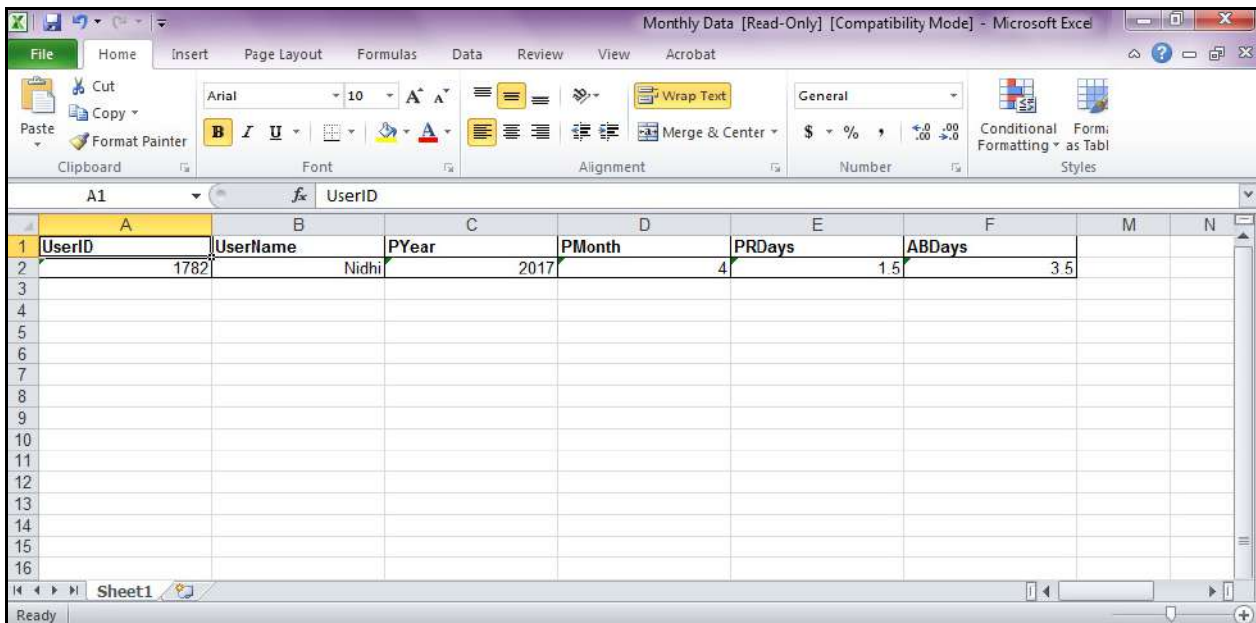


*Event Selection is applicable when Template selected is API\_Template\_ATDEvents or API\_Template\_ACSEvents or Template\_ATDEvents or Template\_ACSEvents.*

**Select Users:** Select the User as **User Wise**, **Group Wise** or **All**. Then select the users accordingly whose data is to be exported.

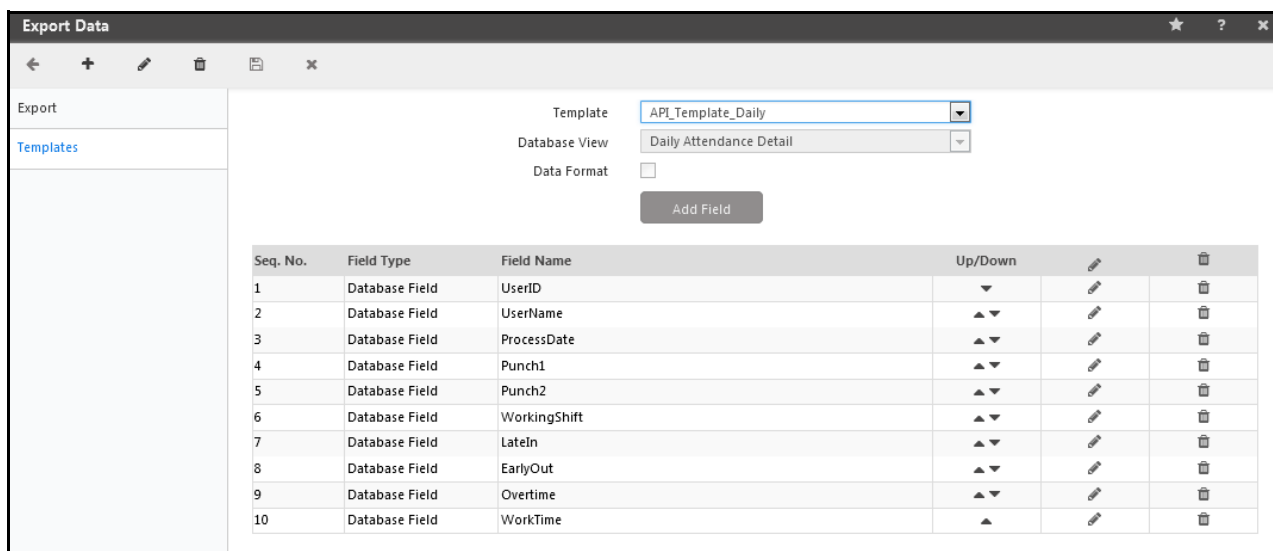
**Generate Export for:** Select the users as **All**, **Active** or **Inactive** for which data is to be exported.

Click on the **Export** button. Open or Save the export file by specifying the location. The below shown file is in Excel format.



## Templates

The COSEC system enables the administrator to define templates for export of data in a customizable format. Select the **Templates** tab on the **Export Data** home page and the following page appears.



To add a new template, click the **New**  button and the following screen appears.

**Template:** Enter a user-friendly name for the new template to be defined (e.g. “*Template\_Canteen*”, “*Template\_DailyEvents*” etc.).

**Database View:** Select a corresponding Database View from the dropdown list.

Click the **Add Field** button. The following pop-up window: **Export Field Configuration** appears for the configuration of Export fields.

### Export Field Configuration

**Field Type:** Select the type of field to be exported from the below options and then click **Save** button to add the fields in the template:

- **Database Field-** If any of the database field is to be modified.
- **Static Field** - To keep a field or column static (fixed).
- **Custom Field** - To create user defined field. Eg: User ID+UserName to be merged as a single field.

### **Field Type as Database Field**

**Display Name:** The name to be displayed as the header of the column is display name.

**Fields:** Select the fields to be displayed in the Export sheet. The fields in the dropdown depends upon the selection of Database View type.



When the "Leave Type" field is selected; then the count of leaves based on the leave code will be displayed in the exported file. Suppose SL and PL are both Paid leaves; then count of SL and PL will be shown separately. [See "Exporting Leave Details" on page 370.](#)

**Field Condition:** To change the field condition i.e. to replace the existing value of a field with new value, you must enable this.

**Field Value:** Specify the value of the field to be edited.

**Replace Value:** Specify the new value to replace the existing field value in database.



**Export Field Configuration**

Field Type: Database Field  
 Display Name: Canteen Name

---

Fields: USERID  
 Field Condition: ☒  
 Field Value:   
 Replace Value:

**Add**

Search

Field Value	Replace Value	
1220	1220001	

**Save** **Cancel**

Eg: The User ID having Field Value 1220 is replaced by value 1220001. The exported sheet will be shown as below. The display name will be shown as column header.

A	B	C	D
Research Employee	Employee ID	Edited ID	Joining
SHEETAL RAVAL	1220	1220001	2013/06/17

### Field Type as Static Field

User can select Field Type as Static field when he wants to display the same (static) field against all the other variable fields such as Employee Name.

**Export Field Configuration**

Field Type: Static Field  
 Display Name: Company Name

---

Field Name: Company Name  
 Field Value: Matrix  
 Data Type: Alpha-Numeric  
 Data Length: 20

**Save** **Cancel**

**Display Name:** The name to be displayed as the header of the column is display name. Eg: “Company Name” is set as Display name.

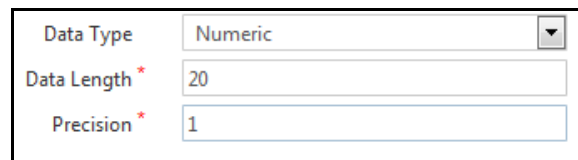
**Field Name:** Specify any field name.

**Field Value:** This is the value of the field which will remain static or same for all records. Eg: “Matrix” is the company name which remains static for all the users of the company.

**Data Type:** Select the data type as Alpha-numeric, Numeric or Date-time according to the field value.

**Data Length:** Specify the length of data which is to be used to map with the data length in destination tables of COSEC Integrate used for exporting data in other database.

**Precision:** If Data Type is selected as **Numeric**, then you will have to specify Precision also. For Eg: If the user wants to display the Working hours of the employee as static Field value, then user can select Data Type as Numeric and will have to define Precision of decimal as the value of Working hours may result in decimal.

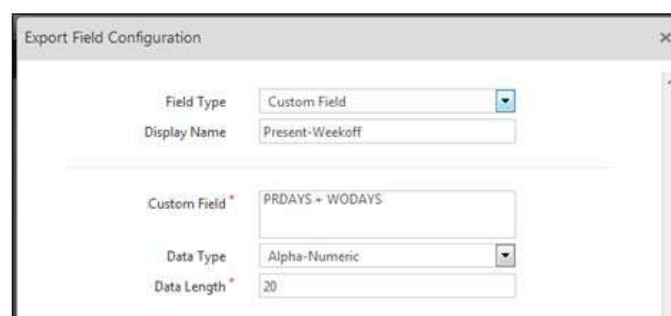


A configuration form with three fields: 'Data Type' is a dropdown menu set to 'Numeric'; 'Data Length \*' is a text input field containing '20'; 'Precision \*' is a text input field containing '1'.

Eg: The Static Field Value “Matrix” with Display Name “Company Name” is shown below in the exported excel file:

A	B
Company Name	Employee Name
MATRIX	JAY K DOSHI
MATRIX	MANOJ DETROJA
MATRIX	HARSHIT PATEL
MATRIX	ANIL TAILOR
MATRIX	VJAYKUMAR
MATRIX	KAUSHAL KADAKIA
MATRIX	VISHAL DHANANI
MATRIX	MANTHAN PATEL
MATRIX	ANIL MODI
MATRIX	SATISH RAJE
MATRIX	SHUBHANGINI
MATRIX	PARTH SUTARIYA
MATRIX	SATISH JHA
MATRIX	TANMAY SHAH

### Field Type as Custom Field



A dialog box titled 'Export Field Configuration'. It contains the following fields: 'Field Type' is a dropdown menu set to 'Custom Field'; 'Display Name' is a text input field containing 'Present-Weekoff'; 'Custom Field \*' is a text input field containing 'PRDAYS + WODAYS'; 'Data Type' is a dropdown menu set to 'Alpha-Numeric'; 'Data Length \*' is a text input field containing '20'.

- **Custom Field:** Provide custom field to display two or more fields in one column or to concatenate the fields and display in single column. The Allowed Length for the Custom Field control for Oracle is 2000; and for SQL is 4000.



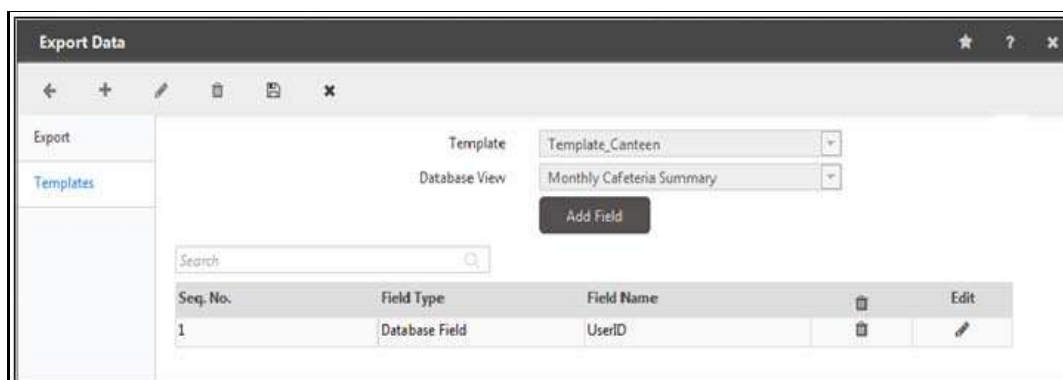
The custom fields specified here are those included in the Database View selected for the template.



For other fields See “Field Type as Static Field” on page 367.

Eg: Present days and Weekoff days are added and shown in single column with Display name “Present-Weekoff”. Also Birthdate and Joining date are shown together.

A	B	C	D	E
Company Name	Employee Name	Company	Present-Weekoff	Birthdate-Joindate
MATRIX	SHEETAL RAVAL	Matrix Comsec Pvt.	27.5	27/11/198717/06/2013
MATRIX	SHRUTI PATKI	Matrix Comsec Pvt.	29.0	08/07/199010/06/2014
MATRIX	AKHILESH DUBEY	Matrix Comsec Pvt.	23.0	14/08/199018/05/2015

- On clicking **Save** button in the Export Field Configuration pop-up window, the fields get displayed in the grid on the main Export page as shown in the screen below:



- To edit a field click the corresponding  icon.
- Click **Save**  to save the export template configuration. This new custom template will now be available for selection in the **Export** section.
- The following screen illustrates a sample Excel file that was exported using the new custom template:

	A	B	C	D
1	Canteen	Canteen door n	Menu location	User discount I
2	27	Canteen Factory	3	1
3	27	Canteen Factory	3	1
4	27	Canteen Factory	3	1
5	27	Canteen Factory	3	1
6	27	Canteen Factory	3	1
7	27	Canteen Factory	3	1
8	27	Canteen Factory	3	1
9	27	Canteen Factory	3	2
10	27	Canteen Factory	3	2
11	16	Canteen HO	1	1
12	27	Canteen Factory	3	1
13	27	Canteen Factory	3	1
14	27	Canteen Factory	3	1
15	16	Canteen HO	1	1
16	27	Canteen Factory	3	1
17	27	Canteen Factory	3	1
18	27	Canteen Factory	3	1
19	27	Canteen Factory	3	2
20	27	Canteen Factory	3	1

## Exporting Leave Details

Suppose a custom template of Database view Monthly Attendance Summary is created. The UserID, UserName, PMonth, PYear, LeaveDays-SL and LeaveDays-PL are selected from Database field.

For example: LeaveDays-SL field is added as shown below.

Export Field Configuration

Field Type: Database Field

Display Name: Sick Leave

Fields: LeaveDays-SL

Field Condition: LATE\_IN\_EARLY\_OUT\_DUR

Field Value: SL

Replace Value: Availed SL

Add

Field Value: SL

Replace Value: Availed SL

Save Cancel

Export Field Configuration

Field Type: Database Field

Display Name: Sick Leave

Fields: LeaveDays-SL

Field Condition: LATE\_IN\_EARLY\_OUT\_DUR

Field Value: SL

Replace Value: Availed SL

Add

Field Value: SL

Replace Value: Availed SL

Save Cancel

Now similarly other fields are added in the template.

Seq. No.	Field Type	Field Name	Up/Down		
1	Database Field	UserID	▼		
2	Database Field	UserName	▲▼		
3	Database Field	PMonth	▲▼		
4	Database Field	PYear	▲▼		
5	Database Field	LeaveDays-SL	▲▼		
6	Database Field	LeaveDays-PL	▲		

Now the fields in the template can be exported by configuring Export details.

Export Parameters

Month-Year: September 2018

File Format: Excel Files

File Name: UserLeaveDetails

Select Users: All

Export

The Exported file shows the count of Sick Leave and Privilege Leave (both PL type of leave) separately.

	A	B	C	D	E	F	G	H	I
1	User ID	User Name	Punch Month	Punch Year	Sick Leave	Privilege Leave			
2	1583	Shilpa	9	2018	0.0	3.0			
3	2	Chirag	9	2018	0.5	1.0			
4									
5									
6									

Similarly count of different leaves of same leave type can be exported through COSEC Integrate Utility also.

# Third Party Export

---

This functionality enables the COSEC system to export attendance data in predefined formats which can be recognized and imported by a third party application. COSEC can integrate with *three* third party applications for data export - **Tally**, **Relyon** - **Saral PayPack** and **IDS**.

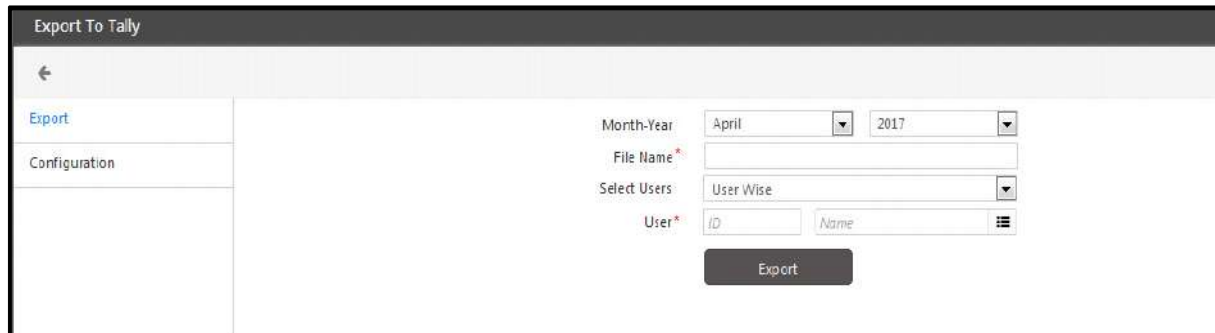
Read the following sections to configure all third party export options using the COSEC Web Application:

- [“Export to Tally”](#)
- [“Export To Relyon”](#)
- [“Export to IDS”](#)

## Export to Tally

This functionality enables the COSEC system to export attendance data in an XML format which can be recognized and imported by the Tally application. Importing attendance data from the COSEC system into the Tally payroll module would allow user to directly generate attendance vouchers which then can be used to maintain Employee accounts. Tally having its own data format does not allow direct import of attendance data from COSEC, hence has to be exported as well imported in an intermediate XML format.

In order to configure the parameters for exporting data, go to **Admin > System Utilities > Third Party Export > Export to Tally** and the following page appears.



Before exporting, Configuration has to be done. See [“Export To Tally Configuration” on page 374](#).

**Month-Year:** Select the Month & Year to specify the time period for which the data is to be exported.

**File Name:** Specify a filename for the XML file that is to be created.

**Select Users:** Select users/groups as per the option selected from the dropdown list. The options are:

- User Wise
- Group Wise (*Available only with the Time & Attendance add on module*)
- All

Click the **Export** button. The system prompts the user to browse to the folder path where the specified file will be saved.

## Guide to Tally

The following points are needed to be taken care of while configuring the Tally application.

Create all the employees whose data is to be imported from the COSEC application.



*User needs to take care and configure one of the following to ensure proper mapping of data:*

- *Enable aliases for employee and enter the User I.D. (as in COSEC application) in the alias field.*
- *Enter User I.D. (as in COSEC application) in the Cost Centre field of Account Info.*

The Tally Tags can be created using the following options:

**Gateway of Tally > Masters > Payroll Info > Units (Work):** Create the necessary units required for different attendance types. For ex: Hrs, Mins, etc.

**Gateway of Tally > Masters > Payroll Info > Attendance/Production Types:** Create the required Attendance Types, for ex: Present, Absent, etc. The user needs to take care to use these Attendance Types while creating Tally Tags in COSEC application with appropriate Attendance Type.

The Payroll Info parameters as defined here should match the parameters as specified in the **Export to Tally** option of the COSEC web application.

Refer the Tally user manual for more details. The import process can be initiated from the Tally application by going to **Gateway of Tally > Utility > Import of Data > Vouchers**.

## Export To Tally Configuration

On the **Export To Tally** page, select the **Configuration** tab.

To configure export to tally click **New** button and the following screen appears.

ID	Voucher Name	Tally Tags	COSEC Fields	Tag Type
No Data				

Configure the following parameters:

- **ID:** The ID will be auto generated.
- **Tally Voucher Name:** Specify a voucher name for tally.
- **Tag Type:** Select the tag type from the options— With Pay, Without Pay or Production.
- **Tally Tag:** Specify the tally tag.
- **Field Type:** Select the COSEC field type from the options — Attendance Fields or Leave Fields if you select the tag type as With Pay or Without Pay.
- **COSEC Fields:** Select the COSEC fields to be exported.
  - Click **Select**. The **Select Attendance Fields** or **Select Leave Fields** pop-up appears according to the selected field type.



Select Attendance Fields

Total Selected: 0 Records

Search

[Show Selected](#)

☐ Select All

<input type="checkbox"/>	ID ▲	COSEC Fields	Value Type
<input type="checkbox"/>	1	PRDays	Days
<input type="checkbox"/>	2	ABDays	Days
<input type="checkbox"/>	3	PLDays	Days
<input type="checkbox"/>	4	ULDays	Days
<input type="checkbox"/>	5	WODays	Days
<input type="checkbox"/>	6	PHDays	Days
<input type="checkbox"/>	8	PREVDays	Days

Ok Close

- You can either select particular fields or can select all the fields at once.
- To select particular fields, select the check boxes of the desired fields.

Select Attendance Fields

Total Selected: 1 Records

Search

[Show Selected](#)

☐ Select All

<input type="checkbox"/>	ID ▲	COSEC Fields	Value Type
<input checked="" type="checkbox"/>	1	PRDays	Days
<input type="checkbox"/>	2	ABDays	Days
<input type="checkbox"/>	3	PLDays	Days
<input type="checkbox"/>	4	ULDays	Days
<input type="checkbox"/>	5	WODays	Days
<input type="checkbox"/>	6	PHDays	Days
<input type="checkbox"/>	8	PREVDays	Days

Ok Close

OR

- To select all the fields at once, select the **Select All** check box. All the fields will be selected.

Select Attendance Fields

Total Selected: 7 Records

[Show Selected](#)

☒ Select All

<input checked="" type="checkbox"/>	ID ▲	COSEC Fields	Value Type
<input checked="" type="checkbox"/>	1	PRDays	Days
<input checked="" type="checkbox"/>	2	ABDays	Days
<input checked="" type="checkbox"/>	3	PLDays	Days
<input checked="" type="checkbox"/>	4	ULDays	Days
<input checked="" type="checkbox"/>	5	WODays	Days
<input checked="" type="checkbox"/>	6	PHDays	Days
<input checked="" type="checkbox"/>	8	PREVDays	Days

Ok

Close

- Click **OK**.
- **Production Unit Name**: Specify the name of production unit if you select the tag type as production.
- Click **Save**. The created voucher appears in the grid.

Export To Tally

✓ Saved Successfully

Export

Configuration

ID

1

Tally Voucher Name \*

Attendance

Tag Type \*

Production

Tally Tag \*

month

COSEC Fields \*

Overtime

Select

Production Unit Name \*

Waghodiya

Search

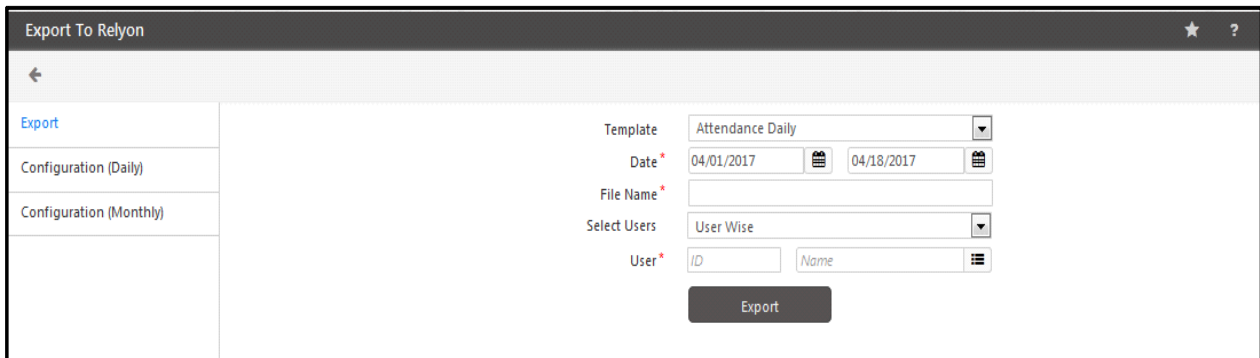
ID ▲	Voucher Name	Tally Tags	COSEC Fields	Tag Type
1	Attendance	month	Overtime	Production

## Export To Relyon

This functionality enables the COSEC system to export attendance data in Excel format which can be recognized and imported by the Relyon's application. The Relyon application needs the following two kinds of attendance data outputs from the COSEC application:

- Daily Attendance
- Monthly Attendance

In order to configure the parameters for exporting data, go to **Admin > System Utilities > Third Party Export > Export to Relyon** option and the following page appears.

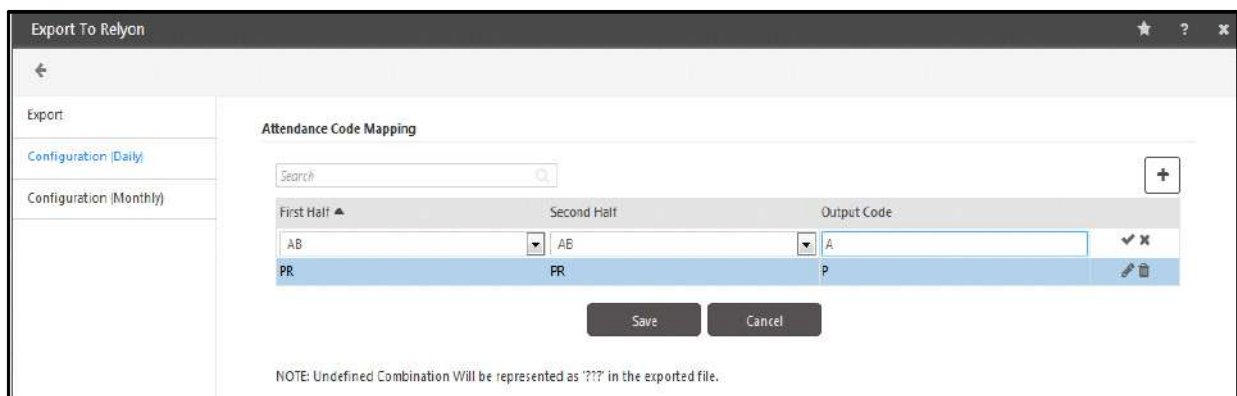


Before exporting, Configuration has to be done. See [“Daily Attendance Configuration”](#) and [“Monthly Attendance Configuration”](#)

### Daily Attendance Configuration

Select the **Configuration (Daily)** tab to configure the export parameters for the daily attendance data.

Click **Add** button to add a new output code for various combinations of attendance status codes.

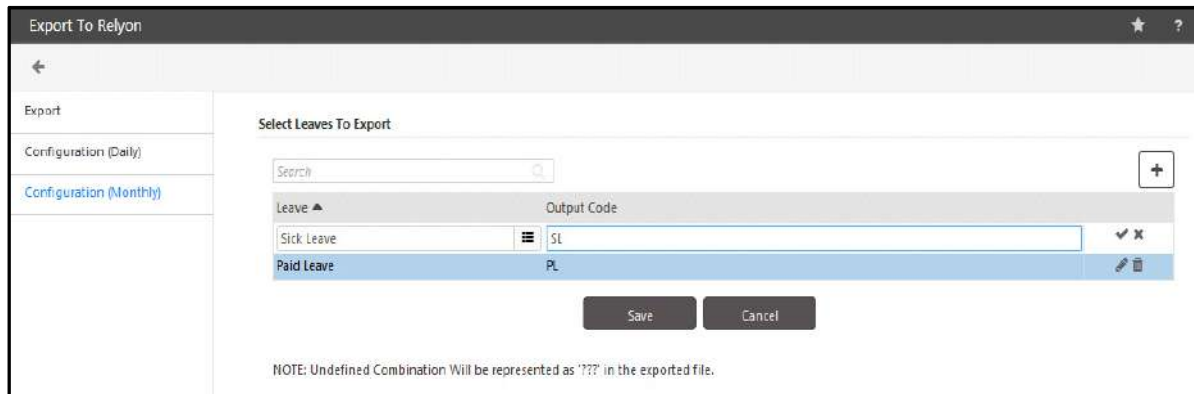


- Select the **First half** and **Second half** codes from the dropdown list and specify the **Output Code** for the combination as shown in the above figure.
- Click OK to save the code mapping.
- Define all the applicable combinations as per the site requirements and click **Save** button once done.

## Monthly Attendance Configuration

Click on the **Configuration (Monthly)** tab to configure the export parameters for the monthly attendance data.

The user can now map the Leave name to the Column name of the exported Excel file. Click **Add** button to add a new leave to export and the following screen appears.

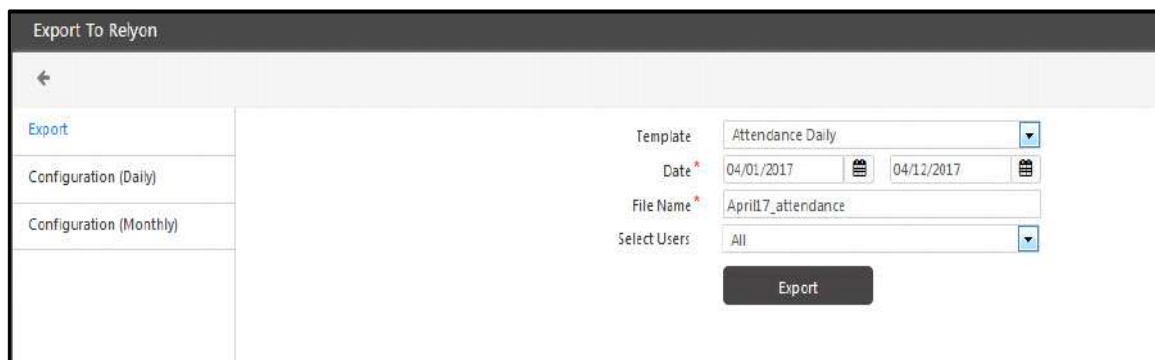


- Select the **Leave** from the picklist and specify the **Output Code** for the leave.
- Click OK to save the code mapping of leaves.
- Define all the applicable leaves to be exported and click **Save button** once done.

## Export

Once the daily and monthly configurations for the export are done, data can be exported to Relyon.

To export data to relyon, go to **Admin > System Utilities > Third Party Export > Export to Relyon > Export** tab and the following screen appears.



- **Template:** Select an export template as Attendance Daily or Attendance Monthly.
- **Date:** Select the date range in the given fields, for which the data is to be exported.
- **File Name:** Specify a filename for the exported data file.
- **Select Users:** Select single or multiple users whose data is to be exported based on filter options of:
  - User Wise
  - Group Wise

- All
- Click the **Export** button. The system will prompt the user to open or save the file. The exported file is shown as below.


A	B	C	D	E
EMPID	REFNO	ATTENDANCEDATE	OUTPUTCODE	OT(hh.mm)
07	7	01-Apr-17	A	0.0
101	101	01-Apr-17	A	0.0
1567	1567	01-Apr-17	P	0.0
1782	1782	01-Apr-17	A	0.0
2	2	01-Apr-17	A	0.0
DVD	1786	01-Apr-17	A	0.0
07	7	02-Apr-17	????	0.0
101	101	02-Apr-17	????	0.0
1567	1567	02-Apr-17	????	0.0
1782	1782	02-Apr-17	????	0.0
2	2	02-Apr-17	????	0.0
DVD	1786	02-Apr-17	????	0.0
07	7	03-Apr-17	A	0.0
101	101	03-Apr-17	A	0.0
1567	1567	03-Apr-17	P	0.0
1782	1782	03-Apr-17	A	0.0
2	2	03-Apr-17	A	0.0
DVD	1786	03-Apr-17	A	0.0
07	7	04-Apr-17	A	0.0
101	101	04-Apr-17	A	0.0
1567	1567	04-Apr-17	????	0.0
1782	1782	04-Apr-17	P	0.0
2	2	04-Apr-17	A	0.0
DVD	1786	04-Apr-17	A	0.0
07	7	05-Apr-17	A	0.0
101	101	05-Apr-17	A	0.0
1567	1567	05-Apr-17	P	0.0
1782	1782	05-Apr-17	????	0.0
2	2	05-Apr-17	A	0.0

## Export to IDS

This functionality enables the COSEC system to export attendance data in a flat line sequential file format which can be recognized and imported by the IDS application.

In order to configure the parameters for exporting data, go to **Admin > System Utilities > Third Party Export > Export to IDS > Configuration** and the following page appears.

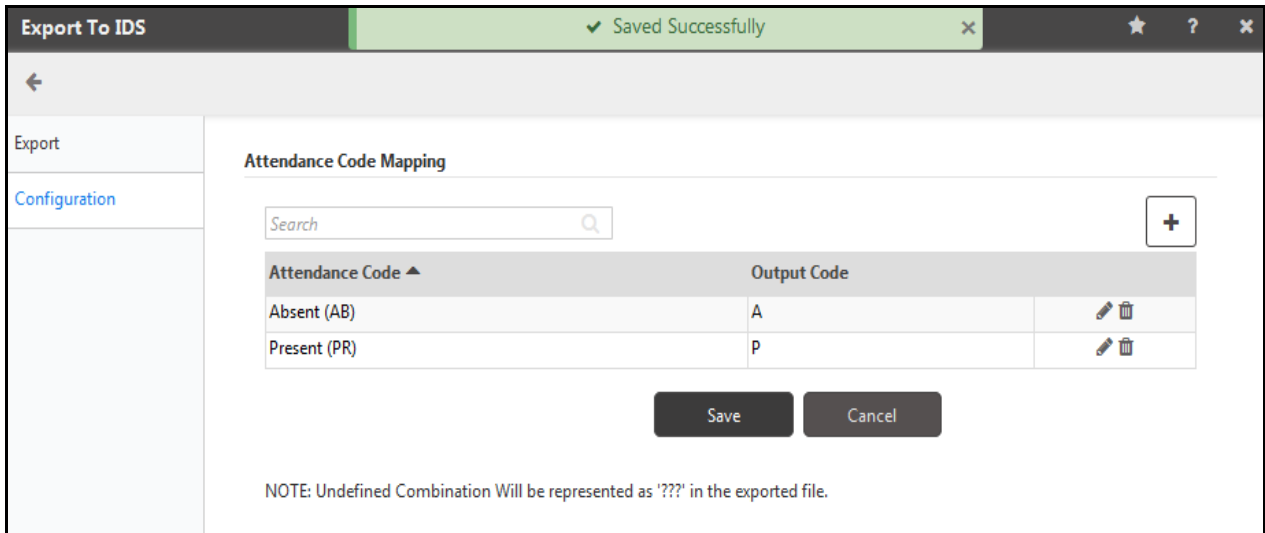
This tab enables the user to map the Attendance Code of the COSEC application to an Output Code as per the site requirements.

Click **Add**  button to add a new leave to export and the following screen appears.

**Attendance Code:** Select the **Attendance Code** from the dropdown list.

**Output Code:** Enter an Output Code to map against the **Attendance Code** (e.g. “P” can be the output code defined for “Present”).

Click on  icon to save the mapping. The defined mapping code appears in the bottom grid as shown below.



Export To IDS

✓ Saved Successfully

←

Export

Configuration

Attendance Code Mapping

Search

Attendance Code ▲	Output Code	
Absent (AB)	A	
Present (PR)	P	

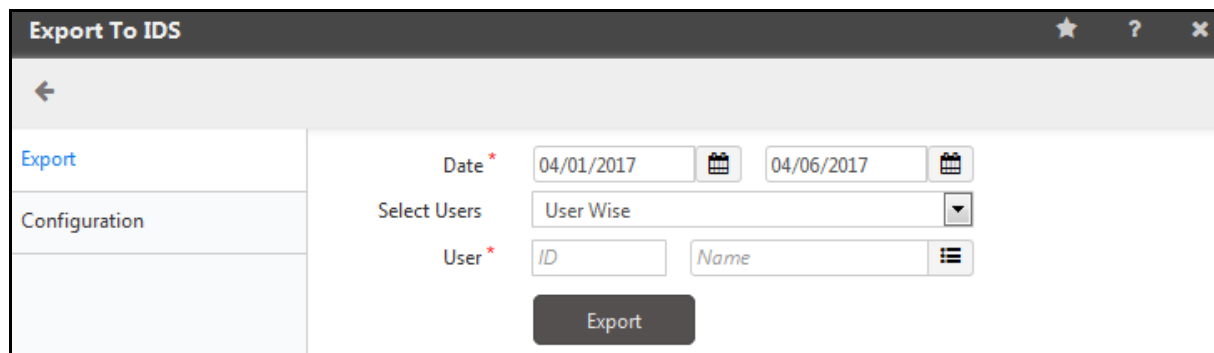
Save Cancel

NOTE: Undefined Combination Will be represented as '???' in the exported file.

Define all the applicable mappings as per the site requirements and click **Save** button once done.

The user can now export the data in required format from the COSEC application.

Click on the **Export** tab and the following screen appears as below:



Export To IDS

←

Export

Configuration

Date \* 04/01/2017 04/06/2017

Select Users User Wise

User \* ID Name

Export

- **Date:** Specify the date range for which the data is to be exported, by selecting the start and the end date.
- **Select Users:** Select single or multiple users whose data is to be exported from dropdown list. The administrator can select from the following options:
  - User Wise
  - Group Wise (*Available only with the Time & Attendance add on module*)
  - All

**Export To IDS**

Export Configuration

Date \* 04/01/2017 04/06/2017

Select Users User Wise

User \* ID Name

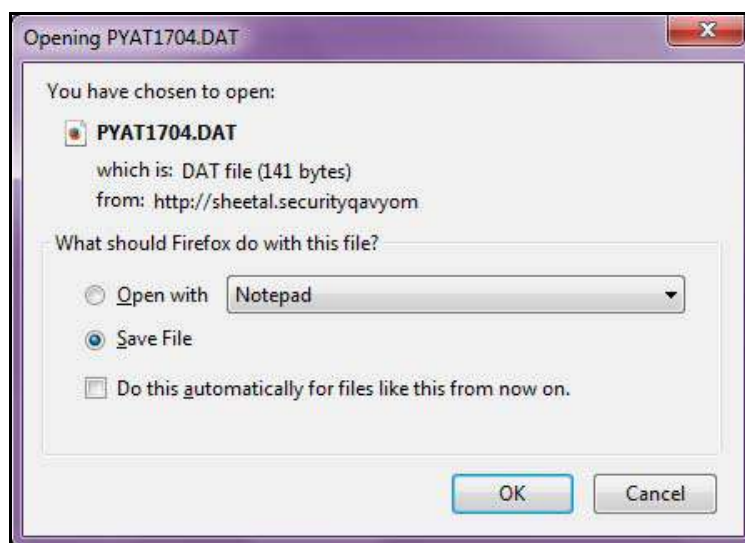
Search

User ID ▲	Name
1782	Nidhi

Export

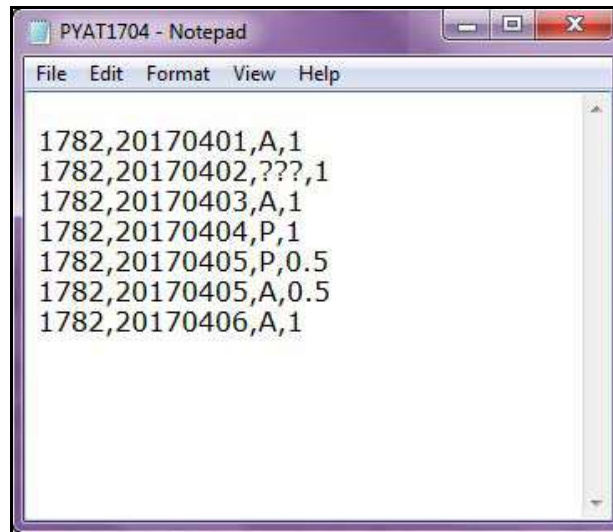
Click the **Export** button. The system prompts to browse to the folder path where the specified file is to be saved. The filename is automatically generated by the system as per the following format:

**PYATYYMM.DAT** (where YY stands for Year and MM stands for month).





The Exported File will display the user's Attendance Data in the following format.



The file generated contains the comma separated values in the sequence: **User ID**, Date in **YYYYMMDD** format, **Output Code**, 1/ 0.5 (Full Day/Half day).

For the better understanding, consider the following example and the screenshot above.

**Example1:**

**1782,20170401,A,1** - This value denotes that the user with ID:**1782** on Date: 1st April 2017 (**20170401**) was Absent (**A**) for the full day (**1**).

**Example2:**

**1782,20170404,P,1** - This value denotes that the user with ID:**1782** on Date: 1st April 2017 (**20170401**) was Present (**P**) for the full day (**1**).

**Example3:**

**1782,20170405,P,0.5**  
**1782,20170405,A,0.5**

The above two values are generated for the same day (**20170405**), as the user was Present (**P**) in the first half (**0.5**) and Absent (**A**) in the second Half (**0.5**).

**Example4:**

**1782,20170402,???,1** - In this value, "???" denotes that the Out put Code has not been mapped with the Attendance Code in the **Configuration** tab.

# Scheduling Tasks/Reports

---

Scheduling refers to the process of setting up certain functions on the COSEC system to take place automatically at a scheduled time, without the need of manual intervention.

The *Scheduler* option in the COSEC application enables the administrator to perform the following functions:

- [“Scheduling Tasks”](#)
- [“Scheduling Reports”](#)
- [“Scheduling Data Export”](#)

To view a log of all scheduled reports/data exports/tasks and their status for a specific period, go to **Admin > Views/Logs > Scheduler Log**. For more information on generating such logs, refer to [“Scheduling Tasks”](#).



*The Alert Service must be running to run schedulers.*

## Scheduling Tasks

The *Task Scheduler* functionality in the COSEC Application enables the system to be scheduled for performing certain pre-defined tasks. Some of these tasks are as follows:

- Periodic database backup.
- Running the monthly schedule process on the scheduled day of the month.
- Running the monthly attendance process on the scheduled day of the month.
- Crediting leaves to user account on the scheduled day of the month.
- Configuring actions related to User relieving process like revoking devices.
- Cafeteria Account Recharge and Payment Process
- Continuous Absent/Presence check
- Delete Unidentified Faces
- Visitor Pass Surrender
- Delete/de-activate Temporary User/Worker as well as convert Temporary User/Worker to Normal User/Worker etc.

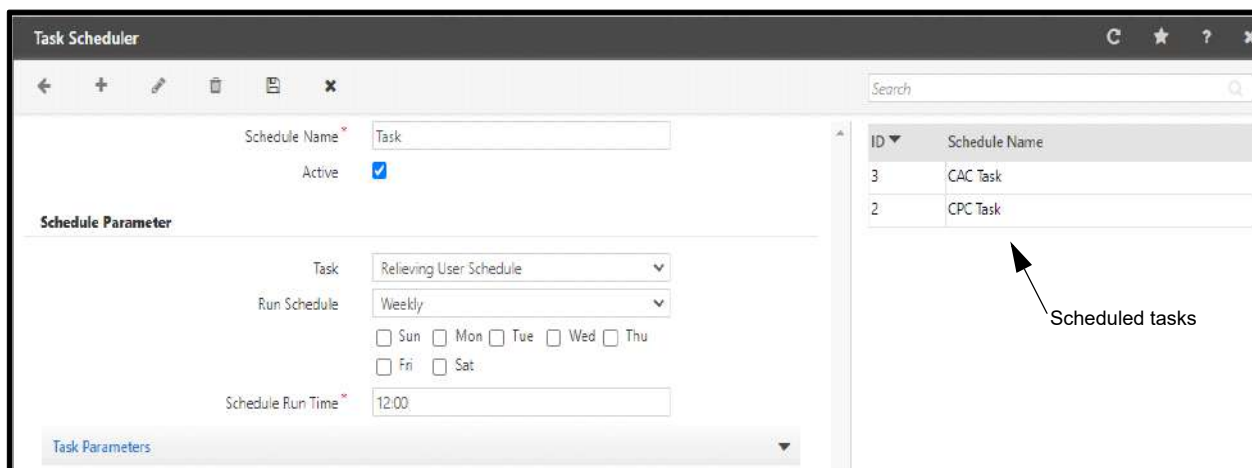


*If you have enabled the **Capture Face of Unidentified User** feature then make sure that you schedule a task of **Delete Unidentified Face** in Admin > System Utilities> Task Scheduler to avoid storage of excess data in the database.*

## Configuring Task Scheduler

To schedule a task,

Click **Admin** module > **System Utilities** > **Task Scheduler**.



The screenshot shows the 'Task Scheduler' window. On the left, the 'Schedule Name' field is set to 'Task', and the 'Active' checkbox is checked. Under the 'Schedule Parameter' section, the 'Task' dropdown is set to 'Relieving User Schedule', 'Run Schedule' is 'Weekly', and 'Schedule Run Time' is '12:00'. On the right, a table lists scheduled tasks:

ID	Schedule Name
3	CAC Task
2	CPC Task

An arrow points to the 'CPC Task' entry with the label 'Scheduled tasks'.

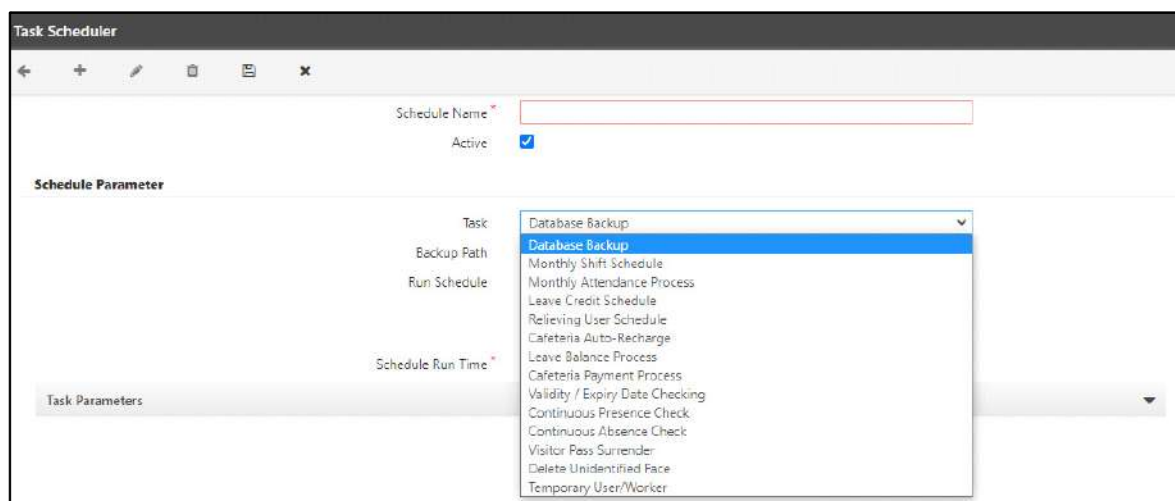
The page displays configurations on the left hand side and to the right is a grid containing scheduled tasks.

- **Schedule Name:** Enter a unique name for the new task schedule to be defined.
- **Active:** Select this check-box to activate the scheduler.

### Schedule Parameter

This section enables you to set the schedule of the desired task.

- **Task:** Select a task from the dropdown list for which you wish to run the scheduler.



The screenshot shows the 'Task Scheduler' window with the 'Task' dropdown menu open. The menu lists the following tasks: Database Backup, Monthly Shift Schedule, Monthly Attendance Process, Leave Credit Schedule, Relieving User Schedule, Cafeteria Auto-Recharge, Leave Balance Process, Cafeteria Payment Process, Validity / Expiry Date Checking, Continuous Presence Check, Continuous Absence Check, Visitor Pass Surrender, Delete Unidentified Face, and Temporary User/Worker. The 'Database Backup' task is currently selected.

- **Run Schedule:** Select the days or months to run the schedule from the drop-down.
- If **Weekly** is selected, then select the check boxes of desired days.

Run Schedule

Weekly

☐ Sun
☐ Mon
☐ Tue
☐ Wed
☐ Thu
  
☐ Fri
☐ Sat

- If **Monthly** is selected, then select the day of the month for which the task is to be scheduled.

Schedule Parameter

Task

Relieving User Schedule

Run Schedule

Monthly

Every(Day Of The Month)

1

Schedule Run Time \*

1

Task Parameters

- **Schedule Run Time:** Specify the time at which the task schedule is to be run by COSEC in 24 hours format.

## Task Parameters

This section lists the Schedule Parameter and their respective Task Parameters. The Task Parameters differ as per the Schedule Parameter selected for the task scheduler.

### For Schedule Parameter: Relieving User Schedule

Schedule Parameter

Task

Relieving User Schedule

Run Schedule

Weekly

☐ Sun
☐ Mon
☐ Tue
☐ Wed
☐ Thu
  
☐ Fri
☐ Sat

Schedule Run Time \*

HH:MM

Task Parameters

Execute Relieving Process

Process

De-activate User

Revoke Assigned Devices

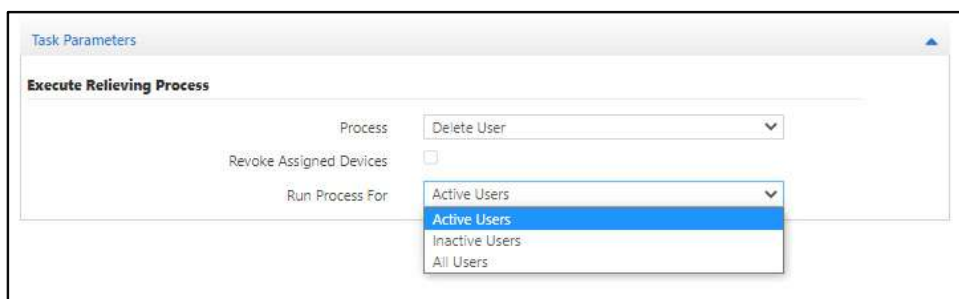
De-activate User

Configure the following for Relieving User Schedule under Execute Relieving Process:

## Execute Relieving Process

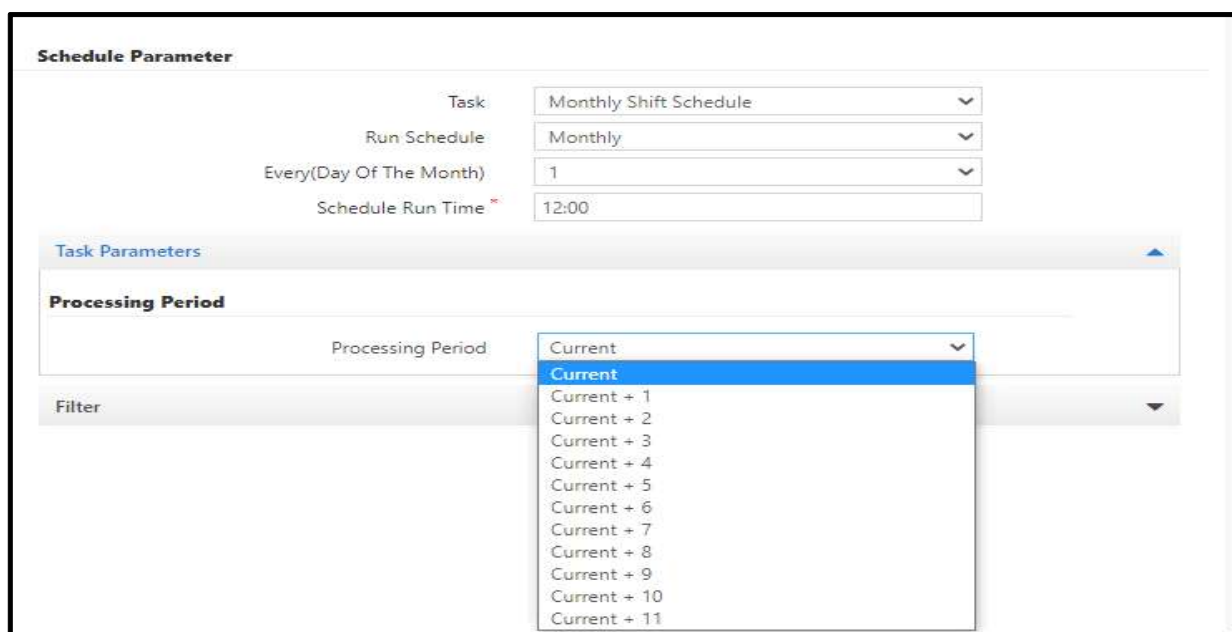
- **Process:** Select the desired process which you wish to execute — **De-activate User** or **Delete User**.
- **Revoke Assigned Device:** If you select **De-activate User**, select this check box to enable.
- **Run Process For:** If you select **Delete User**, select the desired users — Active, Inactive, All — for whom you wish to run this process.

If the user's relieving date is before the schedule run time then user will be relieved, that is, de-activated and the devices which were assigned to him/her will be revoked. For example, User relieving date is entered in his profile as 5th Feb 2023, and relieving schedule is run on 6th Feb 2023; then user will be relieved.



- Click **Save** to save the task scheduler configuration. The created scheduled appears in the grid on the right hand side.

## For Schedule Parameter: Monthly Shift Schedule



- **Processing Period:** Select the desired option— Current, Current +1, Current +2 etc.— from the drop-down list.  
**For example:** If Current month is June 2022, Processing Period selected is Current +3, then monthly schedule for September 2022 will run on 1st Sept at 12 pm.

- **Filter:** Click the Filter panel and configure the following:
- **Select Users:** Select the desired option — **User Wise**, **Group Wise**, **All**.

If you select **User Wise**, click the pick-list to select the desired user.

The screenshot shows the 'Filter' panel with the 'Select Users' dropdown set to 'User Wise'. Below it, the 'User\*' section has two input fields: 'ID' and 'Name', each with a pick-list icon to its right.

If you select **Group Wise**, select the desired type of group from the drop-down list provided.

The screenshot shows the 'Filter' panel with the 'Select Users' dropdown set to 'Group Wise'. Below it, the 'Select Group' dropdown is set to 'Organization'. Under the 'Organization\*' section, there are two input fields: 'ID' and 'Name', each with a pick-list icon to its right.

As per the selection of the group, select the particular group's name from the pick-list provided.

For example, If the type of Group selected is Organization, then select any organization's name and ID from the picklist.

The screenshot shows the 'Filter' panel with the 'Select Users' dropdown set to 'Group Wise' and the 'Select Group' dropdown set to 'Organization'. The 'Organization\*' section is expanded, showing a list of options: Organization (highlighted), Branch, Department, Designation, Section, Category, Grade, Custom Group 1, Custom Group 2, and Custom Group 3.



*The Filter parameter is same as the Monthly Shift Schedule for all the Tasks available in the drop-down list.*

*Filter Parameter is not available for Relieving User Schedule, Validity/Expiry Date Checking and Visitor Pass.*

### For Schedule Parameter: For Monthly Attendance Process

The screenshot shows a web-based configuration interface for the 'Monthly Attendance Process'. The main section is titled 'Schedule Parameter' and contains four dropdown menus: 'Task' (set to 'Monthly Attendance Process'), 'Run Schedule' (set to 'Monthly'), 'Every(Day Of The Month)' (set to '1'), and 'Schedule Run Time' (set to 'HH:MM'). Below this is a 'Task Parameters' section with a checkbox for 'Send Alert Message to Users' (unchecked). Underneath is a 'Processing Period' section with a dropdown menu set to 'Previous'. At the bottom is a 'Filter' section with a dropdown arrow.

- **Send Alert Message to Users:** Select the check box to send alert message to users while processing their monthly attendance.
- **Processing Period:** Select the desired period — Previous, Current — to perform the task.
- **Filter:** Click the Filter panel and configure the following:
  - **Select Users:** Select the desired option — **User Wise, Group Wise, All.**

If you select **User Wise**, click the picklist to select the desired user.

Picklist For User Master

Total Selected: 0 Records

Search  Show Selected

<input type="checkbox"/>	User ID ▲	Name
<input type="checkbox"/>	1	SALIM ANSARI
<input type="checkbox"/>	10	RAJENDRA GOSWAMI
<input type="checkbox"/>	1001	ANKITKUMAR SOHLIYA
<input type="checkbox"/>	1002	MEGHA H SHUKLA
<input type="checkbox"/>	1003	UMESH M TALANPURI
<input type="checkbox"/>	1004	DARSHAK B PATEL
<input type="checkbox"/>	1007	DHAVAL I PATEL
<input type="checkbox"/>	1008	MAYANK K KORAT
<input type="checkbox"/>	1009	DIPTI K RATHWA
<input type="checkbox"/>	1010	RAHUL S SHAH

1 - 10 of 2476 records

« < 1 2 3 ... 248 > »

OK Cancel

Select the desired check boxes from the list. Click **OK**.

The selected users appears in the grid.

Filter

Send Report Of

Select Users: User Wise

User ID:  Name:

Search

User ID ▲	Name	
1	SALIM ANSARI	
10	RAJENDRA GOSWAMI	

Generate Export for: Active Users

You can also delete the desired User. Click **Delete** of the respective user.

If you select **Group Wise**, select the desired type of group from the drop-down list provided. As per the selection of the group, select the particular group's name from the pick-list provided.

For example, If the type of Group selected is Organization, then select any organization's name and ID from the picklist.



The selected options appears in the grid.

Filter

Send Report Of

Select Users: Group Wise

Select Group: Organization

Organization \*

ID: Name: [Menu Icon]

Search [Search Icon]

ID	Name	Group ▲	[Delete Icon]
1	MATRIX COMSEC PVT. LTD.	Organization	[Delete Icon]
2	SAMARTH	Organization	[Delete Icon]
3	AVDHOOT	Organization	[Delete Icon]

Generate Export for: Active Users

You can also delete the desired group. Click **Delete**  of the respective group.

If you select **All**, then all the user will be selected.

## For Schedule Parameter: Leave Credit Schedule

**Schedule Parameter**

Task: Leave Credit Schedule

Run Schedule: Monthly

Every (Day Of the Month): 1

Jan Feb Mar Apr  
May Jun Jul Aug  
Sep Oct Nov Dec

Schedule Run Time: HH:MM

**Task Parameters**

**Leave Selection**

Credit Method: Fixed

Leave: Select

No. of Days:

Apply Pro-rata: ☐

**Processing Period**

Processing Period: Current

Filter

### Leave Selection

- **Credit Method:** Select the method to credit leave as **Fixed** or **Policy**.
- **Leave:** Select the **Leave** from the dropdown list.
- **No. of Days:** For Fixed Credit Method, specify the number of days after which the leave should be credited.
- **No. of Hour(s):** This option is applicable only when Leave selected is Hourly Paid Leaves and Credit Method selected is Fixed. Specify **No. of Hour(s)** that should be credited as leave.

**Task Parameters**

**Leave Selection**

Credit Method: Fixed

Leave: Hourly Paid Leave

No of Hour(s)\*: HHH MM

Apply Pro-rata: ☐

**Processing Period**

Processing Period: Current

Filter

- **Accrual Policy:** For Policy Credit Method, select the desired policy using the picklist.
- **Apply Pro-rata:** For Fixed Credit Method, select this check box to enable. This will enable leave credit on pro-rata basis (that is, based on the actual number of days worked).

## Processing Period

- **Processing Period:** Select the period — Current, Next — to process leave credit from the dropdown list.

## Filter

- **Filter:** Click the Filter panel and configure the following:
  - **Select Users:** Select the desired option — **User Wise**, **Group Wise**, **All**.

If you select **User Wise**, click the picklist to select the desired user.

Picklist For User Master

Total Selected: 0 Records

Search  Show Selected

<input type="checkbox"/>	User ID ▲	Name
<input type="checkbox"/>	1	SALIM ANSARI
<input type="checkbox"/>	10	RAJENDRA GOSWAMI
<input type="checkbox"/>	1001	ANKITKUMAR SOHLIYA
<input type="checkbox"/>	1002	MEGHA H SHUKLA
<input type="checkbox"/>	1003	UMESH M TALANPURI
<input type="checkbox"/>	1004	DARSHAK B PATEL
<input type="checkbox"/>	1007	DHAVAL I PATEL
<input type="checkbox"/>	1008	MAYANK K KORAT
<input type="checkbox"/>	1009	DIPTI K RATHWA
<input type="checkbox"/>	1010	RAHUL S SHAH

1 - 10 of 2476 records

« < 1 2 3 ... 248 > »

OK Cancel

Select the desired check boxes from the list. Click **OK**.

All the selected user appears in the list.

Filter

Send Report Of


Select Users: User Wise

User ID:  Name:

Search

User ID ▲	Name
1	SALIM ANSARI
10	RAJENDRA GOSWAMI

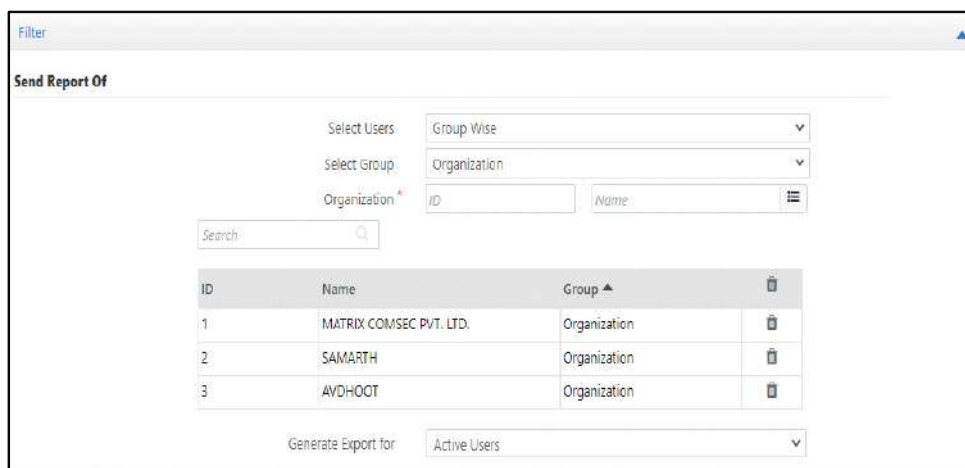
Generate Export for: Active Users

You can also delete the desired User. Click **Delete**  of the respective user.

If you select **Group Wise**, select the desired type of group from the drop-down list provided.  
As per the selection of the group, select the particular group's name from the pick-list provided.

For example, If the type of Group selected is Organization, then select any organization's name and ID from the picklist

The selected options appears in the grid.

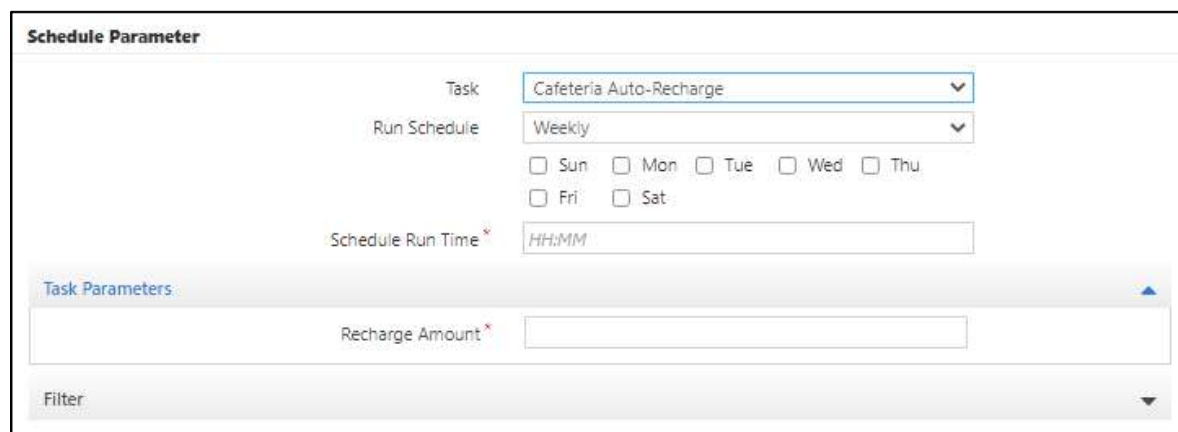


ID	Name	Group
1	MATRIX COMSEC PVT. LTD.	Organization
2	SAMARTH	Organization
3	AVDHOOT	Organization

You can also delete particular group. Click **Delete**  of the respective group.

If you select **All**, then All users will be selected.

#### For Schedule Parameter: Cafeteria Auto-Recharge



- **Recharge Amount:** Specify the amount to recharge the cafeteria account automatically.
- **Filter:** Click the Filter panel and configure the following:
  - **Select Users:** Select the desired option — **User Wise**, **Group Wise**, **All**.

If you select **User Wise**, click the picklist to select the desired user.

Picklist For User Master

Total Selected: 0 Records

Search  Show Selected

<input type="checkbox"/>	User ID ▲	Name
<input type="checkbox"/>	1	SALIM ANSARI
<input type="checkbox"/>	10	RAJENDRA GOSWAMI
<input type="checkbox"/>	1001	ANKITKUMAR SOHLIYA
<input type="checkbox"/>	1002	MEGHA H SHUKLA
<input type="checkbox"/>	1003	UMESH M TALANPURI
<input type="checkbox"/>	1004	DARSHAK B PATEL
<input type="checkbox"/>	1007	DHAVAL I PATEL
<input type="checkbox"/>	1008	MAYANK K KORAT
<input type="checkbox"/>	1009	DIPTI K RATHWA
<input type="checkbox"/>	1010	RAHUL S SHAH

1 - 10 of 2476 records

« < 1 2 3 ... 248 > »

OK Cancel

Select the desired check boxes from the list. Click **OK**.

All the selected users appears in the grid.

Filter

Send Report Of

Select Users: User Wise

User ID Name

Search

User ID ▲	Name
1	SALIM ANSARI
10	RAJENDRA GOSWAMI

Generate Export For: Active Users

You can also delete the desired User. Click **Delete**  of the respective user.

If you select **Group Wise**, select the desired type of group from the drop-down list provided. As per the selection of the group, select the particular group's name from the pick-list provided.


For example, If the type of Group selected is Organization, then select any organization's name and ID from the picklist

The selected option appears in the grid.

The screenshot shows a web interface titled "Send Report Of". It includes a search bar with the text "Search" and a magnifying glass icon. Below the search bar is a table with the following data:

ID	Name	Group	
1	MATRIX COMSEC PVT. LTD.	Organization	
2	SAMARTH	Organization	
3	AVDHOOT	Organization	

Below the table, there is a "Generate Export for" dropdown menu with "Active Users" selected. Above the table, there are several filters: "Select Users" (Group Wise), "Select Group" (Organization), and "Organization" (ID, Name).

You can also delete the desired Group. Click **Delete**  of the respective group.

If you select **All**, then All user will be selected.

#### For Schedule Parameter: Leave Balance Process

The screenshot shows a web interface titled "Schedule Parameter". It includes a "Task" dropdown menu with "Leave Balance Process" selected. Below it, there are "Run Schedule" (Monthly) and "Every(Day Of The Month)" (1) dropdown menus, and a "Schedule Run Time" text input field with "12:00". Below these is a "Task Parameters" section with a "Processing Period" dropdown menu. The dropdown menu is open, showing "Current", "Current", and "Next" options. Below the dropdown menu is a "Filter" button.

- **Processing Period:** Select the period — Current, Next — to process Leave Balance from the dropdown list
- **Filter:** Click the Filter panel and configure the following:
  - **Select Users:** Select the desired option — **User Wise**, **Group Wise**, **All**.

If you select **User Wise**, click the picklist to select the desired user.

Picklist For User Master

Total Selected: 0 Records

Search

<input type="checkbox"/>	User ID ▲	Name
<input checked="" type="checkbox"/>	1	SALIM ANSARI
<input checked="" type="checkbox"/>	10	RAJENDRA GOSWAMI
<input type="checkbox"/>	1001	ANKITKUMAR SOHLIYA
<input type="checkbox"/>	1002	MEGHA H SHUKLA
<input type="checkbox"/>	1003	UMESH M TALANPURI
<input type="checkbox"/>	1004	DARSHAK B PATEL
<input type="checkbox"/>	1007	DHAVAL I PATEL
<input type="checkbox"/>	1008	MAYANK K KORAT
<input type="checkbox"/>	1009	DIPTI K RATHWA
<input type="checkbox"/>	1010	RAHUL S SHAH

1 - 10 of 2476 records

« < 1 2 3 ... 248 > »

Select the desired check boxes from the list. Click **OK**.

The selected users appears in the grid.

Filter

Send Report Of


Select Users: User Wise

User ID  Name

Search

User ID ▲	Name	<input type="checkbox"/>
1	SALIM ANSARI	<input checked="" type="checkbox"/>
10	RAJENDRA GOSWAMI	<input checked="" type="checkbox"/>

Generate Export For: Active Users

You can also delete the desired User. Click **Delete**  of the respective user.

If you select **Group Wise**, select the desired type of group from the drop-down list provided. As per the selection of the group, select the particular group's name from the pick-list provided.

For example, If the type of Group selected is Organization, then select any organization's name and ID from the picklist.

**Send Report Of**

Select Users: Group Wise

Select Group: Organization

Organization \* ID: Name:

Search

ID	Name	Group	
1	MATRIX COMSEC PVT. LTD.	Organization	
2	SAMARTH	Organization	
3	AVDHOOT	Organization	

Generate Export for: Active Users

You can also delete the desired group. Click **Delete**  of the respective group.

If you select **All**, then All users will be selected.

#### For Schedule Parameter: Cafeteria Payment Process

**Schedule Parameter**

Task: Cafeteria Payment Process

Run Schedule: Monthly

Every (Day Of the Month): 1

Schedule Run Time \* HH:MM

**Task Parameters**

Processing Period: Previous

Filter

- **Processing Period:** Select the period — Previous, Current — to process monthly Cafeteria Payment from the dropdown list.
- **Filter:** Click the Filter panel and configure the following:
  - **Select Users:** Select the desired option — User Wise, Group Wise, All.



If you select **User Wise**, click the picklist to select the desired user.

Picklist For User Master

Total Selected: 0 Records

Search  Show Selected

<input type="checkbox"/>	User ID ▲	Name
<input type="checkbox"/>	1	SALIM ANSARI
<input type="checkbox"/>	10	RAJENDRA GOSWAMI
<input type="checkbox"/>	1001	ANKITKUMAR SOHLIYA
<input type="checkbox"/>	1002	MEGHA H SHUKLA
<input type="checkbox"/>	1003	UMESH M TALANPURI
<input type="checkbox"/>	1004	DARSHAK B PATEL
<input type="checkbox"/>	1007	DHAVAL I PATEL
<input type="checkbox"/>	1008	MAYANK K KORAT
<input type="checkbox"/>	1009	DIPTI K RATHWA
<input type="checkbox"/>	1010	RAHUL S SHAH

1 - 10 of 2476 records

« < 1 2 3 ... 248 > »

OK Cancel

Select the desired check boxes from the list. Click **OK**.

The selected users appears in the grid.

Filter

Send Report Of

Select Users: User Wise

User\* ID Name

Search

User ID ▲	Name	
1	SALIM ANSARI	
10	RAJENDRA GOSWAMI	

Generate Export For: Active Users

You can also delete the desired User. Click **Delete** of the respective user.

If you select **Group Wise**, select the desired type of group from the drop-down list provided. As per the selection of the group, select the particular group's name from the pick-list provided.

For example, If the type of Group selected is Organization, then select any organization's name and ID from the picklist.

The selected options appears in the grid.

The screenshot shows a web interface titled "Send Report Of". It includes several input fields: "Select Users" (set to "Group Wise"), "Select Group" (set to "Organization"), and "Organization" (with sub-fields for "ID" and "Name"). Below these is a search bar. A table displays a list of organizations:

ID	Name	Group	
1	MATRIX COMSEC PVT. LTD.	Organization	
2	SAMARTH	Organization	
3	AVDHOOT	Organization	

At the bottom, there is a "Generate Export for" dropdown menu currently set to "Active Users".

You can also delete particular group. Click **Delete** of the respective group.

If you select All, then all users will be selected.

### For Schedule Parameter: Validity/Expiry Date Checking

The screenshot shows the "Schedule Parameter" configuration window. It includes the following settings:

- Task:** Validity / Expiry Date Checking
- Run Schedule:** Weekly
- Schedule Run Time:** 12:00
- Task Parameters:**
  - Execute Relieving Process:**
    - Check Fields:** A list with checkboxes for "Visa", "Driving License", and "Passport", all of which are checked.
    - Process:** A dropdown menu with options "De-activate User", "De-activate User", and "Delete User". The "Delete User" option is currently selected.
    - Revoke Assigned Devices:** A checkbox that is currently unchecked.

### Execute Relieving Process

- **Check Fields:** Select the check boxes of the desired fields that you wish to check for User's ID Proof such as **Visa**, **Driving License**, **Passport**. Custom Fields configured with Date as type will also be visible here. To know more about Custom Fields, refer to ["Custom Fields"](#) in ["Defining Global Policies"](#).
- **Process:** Select the desired process which you wish to execute — **De-activate User** or **Delete User**.
- **Revoke Assigned Device:** If you select **De-activate User**, select this check box to enable and to revoke the devices assigned to these users.

- **Run Process For:** If you select **Delete User**, select the desired users — Active, Inactive, All — for whom you wish to run this process.
- **Filter:** Click the Filter panel and configure the following:
  - **Select Users:** Select the desired option — **User Wise**, **Group Wise**, **All**.

Picklist For User Master

Total Selected: 0 Records

Search  Show Selected

<input type="checkbox"/>	User ID ▲	Name
<input type="checkbox"/>	1	SALIM ANSARI
<input type="checkbox"/>	10	RAJENDRA GOSWAMI
<input type="checkbox"/>	1001	ANKITKUMAR SOHLIYA
<input type="checkbox"/>	1002	MEGHA H SHUKLA
<input type="checkbox"/>	1003	UMESH M TALANPURI
<input type="checkbox"/>	1004	DARSHAK B PATEL
<input type="checkbox"/>	1007	DHAVAL I PATEL
<input type="checkbox"/>	1008	MAYANK K KORAT
<input type="checkbox"/>	1009	DIPTI K RATHWA
<input type="checkbox"/>	1010	RAHUL S SHAH

1 - 10 of 2476 records

« < 1 2 3 ... 248 > »

OK Cancel

Select the desired check boxes from the list. Click **OK**.

The selected users appears in the grid.

Filter

Send Report Of

Select Users: User Wise

User \* ID Name

Search

User ID ▲	Name	
1	SALIM ANSARI	
10	RAJENDRA GOSWAMI	

Generate Export for: Active Users

You can also delete the desired user. Click **Delete** of the respective user.

If you select **Group Wise**, select the desired type of group from the drop-down list provided. As per the selection of the group, select the particular group's name from the pick-list provided.

For example, If the type of Group selected is Organization, then select any organization's name and ID from the picklist.

The selected options appears in the grid.

Filter

**Send Report Of**

Select Users: Group Wise

Select Group: Organization

Organization: ID: Name:

Search

ID	Name	Group	
1	MATRIX COMSEC PVT. LTD.	Organization	
2	SAMARTH	Organization	
3	AVDHOOT	Organization	

Generate Export for: Active Users

You can also delete the desired group. Click **Delete**  of the respective group.

If you select **All**, then all users will be selected.

#### For Schedule Parameter: Continuous Presence Check

**Schedule Parameter**

Task: Continuous Presence Check


Check For (Present Days): 1-99

Schedule Run Time: HH:MM


**Task Parameters**

**Processing Period**

Processing Period: Current

Consider Half Day PR as Full Day PR: ☒ 

**Days to consider as Present**

Days			
AB	<input type="checkbox"/>	Always	HH:MM
Leave	<input type="checkbox"/>	Always	HH:MM
WO	<input type="checkbox"/>	Always	HH:MM
PH	<input type="checkbox"/>	Always	HH:MM
FB	<input type="checkbox"/>	Always	HH:MM
RD	<input type="checkbox"/>	Always	HH:MM
IN	<input checked="" type="checkbox"/>	Always	HH:MM 

Filter

### Schedule Parameter

- **Check For (Present Days):** This will check for the continuous number of present days for the type selected of a user according to the assigned shift/hours. Enter the desired number of days from 1 to 99.
- **Schedule Run Time:** Enter the time in HH:MM format at which you wish the scheduled task must be executed.

### Task Parameters

#### Processing Period

- **Processing Period:** Select the period — Previous, Current — to process Continuous Presence Check from the dropdown list.
- **Consider Half Day PR as Full Day PR:** Select the check box if you wish to consider a day as full day present even if a user is present for half of the total working hours.

#### Days to consider as Present

The screenshot shows a configuration panel titled "Days to consider as Present". It contains a table with columns for "Days", a checkbox, a dropdown menu, and an "HH:MM" input field. The rows are: AB (checked, Shift Based), Leave (checked, Always), WO (checked, Skip), PH (checked, Shift Based), FB (checked, Custom Hours), RD (checked, Always), and IN (checked, Always). The "Always" option is currently selected in the dropdown menu.

- **Days:** Select this check box to consider all types of days — AB, Leave, WO, PH, FB, RD, IN and select their respective option — Always, Skip, Shift Based, Custom Hours. If you select Custom Hours, enter the time in HH:MM format.

### Filter

The screenshot shows a "Filter" panel. It includes a "Select Users" dropdown menu set to "User Wise", a search bar, a table of users with columns "User ID" and "Name", and a "Select Shift" dropdown menu set to "GS". The table shows one user with ID 2323 and name Rrushi.

- **Filter:** Click the Filter panel and configure the following:
  - **Select Users:** Select the desired option — **User Wise, Group Wise, All.**

If you select **User Wise**, click the picklist to select the desired user.

Picklist For User Master

Total Selected: 0 Records

Search  Show Selected

<input type="checkbox"/>	User ID ▲	Name
<input type="checkbox"/>	1	SALIM ANSARI
<input type="checkbox"/>	10	RAJENDRA GOSWAMI
<input type="checkbox"/>	1001	ANKITKUMAR SOHLIYA
<input type="checkbox"/>	1002	MEGHA H SHUKLA
<input type="checkbox"/>	1003	UMESH M TALANPURI
<input type="checkbox"/>	1004	DARSHAK B PATEL
<input type="checkbox"/>	1007	DHAVAL I PATEL
<input type="checkbox"/>	1008	MAYANK K KORAT
<input type="checkbox"/>	1009	DIPTI K RATHWA
<input type="checkbox"/>	1010	RAHUL S SHAH

1 - 10 of 2476 records

« < 1 2 3 ... 248 > »

OK Cancel

Select the desired check boxes from the list. Click **OK**.

The selected users appears in the grid.

Filter

Send Report Of

Select Users: User Wise

User ID:  Name:

Search

User ID ▲	Name
1	SALIM ANSARI
10	RAJENDRA GOSWAMI

Generate Export For: Active Users

You can also delete the desired User. Click **Delete**  of the respective user.

If you select **Group Wise**, select the desired type of group from the drop-down list provided. As per the selection of the group, select the particular group's name from the pick-list provided.

For example, If the type of Group selected is Organization, then select any organization's name and ID from the picklist.

The selected options appears in the grid.

The 'Filter' window contains the following elements:

- Select Users:** A dropdown menu set to 'Group Wise'.
- Select Group:** A dropdown menu set to 'Organization'.
- Organization:** Two input fields for 'ID' and 'Name', with a search icon.
- Search:** A search bar with a magnifying glass icon.
- Group Table:** A table with columns 'ID', 'Name', and 'Group'. It contains one row: ID 1, Name MATRIX COMSEC PVT. LTD., Group Organization. There is a trash icon next to the 'Group' column header.
- Select Shift:** A dropdown menu.
- Shift Table:** A table with columns 'Shift ID' and 'Shift Name'. It contains one row: Shift ID 10, Shift Name GENERAL 9 30 TO 7 00. There is a trash icon next to the 'Shift Name' column header.

You can also delete particular group. Click **Delete**  of the respective group.

If you select **All**, then all users will be selected.

- **Select Shift:** You can select particulars shifts or all the shifts at once.

Click the **Select Shifts** picklist. The **Picklist For Shift Masters** pop-up appears.

The 'Picklist For Shift Masters' window displays the following information:

- Total Selected:** 0 Records
- Search:** A search bar with a magnifying glass icon.
- Show Selected:** A blue link.
- Select All:** A checkbox.
- Shifts Table:** A table with columns: SFTID, SFTName, SFTSTTime, SFTEDTime, BRKSTTime, BRKEDTime. It lists 12 shifts (IDs 10 through AS).
- Footer:** '1 - 10 of 60 records' and a pagination control showing '1' as the current page.
- Buttons:** 'OK' and 'Cancel' buttons at the bottom.

To select particular shifts, select the check boxes of the desired shifts.

**OR**

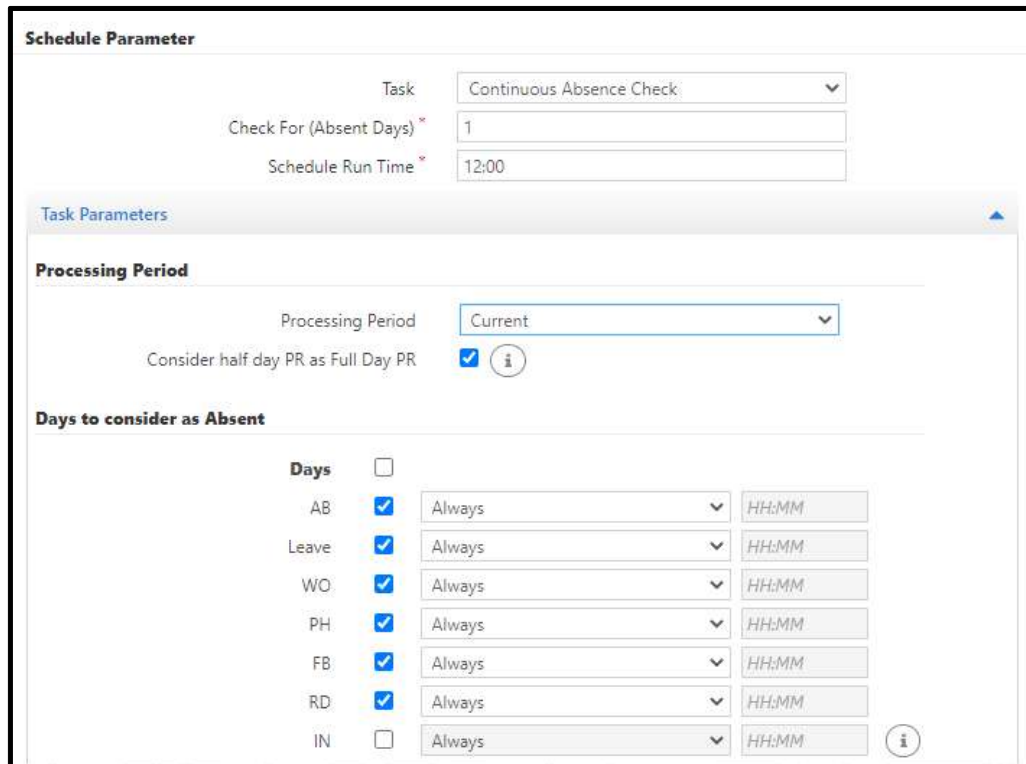
To select all the shifts at once, select the Select All check box.

The selected shifts appear in the grid.

You can also delete particular shifts. Click **Delete**  of the respective shift.

For example: If you select PH from the 'Consider Work Hours For Full Day Present', and set the parameters as 'Custom Hours' which is defined as "03:00" which means, by attending 3:00 hours on a Public Holiday will be considered as a Full Day Present.

#### For Schedule Parameter: Continuous Absence Check



The screenshot shows the 'Schedule Parameter' configuration window. At the top, the 'Task' is set to 'Continuous Absence Check'. Below it, 'Check For (Absent Days)' is set to '1' and 'Schedule Run Time' is set to '12:00'. The 'Task Parameters' section is expanded, showing 'Processing Period' set to 'Current' and 'Consider half day PR as Full Day PR' checked. The 'Days to consider as Absent' section contains a table with columns for 'Days', a checkbox, a dropdown menu, and an 'HH:MM' time field.

Days	<input type="checkbox"/>		HH:MM
AB	<input checked="" type="checkbox"/>	Always	HH:MM
Leave	<input checked="" type="checkbox"/>	Always	HH:MM
WO	<input checked="" type="checkbox"/>	Always	HH:MM
PH	<input checked="" type="checkbox"/>	Always	HH:MM
FB	<input checked="" type="checkbox"/>	Always	HH:MM
RD	<input checked="" type="checkbox"/>	Always	HH:MM
IN	<input type="checkbox"/>	Always	HH:MM

The configuration are similar to continuous Presence check. For details refer to ["For Schedule Parameter: Continuous Presence Check"](#).



## For Schedule Parameter: Visitor Pass Surrender

The screenshot shows the 'Task Scheduler' window. At the top, there's a toolbar with icons for back, add, edit, delete, save, and close. Below the toolbar, the 'Schedule Name' is 'Pass Surrender' and the 'Active' checkbox is checked. The 'Schedule Parameter' section contains a 'Task' dropdown set to 'Visitor Pass Surrender', a 'Run Schedule' dropdown set to 'Weekly', and a row of checkboxes for days of the week: Sun (checked), Mon, Tue, Wed, Thu, Fri, and Sat. Below this, the 'Schedule Run Time' is set to '12:00'. The 'Task Parameters' section at the bottom has a 'Duration After Pass Expiry' field set to '03:00'.

This task will surrender the pass for those visitors by default by system whose visit has ended and they have yet to checkout on their own through visitor portal or via security gate.

### Schedule Parameter

- **Run Schedule:** Select the desired option — **Weekly, Monthly** — to run this scheduled task.
- **Schedule Run Time:** Enter the desired time in HH:MM format at which you wish this scheduled task must be executed.

### Task Parameter

- **Duration After Pass Expiry:** Set the time duration after Visitor Pass expiry which will be considered for auto surrendering of the Visitor Pass.

This time will be a buffer to provide some time to the visitor to submit the pass. If the visitor still doesn't submit then this scheduler will surrender the pass.

*For example 1:*

If a Visitor's Visit time is from 9:00 AM to 11:00 AM.

Scheduled Run Time: 12:00 PM

Duration After Pass Expiry: 03:00 Hours

Now when the visitor checks out at 11:00 AM through Visitor portal or via Security Portal, Visitor Pass will be surrendered.

*For example 2:*

If a Visitor's Visit time is from 9:00 PM to 11:00 PM.

Scheduled Run Time: 12:00 PM

Duration After Pass Expiry: 03:00 Hours

In this case, if the Visitor due to any reason hasn't checked out even after 11:00 PM, then the system will wait for 03 Hours as set in Duration After Pass Expiry and if still the Visitor doesn't checkout, the system will auto surrender the particular Visitor's Pass.

#### For Schedule Parameter: Delete Unidentified Faces

The screenshot shows the 'Schedule Parameter' window. The 'Task' dropdown is set to 'Delete Unidentified Face'. The 'Run Schedule' dropdown is set to 'Weekly'. Below this, there are checkboxes for days of the week: Sun, Mon, Tue, Wed, Thu, Fri, and Sat. The 'Schedule Run Time' field is set to 'HH:MM'. At the bottom, there is a 'Task Parameters' section with a 'Captured Before' field set to '1-99' and a 'Days' label.

If you have enabled the **Capture Face of Unidentified User** feature then this task will delete the unidentified faces after the defined time to avoid storage of excess data in the database.

#### Schedule Parameter

- **Run Schedule:** Select the desired option — **Weekly, Monthly** — to run this scheduled task.
- **Schedule Run Time:** Enter the desired time in HH:MM format at which you wish this scheduled task must be executed.

#### Task Parameter

- **Captured Before:** Enter the number of days from 1 to 99. The faces captured before the specified days will be deleted as per the scheduled task.

#### For Schedule Parameter: Temporary User/Worker

The screenshot shows the 'Schedule Parameter' window. The 'Task' dropdown is set to 'Temporary User/Worker'. The 'Run Schedule' dropdown is set to 'Weekly'. Below this, there are checkboxes for days of the week: Sun, Mon, Tue, Wed, Thu, Fri, and Sat. The 'Schedule Run Time' field is set to 'HH:MM'. At the bottom, there is a 'Task Parameters' section with a 'Process' dropdown set to 'Make User' and a 'Run Process For' dropdown set to 'Active Temporary Users'.

### ***Schedule Parameter***

- **Run Schedule:** Select the desired option — **Weekly, Monthly** — to run this scheduled task.
- **Schedule Run Time:** Enter the desired time in HH:MM format at which you wish this scheduled task must be executed.

### ***Task Parameters***

- **Process:** Select the process which you wish to execute — Delete Temporary User/Worker, De-activate Temporary User/Worker, Make User, Make Worker.
- **Run Process For:** Select the desired option as per the Process selected.
  - If you have selected **Delete Temporary User/Worker** as the **Process**, the **Run Process For** options are Active Temporary Users, Active Temporary Workers, Inactive Temporary Users, Inactive Temporary Worker, All Temporary Users, All Temporary Workers.
  - If you have selected **De-activate Temporary User/Worker** as the **Process**, the **Run Process For** options are All Temporary Users, All Temporary Workers.
  - If you have selected **Make User** as the **Process**, the **Run Process For** options are All Temporary Users, Active Temporary Users, Inactive Temporary Users.
  - If you have selected **Make Worker** as the **Process**, the **Run Process For** options are All Temporary Workers, Active Temporary Workers, Inactive Temporary Workers.

## Scheduling Reports

The *Report Scheduler* functionality enables e-mail reports to be sent to selected users as per configured schedules. The system uses the *COSEC Alerts* service settings to send the e-mails.

To schedule a report, select **Admin module > System Utilities > Report Scheduler** and the following screen will appear.

The screenshot shows the 'Report Scheduler' web application. The interface includes a top navigation bar with a search field and a toolbar with icons for back, add, edit, delete, and print. The main content area is divided into two sections. The left section contains configuration fields: 'Scheduler Type' (set to 'Reports'), 'Schedule Name' (empty), 'Active' (checked), 'Module' (set to 'All'), 'Parent Menu' (set to 'All'), and 'Report' (set to 'Select Report'). Below these are sections for 'Send Email Notification' (with fields for 'Email ID', 'Email Address', 'Report Format' set to 'PDF', and 'Message' set to 'Email Body 500 (Chars)') and 'Schedule Parameter' (with 'Schedule Run Time' set to 'HH:MM' and 'Schedule Run Day' set to 'Weekly' with checkboxes for Mon, Tue, Wed, Thu, Fri, Sat, and Sun). The right section is a table with columns 'ID' and 'Schedule Name', currently displaying 'No Data'. At the bottom, there is a 'Report Parameters' section with a dropdown arrow.

Click the **New** button and provide the following parameters.

- **Scheduler Type:** Select the scheduler type as **Report** from the dropdown list.
- **Schedule Name:** Enter a unique name for the new report schedule to be defined.
- **Active:** Enable to activate the scheduler.
- **Module:** Select the module name from the dropdown list, for which this scheduler would apply. Select **All** if you desire to schedule reports of all the modules.
- **Parent Menu:** As per the selected module, the options (sub module) will be available into the dropdown list. Select the desired one of which the report is to be selected for schedule. If the **Module** selected is **All**, then select **All**, to schedule the report of all the sub modules.
- **Report:** Select a report type from the dropdown list, for which the schedule is assigned. This list is dependent on the **Module** selected.



Along with the existing options, the **Select All** check box is provided that allows you select all the options on all the pages at once. In the reports mentioned below the Select All check box is provided:

- Module (Leave Management) > Report (Leave Register) > Report Parameters > Select Leave (Selected)
- Module (Leave Management) > Report (Leave Application) > Report Parameters > Select Leave (Selected)
- Module (Visitor Management) > Report (Visitor History) > Report Parameters > Group by Selection > Station (Selected)
- Module (Devices) > Report (Device wise Event) > Report Parameters > Device Selection > Filter Device (Randomly)
- Module (Devices) > Report (Device wise Event) > Report Parameters > Device Selection > Filter Device (Device Group)

### Send Email Notification

This section offers the following options:

- **Send Report To:** Select the desired option from the given drop-down.
1. **Configured Email ID:** When Configured Email ID is set, then the report will be sent to the respective Email ID only.

Make sure you configure the desired **Email ID**.

- **Email ID:** If you have selected **Configured ID** as the **Send Report To** option, enter the email address of the recipient to whom the specific report is to be sent. In the event of multiple email ids, use a comma as the separator between the ids.



Report will be sent only to those recipients whose email address is already stored in the system database.

Under the **Filter** section:

- In **Send Report To**, select the desired option.
    - User Wise: Select the desired users from the picklist.
    - Group Wise: Select the desired groups from the picklist. The reports will be sent to the users within the group.
    - All
  - In **Generate Report For**, select the desired option
    - All Users
    - Active Users
    - Inactive Users
2. **Reporting In-Charge:** When Reporting In-Charge is set, then the report will be sent to the Reporting In-Charge of the user for whom this report is being generated.

You can send report to selected RIC users or selected RIC users within a group.

To set the desired option, under the **Filter** section in **Send Report To** select the desired option.

- User Wise: Select the desired RIC users from the picklist.

- **Group Wise:** Select the desired groups from the picklist. The reports will be sent to the RIC users within the group.

In case the Email ID of Reporting In-Charge is not available or is invalid, then the report will not be sent. Make sure the Reporting Group is configured for the user otherwise the report will not be sent.

3. **Assigned User Itself:** When Assigned User itself is set, then the report will be sent to respective user for whom the report is being generated.

You can send report to selected users or selected users within a group.

To set the desired option, under the **Filter** section in **Send Report To** select the desired option.

- **User Wise:** Select the desired users from the picklist.
- **Group Wise:** Select the desired groups from the picklist. The reports will be sent to the users within the group.
- **All**

In case the Email ID of the users is not available or is invalid, then the report will not be sent.

- **Report Format:** Select the format in which the report is to be mailed to the recipients in one of the three formats - PDF, XLS or CSV.
- **Message:** Enter relevant description regarding the report in the **Message** field with maximum 500 characters. The subject line for the scheduled reports will be as follows:

<Report Name>: Generated on - <schedule run date-time (dd/mmm/yyyy - hh:mm)>

### Schedule Parameter

This section enables the user to set the schedule of the reports or tasks.

The screenshot shows the 'Schedule Parameter' form. It has two main fields: 'Schedule Run Time' with a text input containing 'HH:MM' and a red asterisk, and 'Schedule Run Day' with a dropdown menu set to 'Weekly'. Below the dropdown are seven checkboxes for the days of the week: Sun, Mon, Tue, Wed, Thu, Fri, and Sat.

- **Schedule Run Time:** Specify the time at which you want the report to be generated.
- **Schedule Run Day:** You can schedule reports **Weekly** or **Monthly** or **Bi-weekly**.
  - For **Weekly** reports, you can select the days of the week.
  - For **Monthly**, you can select any day of the month.

The screenshot shows the 'Schedule Parameter' form with 'Monthly' selected in the 'Schedule Run Day' dropdown. The 'Every (Day Of the Month)' field is set to '1'.

- For **Bi-Weekly** reports, you can select a day of the week.as well select the desired week of the year.

**Schedule Parameter**

Schedule Run Time \*

Schedule Run Day

☒ Mon ☐ Tue ☐ Wed ☐ Thu  
☐ Fri ☐ Sat ☐ Sun

Week of the Year  ⓘ

- In **Week of the Year** select the desired option as **Odd Weeks** or **Even Weeks**.

## Report Parameters

This section lists some additional parameters for the report scheduler configuration, depending on the type of report scheduled.

- The **Processing Period** enables the administrator to set the time period of the selected report. Some reports will have only the **For Date** option while others will have the **Start Date** and the **End Date** options.
- **For Date:** Specify the day prior to the scheduled day for which the report is required. If report for current date of scheduled day is required then set the value as 0. If scheduled day is set as Friday and the number of days specified is 2 then system will send the report of Wednesday every Friday.
- **Start and End Date:** Specify the time period prior to the scheduled day for which the report is required. For reports relating to month wise data, specify the month prior to the scheduled month for which the report is required. If the number specified in this field is 1, then system will send report of the previous month.
- **Group By Selection:** Select the group from the **Group By** dropdown list for which the report is to be scheduled.
- **Format Selection:** Select the Select the desired Format from the dropdown list to generate the report. If you select Visitor History 1, the report will be generated without Visitor photo and if you select Visitor History 2, the report will be generated with Visitor photo.
- **Application Type Filter:** Select the **Application Type** from the dropdown list for which the report is to be scheduled.
- **List Selection:** Select the type of applications from the **Select** dropdown list for which the report is to be scheduled. One can select multiple applications.

The below figure illustrates the **Report Parameters** for an example, where a Leave Application report is being scheduled by a Leave Management module user:

Report Scheduler

←

+

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🗑

💾

✕

Scheduler Type

Reports

Schedule Name

Absence Check

Active

☒

Module

Leave Management

Parent Menu

None

Report

Leave Application

Send Email Notification

Email ID

sheetal@matrix.com

Report Format

PDF

Message

Leave Application Report

Schedule Parameter

Schedule Run Time

12:00

Schedule Run Day

Weekly

☐ Sun
☒ Mon
☐ Tue
☐ Wed
☐ Thu
☐ Fri
☐ Sat

Report Parameters

Processing Period

Start Days Before Scheduled Day

1

End Days Before Scheduled Day

1

Group by Selection

Group By

Organization

Application Type Filter

Application Type

All

Group By Selection

Group By

Date

List Selection

Select

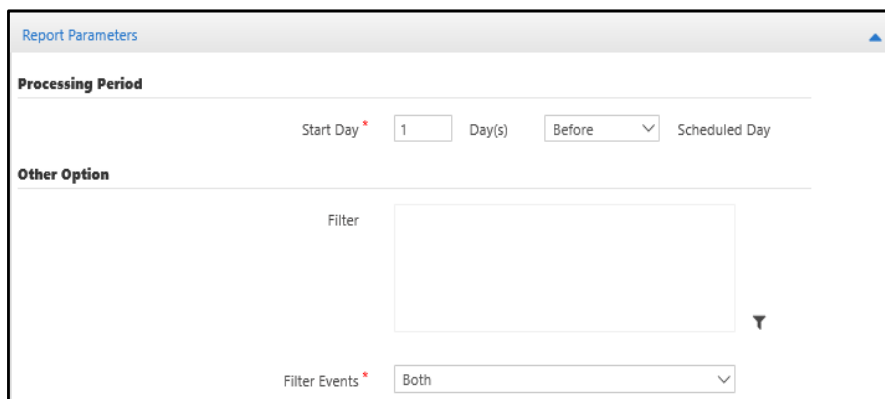
☒ Pending
☐ Approved
☐ Rejected

thSelect Leave/Tour el

All



For the customized report, the 'Processing Period' will include **Other Option** parameters (Filter) if the 'Optional Parameters' option is enabled in the *Report Configurations > Report Builder*.



The screenshot shows a 'Report Parameters' window. Under the 'Processing Period' header, there are fields for 'Start Day' (containing '1'), 'Day(s)', a 'Before' dropdown menu, and 'Scheduled Day'. Under the 'Other Option' header, there is a 'Filter' text area and a 'Filter Events' dropdown menu set to 'Both'.



*"Filter Events" option will available only for the report with Report Type = Events.*

For the detailed configuration of Other Option, [See "Example: Events Report Template placed in User module" on page 3067.](#)

## Filter

This section enables you to specify the users to whom the reports need to be sent. The users can be filtered based on individual users or users belonging to various groups as configured in the COSEC application.

Refer to ["Send Email Notification"](#) for more details.

Click the **Save** button to save the report schedule. All created report schedules are displayed in the list on the right hand side of the page.



*You must configure Email settings from **Email Configuration** page of **System Configuration** tab to send the Email notification.*

*The Access Control- Elevator Access Control Report requires Basic + ACS License.*

### Example: JPC module- Project Summary report scheduler

**Report Scheduler**

Scheduler Type: Reports

Schedule Name: JPC

Active: ☒

Module: Job Processing and Costing

Parent Menu: Work Summary

Report: Project Summary

**Send Email Notification**

Email ID: Email Address

Report Format: PDF

Message: Email Body 500(chars)

**Schedule Parameter**

Schedule Run Time: 12:00

Schedule Run Day: Weekly

☐ Sun ☒ Mon ☐ Tue ☐ Wed ☐ Thu ☐ Fri ☐ Sat

### Example: Device module- Device Wise Events report scheduler

**Report Scheduler**

Scheduler Type: Reports

Schedule Name: DevicewiseEvents

Active: ☒

Module: Devices

Parent Menu: None

Report: Device-Wise Events

**Send Email Notification**

Email ID: Email Address

Report Format: PDF

Message: Email Body 500(chars)

**Schedule Parameter**

Schedule Run Time: 12:00

Schedule Run Day: Monthly

Every(Day Of The Month): 1

### Example: Continuous Absence/Presence

The continuous Absence/Presence report allow you to generate the attendance summary of user, if he/she is absent or present continuously for how many days.

Select "Time and Attendance" as **Module**, "Absenteeism" as **Parent Menu** and "Continuous Absence/Presence" as **Report**

Report Scheduler

←

+

✎

🗑

📄

✕

Scheduler Type

Reports

Schedule Name \*

AB-PR

Active

☒

Module

Time and Attendance

Parent Menu

Absenteeism

Report

Continuous Absence/Presence

Send Email Notification

Email ID

Email Address

Report Format

PDF

Message

Email Body 500(chars)

Schedule Parameter

Schedule Run Time \*

20:00

Schedule Run Day

Weekly

☒ Sun

☐ Mon

☐ Tue

☐ Wed

☐ Thu

☐ Fri

☐ Sat

Consider below Report Parameters for Report Type = “Continuous Absence”

Report Parameters

Processing Period

Start Days Before Scheduled Day \*

1

End Days Before Scheduled Day \*

1

Report Template

Report Type

Continuous Absence

Continuous Absent Days \*

1

Select Shift

All

Consider half day PR as full day PR

☒

?

Days to consider as Absent

☐ Days

<input checked="" type="checkbox"/> AB	Always	?	HH:MM
<input checked="" type="checkbox"/> WO	Always	?	HH:MM
<input checked="" type="checkbox"/> PH	Always	?	HH:MM
<input checked="" type="checkbox"/> Leave	Always	?	HH:MM
<input checked="" type="checkbox"/> FB	Always	?	HH:MM
<input checked="" type="checkbox"/> RD	Always	?	HH:MM
<input type="checkbox"/> IN	Always	?	HH:MM

?

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## Report Template

- **Continuous Absent Days:** Enter the minimum number of days for 'Absence' which is required to be counted as 'Continuous Absent Days'. Suppose, 3 days are specified, then the counting will be started and shown into the report only if user is absent for 3 or more days. The absence of less than 3 days will not be considered as Continuous Absent Days.


- **Select Shift:** Select the desired option — **All**, or **Shift Wise**.

Select **All**, if you want the report to be generated for all the Shifts. In case you require reports of particular shifts like Report of only General Shift or Report of Night Shift, then select the **Shift Wise** option. Multiple shifts can be selected from the picklist.

If you select **Shift Wise**, click the **Shift** picklist. The **Picklist for Shift Masters** pop-up appears. You can either select particular shifts or can select all the shifts at once.

To select particular shifts, select the check boxes of the desired shifts or to select all the shifts, select the **Select All** check box.

Click **OK**.

The selected shifts appear in the grid. You can also delete the desired shift. To do so, click **Delete**  of the respective shift.

- **Consider half day PR as full day PR:** Enable the check-box to consider a day as full day present even if the user is present for half day.

## Days to Consider as Absent

Enable the respective check-boxes for the days which should be consider as a Absent. Also select the required option from the dropdown list located besides the day column as shown below.

**Always:** Select the option to count the entire day as 'Absent'.

**Skip:** Select to Skip the day from counting of continuous absence.

**Shift Hours:** Select to check for assigned work hours of a user. If the work hours for the day are equal or greater than the assigned hours, then count as present else count the day in number of total continue absent days.

**Custom Hours:** Select and specify the custom work hours which is required to be completed on the day. If the work hours are equal or greater than the specified hours then, count as present else count the day in number of total continue absent days.

Configure the Filter tab and click on the save button to Save the scheduled report.



*Kindly consider below example for the report generation of Continuous Absence.*

Let consider below weekly attendance details of a User-1 for which the 'Continuous Absence' report is to be generated.

01/06/2020 - PR - PR  
02/06/2020 - PR - PR  
03/06/2020 - AB - AB  
04/06/2020 - PR - PR  
05/06/2020 - PR - PR

06/06/2020 - PR - PR  
07/06/2020 - WO - WO

The 'Schedule Run Time' is 20.00 hrs and 'Schedule Run Day'; Sunday is configured as shown below:

**Schedule Parameter**

Schedule Run Time \* 20:00

Schedule Run Day Weekly

☒ Sun ☐ Mon ☐ Tue ☐ Wed ☐ Thu  
☐ Fri ☐ Sat

Report Parameters

Filter

The 'Report Template' and 'Days to Consider as Absent' is configured as shown below:

**Report Template**

Report Type Continuous Absence

Continuous Absent Days \* 1

Select Shift All

Consider half day PR as full day PR ☒

**Days to consider as Absent**

<input type="checkbox"/> Days			
<input checked="" type="checkbox"/> AB	Always		HH:MM
<input checked="" type="checkbox"/> WO	Always		HH:MM
<input checked="" type="checkbox"/> PH	Always		HH:MM
<input checked="" type="checkbox"/> Leave	Always		HH:MM
<input checked="" type="checkbox"/> FB	Always		HH:MM
<input checked="" type="checkbox"/> RD	Always		HH:MM
<input type="checkbox"/> IN	Always		HH:MM

Save the configuration.

Now as per the User-1's weekly attendance and configuration, the scheduled report (on Sunday) will be run as shown below.

Back

Find...

1 of 1

100%

Main Report

Organization-1

Page 1 of 1

Continuous Absence For 1 Or More Days From 01/06/2020 To 07/06/2020

Run by: System Admin

Date: 15/06/2020

16:40

Sr No	User ID	Name	From	To	No. of Days
1	1062	Man User-1	07/06/2020	07/06/2020	1
2	1062	Man User-1	03/06/2020	03/06/2020	1

The same way you can configure the parameters for the Report Type = “Continuous Presence” as shown below.

Report Scheduler

Processing Period

Start Days Before Scheduled Day \*

1

End Days Before Scheduled Day \*

1

Report Template

Report Type

Continuous Presence

Filter Based On

Days

Continuous Present Days \*

1

Select Shift

All

Consider half day PR as full day PR

☒

Days to consider as Present

☐ Days

☐ AB

Always

HHMM

☐ WO

Always

HHMM

☐ PH

Always

HHMM

☐ Leave

Always

HHMM

☐ FB

Always

HHMM

☐ RD

Always

HHMM

☒ IN

Always

HHMM

Filter

## Report Template

- **Continuous Present Days:** Enter the minimum number of days for 'Presence' which is required to be counted as 'Continuous Present Days'. Suppose, 4 days are specified, then the counting will be started and shown into the report only if user is present for 4 or more days. The presence of less than 4 days will not be considered as Continuous Present Days.
- **Consider half day PR as full day PR:** Enable the checkbox to consider a day as full day present even if the user is present for half day.

## Days to Consider as Present

Enable the respective checkboxes for the days which should be consider as a Present. Also select the required option from the dropdown list located besides the day column as shown below.

**Always:** Select the option to count the entire day as Present.

**Skip:** Select to Skip the day from counting of continuous Present.

**Shift Hours:** Select to check for assigned work hours of a user. If the work hours for the day are equal or greater than the assigned hours, then count as present else count the day in number of total continue absent days.

**Custom Hours:** Select and specify the custom work hours which is required to be completed on the day. If the work hours are equal or greater than the specified hours then, count as present else count the day in number of total continue absent days.

Configure the Filter tab and click on the save button to Save the scheduled report.



*Kindly consider below example for the report generation of Continuous Presence.*

Let consider below weekly attendance details of a User-1 for which the 'Continuous Presence' report is to be generated.

01/06/2020 - PR - PR  
02/06/2020 - PR - PR  
03/06/2020 - AB - AB  
04/06/2020 - PR - PR  
05/06/2020 - PR - PR  
06/06/2020 - PR - PR  
07/06/2020 - WO - WO

The 'Schedule Run Time' is 20.00 hrs and 'Schedule Run Day'; Sunday is configured as shown below:

**Schedule Parameter**

Schedule Run Time \* 20:00

Schedule Run Day Weekly

☒ Sun ☐ Mon ☐ Tue ☐ Wed ☐ Thu  
☐ Fri ☐ Sat

Report Parameters

Filter

The 'Report Template' and 'Days to Consider as Present' is configured as shown below:

**Report Template**

Report Type: Continuous Presence

Filter Based On: Days

Continuous Present Days: 1

Select Shift: All

Consider half day PR as full day PR: ☒

**Days to consider as Present**

Days			
<input type="checkbox"/> Days			
<input type="checkbox"/> AB	Always		HHMM
<input type="checkbox"/> WO	Always		HHMM
<input type="checkbox"/> PH	Always		HHMM
<input type="checkbox"/> Leave	Always		HHMM
<input type="checkbox"/> FB	Always		HHMM
<input type="checkbox"/> RD	Always		HHMM
<input checked="" type="checkbox"/> IN	Always		HHMM

Save the configuration.

Now as per the User-1's weekly attendance and configuration, the scheduled report (on Sunday) will be run as shown below.

Back

Find... 1 of 1 100%

**Main Report**

Organization-1 Page 1 of 1

Continuous Presence For 1 Or More Days From 01/06/2020 To 07/06/2020

Run by: System Admin Date: 15/06/2020 17:05

Sr No	User ID	Name	From	To	No. of Days
1	1062	Mant User-1	04/06/2020	06/06/2020	3
2	1062	Mant User-1	01/06/2020	02/06/2020	2



### Example: Visitor History Report

Select “**Visitor Management**” as Module and “**Visitor History**” as Report.

Scheduler Type	Reports
Schedule Name *	Visitor Report
Active	<input checked="" type="checkbox"/>
Module	Visitor Management
Parent Menu	Visitor Summary
Report	Visitor History

This Report parameters will change according to **Report Type**.

Report Parameters	
<b>Processing Period</b>	
Start Days Before Scheduled Day *	1
End Days Before Scheduled Day *	1
<b>Group by Selection</b>	
Group By	Organization
Group Needed In Report	<input type="checkbox"/>
Station	All
<b>Report Template</b>	
Format Selection	Visitor History 1

Enabling the check-box “**Group Needed In Report**” will display the name for that particular group in the generated report.

Then Fill up the filter:

**Select Users:** Select All or User Wise depending on your requirement.

**User:** If you select “Select Users : User Wise”, then you have to mention that particular user.

**Generate Report For:** Select for whom you want to generate the report.

Filter	
<b>Send Report Of</b>	
Select Users	User Wise
User *	ID <input type="text"/> Name <input type="text"/>
Generate Report For	All Users

Click on **Save icon** after you are done with the configuration.

## Scheduling Data Export

This scheduler enables data export templates to be sent by e-mail to selected users as per configured schedules. The system uses the *COSEC Alerts* service settings to send the e-mails.

To schedule a data export, go to **Report Scheduler** page and click the **New** button.

ID	Schedule Name
5	Attendance Report
2	Monthly OT Report
1	Leave Application Schedule

- **Scheduler Type:** Select the scheduler type as **Export Data** from the dropdown list.
- **Schedule Name:** Enter a unique name for the new report schedule to be defined.
- **Active:** Enable to activate the scheduler.
- **Template:** Select template from the dropdown list based on which the report is to be exported.
- Setup the required e-mail and schedule configurations for the scheduler. Refer “Scheduling Reports”
- The **Export Parameters** section for data export scheduler will vary depending on the template selected. This section primarily defines the time range for which the data must be exported and the export file details.

For daily data, specify the number of days prior to the Scheduled Day for the **Start Date** as well as the **End Date** as shown. Here, the data from 1 day before the scheduled date to 1 day1s before the scheduled date is specified for export:

Export Parameters

Start Date (Days Before Scheduled Day) \*

1

End Date (Days Before Scheduled Day) \*

1

File Format

XLS

Filename \*

Export Data

For month-wise data, specify the month before the scheduled day for which data must be exported. If the number specified in this field is 1, then system will send data of the previous month.

- **File Format:** Specify the export file format.
- **Filename:** Specify a name for the file to be exported.



*If number of rows and columns are found to be more than 65535 and 255 respectively then Export Data would generate .xlsx file.*

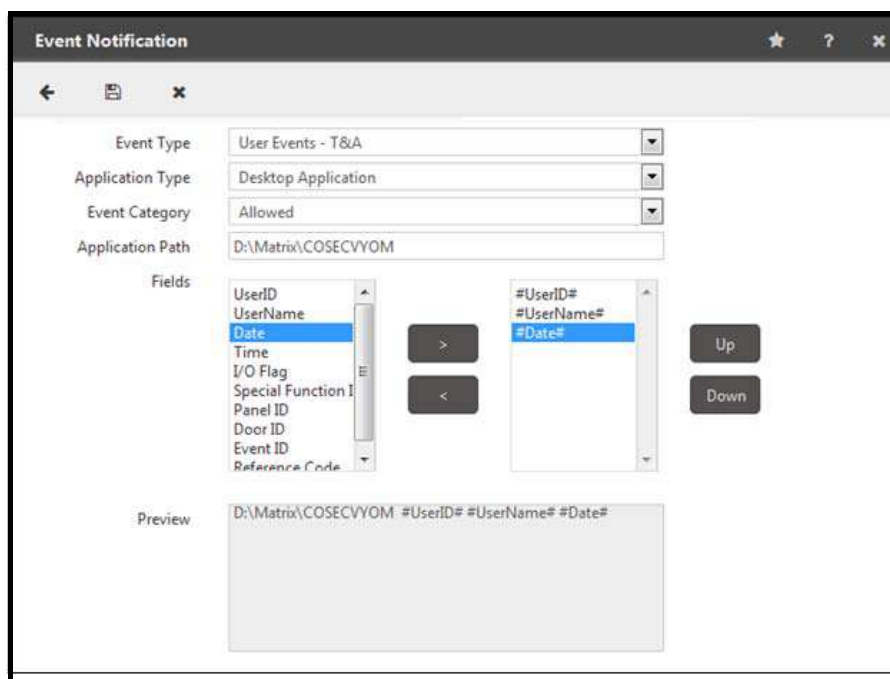
- In the **Filter** section, specify the users whose data is to be exported (if required).
- Click the **Save** button to save the schedule.

# Event Notification

The Event Notification feature enables third party application to access and display the COSEC events which is only displayed in COSEC monitor.

It enables to pass pre-defined fields from live events coming from the COSEC Panel-lite and door controllers to an external application, which in turn can place it in another database. The external application could be any third party desktop or a web application.

To access this functionality, Go to **Admin> System Utilities > Event Notification** and the following screen appears.



- **Event Type:** Select the type of event from the dropdown list. The options available are:
  - User Events - T&A (*Available only with the Time & Attendance add on module*)
  - User Events - All
- **Application Type:** Select the Application Type from the dropdown list.
- **Event Category:** Select the **Event Category** from the drop down list. The options available are: Allowed, Denied and Allowed+Denied.
- **Application Path:** Specify the application path in the following formats:
  - For Desktop application: **C:\Program Files\XYZ\XYZ.exe**
  - For Web Application: **http://localhost/XYZ/default.aspx**

The desktop application has to incorporate command line arguments while in the case of the web application query strings need to be incorporated in the external application.



*The application path is the path of third party application as required by the customer.*

- **Fields:** The grid displays the fields whose live values are available for export as shown.

The screenshot shows a user interface for selecting fields for export. On the left, under the heading 'Fields', is a scrollable list of available fields: UserID, UserName, Date, Time, I/O Flag, Special Function ID, Panel ID, Door ID, Event ID, and Reference Code. A right-pointing arrow button is positioned between the two lists. On the right, there is a scrollable list of selected fields, which currently contains '#UserName#' and '#UserID#'. Below this list are 'Up' and 'Down' buttons to adjust the order of the selected fields.

Select the fields one at a time and click on the right arrow button. The selected fields will be visible on the right grid as shown above. Click on the **Up** or **Down** button to change the order of the selected fields.

Refer the “[Field Values](#)” section of this topic for the values which will be sent for the various user events.

- Click **Save** on the menu bar to commit the changes. The administrator needs to ensure that the COSEC Monitor application is running for this functionality to work. In order to stop the exporting process the administrator needs to blank out the **Application Path** parameter from the page.

## Field Values

The export events option will send the following values based on the user event.

- **I/O Flag:** This flag represents the IN or OUT status. The following values can be sent:
  - 0 = Entry
  - 1 = Exit
- **Special Function ID:** The following special function code values will be sent based on the special function associated with the user event.

Special Function Name	Special Function Code
Official Work-IN Marking in T&A	1
Official Work-OUT Marking in T&A	2
Short Leave-IN Marking in T&A	3
Short Leave-OUT Marking in T&A	4
Regular - IN Marking in T&A	5
Regular - OUT Marking in T&A	6
Break End Marking in T&A	7
Break Start Marking in T&A	8
Over time - IN Marking in T&A	9
Over time - OUT Marking in T&A	10
Late -IN Allowed Marking in T&A	11
Early - OUT Allowed Marking in T&A	12
Access in Degrade Mode Marking	99
Smart Identification	98

Special Function Name	Special Function Code
e-Canteen	97

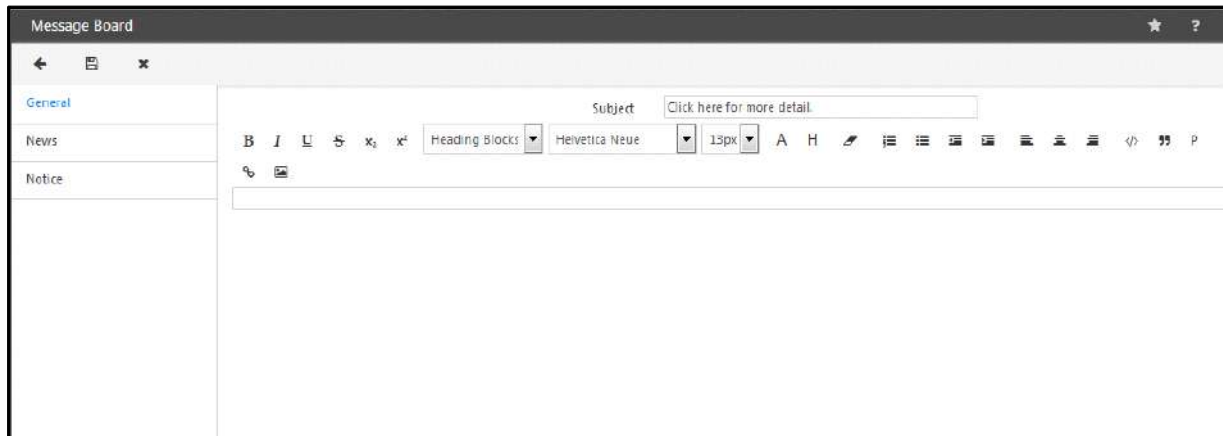
- **Event ID:** This value will depend on the User category as well as the type of user event as follows:

Event ID	Event Description
101	User Allowed
102	User Allowed - with Duress
103	User Allowed - Anti-Pass Back-soft
104	User Allowed - Dead-man Zone
105	User Allowed - Door Not open
151	User Denied - User Invalid
152	User Denied - Occupancy Control
153	User Denied - 2-Person Rule
154 '	User Denied - Time Out
155	User Denied - Visitor Escort Rule
156	User Denied - Anti-Pass Back
157	User Denied - Disabled User
158	User Denied - Blocked User
159	User Denied - First IN User
160	User Denied - DND Enabled
161	User denied - Control zone
162	User Denied - Door Lock
163	User Denied - Invalid Access Group

# Message Board

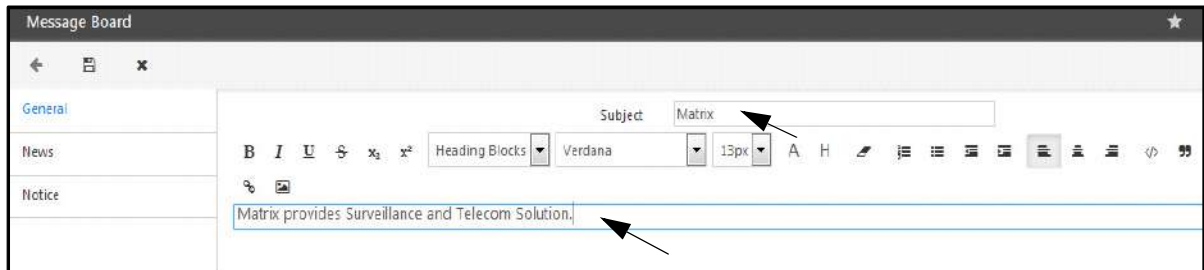
The Message board has been provided to enable the administrator to specify messages which should be displayed on the *Employee Self Service* application home page when ESS users login to the application.

To access this option, go to **Admin module > System Utilities > Message Board** and the following screen appears.



The page displays the following tabs:

- **General** - This tab allows to configure and display general messages of interest.
- **News** - This tab allows to configure and display latest news items.
- **Notice** - This tab allows to configure and display notices for all employees.

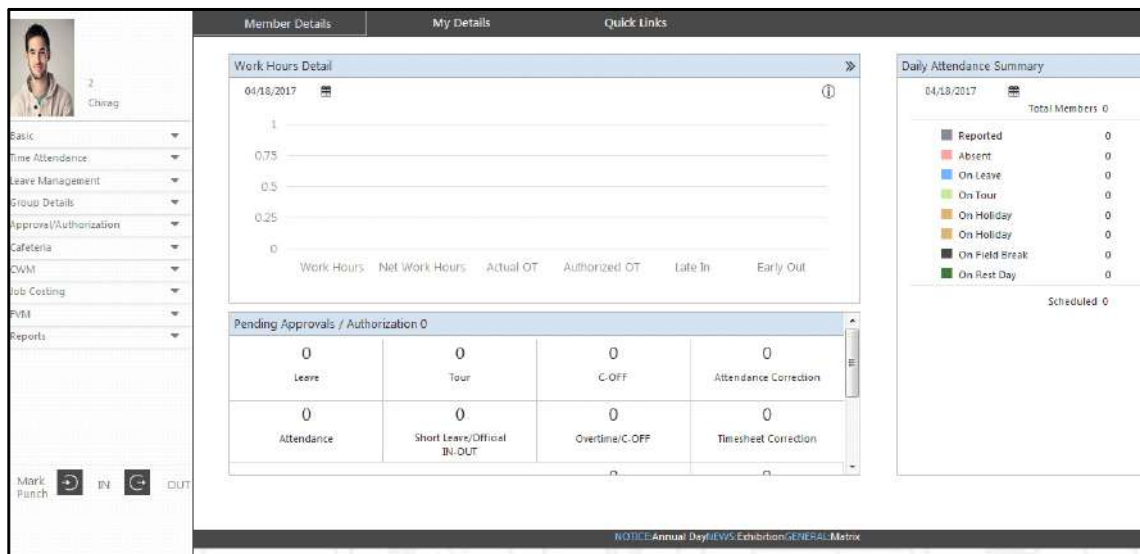


Select the appropriate tab based on the type of message to be configured and enter the message for the ESS users.

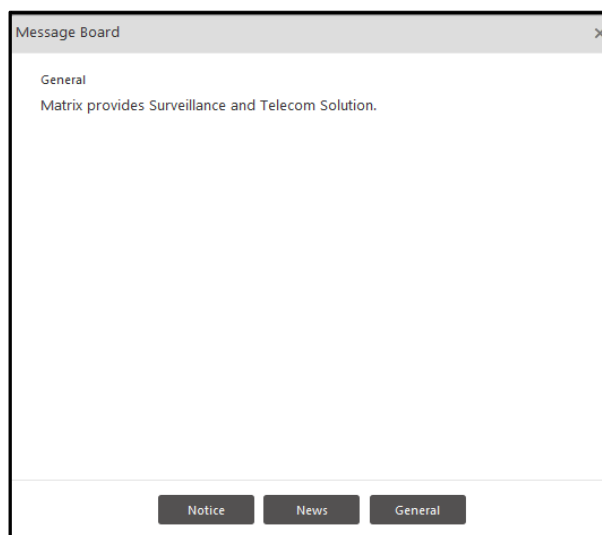
Enter the **Subject** and the related message in the box as shown above.

Click the **Save** button to save the entries.

The ESS user can view the **Notice**, **News** and **General** message by clicking on it on the scrolling information from the bottom of home page as shown below.



Click on General. The general message will be displayed as shown below.



You can click on Notice and News button to read the respective message.



# Manage Database

---

Manage Database allows the posting, retrieval and erasing of data from the database. The Post/Retrieve/Remove request is submitted in a queue which will be processed on server side in a parallel manner.

To access this functionality, go to **Admin Module > System Utilities > Manage Database** and the following screen appears.



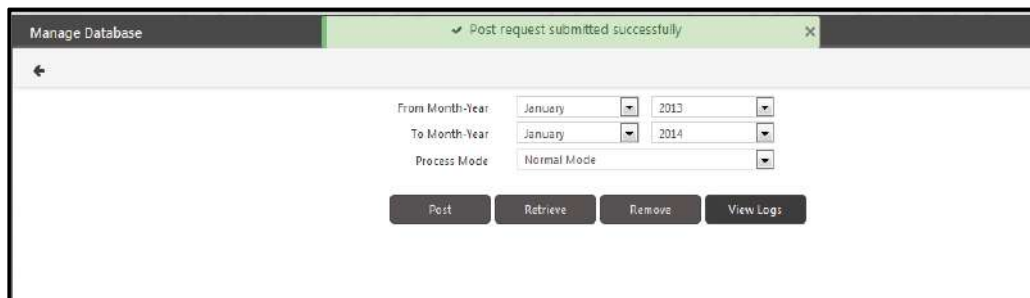
The screenshot shows the 'Manage Database' utility window. It features a header bar with the title 'Manage Database' and a back arrow icon. Below the header, there are three input fields: 'From Month-Year' with a dropdown menu set to 'January' and a year field set to '2013'; 'To Month-Year' with a dropdown menu set to 'January' and a year field set to '2014'; and 'Process Mode' with a dropdown menu set to 'Normal Mode'. At the bottom of the form, there are four buttons: 'Post', 'Retrieve', 'Remove', and 'View Logs'.

Select the **From month- year** as well as the **To month-year** whose data is to be posted. This functionality removes the transactions of the selected period from the current transaction table and posts it to another table thus reducing the load on the current transaction table.

Select the **Process Mode** as Normal mode or Advanced mode (overwrite destination).

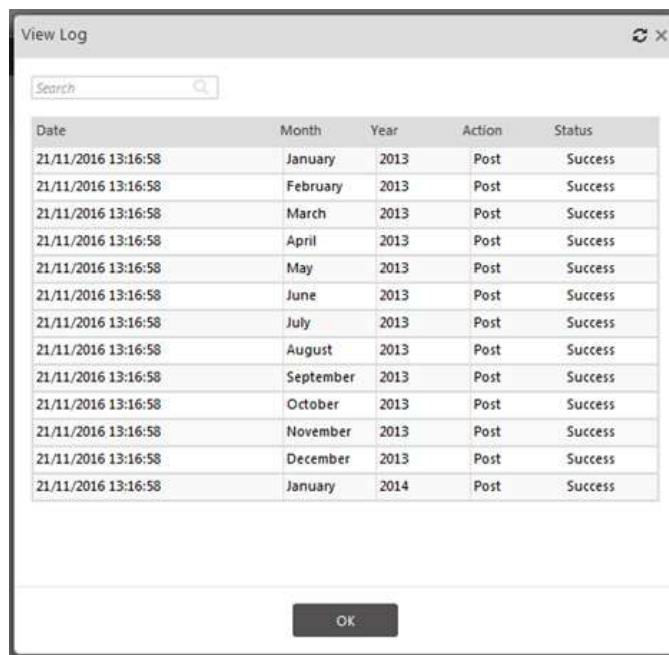
Click on the **Post** button. The utility will post the data to the backup table and will display the status in the bottom grid.

The Post request with log details is shown as below.



The screenshot shows the 'Manage Database' utility window after a successful post request. A green notification bar at the top displays the message 'Post request submitted successfully' with a close button. The form fields and buttons are identical to the previous screenshot, but the 'Post' button is now disabled.

Click on the **View Log** button to view the status of the transaction.



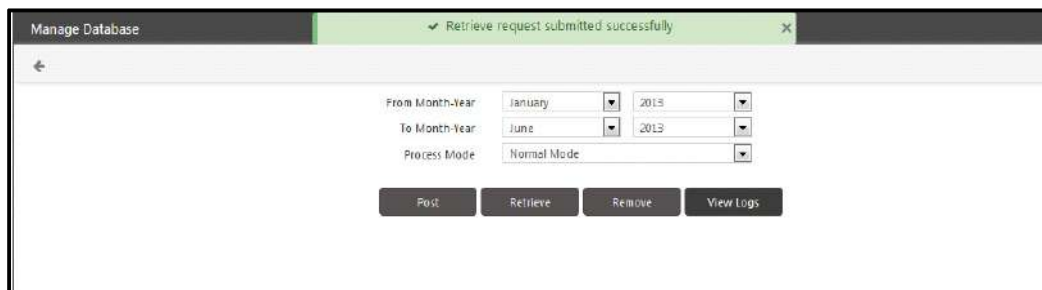
The View Log window displays a table with the following data:

Date	Month	Year	Action	Status
21/11/2016 13:16:58	January	2013	Post	Success
21/11/2016 13:16:58	February	2013	Post	Success
21/11/2016 13:16:58	March	2013	Post	Success
21/11/2016 13:16:58	April	2013	Post	Success
21/11/2016 13:16:58	May	2013	Post	Success
21/11/2016 13:16:58	June	2013	Post	Success
21/11/2016 13:16:58	July	2013	Post	Success
21/11/2016 13:16:58	August	2013	Post	Success
21/11/2016 13:16:58	September	2013	Post	Success
21/11/2016 13:16:58	October	2013	Post	Success
21/11/2016 13:16:58	November	2013	Post	Success
21/11/2016 13:16:58	December	2013	Post	Success
21/11/2016 13:16:58	January	2014	Post	Success



*Data posting cannot be done for data of the last three months, for posting data select the time period before three months.*

The **Retrieve** functionality restores the transactions of the selected month from the backup table to the current transaction table and is thus the reverse of the Posting process.



The Manage Database window shows the following options for data retrieval:


From Month-Year: January 2013

To Month-Year: June 2013

Process Mode: Normal Mode

Buttons: Post, Retrieve, Remove, View Logs

A green status bar at the top indicates: **Retrieve request submitted successfully**



The View Log window displays a table with the following data:

Date	Month	Year	Action	Status
21/11/2016 14:45:18	January	2013	Retrieve	Success
21/11/2016 14:45:18	February	2013	Retrieve	Success
21/11/2016 14:45:18	March	2013	Retrieve	Success
21/11/2016 14:45:18	April	2013	Retrieve	Success
21/11/2016 14:45:18	May	2013	Retrieve	Success
21/11/2016 14:45:18	June	2013	Retrieve	Success
21/11/2016 13:16:58	January	2013	Post	Success
21/11/2016 13:16:58	February	2013	Post	Success
21/11/2016 13:16:58	March	2013	Post	Success

The **Remove** option permanently deletes the transactions of the selected month from the table.



If Process mode is selected as **Normal**, then on clicking **Post**, the data which are already present in Backup table will be skipped when data are transferred. If the Process Mode is selected as **Advance**, then on clicking **Post**, the data which are already present in Backup table will be overwritten when data are transferred.

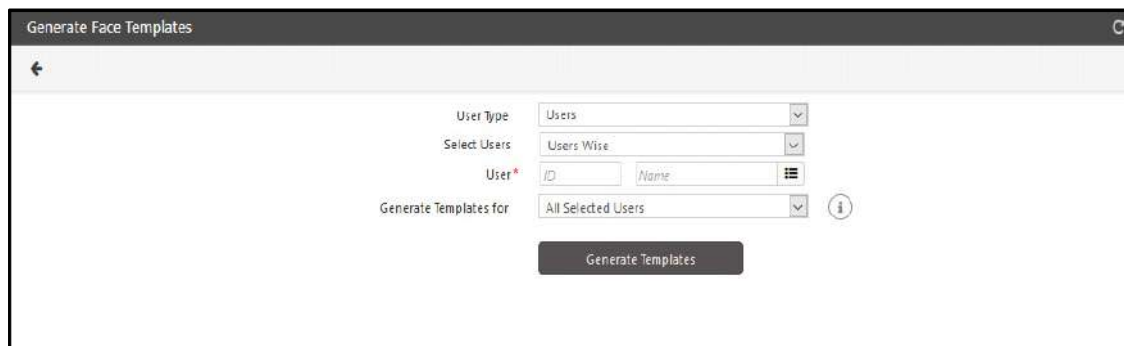
If Process mode is selected as **Normal**, then on clicking **Retrieve**, the data which are already present in Current table will be skipped when data are transferred. If the Process Mode is selected as **Advance**, then on clicking **Retrieve**, the data which are already present in Current table will be overwritten when data are transferred.

# Generate Face Templates

When Matrix FR algorithm is to be used for identification process, it requires face templates for identification and recognition process. So if the images are converted into templates during enrollment of faces, then it reduces the duration required for template conversion at Identification Service restart.

This page enables to convert face into templates.

To access this functionality, go to **Admin Module > System Utilities > Generate Face Templates** and the following screen appears.

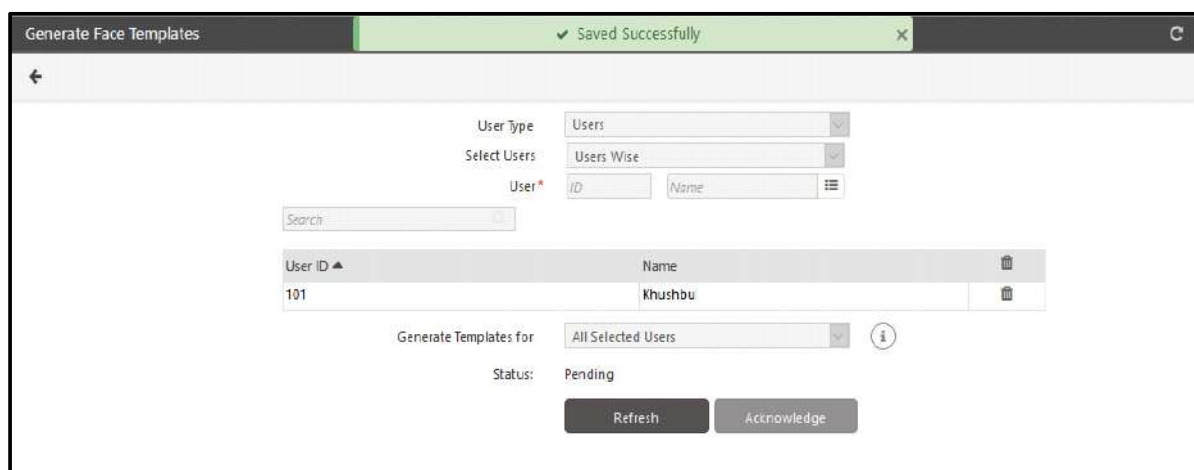


**User Type:** Select the User type as Users, Visitors or Both.

**Select Users/Visitors:** Based on selection of User Type, select the User, Visitor or Both individually, Group wise or All. The picklist will contain only FR enables user/visitor.

**Generate Templates for:** Select the option for generating template for All Selected Users or Differential Users. Selecting Differential Users will generate templates for users out of selected users, whose templates have not been generated previously.(For Users displayed in the error list)

Then click on **Generate Templates** button to process the conversion of enrolled faces into templates.



On start of Alert Service, it will pick up the records that are in pending state and the records change to "In Progress" state. If the process of generating templates is complete, the status is displayed as "Process Completed".



*Generate Face Templates is not tested in 32 bit Computer*

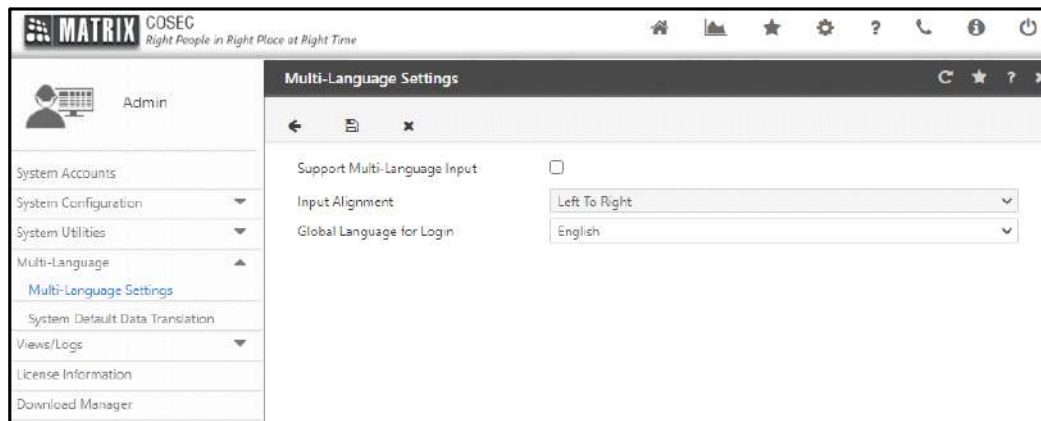
# Multi-Language Settings

COSEC supports multi-language, making it usable across the globe.

To configure multi-language settings,

Click **Admin Module > Multi-Language > Multi-Language Settings**.

The **Multi-Language Settings** page appears.



- **Support Multi-language Input:** The users around the world can use COSEC system in their regional languages. Select the check box to enable the multi-language input functionality which will enable you to enter the input in your own language.

Data input from server side, device side and storing the same in database will support UTF-8 characters.

If you wish to set the keyboard functionality to the preferred language then follow [“Keyboard Functionality”](#).



*Multi-language is not supported in Alert Messages sent via Email/SMS/App Notification.*

*Multi-language is not supported in Reports generated via Report Builder.*

- **Input Alignment:** Select the orientation of multi-language input data from **Left to right** or **Right to left**. Example: if you have selected the **Right to Left** option, then the input is entered begins from right side of the text-box and goes to the left. The invalid characters are as follows: # % ^ = ' " { } | ; < > ? & \*
- **Global Language For Login:** Select the preferred language from the drop-down list. Once you select the preferred language, it will be applied only on the Login pages of — **COSEC Web, COSEC Employee On-boarding, COSEC VMS Web Portal, COSEC Enroll Utility, COSEC Visitor Utility, and COSEC Monitor Utility**.

**Example:** If you select Gujarati from the drop-down list and save the changes, then the default English language will be replaced by Gujarati on Login pages of — **COSEC Web, COSEC Employee On-boarding, COSEC VMS Web Portal, COSEC Enroll Utility, COSEC Visitor Utility, and COSEC Monitor Utility**.

If you wish to view the pages in another language post login, click **Account Settings > Set Language> Preferred Language**. For details, refer to [“Account Setting”](#).



**Global Language For Login** option is applicable only for — **Centra** and **OEM**.

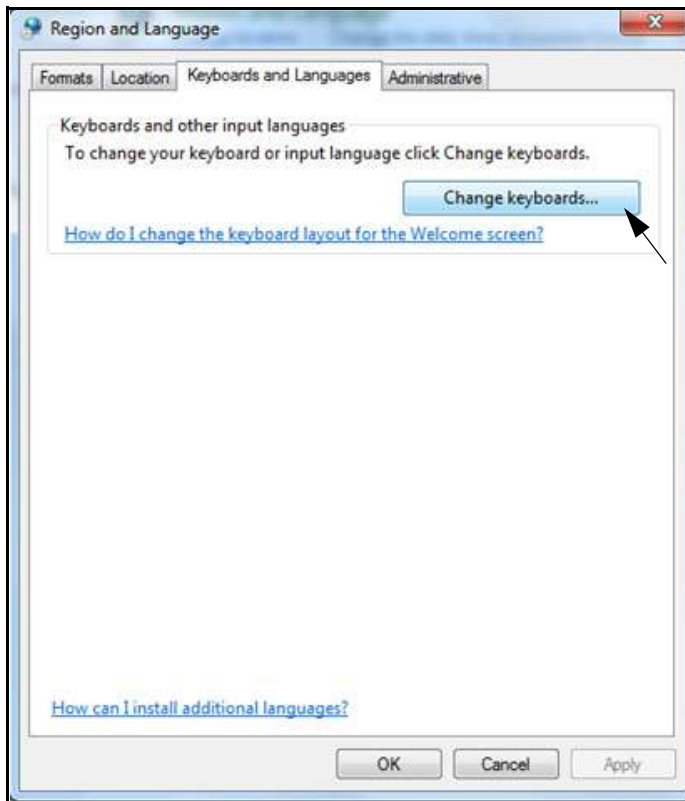
The **Global Language For Login** options appear as per the language files available in the **Language Resource** folder at the following path: **C:\inetpub\wwwroot\COSEC\Language Resource**.

You can add language files to this folder via Language translation using the Multi-Language Utility. To know more, refer to the Multi- Language Utility User Guide.

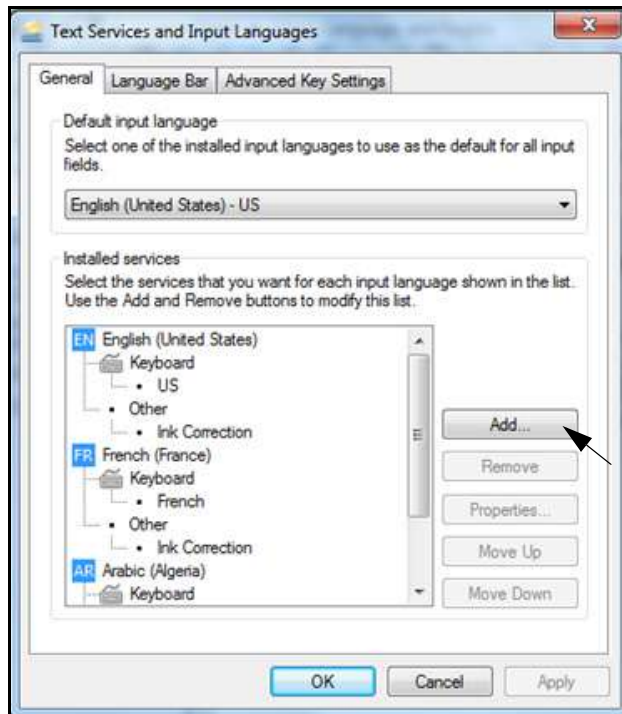
## Keyboard Functionality

To configure the Multi-language input functionality,

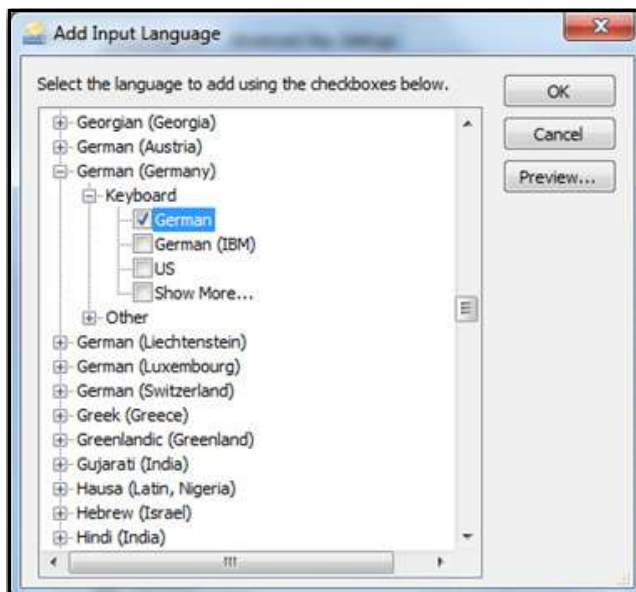
- Go to **Control Panel**.
- Select the **Clock, Language and Region**. Now click on **Change keyboards and other input methods**. The Region and Language window appears.



- Click on **Change Keyboards**. The **Text Services and Input Languages** window appears.



- Click **Add**. The Add Input Language window appears. Select the language to be added in the list. Click **OK**.



- The German language will be added as shown below.



- Again click **OK**. The Language bar can be viewed in the toolbar as shown below.



- You can select the language as Germany from language bar. The on-screen keyboard will be converted from English to German language.

## English Language Keyboard



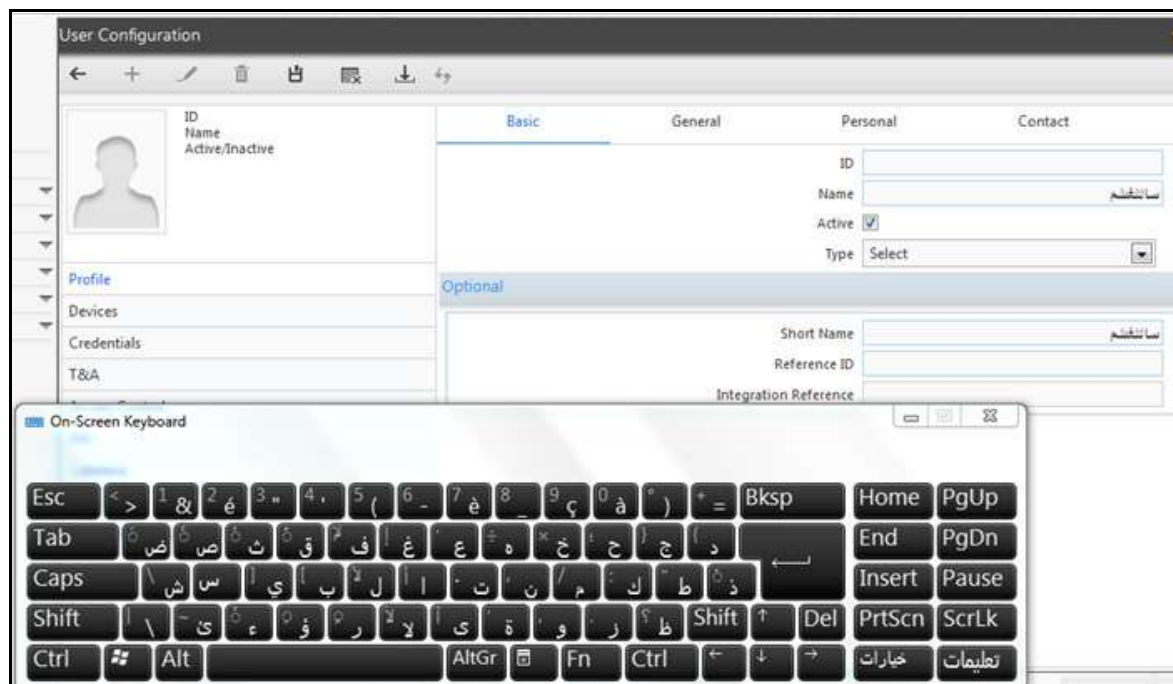


## German Language Keyboard



**Example:** The language input option selected is **right to left**. The language is selected as **Arabic**.

The user name is entered through on-screen keyboard in Arabic language as shown below:



Similarly the other parameters can be entered in the desired language.

# System Default Data Translation


The COSEC Application has various data which is displayed as the default data. You can convert this data into the language of your choice.

To translate the default data,



Make sure the **Support Multi-Language Input** check box is enabled in [“Multi-Language Settings”](#).

- Click **Admin Module > Multi-Language > System Default Data Translation**.
- The **System Default Data Translation** page appears.

- You need to download the sample import file by clicking **Download Sample Import file** . The **Custom Language Translation** file is downloaded. Double-click to open the file from the downloaded location.

The sheet displays the fields required for importing specific data. You need to update the details as per requirement in the same file.

The downloaded file has the following details:

Row ID	Default String	Translated String	Reflection Path
1	Field 1		Global Policy > User > Custom Fields
2	Field 2		
3	Field 3		
4	Field 4		
5	Field 5		
6	Field 6		
7	Field 7		
8	Field 8		
9	Field 9		
10	Field 10		
11	Fever		Global Policy > User > Temperature and Symptoms Configuration
12	Cough		
13	Difficulty in Breathing		
14	Health declaration parameter exceeded threshold. Consult the Doctor		
15	ID Proof 1		Global Policy > Visitor Management > Custom Fields
16	ID Proof 2		
17	Custom Field 1		
18	Custom Field 2		
19	Custom Field 3		
20	Custom Field 4		
21	Custom Field 5		
22	Field 1		
23	Field 2		
24	Field 3		
25	Field 4		
26	Field 5		
27	Field 6		
28	Field 7		
29	Field 8		
30	Field 9		
31	Field 10		

- **Row ID:** This is a unique ID assigned to each system default data field. Make sure you do not tamper with this field. If the same is modified/delete then while importing data the data may be translated at inappropriate locations or the system may misbehave.
- **Default String:** This displays the system default strings. You need to convert these strings in the desired language you want.
- **Translated String:** In this column you need to enter the translated language string for the Default String.
- **Reflection Path:** This is the path at which the Translated String will appear in the system.

After you have updated the file in the desired language, save the same in the local PC. Make sure it is in XLS or XLSX format.



*Make sure you do not tamper with the fields — Row ID and Default String. If the same is modified/delete then while importing data the data may be translated at inappropriate locations or the system may misbehave.*

*The changes made in the downloaded file will not be reflected in the sample file available for download.*

To import the file into the system,

- **File Format:** Select the desired file format — XLS or XLSX.

- **Import File:** Click **Choose File/Browse** and select the file from the path at which the same is stored in the local PC.

System Default Data Translation

Import Data For: System Default Data

File Format: XLS

Import File: Choose File Custom\_Lan...anslation.xls

Upload Import Data

- Click **Upload**. The file will be saved and you can preview the data.

System Default Data Translation

File saved successfully

Import Data For: System Default Data

File Format: XLS

Import File: Choose File Custom\_Lan...anslation.xls

Preview Data Import Data

- Click **Preview Data**. The details are displayed on the screen and you can view the uploaded data to confirm if it is correct before you finally import the same.

System Default Data Translation

Import Data For: System Default Data

File Format: XLS

Import File: Choose File Custom\_Lan...anslation.xls

Preview Data Import Data

Row ID	Default String	Translated String
61	Section 10	
62	Click here for more detail.	
63	Click here for more detail.	
64	Click here for more detail.	
65	AnyOne	
66	All Sequential	
67	All Final-1	
68	All Final-2	
69	Default Rights	
70	Default Format	
71	Happy Birthday	
72	Good Morning	buen día
73	Good Afternoon	buenas tardes
74	Good Evening	buenas noches
75	Good Night	buenas noches

61 - 75 of 187 records

« < 1 ... 5 ... 13 > »

- Click **Import Data** to import the data into the system.



*If multiple entries are found for the same Row ID, then the data will be updated/over-written multiple times according to the number of entries.*

*If any Row ID is deleted then the data of that Row ID will not be translated.*

*If for any Row ID the Translation String is not found then the system will not translate such data.*

*Admin Module > Form Builder > Form Content, the system will only translate new data, if added and not already available records.*

*If there are any mis-matches, then the system will ignore those strings for translation and translate the remaining data. The details of such mis-matches will be displayed in the Result Description.*

*You can translate and upload strings multiple number of times as per your requirement.*

## Result

The Result of imported data is displayed as Success or Failure along with Result Description.

The screenshot shows the 'System Default Data Translation' window. At the top, there are dropdowns for 'Import Data For' (System Default Data) and 'File Format' (XLS). Below these is an 'Import File' section with a 'Choose File' button and a text input field containing 'Custom\_Lan...anslation.xls'. There are 'Preview Data' and 'Import Data' buttons. Below this is a 'Result' dropdown set to 'Both'. The main part of the window is a table with the following data:

Row ID	Default String	Translated String	Result	Result Description
72	Good Morning	buen dia	Success	Updated Successfully
73	Good Afternoon	buenas tardes	Success	Updated Successfully
74	Good Evening	buenas noches	Success	Updated Successfully
75	Good Night	buenas noches	Success	Updated Successfully

By default all the details are displayed.

You can also filter the Result records by selected the desired option — Success, Failure or Both.

The screenshot shows the same 'System Default Data Translation' window, but with the 'Result' dropdown menu open. The menu has three options: 'Both' (selected), 'Success', and 'Failure'. An arrow points to the 'Both' option. The table below the dropdown shows the same data as the previous screenshot.

Row ID	Default String	Translated String	Result	Result Description
72	Good Morning	buen dia	Success	Updated Successfully
73	Good Afternoon	buenas tardes	Success	Updated Successfully
74	Good Evening	buenas noches	Success	Updated Successfully
75	Good Night	buenas noches	Success	Updated Successfully

Once the data is imported successfully, the data will be displayed at the relevant locations in the COSEC Web as mentioned in the **Custom Language Translation** file > Reflection Path.



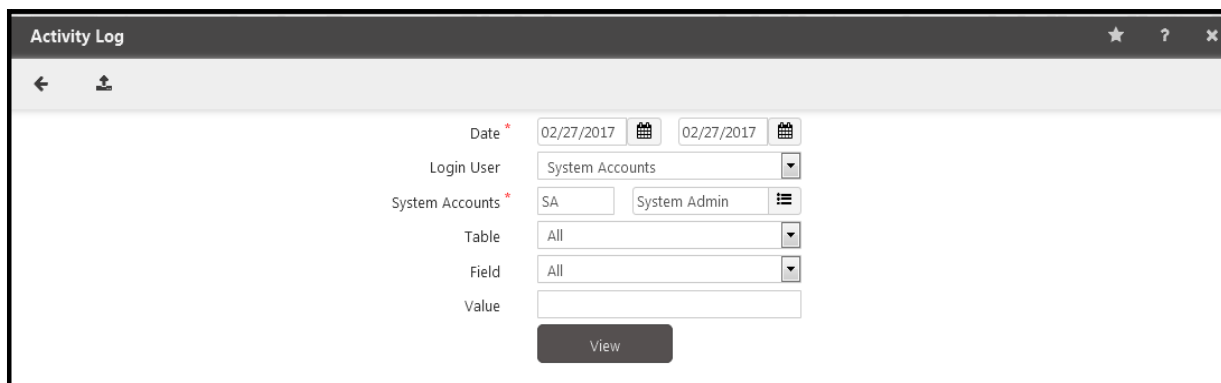
*Make sure full access rights are provided to the folder containing the xls or xlsx file for the import data operation.*

# Activity Log

This option enables the user to view activity logs which provide information about all the actions performed by login users with key field information. The system thus maintains an audit trail of all actions performed by the Login users and this information can be viewed by the system administrator.

To view the activity logs,

1. Go to the **Admin module > Views/Logs > Activity Log** and the following screen appears.



The screenshot shows a web application window titled "Activity Log". It contains a form with the following fields and controls:

- Date \***: Two date pickers, both showing "02/27/2017".
- Login User**: A dropdown menu with "System Accounts" selected.
- System Accounts \***: A text input field containing "SA" and a button labeled "System Admin".
- Table**: A dropdown menu with "All" selected.
- Field**: A dropdown menu with "All" selected.
- Value**: A text input field.
- View**: A button at the bottom of the form.

2. Select the time period for which the activity log is to be displayed by defining the start and the end **date**.
3. The other three filtering options available for viewing the audit trail are as follows:
  - **Login User**: Select the Login user whose activities need to be displayed. Available options for Login User are: All, System Accounts, User.
  - **User/System Accounts**: For the Login User type selected, specify a user/System Accounts from the user picklist. The Label will be changed to **System Accounts** in case of Login User = System Accounts as shown in the screenshot above.
  - **Table**: Select the data table for which you would like to view the change history.
  - **Field**: Select the field for which you would like to view the change history. User can Select the field from the drop down list and specify the Value for the field as an additional filtering criteria.
4. Click the **View** button.

The following screenshot illustrates an *Activity Log* for a system administrator:

Activity Log

←

⬆

Date \*

02/27/2017

02/27/2017

Login User

System Accounts

System Accounts \*

SA

System Admin

Table

All

Field

All

Value

View

Search

Q

User ID	Date ▼	Action	Table	Key Field	Key Value	Host IP	Details
SA	02/27/2017 17:30:33	Add	Project Phase Detail	Project Code	open	192.168.104.13	⋮
SA	02/27/2017 17:30:29	Add	Phase Master	Phase ID	10	192.168.104.13	⋮
SA	02/27/2017 17:28:12	Edit	Leave Credit Policy Master	LCPLCID	5	192.168.104.15	⋮
SA	02/27/2017 17:27:53	Edit	Leave Credit Policy Master	LCPLCID	5	192.168.104.15	⋮
SA	02/27/2017 17:27:24	Edit	Leave Credit Policy Master	LCPLCID	5	192.168.104.15	⋮

1 - 5 of 1034 records

«

<

1

2

3

...

207

>

»

You can click the **Details** icon to view detailed information of each entry.

Detail Information

Search

Q

Field ▲	Old Value	New Value
Type		7
Panel ID		11
Home zone ID		1
VIP Feature Enable		0
Access Group ID		1
Functional Group ID		1
Absentee Rule Enable		0
Max Absent Allowed		60
Ref Index		11
Enable		1

1 - 10 of 15 records

«

<

1

2

>

»

Close

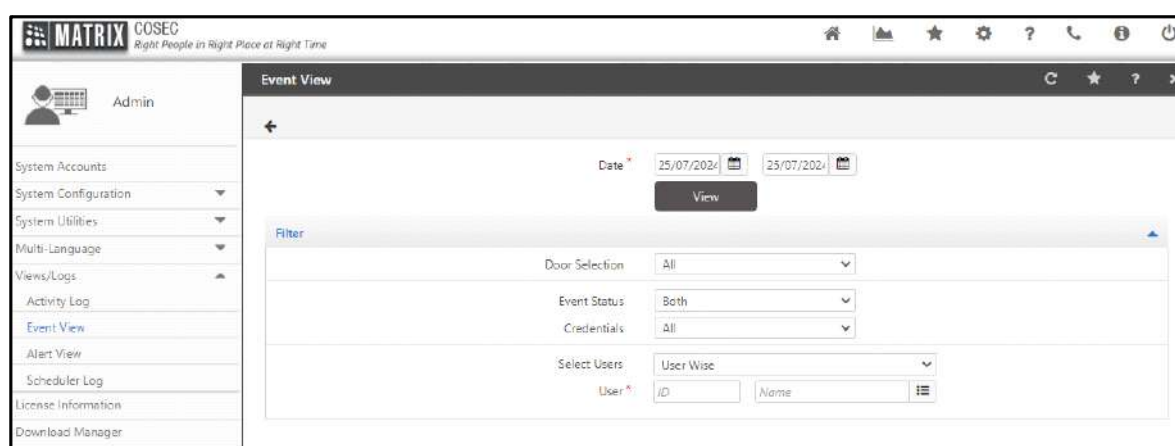


# Event View

The COSEC system interfaces with specific video recorder devices such as the *Matrix HVR/NVR* and enables the user to grab images triggered by user events at the respective doors. Doors such as the *NGT door controller* also have a built-in camera which can be configured to capture user images based on an event trigger. To know more about configuring doors for *Visual Tagging*, refer to “[Device List](#)”. These user events and related images can be viewed using the **Event View** option under the *Admin* module.

To access this feature,

Click **Admin module > Views/Logs > Event View** and the following screen appears.



On the **Event View** page, in **Date**, select the start date and end date for which user event records are to be retrieved.

## Filter

Set the following parameters as per your requirement to filter the records:

- **Door Selection:** Select the doors for which events are to be viewed. Select the desired option — All, Randomly.

If you select Randomly,

- Click the **Door** picklist. The **Picklist For Panel Doors and Direct Doors** pop-up appears.
- Click to select the desired door.
- **Event Status:** Select the desired option — Allowed, Denied, Both — to view events.
- **Credentials:** Select the desired option to view events based on the type of credentials used.
- **Card Type:** If you have selected the Credentials as any one of the following — Card, Card + PIN, API + Card, Card + Face, BLE + Card, Finger + Card, Finger + Card + PIN, Palm + Card, Palm + Card + PIN — then you can select the desired **Card Type** — RFID, QR — option.
- **Card Selection:** If you have selected the Credentials as any one of the following — Card, Card + PIN, API + Card, Card + Face, BLE + Card, Finger + Card, Finger + Card + PIN, Palm + Card, Palm + Card + PIN,

BLE, BLE + PIN, BLE + Finger, BLE + Palm — then you can select the desired **Card Selection** — Access Card 1, Access Card 2 — option.




*The options Card Type and Card Selection are applicable to ARGO, VEGA, ARGO FACE, PATH V2, ARC DC 200 Direct Doors as well as Panel Doors.*


*For other devices the filters Card Type and Card Selection will not be applicable. If any option is selected in these filters then the same will be ignored and the system will display all the events as per the selected Credential option.*

- **Select Users:** Select the users whose events you wish to view. Select the desired option — User Wise, Group Wise, All.

If you select **User Wise**,

- Click the **User** picklist. The **Picklist For All Users** pop-up appears.
- Select the check boxes of the desired users.
- The selected users appear in the grid.
- You can delete users from the grid if required. To do so, click **Delete**  of the respective user.
- Click **OK**.

If you select **Group Wise** option,

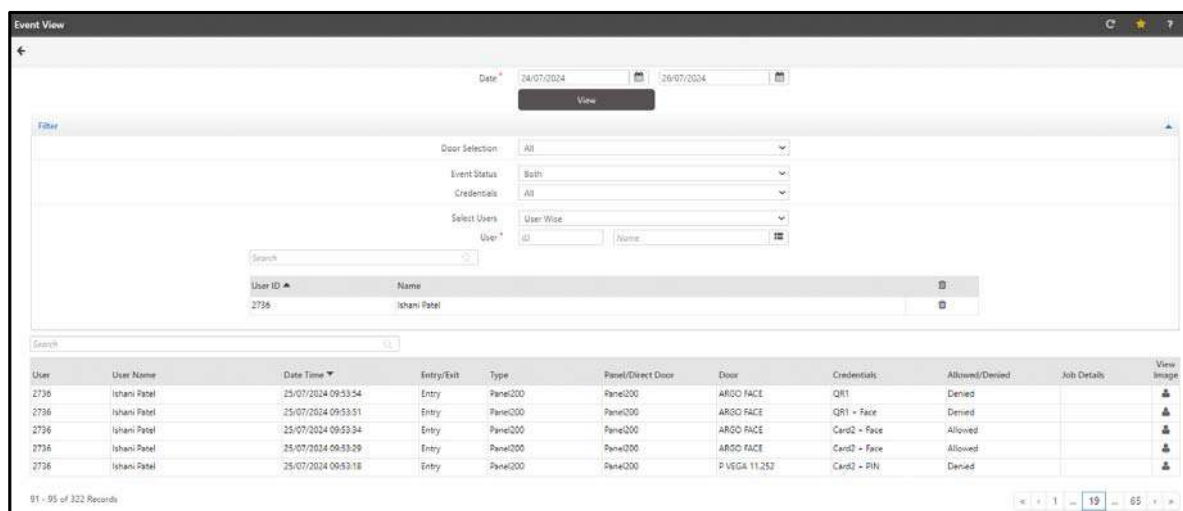
- Select the desired enterprise group—Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1/2/3.
- For each enterprise group — Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1/2/3, click the corresponding picklist to select the desired option/s.
- The selected groups appear in the grid.
- You can also delete particular group. To do so, click **Delete**  of the respective group.
- Click **OK**.

If you select **All**, then all the users will be selected.

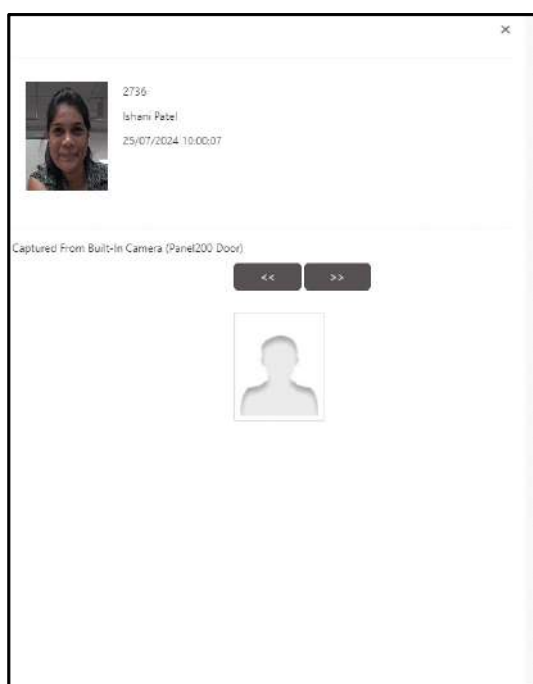
- Click **OK**.

Click **View**.

A detailed list of all the events as per the set filters appears in the grid.



Click on the icon under the **View Image** column against the relevant user event and view the associated snapshot image, if available. Click on the button to view images captured for the successive events.



# Alert View

This tab enables you to view logs of SMS, Email or WhatsApp alerts.

To view the alert logs, click **Admin module > Views/Logs > Alert View** and set the filters as per your requirement:

The screenshot shows the 'Alert Log' window. At the top, there are date pickers for 'Start' and 'End' dates, both set to '08/11/2023'. Below them is a 'View' button. A 'Filter' section is expanded, showing a dropdown for 'Alert' with options 'SMS', 'Email', and 'WhatsApp'. The 'Phone Number' field is empty.

**Date:** Select the time period — **Start** and **End** date — for which you wish to view the alert log.

Click the **Filter** collapsible panel and configure the following:

- **Alert:** Select the desired option — **SMS**, **Email** or **WhatsApp** — as the alert mode.

You can also view logs of a particular Number or Email ID. To do so,

- **Phone Number:** If you have selected **SMS** as the **Alert** option, you can configure the particular number whose logs you wish to view. If you wish to view all the logs, keep this blank.
- **Email ID:** If you have selected **Email** as the **Alert** option, you can configure the particular Email ID whose logs you wish to view. If you wish to view all the logs, keep this blank.
- **WhatsApp Number:** If you have selected **WhatsApp** as the **Alert** option, you can configure the particular WhatsApp Number whose logs you wish to view. If you wish to view all the logs, keep this blank.

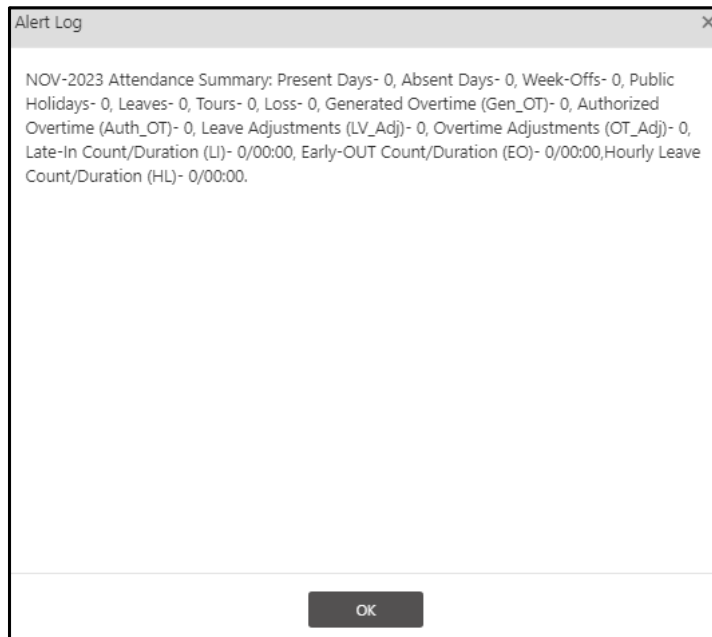
Click **View**.

The logs are displayed as per the set filters.

The screenshot shows the 'Alert Log' window with the 'Alert' filter set to 'WhatsApp'. Below the filter section, there is a search bar and a table of logs. The table has four columns: 'WhatsApp Number', 'Message', 'Date Time', and 'Error/Status'.

WhatsApp Number	Message	Date Time	Error/Status
1113232132123	NOV-2023 Attendance Summary: Present Days- 0, Absent...	08/11/2023 10:07:14	
332132131321	NOV-2023 Attendance Summary: Present Days- 0, Absent...	08/11/2023 10:07:14	
1113232132123	NOV-2023 Attendance Summary: Present Days- 0, Absent...	08/11/2023 10:07:06	
332132131321	NOV-2023 Attendance Summary: Present Days- 0, Absent...	08/11/2023 10:07:06	

- Double click on an entry in any of the columns except the **Date Time** column, you the details.



# Scheduler Log

The Scheduler Log enables the user to view details of all scheduled **tasks** and **reports** in the COSEC system for a defined date range. These details include the scheduling and completion status of all report and task schedules.



*This section displays the logs of the **Task Scheduler** or **Report Scheduler** created from the path: **Admin Module > System Utilities > Task/Report Scheduler**.*

To view Scheduler Logs, click **Admin module > Views/Logs > Scheduler Log** and the following screen appears.

**Date:** Select the time period for which the scheduler log needs to be displayed by defining the start and the end Date.

## Filter

Expand the **Filter** panel to set the following parameters:

**Scheduler Activity** - Select an activity (such as Leave Credit, Blocked User, etc) to filter the scheduler log for specific results.

**Status** - Select a **Status** type for the scheduled activity from the dropdown list. The options available are: Succeed, Failed and Both.

Click the **View** button.

The *Scheduler Log* appears in a grid as shown in the figure below.

**Scheduler Log**

← ↑

Date\* 01/01/2017 28/03/2017  
View

Filter

Scheduler Activity All  
Status Both

Search

Task/Report Name	Scheduled Date-Time	Completion Date-Time	Status	Status Description
Cafeteria users CSV Weekly	08/02/2017 16:00	08/02/2017 16:00	Succeed	
Cafeteria Sales XLS Weekly	08/02/2017 17:00	08/02/2017 17:00	Succeed	
Cafeteria Credit debit CSV Wee	08/02/2017 17:00	08/02/2017 17:01	Succeed	No Data Found
Visitor history XLSWeek	08/02/2017 19:00	08/02/2017 19:00	Succeed	
Visitor history XLS Week	08/02/2017 19:00	08/02/2017 19:00	Failed	

121 - 125 of 503 records

« 1 ... 101 »

You can also Export the Scheduler Logs in the **xls format** by clicking on the **Export** button as shown with the arrow above.

The Scheduler Logs will be saved in xls format as shown below:

SchedulerLog\_export [Protected View] - Microsoft Excel

Protected View This file originated from an Internet location and might be unsafe. Click for more details. Enable Editing

	A	B	C	D	E	F
60	Cafeteria Sales PDF	2017/02/07 10:00	2017/02/07 10:00	Succeed		
61	Cafeteria USer PDF	2017/02/07 10:00	2017/02/07 10:00	Succeed		
62	Visitor history PDF Week	2017/02/07 10:00	2017/02/07 10:00	Succeed	No Data Found	
63	Visitor Expired PDF	2017/02/07 10:00	2017/02/07 10:00	Succeed		
64	Cafeteria Blocked users	2017/02/07 11:00	2017/02/07 11:00	Succeed	No Data Found	
65	Relieving User Sch Deacti	2017/02/07 11:00	2017/02/07 11:00	Succeed	Users not found for Process	
66	VM	2017/02/07 12:00	2017/02/07 12:00	Failed		
67	Visitor history CSV Week	2017/02/07 12:00	2017/02/07 12:00	Succeed		
68	Visitor history XLS Week	2017/02/07 12:00	2017/02/07 12:00	Failed		
69	Visitor head Count XLS	2017/02/07 12:00	2017/02/07 12:00	Succeed		
70	Relieving User Sch Delete	2017/02/07 12:00	2017/02/07 12:00	Succeed	Users not found for Process	
71	new invalid events	2017/02/07 12:10	2017/02/07 12:10	Failed		
72	Relie User Sch De-act	2017/02/07 12:30	2017/02/07 12:30	Succeed	Users not found for Process	
73	Cafeteria Headcount PDF	2017/02/07 13:00	2017/02/07 13:00	Failed	Incorrect syntax near ')	
74	Cafeteria Sales CSV	2017/02/07 13:00	2017/02/07 13:00	Succeed		
75	Visitor head count CSV	2017/02/07 15:00	2017/02/07 15:00	Succeed		
76	Visitor Expired CSV	2017/02/07 15:00	2017/02/07 15:00	Succeed		
77	Cafeteria users CSV	2017/02/07 16:00	2017/02/07 16:00	Succeed		
78	Cafeteria Sales XLS	2017/02/07 17:00	2017/02/07 17:00	Succeed		
79	Cafeteria Credit debit CSV	2017/02/07 17:00	2017/02/07 17:01	Succeed	No Data Found	
80	Visitor history XLSWeek	2017/02/07 19:00	2017/02/07 19:00	Succeed		

Sheet1

# License Information

The page displays the license information of the COSEC web application.

To view the license details, Go to **Admin module > License Information** and the following screen appears.

Module	Current Usage	Allowed Limit
Platform Users	4	100000
ACM Users	4	100000
CMM Users	0	100000
VMM Users	2	100000
TAM Users	2	100000
CWM Users	1	100000
JPC Users	0	100000
FVM Users	0	100000
ESS Users	1	100000
FR Users	1	100000

[End User License Agreement](#)

The page displays the existing license profile and lists the following information:

- **Product Variant:** It displays the COSEC product variant licensed to the user. For example: COSEC PLT.
- **License Key:** It displays 56 or 128 (excluding the separators) characters valid license key string.

## License Details

- **Annual Upgrade Package Validity:** It displays the Month - Year for the validity of the package after which the package is required to be upgraded.
- **Modules:** It shows the modules in the license along with Current usage and Allowed limit.
  - **Current Usage-** It displays the number of users active in the system.
  - **Allowed Limit-** It is displayed as per the license key.

**End User License Agreement-** By clicking on this link, you can read the end user license agreement.



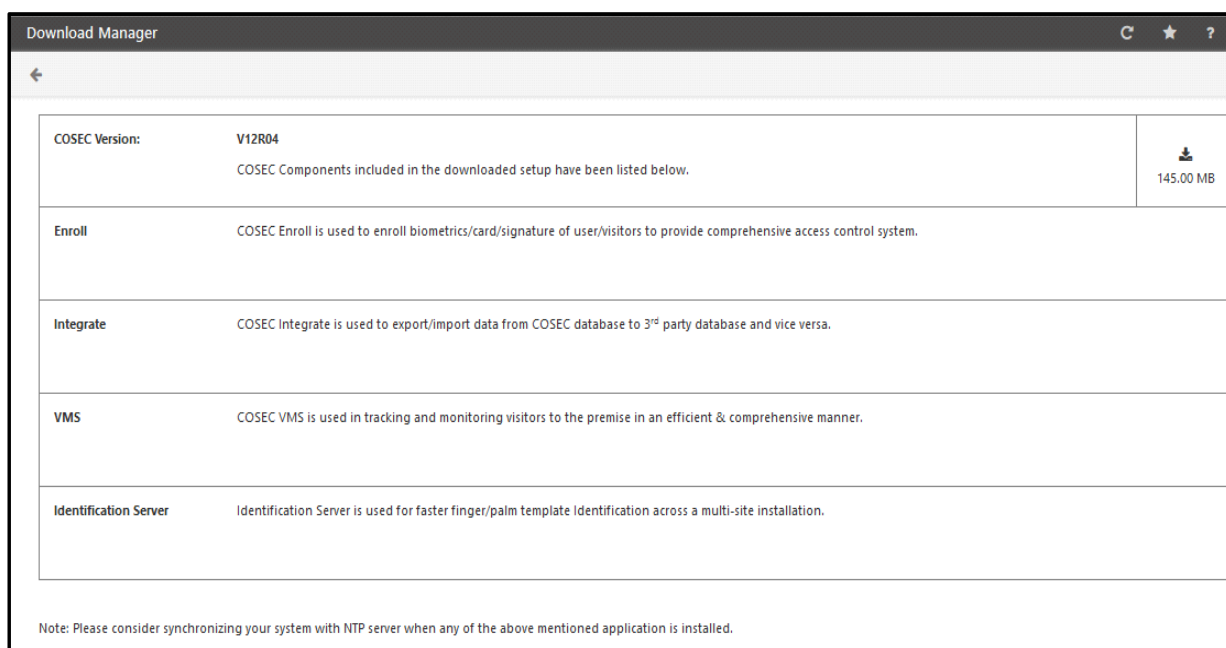
# Download Manager

Download Manager is a page that enables to download COSEC Enroll, COSEC Integrate, COSEC VMS and Identification Server applications. Before installing the COSEC applications refer, "[System Requirements](#)" to ensure the prerequisites are fulfilled.



*After the installation, if you are upgrading the IDS, Enroll, VMS, or Alert Services from the Service Tray App (refer to the Services User Guide to know more) you will need to update the FR libraries manually. To do so,*

- *Copy the desired FR files from the downloaded package, that is from MxFRSDK > MxFRSDK\_x64\_CPU or MxFRSDK\_x64\_GPU.*
- *Paste the same into the respective library folder in the setup folder in your local PC.*



To install any of the above applications click  download icon.

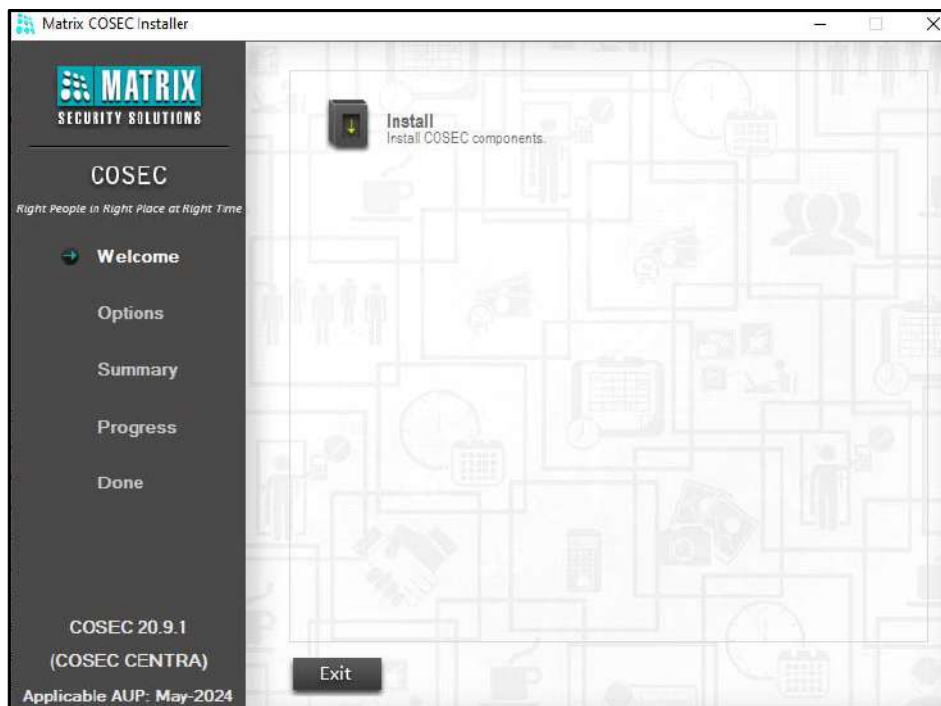
The Cloud download Setup window appears as shown below.



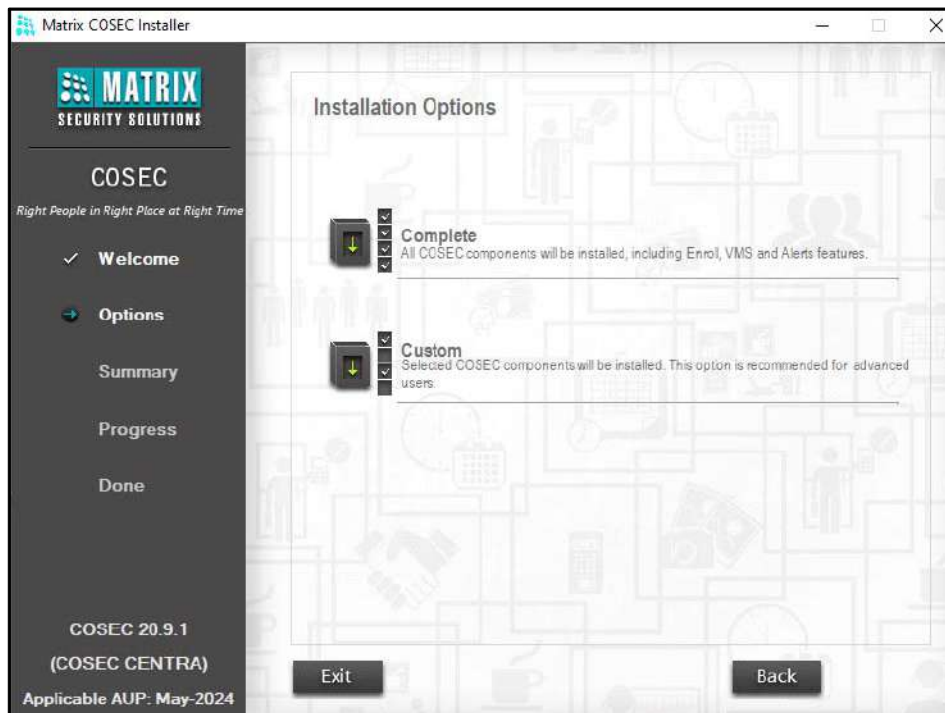
Open the Zip folder or Save the folder. Open the folder as shown below.



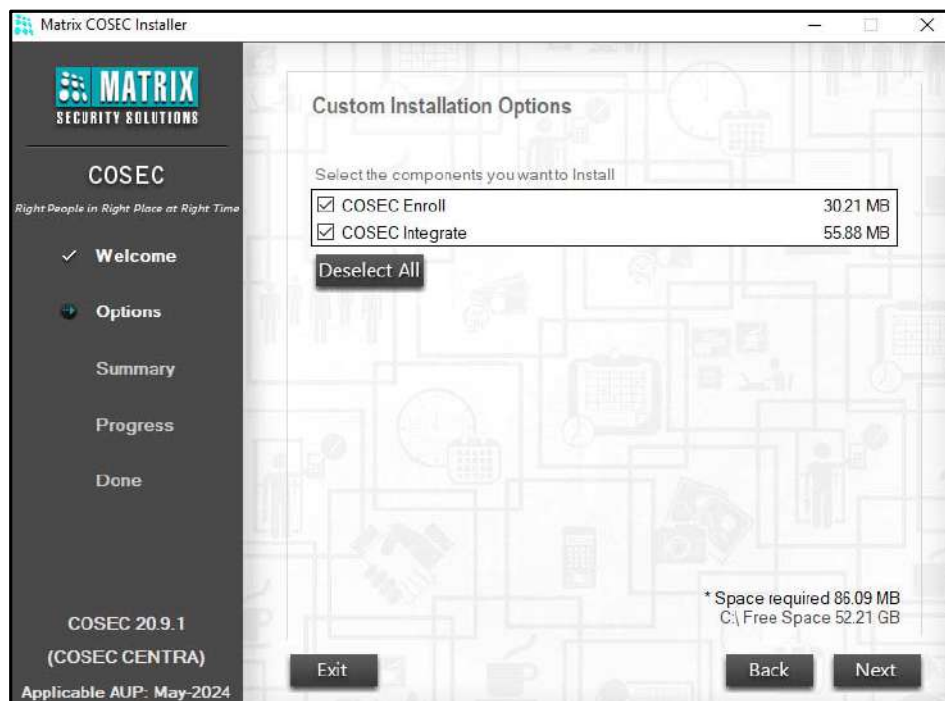
Click on Application **Setup**. The COSEC Installer is shown as below.



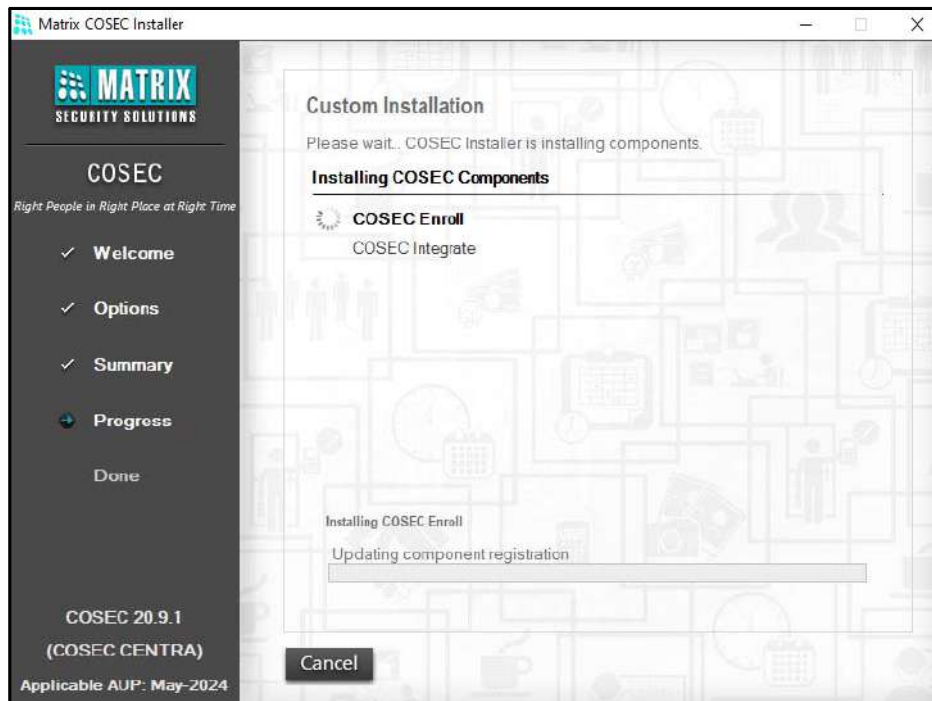
Click **Install**. The Installation options are shown as below.



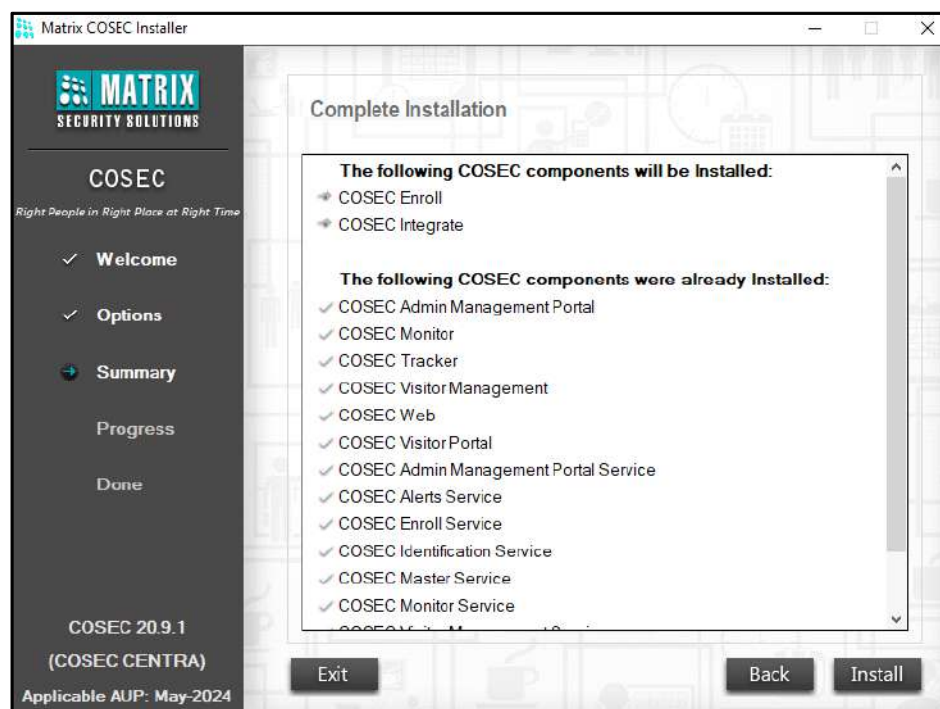
You can select the **Custom** option and select the desired component to be installed.

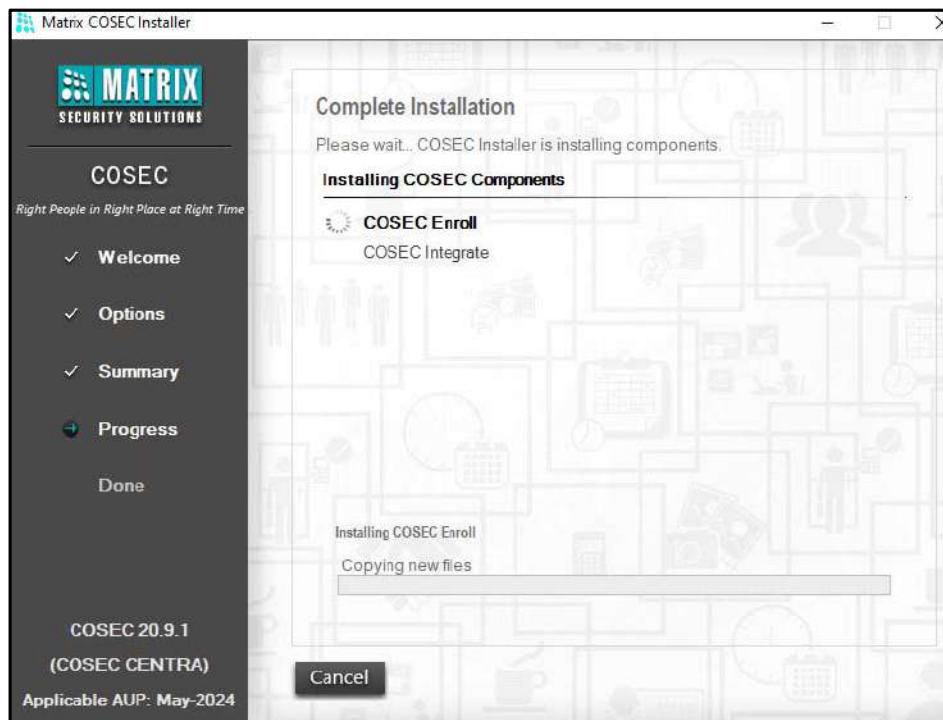


After selecting a component, click **Next** to install. The **Custom** Installation is shown as below.

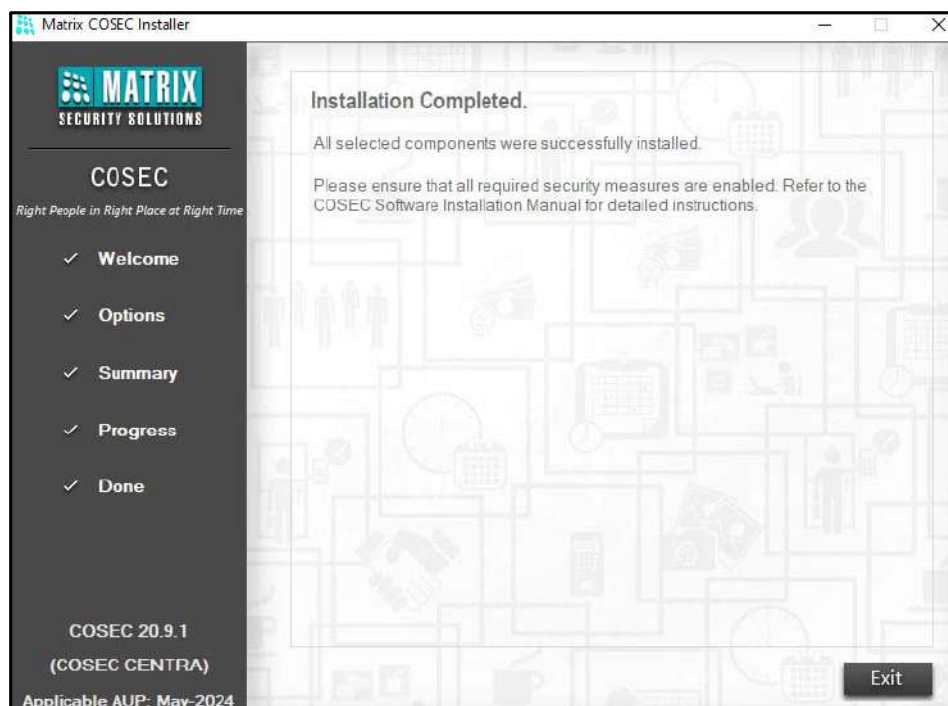


The **Complete** Installation is shown as below.





After completing the installation, Installation Completed window will be shown as below.

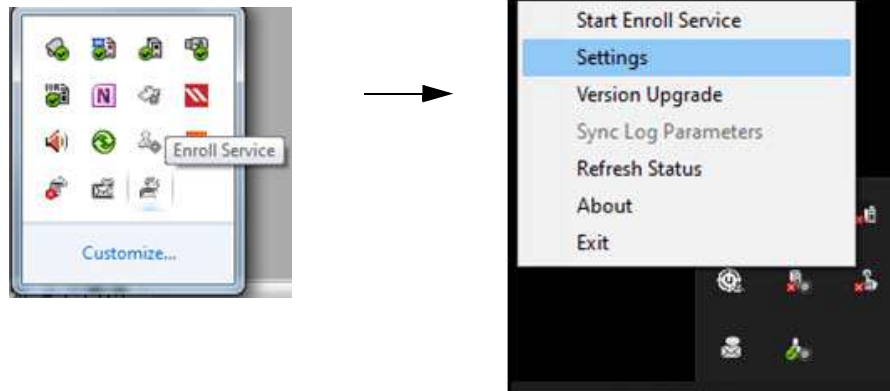


## Enroll Service

After the Installation, a shortcut icon  will be created on your desktop.

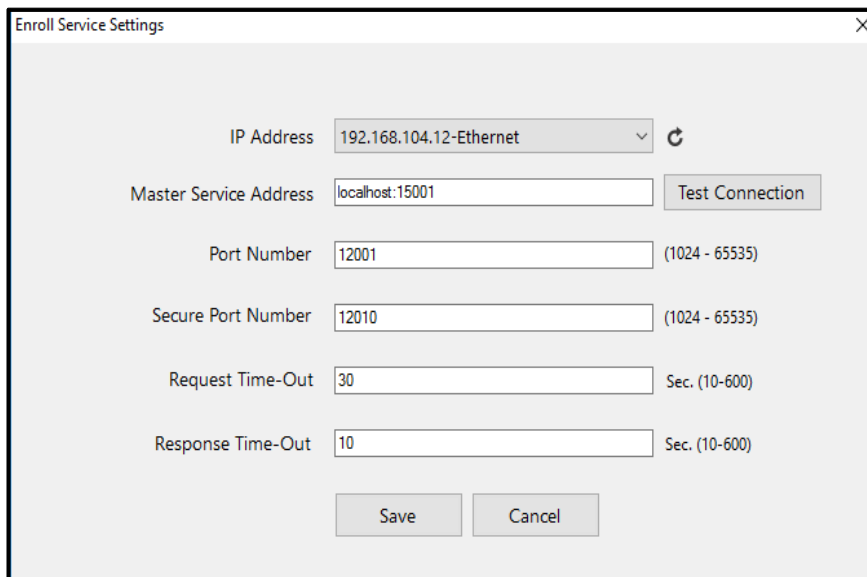
Also you can start the Enroll Service Application by browsing the folder from **All Programs> Matrix> Enroll Service**.

When the Enroll Service is started, an icon will be visible in the system tray as shown below. Then Right click on icon to configure the settings and start the service.



If the service entry is not found on general settings table then service will self-register itself. When Master Service URL in Tenant Portal> System Configuration > General Settings is blank then service will self-register itself.

At the time of self-registration MAC-Address, IP Address, URL (generated), Port Number and Domain Name from general settings should be passed as parameters.

The image shows a dialog box titled 'Enroll Service Settings'. It contains several input fields and buttons. The fields are: 'IP Address' with a dropdown menu showing '192.168.104.12-Ethernet' and a refresh icon; 'Master Service Address' with a text box containing 'localhost:15001' and a 'Test Connection' button; 'Port Number' with a text box containing '12001' and a range '(1024 - 65535)'; 'Secure Port Number' with a text box containing '12010' and a range '(1024 - 65535)'; 'Request Time-Out' with a text box containing '30' and a range 'Sec. (10-600)'; and 'Response Time-Out' with a text box containing '10' and a range 'Sec. (10-600)'. At the bottom are 'Save' and 'Cancel' buttons.

**Master Service Address:** Enter the IP Address or URL of the Master Service.

On Changing / Updating the Master Service Address, connection should be tested with the master service on click of Test Connection button. Eg: localhost:15001

Click **Test Connection** to test the connection with Master service.

**Port Number:** This is the port number of the computer at which device will do enrollment.

**Secure Port Number:** This is the port number of the computer at which device will do enrollment.

Specify the **Request time-out** duration in seconds.

Specify the **Response time-out** duration in seconds.


Click **Save** button to save the settings.

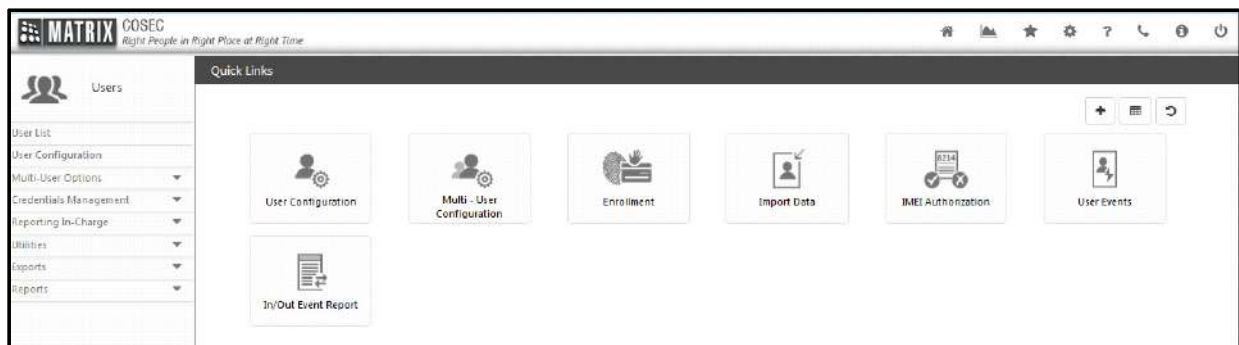




User Configuration is a consolidation of the user information at one place to manage and to obtain details whenever needed. It enables the creation of a user database that allows the system to consider the configured user as a valid user of the system.


It is necessary to create a user database that shall have the information about him/her like employee ID, general details, personal details, access privileges detail, contact details etc. Having the user details organized makes it simpler to manage the system and the details of any user can be obtained whenever needed.

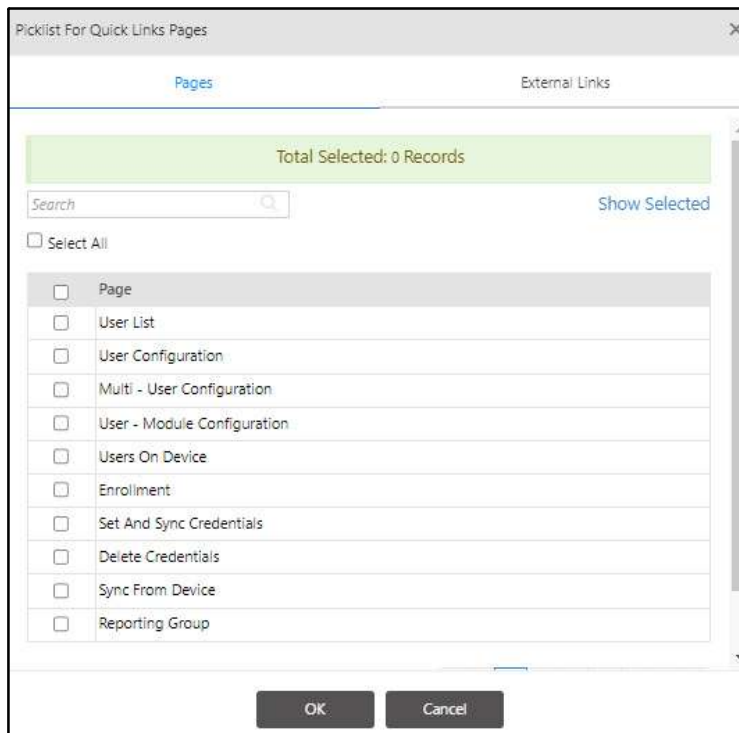
To access the **Users** module with the COSEC Web Application, select the **Users**  icon on the module selection page. The **Users** page will appear on your screen as shown below.



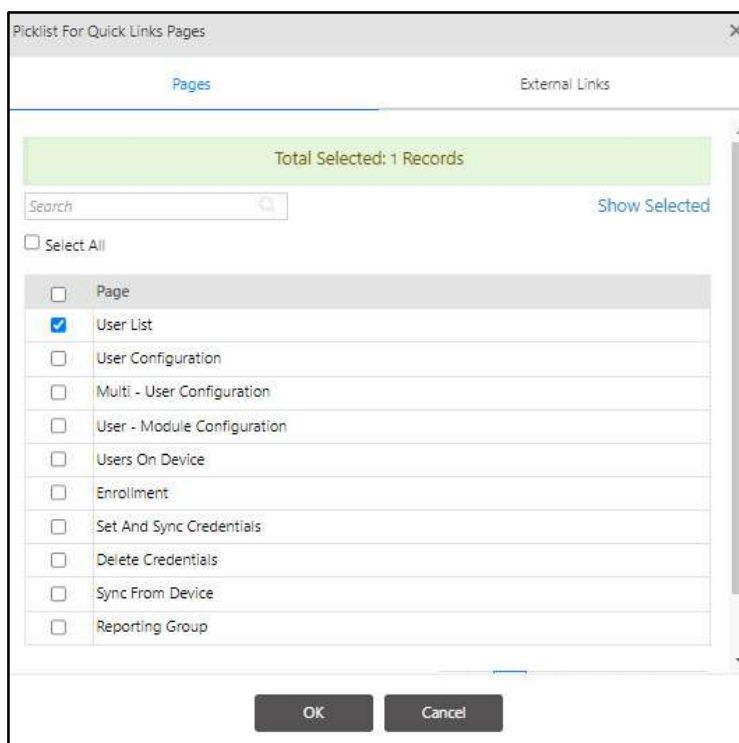
The page displays a menu and **Quick Links** to go to the required page in just one click. Quick Links are shortcuts to reach to a specific page easily. You can configure these options for Quick Links — **Add Quick Link**, **Select Layout** and **Reset to Default**.

### Add Quick Links

- Click **Add**  . The **Picklist For Quick Links Pages** pop-up appears.

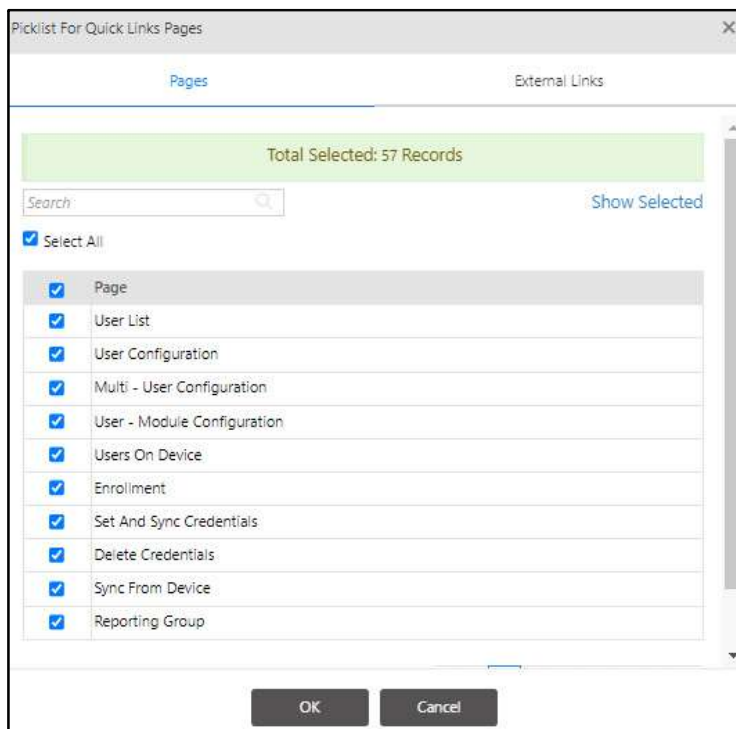


- You can either select particular page or can select all the pages at once. Maximum **20** quick links can be displayed.
- To select particular pages, select the check boxes of the desired pages.




OR

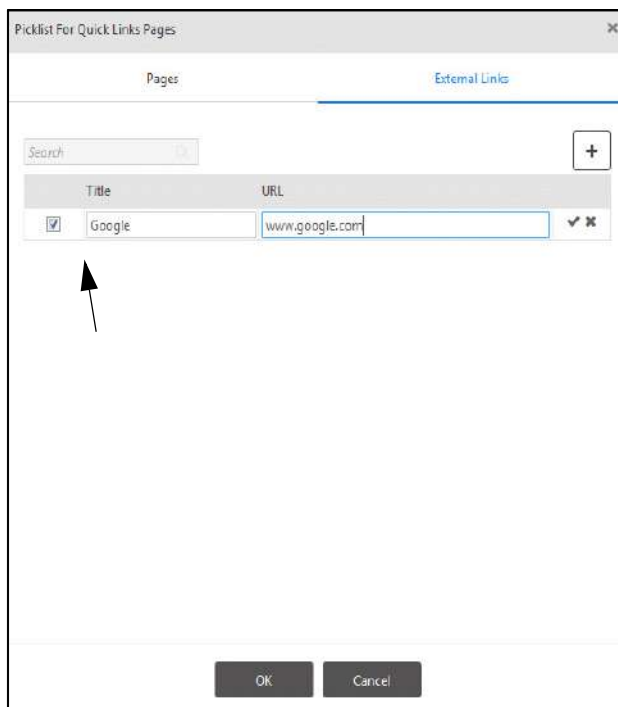
- To select all the pages at once, select the **Select All** check box. All the pages will be selected.





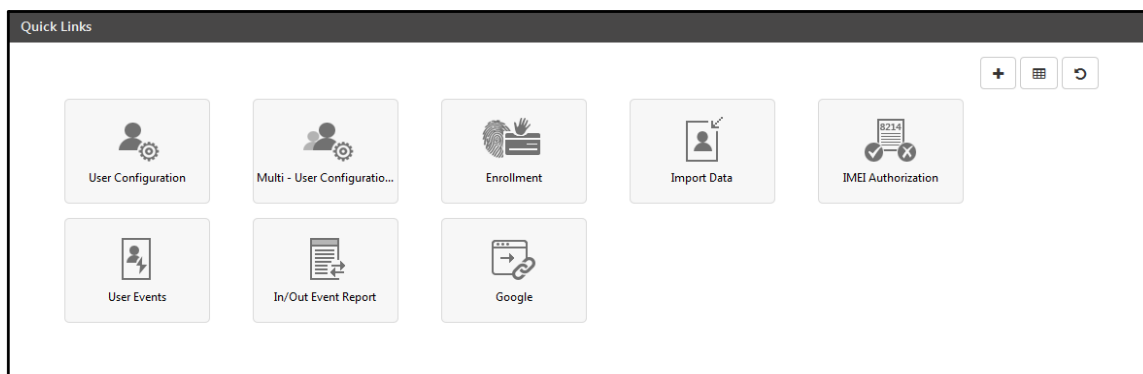
- Click **OK**.
- The Quick Links for selected pages appear on the Quick Link page.

#### Adding External Links,


- Select **External Link** tab and click on  button to add new external link.
- Configure the **Title** and **URL** of the external link under the respective fields. Select the check box to display the Quick Link for the configured link.




- Click **Save**  to save the configuration.
- Once you have saved the configuration, you can edit it. Click **Edit**  to edit the saved configuration.
- Click **OK** to save the configuration of the external link. The Quick Link for the external link appears on the Quick Link page.



## Select Layout

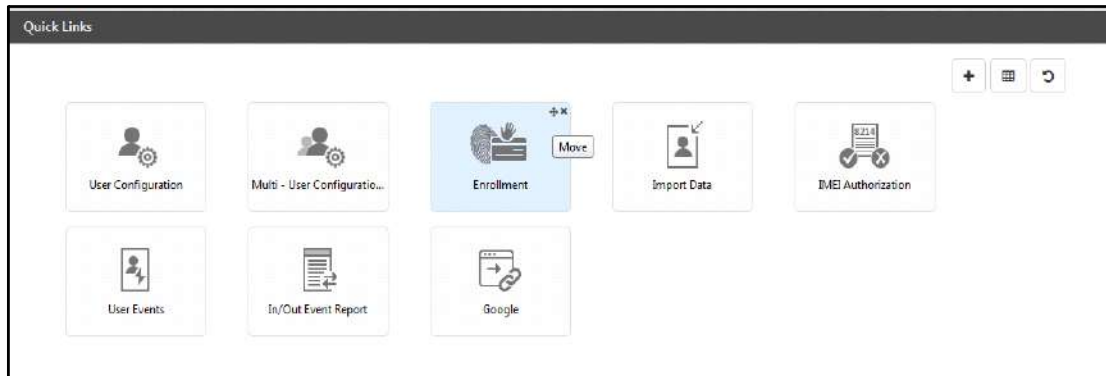
Click **Select Layout**  to select a layout for the quick links. You can select 5x4 or 4x5 layout to manage the quick links.

## Reset To Default

- Click **Reset To Default**  to reset the quick links to the default quick links.

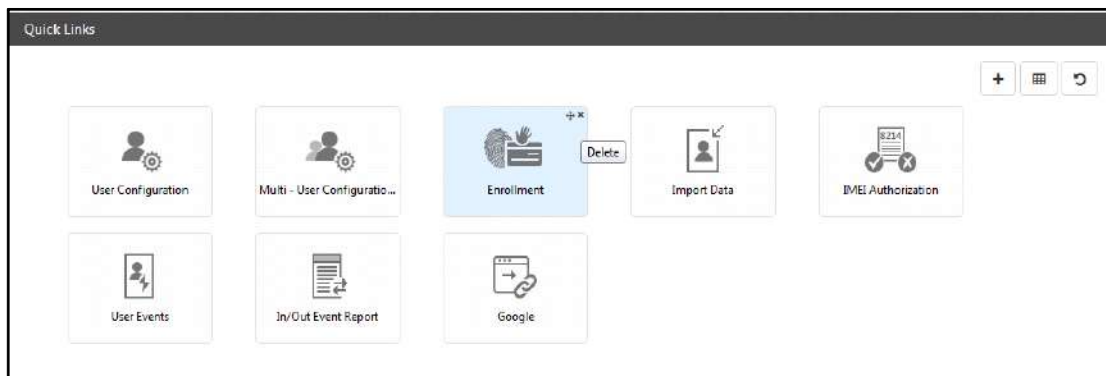
## Move the Link

To move the link from one place to another, hover on the link on top right corner and click **Move** icon as shown below. Then drag the quick link to the desired place. It will be placed at the desired location on the quick links page.




## Delete the Link

To delete a particular link, hover on the link on top right corner and click **Delete** icon as shown below.




*Quick links are displayed as per rights given to System Account and ESS users.*

## Users Dashboard

To view the Dashboard, click the Dashboard button  on the **Users** page.

It displays the basic information on Users relating to the COSEC Software under three groups:

### Users

- Total Users- Total no. of ESS Users (employees) created in COSEC.
-  Click on the Import Users button to go to the Import users page.
- Active Users- Total no. of Users (employees) currently that are active.
- Blocked Users- Total no. of Users (employees) that are blocked.




### Enrollment Status

- Enrollment Pending- Total no. of users whose enrollment is not done at all.
- Finger Credentials- Total no. of users with one or more fingers enrolled.
- Cards Assigned- Total no. of users with one or more cards assigned.
- PIN's Assigned- Total no. of users with PIN assigned.
- Palm Credentials- Total no. of users with at least one palms enrolled.
- Face Credentials- Total no. of users whose faces are enrolled.

### Reminder

- Birthday- Total no. of users whose birthday is on the current day.
- Confirmations- Total no. of users whose confirmation date is on the current day.
- Send-off- Total no. of users whose leaving date is on the current day.
- Visa Expiry- Total no. of users whose visa expires on the current day.
- Driving License Expiry- Total no. of users whose driving license expires on the current day.
- Passport Expiry- Total no. of users whose passport expires on the current day.

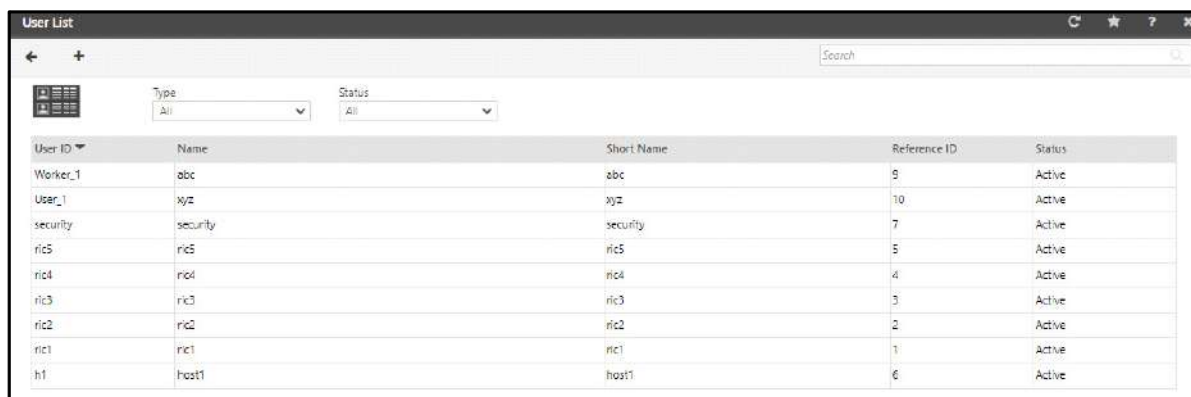
For more information on the above Dashboard options, click the respective information links on the Dashboard. The Latest values on Dashboard are updated on clicking the Refresh  button.

# User List

COSEC allows you to add new users to its database via the Users Module. This functionality can be used by administrators to add new user information, define user profiles and contact details.

To define a new user, Select the **Users module > User List**.

The **User List** page opens as follows:



The screenshot shows the 'User List' application window. It features a search bar at the top right and two dropdown menus for 'Type' and 'Status', both set to 'All'. Below these is a table with the following columns: User ID, Name, Short Name, Reference ID, and Status. The table contains the following data:

User ID	Name	Short Name	Reference ID	Status
Worker_1	abc	abc	9	Active
User_1	xyz	xyz	10	Active
security	security	security	7	Active
ric5	ric5	ric5	5	Active
ric4	ric4	ric4	4	Active
ric3	ric3	ric3	3	Active
ric2	ric2	ric2	2	Active
ric1	ric1	ric1	1	Active
h1	host1	host1	6	Active

The User List will display only those users, temporary users, workers and temporary workers for which rights are assigned to the SA, that is as per the enterprise groups assigned to the users/workers/temporary users/temporary workers.

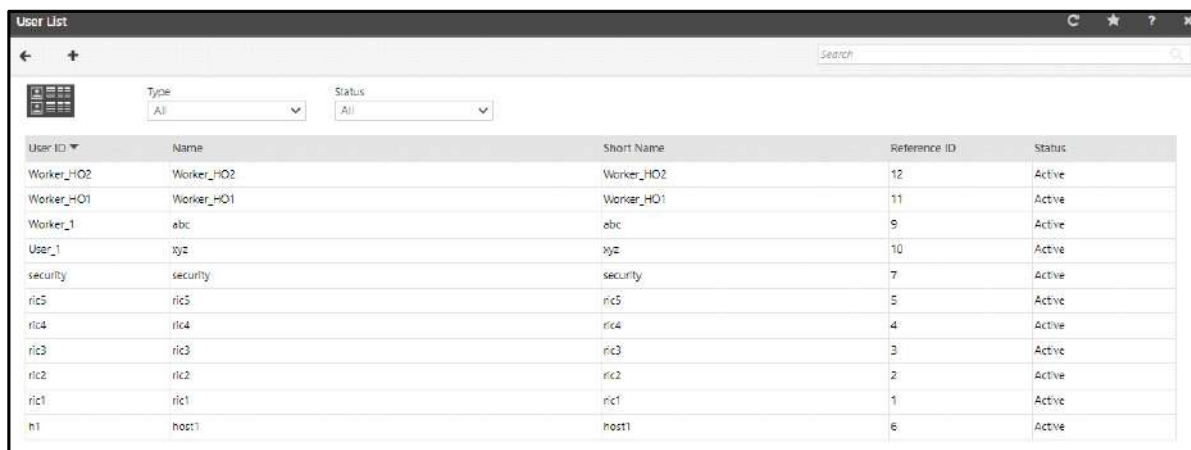
For example, if for User1 in Groups, Organization is ORG1 and if the rights for ORG1 are not assigned to the SA, then through the SA login the User List will not display User1.

For details, refer to [“Assigning Group-Wise Rights”](#) under [“System Accounts”](#) as well as [“Group”](#) under [“Configuring Users”](#).

The Users List can be viewed in **Grid** or **Photo** View.

## Grid View

This is the default view. Click User List the **Grid View** appears.



The screenshot shows the 'User List' application window in Grid View. It features a search bar at the top right and two dropdown menus for 'Type' and 'Status', both set to 'All'. Below these is a table with the following columns: User ID, Name, Short Name, Reference ID, and Status. The table contains the following data:

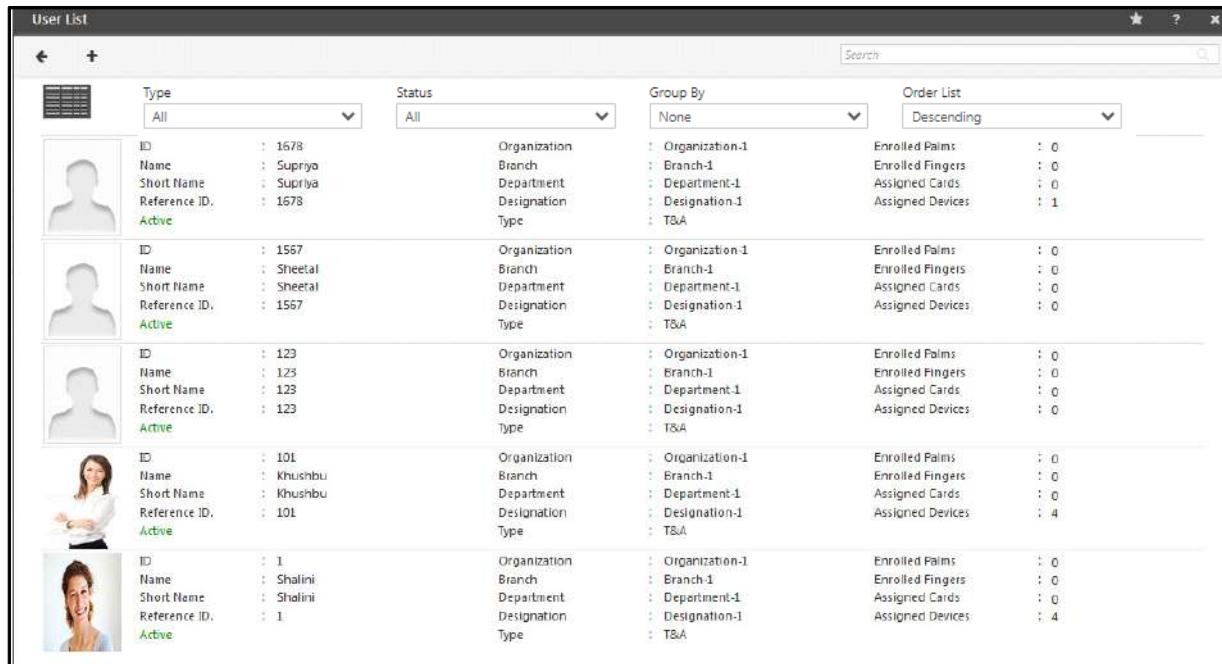
User ID	Name	Short Name	Reference ID	Status
Worker_HO2	Worker_HO2	Worker_HO2	12	Active
Worker_HO1	Worker_HO1	Worker_HO1	11	Active
Worker_1	abc	abc	9	Active
User_1	xyz	xyz	10	Active
security	security	security	7	Active
ric5	ric5	ric5	5	Active
ric4	ric4	ric4	4	Active
ric3	ric3	ric3	3	Active
ric2	ric2	ric2	2	Active
ric1	ric1	ric1	1	Active
h1	host1	host1	6	Active

The list can be filtered on the basis of **Type** and/or **Status**. To do so,






- The Type options are All, Users, Temporary Users, Worker, Temporary Worker.
- The Status options are All, Active and Inactive.

### Photo View

Click **Photo View**  to view the users in this view.



Type	Status	Group By	Order List
All	All	None	Descending

	ID : 1678 Name : Supriya Short Name : Supriya Reference ID : 1678 Active	Organization : Organization-1 Branch : Branch-1 Department : Department-1 Designation : Designation-1 Type : T&A	Enrolled Fingers : 0 Assigned Cards : 0 Assigned Devices : 1
	ID : 1567 Name : Sheetal Short Name : Sheetal Reference ID : 1567 Active	Organization : Organization-1 Branch : Branch-1 Department : Department-1 Designation : Designation-1 Type : T&A	Enrolled Fingers : 0 Assigned Cards : 0 Assigned Devices : 0
	ID : 123 Name : 123 Short Name : 123 Reference ID : 123 Active	Organization : Organization-1 Branch : Branch-1 Department : Department-1 Designation : Designation-1 Type : T&A	Enrolled Fingers : 0 Assigned Cards : 0 Assigned Devices : 0
	ID : 101 Name : Khushbu Short Name : Khushbu Reference ID : 101 Active	Organization : Organization-1 Branch : Branch-1 Department : Department-1 Designation : Designation-1 Type : T&A	Enrolled Fingers : 0 Assigned Cards : 0 Assigned Devices : 4
	ID : 1 Name : Shalini Short Name : Shalini Reference ID : 1 Active	Organization : Organization-1 Branch : Branch-1 Department : Department-1 Designation : Designation-1 Type : T&A	Enrolled Fingers : 0 Assigned Cards : 0 Assigned Devices : 4

The list can be filtered on the basis of **Type**, **Status**, **Group By** and **Order List**.

- The Type options are All, Users, Temporary Users, Worker, Temporary Worker.
- The Status options are All, Active and Inactive.
- The Group By options are Department and Designation.
- The Order List options are Ascending or Descending.

You can search either ID, Name or Short Name from the search box on top right of the page.

Click on the desired entry in the grid. The respective profile page appears.

You can also add new user's. To do so,

Click **New**  to add a new user. The **User Configuration** page appears.

You can directly click on **User Configuration** option from where the user Profile can be configured as described below:



**User Configuration**

Search User ID or Name

**Basic** | General | Personal | Contact

ID \* 15 chars

Name \* 45 chars

Active ☒

**Optional**

Full Name 200 chars

Short Name \* 15 chars

Reference ID \* 8 chars

Integration Reference 20 chars

**Profile**

Devices

Credentials

Group

T&A

Access Control

ESS

Cafeteria

Job Costing

Field Visit Management

The user can be added by entering the ID and Name of the user. Then click on Save button to save the user. The other configurations can be done by selecting the respective tab or section. Then click the edit button to configure the user details.

For more details See [“Configuring Users” on page 472](#).

**User Configuration**

Search User ID or Name

**Basic** | General | Personal | Contact

ID \* 3

Name \* Sheetal

Active ☒

**Optional**

Full Name Sheetal Pradip Pandya\_Ahmd

Short Name \* Sheetal

Reference ID \* 3

Integration Reference 20 chars

**Profile**

Devices

Credentials

Group

T&A

Access Control

ESS

Cafeteria

Job Costing

Field Visit Management

# Configuring Users

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COSEC allows you to add new users from the Users Module. This functionality can be used by administrators to add new employee information, define employee profiles and contact details.

The User configuration options can be viewed from:

- *["Profile"](#)*
- *["Adding User Photo"](#)*
- *["Devices"](#)*
- *["Credentials"](#)*
- *["Group"](#)*
- *["T&A"](#)*
- *["Access Control"](#)*
- *["ESS"](#)*
- *["Cafeteria"](#)*
- *["Contract Worker Management \(CWM\)"](#)*
- *["Job Costing"](#)*
- *["Field Visit Management"](#)*
- *["Face Recognition"](#)*
- *["Visitor Management"](#)*
- *["Events"](#)*

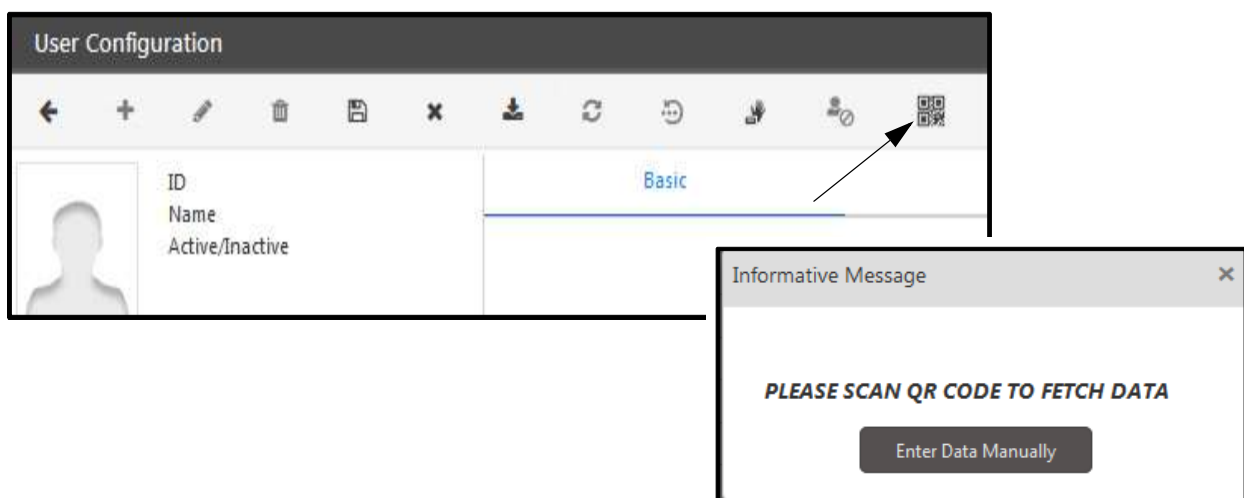
## Profile

To configure a User Profile, follow the below steps.

- *“Basic”*
- *“General”*
- *“Personal”*
- *“Contact”*

The details can also be fetched directly from user's Aadhar Card. By Scanning the QR Code of Aadhar Card through 'QR Code Scanner', the information like Name, Gender, DoB, Address etc. available in Aadhar Card will be automatically fetched, and filled into the respective fields of above listed sections.

From the Top menu Bar click on the **QR Code** button and the Pop-up will open as shown below.



Scan the user's Aadhar Card QR through the QR Code scanner or click on the **Enter Data Manually** button to enter the details manually into a pop-up window.

Once the Aadhar Card is scanned and information is received by COSEC Server, the fetched details including Aadhar Number will display as shown below.

×

Aadhaar No.

702351944240

Name

Bindu Singh

Gender

Female

▼

Date Of Birth

15/09/1987

📅

Address

A2-92-Sanidhya Township, Behin

d Dasalad, Ajwa Road, Vadodara

Street

Waghodiya Road

City-Pincode

Vadodara

-

390019

State

Gujarat

Country

India

Father/Spouse Name

Roopnarayan Singh

OK

Cancel

User can edit the details if required.



*The Aadhar Number must be unique from existing users to configure a new one.*

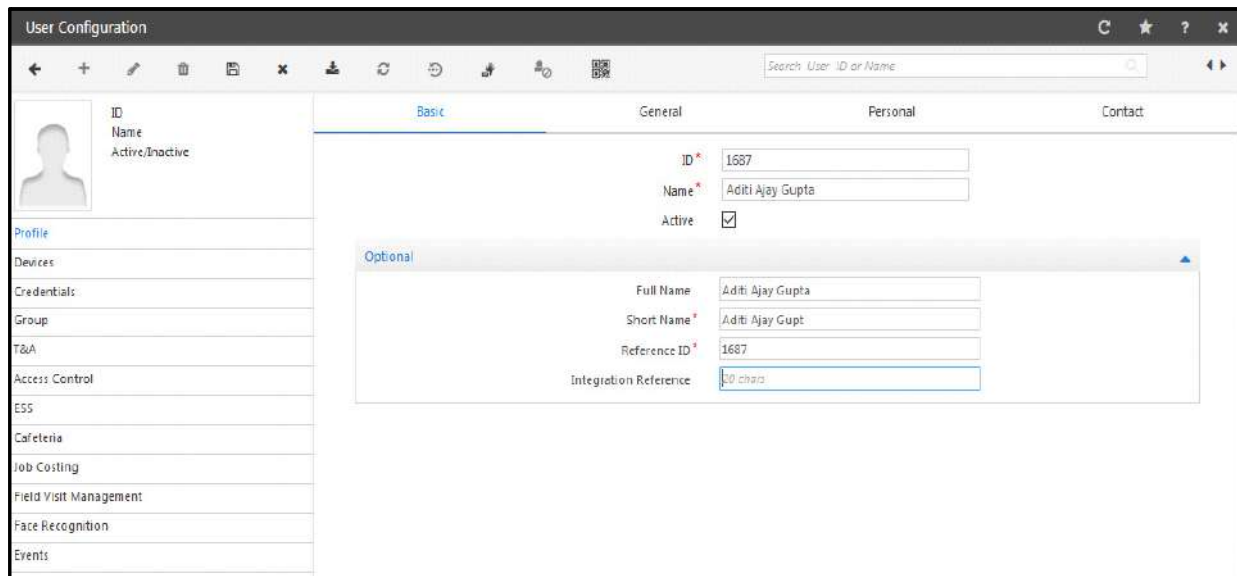
Click on the **OK** button to Save the details or **Cancel** to cancel the configuration.

Once saved, the details will be placed into the fields of respective sections.

If the Admin has configure QR Code scanning optional then, the above step can be skipped and the details can be added manually as describe below.

## Basic

The **Basic** section is displayed as follows:



The screenshot shows a 'User Configuration' window with a sidebar on the left containing links to Profile, Devices, Credentials, Group, T&A, Access Control, ESS, Cafeteria, Job Costing, Field Visit Management, Face Recognition, and Events. The main content area is divided into tabs: Basic, General, Personal, and Contact. The 'Basic' tab is active, displaying the following fields:

- ID: 1687
- Name: Aditi Ajay Gupta
- Active: ☒
- Optional section:
  - Full Name: Aditi Ajay Gupta
  - Short Name: Aditi Ajay Gupta
  - Reference ID: 1687
  - Integration Reference: 50 chars

The following parameters appear here for configuration:



*When Full name of user is entered and Name and Short name are blank then Name will be auto updated with 45 characters of full name excluding special characters and Short name will be updated with 15 characters of full name.*

**ID** - Specify a unique User ID. It can have an alphanumeric value. If the Admin has configured a User ID to be generated automatically then, a user does not need to specify this field. Once the further details are configured and saved, the unique ID will be automatically allocated to the user.



*If the ID contains colon (':') then the API authentication with such User ID will not be functional. As well as, such users will not be able to login using their credentials in COSEC APTA. However, they can login into COSEC APTA using SSO or Active Directory credentials.*

**Name** - Enter a name in this field that identifies the user (maximum upto 45 characters)

**Active** - Select this checkbox to activate the user. Whenever a user is made inactive (i.e. **Active** checkbox is unchecked), say, on the last day of employment, the admin will be prompted to choose whether all assigned devices should be revoked from the user or not.

### Optional

**Full Name**- You can also specify the Full name of the user with maximum 200 characters. The supported values are: **A-Z, a-z, 0-9, ( ) , [ ] \_ (underscore), - (Hyphen), . (full Stop), /, &, , (comma), @, ' (single quote), [space]**



*A function name followed by ( bracket is invalid in full name. Eg: Thomas S/O Round ( will be invalid.*

**Short Name** - Specify an alternative short name for the user which will be displayed on the COSEC doors whenever there is an event related to this user. (maximum up to 15 characters).

**Reference ID** - The system allots a random sequential Reference Code based on the last reference code allotted (numeric value with a maximum of 8 digits). This option is used to provide a linkage ID in the event of an organization using a different user ID format in another software application for e.g. the payroll application.

**Integration Reference** - This field is provided for integration with third party applications where the user ID has to be alphanumeric and up to 20 characters.

## Temporary User/Worker

This panel will be visible only for Temporary Users/Workers.



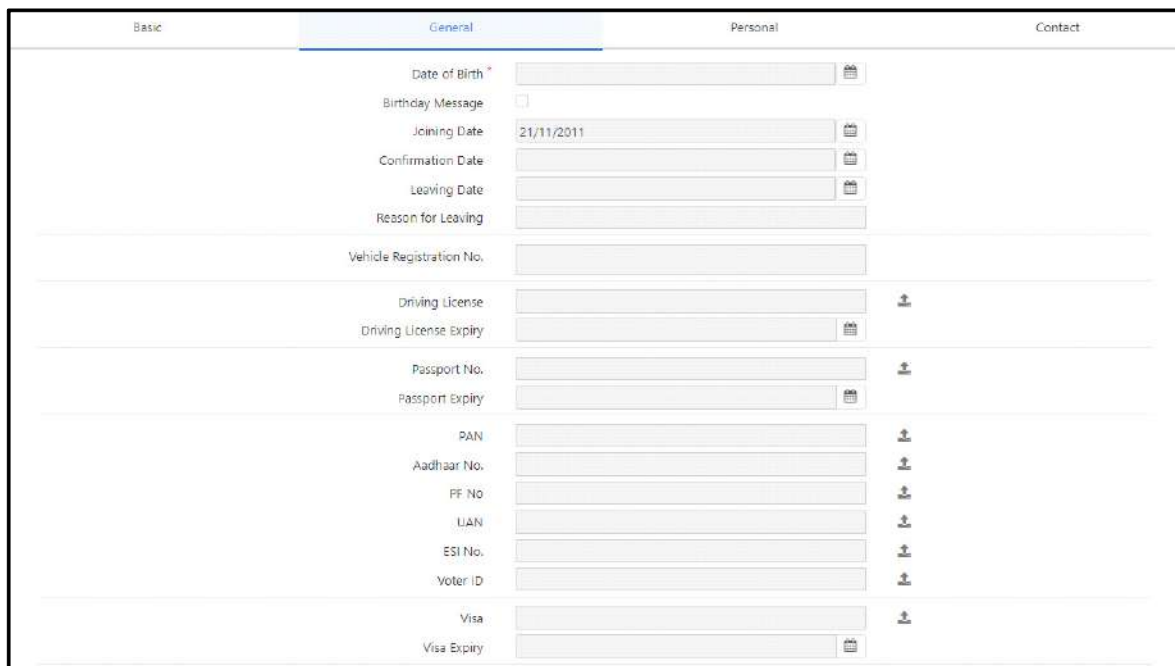
The screenshot shows a panel titled "Temporary User" with a blue header bar. Below the header, there are three rows of information:

Auto-Registered Date & Time	18/12/2023 12:34
Auto-Registered via Device	PD-ARGO FACE--61-amit testing
Auto-Registered via Credential	Face

- **Auto-Registered Date & Time:** Displays the date and time when the temporary user/worker is auto-registered.
- **Auto-Registered via Device:** Displays the name of the Device using which the temporary user/worker is auto-registered.
- **Auto-Registered via Credential:** Displays the credentials using which the temporary user/worker is auto-registered.

## General

This section allows you to add general information about a user. The **General** page appears as follows:



The screenshot shows the "General" tab of a user profile page. The page has a header with four tabs: "Basic", "General" (selected), "Personal", and "Contact". The "General" tab contains the following fields:

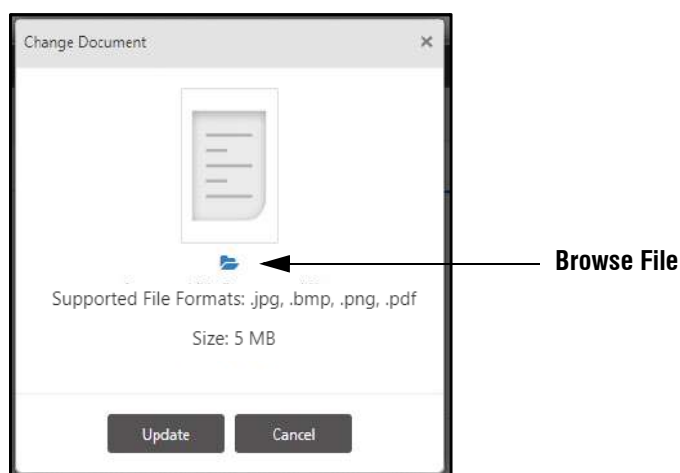
Date of Birth *	<input type="text"/>	
Birthday Message	<input type="checkbox"/>	
Joining Date	21/11/2011	
Confirmation Date	<input type="text"/>	
Leaving Date	<input type="text"/>	
Reason for Leaving	<input type="text"/>	
Vehicle Registration No.	<input type="text"/>	
Driving License	<input type="text"/>	
Driving License Expiry	<input type="text"/>	
Passport No.	<input type="text"/>	
Passport Expiry	<input type="text"/>	
PAN	<input type="text"/>	
Aadhaar No.	<input type="text"/>	
PF No	<input type="text"/>	
UAN	<input type="text"/>	
ESI No.	<input type="text"/>	
Voter ID	<input type="text"/>	
Visa	<input type="text"/>	
Visa Expiry	<input type="text"/>	

Security Number	<input type="text"/>	
ID Proof *	<input type="text"/>	
Nominee Name *	<input type="text"/>	
Field 4	<input type="text"/>	

Enter the relevant employee information — Date of Birth, Joining Date, Confirmation Date etc.— either manually or by clicking the date selection button as shown in the above images.

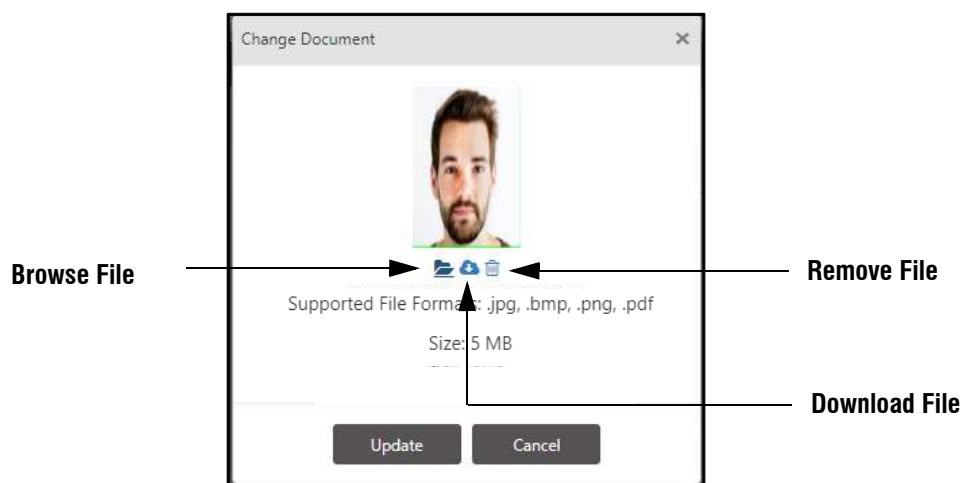
If the **Date of Birth Mandatory** check box is enabled in “[Minimum Age Requirement for Users](#)” in “[User Policy](#)”, then Date of Birth parameter will be mandatory. When the date is configured here, the age will be displayed in Years and Months. Any User Profile below the age configured in User Policy > Minimum Age will not be created.


In certain parameters like Driving License, Passport No., PAN, etc, you can upload the documents by clicking **Upload** button. Then **Change Document** pop-up appears as shown below.





Click **Browse File** .

To upload, select the desired file as per the supported formats and size (.jpg, .bmp, .png, pdf) from your local PC.




After uploading the file, if you wish to upload a different file instead of the current uploaded file, click **Browse File**  again and select the desired file from your local PC. The previously uploaded file will get replaced with the new file.

To download the uploaded file, click **Download File**  .


To remove the uploaded file, click **Remove File**  .

Then click **Update**.

The document will be uploaded and can be previewed by clicking the **Preview**  icon.

There are 10 additional fields in which you can enter the desired details of the users as per your requirement.

These are visible only after they are configured from **Admin> System Configuration> Global Policy> User**. For details refer *“Custom Fields”*. For example Security Number, ID Proof, Nominee Name, etc.

Click on the **Upload**  button and follow the steps as mentioned above.

## Personal



This section allows you to add personal information about a user. The **Personal** page appears as follows:

Basic	General	Personal	Contact
Nationality <input type="text" value="Indian"/>			
Qualification <input type="text" value="B.E-E.C"/>			
Experience <input type="text" value="3 years"/>			
Gender <input type="text" value="Female"/>			
Blood Group <input type="text" value="A+"/>			
Height (cms) <input type="text" value="180"/>			
Weight (kgs) <input type="text" value="55.0"/>			
Medical History <input type="text"/>			
Marital Status <input type="text" value="Married"/>			
Father/Spouse Name <input type="text" value="N M Raval"/>			

Enter the relevant personal details — Nationality, Qualification, Experience etc. — of an employee in the following fields either manually or by choosing from the respective drop-down lists:

## Contact

This section allows you to add contact information about a user. The **Contact** page appears as follows:

Enter the relevant contact and address details of the employee in the **Contact Info** and **Address** tabs.

## Contact Info

Basic	General	Personal	Contact
Contact Info			
<b>Personal</b>			
Phone <input type="text" value="9682624826"/>			
Mobile <input type="text" value="8611224120"/>			
Email <input type="text" value="aditigupta@gmail.com"/>			
<b>Official</b>			
Phone <input type="text" value="230493"/> - <input type="text" value="02626"/>			
Mobile <input type="text" value="9541282005"/>			
Email <input type="text" value="aditigupta@matrixrd.org"/>			
<b>Receive Alert On</b>			
Personal Mobile <input type="checkbox"/>			
Personal Email <input type="checkbox"/>			
Official Mobile <input checked="" type="checkbox"/>			
Official Email <input checked="" type="checkbox"/>			
Address			

Enter the relevant contact information — Phone, Mobile and Email under **Personal** and **Official** sections. The alerts —SMS, WhatsApp and Email are sent on the Mobile Number and Email ID configured here.

**Receive Alert On:** Select the check boxes for the desired options where you wish to receive alerts.

## Address

The screenshot shows a web form with four tabs: 'Basic', 'General', 'Personal', and 'Contact'. The 'Contact' tab is active. Under 'Contact Info', the 'Address' section is expanded. It contains two sub-sections: 'Local' and 'Permanent'. Each sub-section has a form with the following fields: Address, Street, City-Pincode, State, and Country. To the right of the 'City-Pincode' field is a 'Pincode' field. The 'Local' section is filled with: Address: 302, shivam Residency, Street: Manjalpur, City-Pincode: 390011, State: Gujarat, Country: India. The 'Permanent' section is filled with: Address: CTM, Street: Ahmedabad, City-Pincode: 380002, State: Gujarat, Country: India.

Section	Address	Street	City-Pincode	State	Country	Pincode
Local	302, shivam Residency	Manjalpur	390011	Gujarat	India	
Permanent	CTM	Ahmedabad	380002	Gujarat	India	

Enter the relevant information— Address, Street, City-Pincode, State and Country under **Local** and **Permanent** sections.

Click on the **Save** button to save the user's profile.

This user will now be reflected in the list of users on the **User List** page.

To further add or edit any user details, go to **Users module > User List**.

Select the user from the **User List** by searching the user through ID or name. Also the user can be searched by specifying the ID or Name in User Configuration page.

The **User Configuration** page opens with the selected user details as shown below.

The screenshot shows the 'User Configuration' window with a sidebar on the left containing a user profile icon and a list of configuration tabs: Profile, Devices, Credentials, Group, T&A, Access Control, ESS, Cafeteria, Job Costing, Field Visit Management, Face Recognition, and Events. The 'Basic' tab is selected. The main area displays user details for 'Aditi Ajay Gupta' with ID '1687'. The 'Active' checkbox is checked. Below this, an 'Optional' section contains fields for 'Full Name' (Aditi Ajay Gupta), 'Short Name' (Aditi Ajay Gupta), 'Reference ID' (1687), and 'Integration Reference' (20 chars).

Tab	ID	Name	Active	Full Name	Short Name	Reference ID	Integration Reference
Basic	1687	Aditi Ajay Gupta	<input checked="" type="checkbox"/>	Aditi Ajay Gupta	Aditi Ajay Gupta	1687	20 chars

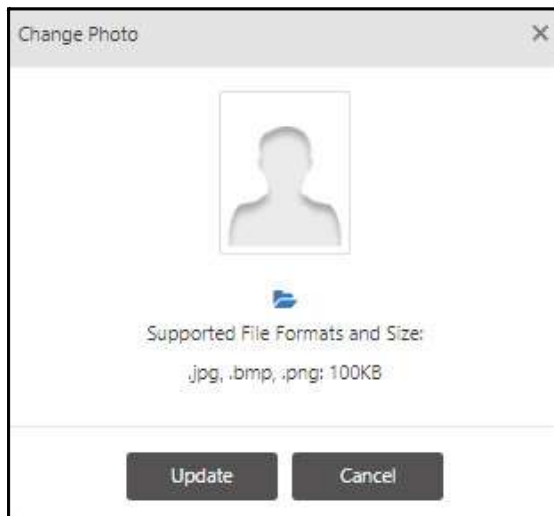
The User Configuration page provides various options for detailed configuration of the new user. Once the Profile tab is configured, the administrator can proceed to configure the other sections.


## Adding User Photo

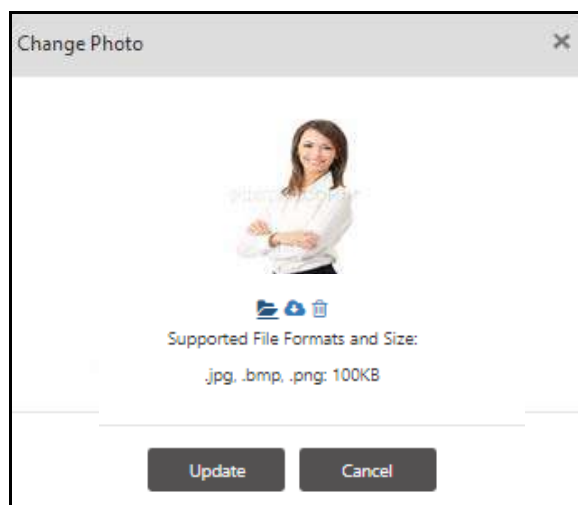
The administrator can add a profile photograph for each user defined in the COSEC system. The allowed size limit for uploading an image file is 100 KB.

This screenshot is identical to the previous one, but with a black arrow pointing to the profile photo icon in the sidebar, indicating where to click to upload a user photo.

To add an image as the profile photograph for a user, click the image icon. The Change Photo window appears as shown below.



Click  to browse the image file. The Supported File Formats are \*.jpg, .bmp and .png. Once the required image file is selected, click the **Update** button.



Then click **Save** button. The user photo will be successfully updated on the **User Configuration** page as shown below.

**User Configuration**

Search User ID or Name

1687  
Aditi Ajay Gupt  
Active

Profile  
Devices  
Credentials  
Group  
T&A  
Access Control  
ESS  
Cafeteria  
Job Costing  
Field Visit Management

Basic General Personal Contact

ID\*: 1687  
Name\*: Aditi Ajay Gupt, Ahmedabad  
Active: ☒

Optional

Full Name: Aditi Ajay Gupt, Ahmedabad  
Short Name\*: Aditi Ajay Gupt  
Reference ID\*: 1687  
Integration Reference: 20 chars

## Devices

This option enables the administrator to assign the user to the Panel200, Direct doors and Device groups defined in the system.



*The COSEC devices must be configured before assigning users on devices.*

## Assign

TestUser  
TestUser  
Active

Profile  
Devices  
Credentials  
Group  
T&A  
Access Control  
ESS  
Cafeteria  
Job Costing  
Field Visit Management  
Face Recognition  
Visitor Management  
Events

Assign Configure

Device Group ID Name

Device Name

Search

DGID	Device Group Name	
No Data		

Search

Device Name	Type	Restrict Access	Restrict Attendance	Action
No Data				

**Note:** Device(s) will be automatically retained which are part of any Access Rule(s) assigned to the User. For more details [Click here](#)

You can assign Device Groups as well as Devices to the users.

**Device Group:** Device Group can be a group of individual devices or a group of device groups. You can assign the same to the user.

To do so, click the **Device Group** picklist. The **Picklist for Device Group** pop-up appears.

The screenshot shows a window titled "Picklist For Device Group". At the top, a green bar displays "Total Selected: 0 Records". Below this is a search bar with the text "Search" and a magnifying glass icon, and a "Show Selected" button. A "Select All" checkbox is present. The main area contains a table with columns "DGID" and "Name". The table lists 10 device groups, with DGIDs 1 through 10. The first two rows are "ACTA Devices" (DGID 1) and "RnD1Visitor" (DGID 2). The remaining eight rows are "Device Group 3" through "Device Group 10". All checkboxes in the "DGID" column are unchecked. At the bottom left, it says "1 - 10 of 12 records". At the bottom right, there are navigation buttons: "<<", "<", "1", ">", ">>". At the very bottom are "OK" and "Cancel" buttons.

DGID	Name
1	ACTA Devices
2	RnD1Visitor
3	Device Group 3
4	Device Group 4
5	Device Group 5
6	Device Group 6
7	Device Group 7
8	Device Group 8
9	Device Group 9
10	Device Group 10

You can select particular groups or can select all the groups at once.

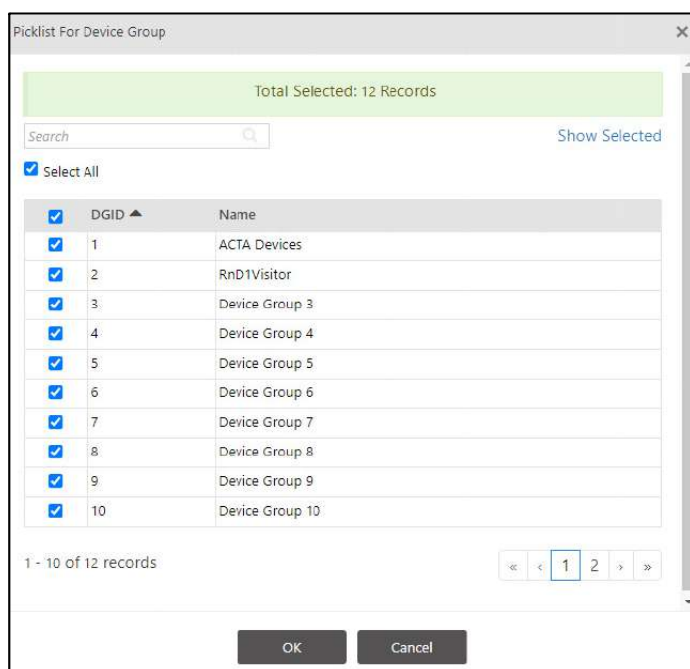
To select particular device group, select the check boxes of the desired device group.

The screenshot shows the same "Picklist For Device Group" window, but now two records are selected. The green bar at the top displays "Total Selected: 2 Records". The checkboxes for DGID 1 and DGID 2 are now checked. The rest of the interface, including the search bar, "Select All" checkbox, table, pagination, and buttons, remains the same.

DGID	Name
<input checked="" type="checkbox"/> 1	ACTA Devices
<input checked="" type="checkbox"/> 2	RnD1Visitor
<input type="checkbox"/> 3	Device Group 3
<input type="checkbox"/> 4	Device Group 4
<input type="checkbox"/> 5	Device Group 5
<input type="checkbox"/> 6	Device Group 6
<input type="checkbox"/> 7	Device Group 7
<input type="checkbox"/> 8	Device Group 8
<input type="checkbox"/> 9	Device Group 9
<input type="checkbox"/> 10	Device Group 10

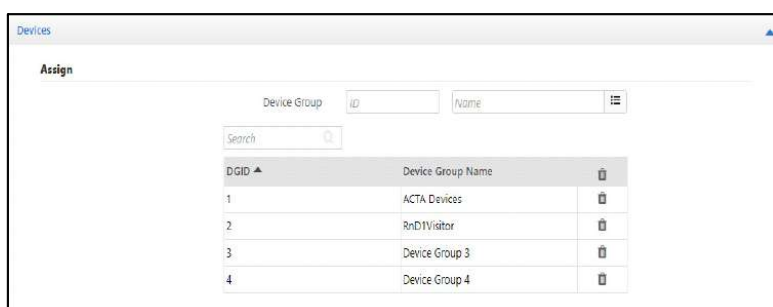
**OR**


To select all the device groups, select the **Select All** check box. The device group on all the pages will be selected.



Click **OK**.

The selected Device Groups appear in a grid.



You can also delete the desired device group/s. To do so, click **Delete**  of the respective device group.

Then click **Save**. The devices belonging to the selected device group/s appear in the grid.

DGID	Device Group Name	
1	ACTA Devices	
2	RnD1Visitor	
3	Device Group 3	

Device Name	Type	Restrict Access	Restrict Attendance	Action
FACTORY ACCOUNT	Door V3	<input type="checkbox"/>	<input type="checkbox"/>	
Factory Admin FMX	Door FMX	<input type="checkbox"/>	<input type="checkbox"/>	
Factory Canteen FMX	Door FMX	<input type="checkbox"/>	<input type="checkbox"/>	
Factory Production1 ARGO	ARGO	<input type="checkbox"/>	<input type="checkbox"/>	
Factory QC ARGO	ARGO	<input type="checkbox"/>	<input type="checkbox"/>	
Factory QC FMX	Door FMX	<input type="checkbox"/>	<input type="checkbox"/>	
FACTORY STORE	Door V3	<input type="checkbox"/>	<input type="checkbox"/>	
Factory Vega Production-2	Vega Controller	<input type="checkbox"/>	<input type="checkbox"/>	
HQ Access VEGA	Vega Controller	<input type="checkbox"/>	<input type="checkbox"/>	
HQ TA ARGO	ARGO	<input type="checkbox"/>	<input type="checkbox"/>	

Click **Edit**. You can un-assign the particular device from the assigned Device Group by clicking on icon. Click on the icon to assign the device again.



*If any device or a device belonging to any device group is un-assigned against any user or is selected for deletion but is a part of the Access Rule which is assigned to that user, then those door(s) will be retained against that user.*

Device Name	Type	Restrict Access	Restrict Attendance	Action
Factory Vega Production-2	Vega Controller	<input type="checkbox"/>	<input type="checkbox"/>	Click to Assign
RnD1 BOOM BARRIER IN	Vega Controller	<input type="checkbox"/>	<input type="checkbox"/>	
RnD1 GF TRIPOD LEFT OUT	PVR Door	<input type="checkbox"/>	<input type="checkbox"/>	

Select the corresponding **Restrict Access** and **Restrict Attendance** check boxes to enable these restrictions for the selected user on the selected device.

Similarly you can also assign devices to the user.



**Device:** To assign a device to the user; click the **Device** picklist. The **Select Device** pop-up appears.

The 'Select Device' pop-up window displays a list of devices. At the top, a green bar indicates 'Total Selected: 0 Records'. Below this is a search bar and a 'Show Selected' link. A 'Select All' checkbox is present. The main table lists devices with columns for 'Name' and 'Type'. The first device, 'ARCDC100\_DD\_Door', is selected. The bottom of the window shows '1 - 10 of 94 records' and navigation buttons.

<input type="checkbox"/>	Name	Type
<input checked="" type="checkbox"/>	ARCDC100_DD_Door	Panel200 Door
<input type="checkbox"/>	ARCDC100_DD_Door	Panel200 Door
<input type="checkbox"/>	ARCDC100_SD_Door	Panel200 Door
<input type="checkbox"/>	ARGO_PANEL	Panel200 Door
<input type="checkbox"/>	DoorV3	Panel200 Door
<input type="checkbox"/>	DoorV3_Door	Panel200 Door
<input type="checkbox"/>	DOORV4_PANEL	Panel200 Door
<input type="checkbox"/>	dumy	Panel200 Door
<input type="checkbox"/>	PATHV2_PANEL	Panel200 Door
<input type="checkbox"/>	VEGA_PANEL	Panel200 Door

You can select particular devices or can select all the devices at once.

To select particular devices, select the check boxes of the desired devices.

The 'Select Device' pop-up window displays a list of devices. At the top, a green bar indicates 'Total Selected: 1 Records'. Below this is a search bar and a 'Show Selected' link. A 'Select All' checkbox is present. The main table lists devices with columns for 'Name' and 'Type'. The first device, 'ARCDC100\_DD\_Door', is selected. The bottom of the window shows '1 - 10 of 94 records' and navigation buttons.

<input type="checkbox"/>	Name	Type
<input checked="" type="checkbox"/>	ARCDC100_DD_Door	Panel200 Door
<input type="checkbox"/>	ARCDC100_DD_Door	Panel200 Door
<input type="checkbox"/>	ARCDC100_SD_Door	Panel200 Door
<input type="checkbox"/>	ARGO_PANEL	Panel200 Door
<input type="checkbox"/>	DoorV3	Panel200 Door
<input type="checkbox"/>	DoorV3_Door	Panel200 Door
<input type="checkbox"/>	DOORV4_PANEL	Panel200 Door
<input type="checkbox"/>	dumy	Panel200 Door
<input type="checkbox"/>	PATHV2_PANEL	Panel200 Door
<input type="checkbox"/>	VEGA_PANEL	Panel200 Door

**OR**

To select all the devices, select the **Select All** check box. The devices on all the pages will be selected.

Select Device

Total Selected: 94 Records

Search

☒ Select All

<input checked="" type="checkbox"/>	Name	Type
<input checked="" type="checkbox"/>	ARCDC100_DD_Door	Panel200 Door
<input checked="" type="checkbox"/>	ARCDC100_DD_Door	Panel200 Door
<input checked="" type="checkbox"/>	ARCDC100_SD_Door	Panel200 Door
<input checked="" type="checkbox"/>	ARGO_PANEL	Panel200 Door
<input checked="" type="checkbox"/>	DoorV3	Panel200 Door
<input checked="" type="checkbox"/>	DoorV3_Door	Panel200 Door
<input checked="" type="checkbox"/>	DOORV4_PANEL	Panel200 Door
<input checked="" type="checkbox"/>	dumy	Panel200 Door
<input checked="" type="checkbox"/>	PATHV2_PANEL	Panel200 Door
<input checked="" type="checkbox"/>	VEGA_PANEL	Panel200 Door

1 - 10 of 94 records

« < 1 2 3 ... 10 > »

OK Cancel

Click **OK**.

The device/s appear in the grid.

Search <input type="text"/>				
Device Name	Type	Restrict Access	Restrict Attendance	Action
Factory Vega Production-2	Vega Controller	<input type="checkbox"/>	<input type="checkbox"/>	
RnD1 BOOM BARRIER IN	Vega Controller	<input type="checkbox"/>	<input type="checkbox"/>	
RnD1 Canteen1 PVR	PVR Door	<input type="checkbox"/>	<input type="checkbox"/>	
RnD1 Canteen2 PVR	PVR Door	<input type="checkbox"/>	<input type="checkbox"/>	
RnD1 CF TRIPOD LEFT OUT	PVR Door	<input type="checkbox"/>	<input type="checkbox"/>	

You can also delete the desired device/s. To do so, click **Delete** of the respective device.

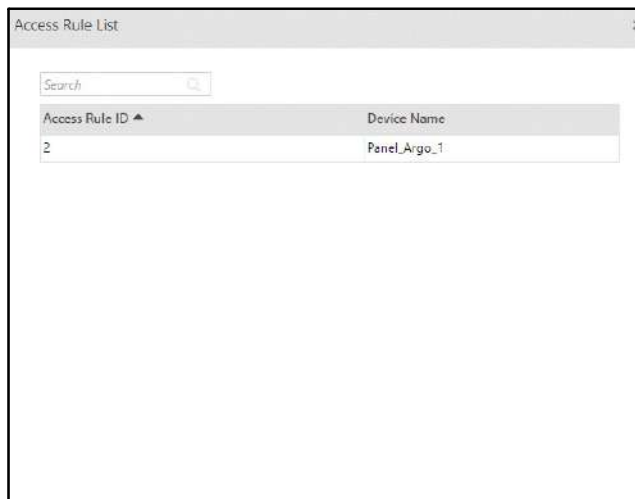


*The device picklist will include Panel Doors and Direct Doors only.*

Select the corresponding **Restrict Access** and **Restrict Attendance** check boxes to enable these restrictions for the selected user on the selected device.

- If you select the **Restrict Access** check box, then user will be restricted for access on that Door. The punches of the user on this door will be considered for attendance only and the door will not open for access.
- If you select the **Restrict Attendance** check box, the punch of the user on door will open the door for access but will not be considered for calculating the attendance.

If you wish to check the devices assigned against any Access Rule, click the **Click here** link at the bottom of the page. The **Access Rule List** pop-up appears.



The image shows a pop-up window titled "Access Rule List". It contains a search bar at the top. Below it is a table with two columns: "Access Rule ID" and "Device Name". There is one row in the table with the value "2" under "Access Rule ID" and "Panel\_Argo\_1" under "Device Name".

Access Rule ID	Device Name
2	Panel_Argo_1

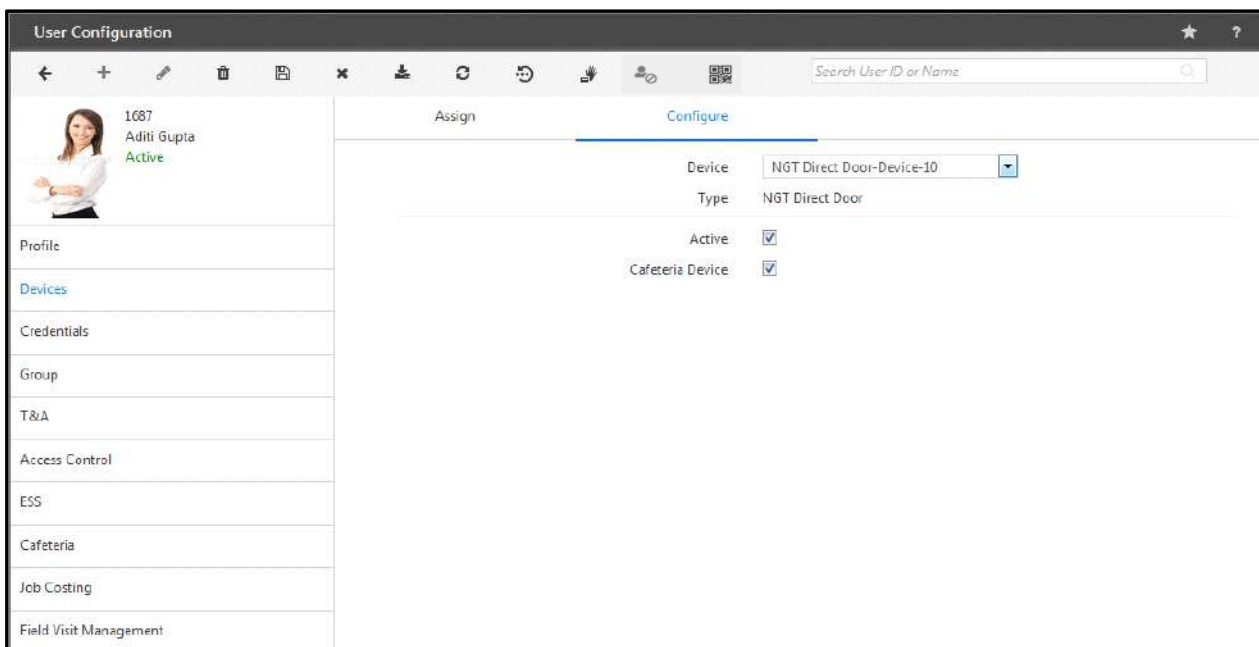
It displays the list of Devices along with the Access Rule ID against which they are assigned.

Click the **Save** button to save the device selection for assigning to the user.

## Configure



*The parameters for "Configure" varies for different type of devices.*

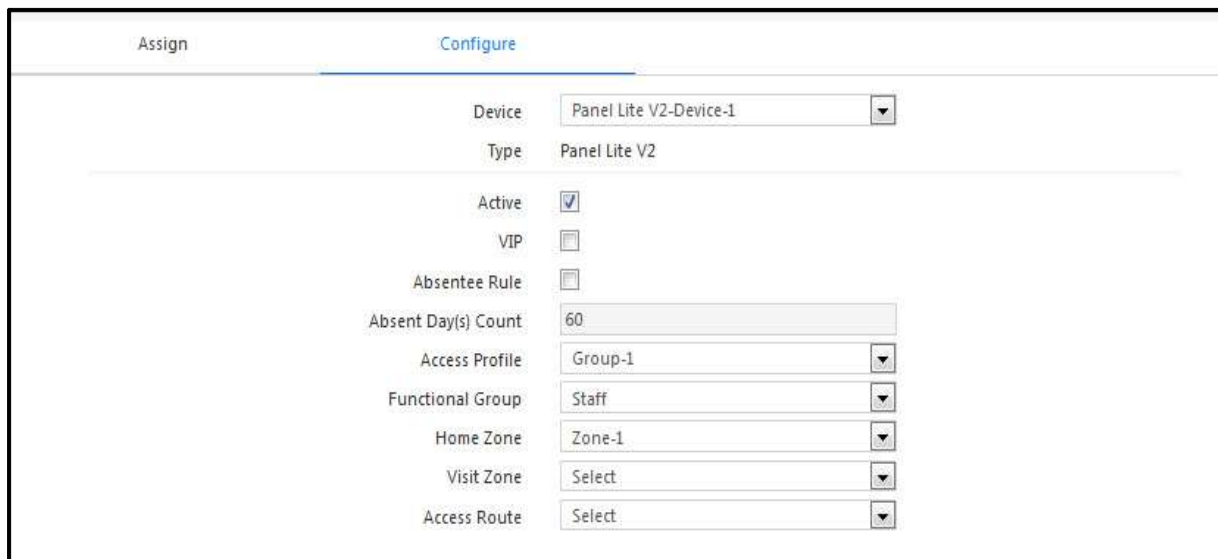


The image shows a "User Configuration" window. On the left is a sidebar with a user profile (Aditi Gupta, ID 1687, Active) and a list of configuration options: Profile, Devices, Credentials, Group, T&A, Access Control, ESS, Cafeteria, Job Costing, and Field Visit Management. The "Devices" option is selected. The main area has two tabs: "Assign" and "Configure". The "Configure" tab is active, showing a "Device" dropdown menu set to "NGT Direct Door-Device-10", a "Type" field set to "NGT Direct Door", and two checkboxes: "Active" (checked) and "Cafeteria Device" (checked).

**Device:** Select a device from the Device drop down list. This list displays all devices on which the selected user is assigned.

**Active:** The Active check box is selected by default to enable the user credentials on the selected device.

Configuration of Panel200 is shown below:



The screenshot displays the 'Configure' tab of the Panel200 configuration interface. It features a list of configuration options on the left and their corresponding values or controls on the right. The options include Device, Type, Active, VIP, Absentee Rule, Absent Day(s) Count, Access Profile, Functional Group, Home Zone, Visit Zone, and Access Route. The values are: Device (Panel Lite V2-Device-1), Type (Panel Lite V2), Active (checked), VIP (unchecked), Absentee Rule (unchecked), Absent Day(s) Count (60), Access Profile (Group-1), Functional Group (Staff), Home Zone (Zone-1), Visit Zone (Select), and Access Route (Select).

**VIP:** Check the VIP box if the user is to be given unrestricted access rights.

**Absentee rule:** Check this box to enable Absentee rule feature at user level for each Panel200 and Direct door. However, this option needs to be first enabled at the Panel200 and Direct door levels.

- **Absent Days Count:** Specify the days count ranging from 1 to 365 for which if the user remains absent, he will be marked inactive.

**Access Profile:** Select the Access Profile to be assigned to the user for the selected Panel200. If you have configured the Access Profile in the Enterprise Group assigned to the user, then the same will be assigned here. However, you can assign any other group from the list if required. For details refer to the desired Enterprise Group — “Organization”, “Branch”, “Department”, “Designation”, “Section”, “Category”, “Grade”, “Custom Group1”, “Custom Group2”, “Custom Group3”.

**Functional Group:** Select the Functional Group to be assigned to the user for the selected Panel200.

**Zone:** Select the user's **Home Zone** and the **Visit Zone** for the selected Panel200.

**Access Route:** The administrator can also assign a defined access route to the user. Select the access route from the drop down list if required.

Select another device and configure the access control options as applicable.



*This option is only available with the **Access Control** add on module.*

## Credentials

The Credentials option enables the configuration and enrollment of user credentials for the selected user.

The screenshot shows the 'User Configuration' window with the 'Credentials' tab selected. On the left, a sidebar lists configuration options: Profile, Devices, Credentials (selected), Group, T&A, Access Control, ESS, Cafeteria, Job Costing, Field Visit Management, Face Recognition, and Events. The main content area displays the following fields:

- PIN: [Empty text box]
- Biometric Group No.: 42
- Roaming User: ☐
- Access Card 1: [Empty text box]
- Access Card 2: [Empty text box]
- Enrolled Fingers (Suprema Proprietary): 0
- Enrolled Fingers (Suprema ISC): 0
- Enrolled Fingers (Lumidigm ISC): 0
- Enrolled Fingers (Lumidigm Proprietary): 0
- Enrolled Palm: 0
- Enrolled Face: 0
- Enable Self-Enrollment: ☐

The following parameters are available for configuration for the selected user:

**PIN:** Specify the PIN no. for the user. User PIN should be a numeric value ranging from 1 digit to a maximum of 15 digits. The value entered in this field will only be visible to the “SA” user. For all other login users the value in this field will be masked.

**Biometric Group No.:** Specify the Biometric group number to be assigned to the user if applicable. It is a number allotted to a group of users assigned on a device. This enables the device to match a template against only those users who are part of the same Biometric Group thus reducing processing time.

This value is used for Palm/Face Identification of user on Identification Server in shorter time span considering user first specifies Group No and then punches on the device.

Identification Server will be allocating templates to its child threads on the basis of this field.

**Roaming User:** You can mark the user as roaming user for the users who are field engineers, partners etc who report to office rarely. When such users mark their punch after pressing 0 on door, then they will be identified from the Roaming user group.

The Identification server will maintain a list of users along with their templates to be considered as roaming/remote users.

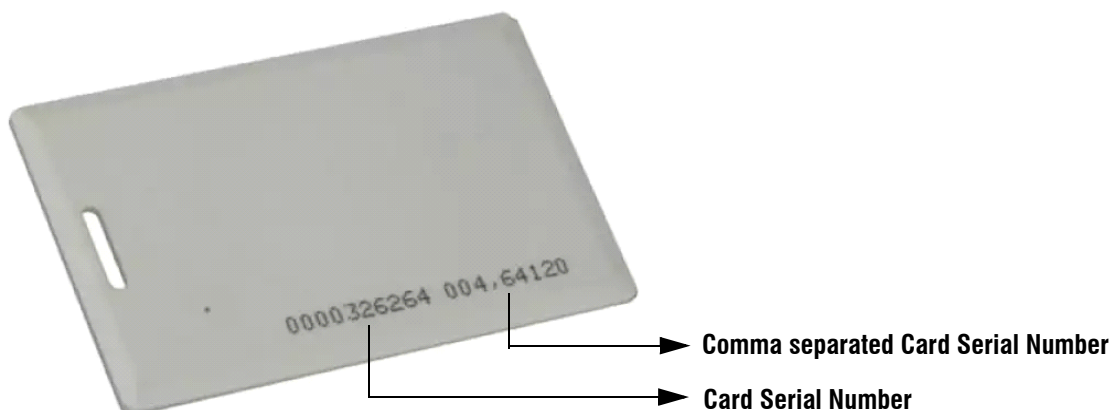


*If Enterprise Group Mapping is done then on user configuration page by default status of 'Roaming User' will be loaded as per mapped enterprise group.*

**Access Card 1:** Enter a Card Serial Number (CSN) or a Comma separated CSN which is to be assigned to the user.

Format:

- **Card Serial Number** = 1343933547.
- **Comma separated CSN** = 12,345789



The maximum character limit for Card Serial Number (CSN) is 20 digits. While the maximum character limit for Comma separated CSN is 21 digits.

To configure a comma separated card value, make sure you configure a 26-bit card format in the system and then assign the same to the device. To know more, refer [“Card Formats”](#).

If there is any discrepancy while entering the Access Card number (CSN), the system will display an error.

This Access Card number will be synced with the devices to allow/deny access to users.

COSEC accepts up to two cards per user. So if required and available, enter the **Access Card 2** number.

Once you save the configurations, hover your mouse over the Comma separated CSN value of any Access Card, the system will display an encoded (converted) value of Comma separated CSN.

While importing the data of users, make sure you enter the correct Access Card details in the desired format — Card Serial Number (CSN) or Comma separated CSN. To know more about importing users, refer [“Import Users”](#).

**Access Card 2**, can also be used to generate the QR Code. Users can access the device using this QR Code.



*Access Via QR feature is not applicable for Temporary Users.*

*Make sure you have saved the earlier configurations as QR Code can be generated in view mode only*

For QR Code functionality, make sure:

- you have enabled **Allow Access Via QR** in the desired ARGO FACE (Direct Door / Panel Door) device as well as configured the Image Setting parameters. For details refer to [“Face/Image Settings”](#).
- enabled the Alert, so that the generated/re-generated QR can be sent to the desired users/workers using SMS/Email/WhatsApp. Make sure you select the Alert Filter as **Users** and Event as **User Access - QR Credentials**. For details, refer to [“Configuring Alert Messages”](#).

If you add new devices and want **Allow Access Via QR** check box to be enabled by default, make sure you have enabled the same in Global Policy > Device. For details refer to [“Device”](#) in [“Defining Global Policies”](#)

QR Code can be generated in two ways:

- If a card is enrolled, then with the same details a QR Code can also be generated. In this case the user will be able to use, both the Card as well as the QR Code to access the device.

To generate the QR Code:

The screenshot shows the 'User Configuration' window for 'User4' (Active). The 'Credentials' tab is selected. Fields include PIN, Biometric Group No. (5), Roaming User (checkbox), Access Card 1, Access Card 2, and various biometric enrollment options (Fingers, Palms, Faces) with counts. A 'Generate' button (QR icon) and a 'Download' button (download icon) are located next to the Access Card 2 field. An arrow points to the 'Generate' button with the text 'Click Here'.



**Generate** will be accessible in view mode only.



- Click **Generate** . This generated QR Code is sent to the desired users via User Access - QR Credentials Alert using SMS, Email or WhatsApp as per the configurations done. Now, this QR Code can be used as a credential to access the device.
- Click **Download** , to download the generated QR Code on the local PC.
- If a card is enrolled, but you do not wish to generate the QR Code using the same details, then the QR Code can be generated using Re-generate option. In this case the Card value will be over-written with the QR Code value and the user will be able to use only the QR Code.

You can also click Re-generate to generate a new QR Code after you have generated the QR Code once.

To generate the QR Code:



**Re-generate** will be accessible in view mode only.

- Click **Re-generate** . A warning pop-up appears as the existing value of the Access Card will be erased. Click **Yes** to confirm. The new QR Code is generated. This generated QR Code is sent to the desired users via User Access - QR Credentials Alert using SMS, Email or WhatsApp as per the configurations done. Now, this QR Code can be used as a credential to access the device.
- Click **Download** , to download the generated QR Code on the local PC.

**Enrolled Fingers:** This option displays the number of fingerprint templates enrolled against the selected user.

- FP Template Type-** If Credential is selected as FP Template; then you can select the Type of FP Template which is to be deleted. The options of template are Suprema Proprietary, Suprema ISO, Lumidigm ISO, Lumidigm Proprietary and All.

**Enrolled Palm:** This option displays the number of palm vein templates enrolled against the selected user.

**Enrolled Face:** This option displays the number of Face templates enrolled against the selected user.

**Enable Self-Enrollment:** Select this checkbox to enable the Self-Enrollment feature for the selected user.


The *Self-Enrollment* feature enables the user to enroll himself/herself at a COSEC door controller using an already provided access PIN, without the help of any operator or HR executive. This feature is applicable for Wireless Door, PVR Door, NGT Controller, Vega Controller, Door V3 and Door V4.

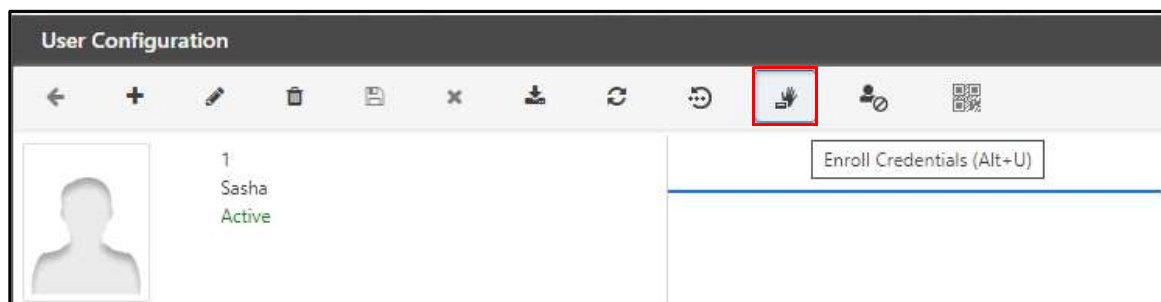
To enable Self- Enrollment at door; select *Device Configuration > Enrollment > Settings*.

An alert message containing the access PIN will be sent to the user once this feature is enabled for this user. To configure the access PIN to be sent in Alert message, [See “Configuring Alert Messages” on page 273](#). Self-Enrollment can be especially beneficial for organizations with large number of employees.

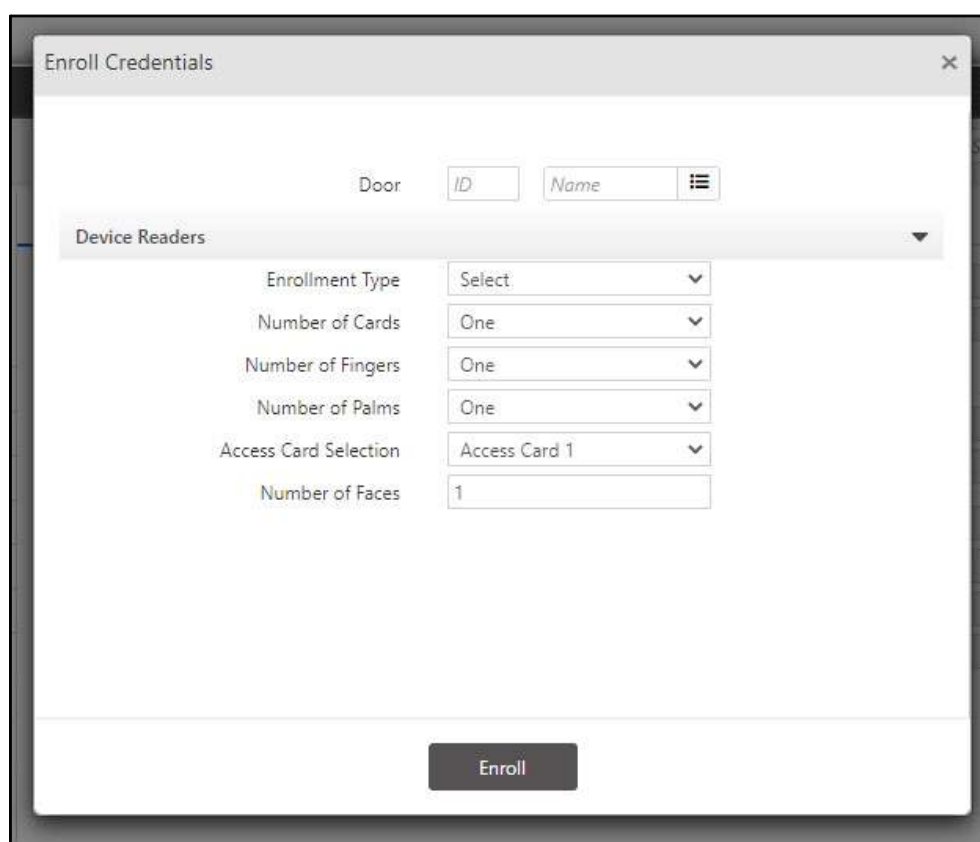


## Enroll Credentials

The Administrator can enroll credentials for the user by clicking **Enroll Credentials**  as shown below.



The **Enroll Credentials** window appears as shown below:



- **Door:** Select the desired door from the pick-list on which the enrollment is to done.

### **Device Readers**

Device Readers displays the information of the readers configured in the selected **Door**.

Enroll Credentials

Door

Device Readers

Card Reader

Biometric Reader

External Reader

Enrollment Type

Number of Cards

Number of Fingers

Number of Palms

Access Card Selection

Number of Faces

**Enroll**

Card Reader, Biometric Reader and External Reader information are displayed here.

Enroll Credentials

Door

Device Readers

Card Reader

Biometric Reader

External Reader

Enrollment Type

Number of Cards

**Enroll**

- **Enrollment Type:** From the dropdown list, select the desired enrollment type — **Read Only Card, Smart Card, Face, Biometrics, BiometricsThenCard, Mobile, or Duress Finger.**

Based on the selection of the **Door** and **Enrollment Type**, below parameters will be displayed for configuration.



*When Enrollment Type selected is Smart card or BiometricThenCard, Duress Finger Templates will not be written in the Smart Card.*

*Below parameters also depend on the Readers configured in the Door. To configure the desired Reader, refer Readers section under Devices > Device Configuration (of the desired Door) > Profile > Readers.*

**1. Enrollment Type = Read Only Card**

**Number of Cards:** Select the desired number of cards from the drop-down list.

**2. Enrollment Type = Smart Card**

**Number of Cards:** Select the desired number of cards from the drop-down list.

**Details on Smart Card**

Select the desired check boxes of the parameters — **User ID**, **Facility Code (FC)**, **Additional Security Code (ASC)** — which are to be displayed on the Smart Card.

Select the desired number of **Finger Templates** from the drop-down list.

If the **Door** is selected as PVR Door, **Palm Templates** parameter will be visible. Select the check box of this parameter if you wish to display it on the smart card.

To store palm templates, MiFare 4k reader must be configured in the PVR Door.



*Door PVR must be set in the Adaptive mode (configure from Admin> System Configuration> Global Policy) for the palm templates to be saved into the Smart Card.*

### Additional Details on Smart Card

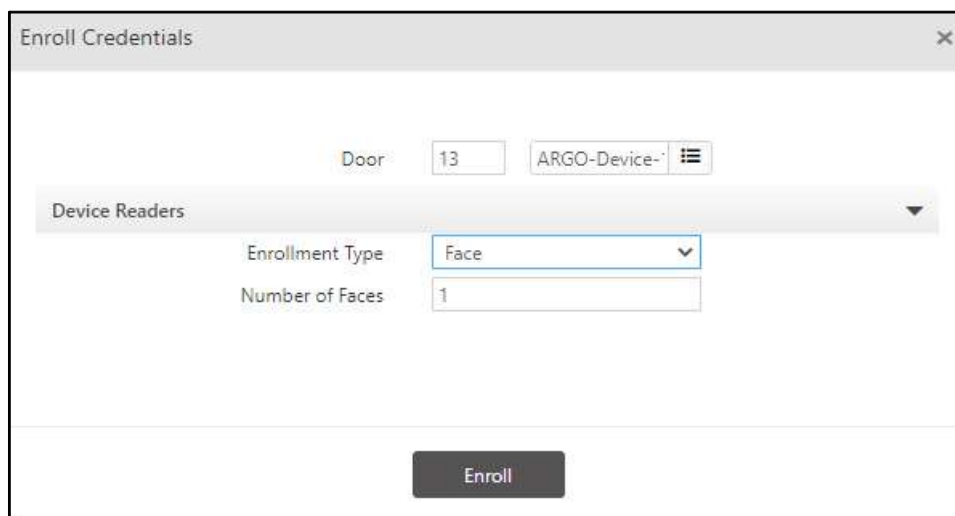
Other than the parameters mentioned in the Details on Smart Card, you can display additional details on Smart Card.

Select the desired check boxes of the parameters — **Short Name, Branch, Department, Designation, Emergency Contact, Blood Group** and **Medical History**— which are to be displayed on the Smart Card.

The values of these additional details are displayed as well. Make sure the values of these additional details are not blank for successful enrollment process.

#### 3. Enrollment Type = Face

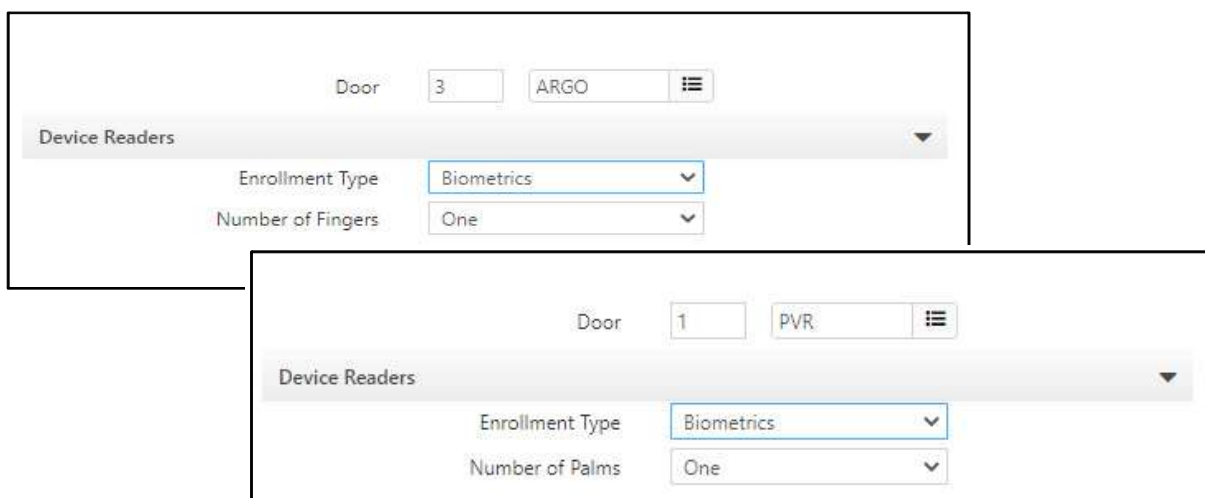
**Number of Faces:** Select the desired number of faces from the dropdown list.



The screenshot shows the 'Enroll Credentials' dialog box. At the top, there is a 'Door' field with the value '13' and a dropdown menu showing 'ARGO-Device-'. Below this is a 'Device Readers' section with a dropdown arrow. Underneath, the 'Enrollment Type' is set to 'Face' and the 'Number of Faces' is set to '1'. At the bottom, there is an 'Enroll' button.

#### 4. Enrollment Type = Biometrics

**Number of Fingers/ Number of Palms:** Select the desired number of fingers or palms from the dropdown list.



The first screenshot shows the 'Enroll Credentials' dialog box for Biometrics enrollment. The 'Door' field has the value '3' and the dropdown menu shows 'ARGO'. The 'Device Readers' section has a dropdown arrow. The 'Enrollment Type' is set to 'Biometrics' and the 'Number of Fingers' is set to 'One'. The second screenshot shows a similar dialog box for Biometrics enrollment. The 'Door' field has the value '1' and the dropdown menu shows 'PVR'. The 'Device Readers' section has a dropdown arrow. The 'Enrollment Type' is set to 'Biometrics' and the 'Number of Palms' is set to 'One'.

##### 5. Enrollment Type = BiometricsThenCard

**Number of Cards:** Select the desired number of cards from the dropdown list.

**Number of Fingers/ Number of Palms:** Select the desired number of fingers or palms from the dropdown list.

The screenshot shows the 'Enroll Credentials' window. At the top, 'Door' is set to '3' and 'ARGO' is selected. Under 'Device Readers', 'Enrollment Type' is 'BiometricsThenCard', 'Number of Cards' is 'One', and 'Number of Fingers' is 'One'. The 'Details on Smart Card' section has 'User ID', 'Facility Code (FC)', and 'Additional Security Code (ASC)' as unchecked checkboxes, and 'Finger Templates' as a dropdown set to 'None'. A tooltip points to the 'Finger Templates' dropdown with the text 'Duress Finger Templates will not be written in the Smart Card'. Below this is the 'Additional Details On Smart Card' section with a list of fields, each with an unchecked checkbox and a text input: 'Short Name' (Athira), 'Branch' (DFLTBRC), 'Department' (DFLTDPT), 'Designation' (DFLTDG), 'Emergency Contact', 'Blood Group' (NA), and 'Medical History'. An 'Enroll' button is at the bottom.

##### **Details on Smart Card**

Select the desired check boxes of the parameters — **User ID**, **Facility Code (FC)**, **Additional Security Code (ASC)** — which are to be displayed on the Smart Card.

Select the desired number of **Finger Templates** from the drop-down list.

If the **Door** is selected as PVR Door, **Palm Templates** parameter will be visible. Select the check box of this parameter if you wish to display it on the smart card.

To store palm templates, MiFare 4k reader must be configured in the PVR Door.



*Door PVR must be set in the Adaptive mode (configure from Admin> System Configuration> Global Policy) for the palm templates to be saved into the Smart Card.*

### **Additional Details on Smart Card**

Other than the parameters mentioned in the Details on Smart Card, you can display additional details on Smart Card.

Select the desired check boxes of the parameters — **Short Name, Branch, Department, Designation, Emergency Contact, Blood Group and Medical History**— which are to be displayed on the Smart Card.

The values of these additional details are displayed as well. Make sure the values of these additional details are not blank for successful enrollment process.

### **6. Enrollment Type = Mobile**



*To select **Enrollment Type** as Mobile, the particular device must have BLE support and ensure Bluetooth is ON in the mobile.*

**Access Card Selection:** Select the desired Access Card from the drop-down list.

The screenshot shows a window titled "Enroll Credentials". Inside, there are several fields: "Door" with the value "3", "Device Readers" with a dropdown showing "ARGO", "Enrollment Type" with a dropdown showing "Mobile", "Access Card Selection" with a dropdown showing "Access Card 1", and "Facility Code (FC)" with an unchecked checkbox. At the bottom center is a button labeled "Enroll".

**Facility Code (FC):** Select this check box to enroll the Facility Code (FC) against the user.

Click **Enroll** to initiate the enrollment process.

Enroll Credentials ✓ Enrollment Command Sent ✕

Door: 3 ARGO ⋮

Device Readers

Enrollment Type: Mobile ▼

Access Card Selection: Access Card 1 ▼

Facility Code (FC): ☐

**Enroll**

To know more about enrolling credentials of users, refer [“Enrolling Users”](#).

## 7. Enrollment Type = Duress Finger

**Number of Fingers:** Select the desired number of fingers that you want to enroll as **Duress Finger** from the drop-down list— **One** or **Two**.

Matrix COSEC Right People in Right Place at Right Time

Users

User Configuration

1224 Duress User Active

Profile

Device

Credentials

Group

TNA

Access Control

ZCS

Calendar

Job Costing

Field Visit Management

Face Recognition

Visitor Management

Events

Enroll Credentials ✕

Door: 1 ARGO Device ⋮

Device Readers

Enrollment Type: Duress Finger ▼

Number of Fingers: One ▼

**Enroll**

Click **Enroll** to initiate the enrollment process.

## Group

This option enables to assign the Enterprise groups, Reporting group, Approval Policy, Leave group and Week off group to the user.

The screenshot shows the 'User Configuration' window for user 'Aditi Ajay Gupta' (ID: 1687, Status: Active). The 'Group' tab is selected. The interface includes a sidebar with navigation options: Profile, Devices, Credentials, Group (selected), T&A, Access Control, ESS, Cafeteria, Job Costing, and Field Visit Management. The main area displays assignment fields for various groups, each with a numeric input and a picklist:

Field	Value	Picklist
Organization *	1	Organization-1
Branch *	1	Branch-1
Department *	1	Department-1
Section *	1	Section-1
Category *	1	Category-1
Grade *	1	Grade-1
Designation *	1	Designation-1
Custom Group 1 *	1	Custom Group 1
Custom Group 2 *	1	Custom Group 2
Custom Group 3 *	1	Custom Group 3
Reporting Group	1	QA Group
Approval Policy	2	1then2
Leave Group *	1	Leave Group-1
Week Off Group	ID	Name

This page will be available with the Time & Attendance add on module.

The default groups will be shown in the respective fields. Click on the picklist buttons and select the appropriate enterprise groups (Organization, Branch, Department, Section, Category, Grade, Designation, Custom Groups) to assign the user.



*The Enterprise Groups changed from here will be effective from the current date only. For the changed group to be effective from previous date, change the group from User module> Utilities> Change Group.*

*The picklist options that appear in each enterprise group will be as per the rights assigned to the SA. For details, refer to [“Assigning Group-Wise Rights”](#) under [“System Accounts”](#).*

- **Reporting Group:** Select the group from the pick-list to be assigned as reporting group for the user. The In-charge of the selected group will be the in-charge of the user. The different applications of user will require authorization of the in-charge of the group.

To create the Reporting group; click *Users module> Reporting In-Charge> Reporting Group*. For details, refer to [“Reporting Group”](#)

- **Approval Policy:** When Reporting Group is assigned to the user only then you can select the Approval Policy from the pick-list to assign to the user.

The Approval policy is created from *Users module> Reporting In-Charge> Approval Policy*. Refer to [“Approval Policy”](#).

- **Leave Group:** Select the leave group from the pick-list to assign a group of leaves to the user.





*To assign the new leave to the user, add the leave to the Leave group and assign the leave group to the user.*

- **Week Off Group:** Select the week off group from the picklist to assign the configured week offs to the user.



*To create the Week Off group, go to Shifts and Schedule module > Week Off Group*

*If 'Shift Based Access' flag is enabled in User Configuration, then effect of Week Off group assigned to user differently won't be effective.*

*Also if flag of 'Deny Access On Week Off' is enabled in Shift Schedule assigned to user, then user won't be granted access though user did not have week off based on Week Off group.*

## T&A

This tab will be available only for the *Time and Attendance* license. Here, the administrator can enter the attendance and the working policy related information for the user.

The screenshot shows the 'User Configuration' window with the 'T&A' tab selected. The user profile for 'Aditi Gupta' (ID: 1687, Active) is shown on the left. The main area is divided into 'Attendance' and 'Policy' sections. The 'Attendance' section includes: 'Enable Attendance Calculation' (checked), 'Restrict Half Day Considerations' (unchecked), 'Attendance Marking Type' (Normal), 'Max Punches To Be Considered' (Select), and 'Bypass Finger/Palm/Face For Attendance' (unchecked). The 'Policy' section includes: 'Max Short Leaves Allowed' (None), 'OT/C-OFF Eligibility' (None), 'Authorize C-OFF On' (WO, PH, WO/PH, FB, RD, Normal Day), 'Bus Route' (ID, Name), 'Enable Site Based Auto Tour Application' (unchecked), 'Tour' (Select), 'Base Site Selection' (ID, Name), and 'Auto Authorize Site Based Tour Application' (unchecked).

This section shows the configuration for 'Enable Location Based Auto Tour Application' (checked). It includes: 'Tour' (T2 - Tour2), 'Base Location Assignment' (Selected), 'Location' (Code, Name), 'Location Group' (ID, Name), 'Auto Authorize Location Based Tour Application' (checked), and 'Show Attendance Details On Device' (checked).



*If the Attendance Policy for the user is configured then assign that policy to the user. There is no need to configure same parameters i.e. "Max Punches to be considered" and "Max Short Leaves Allowed" here. Still If configured, then parameters configured here will be applicable for the user.*

## Attendance

In the **Attendance** section, configure the following parameters:

The screenshot shows the 'Attendance' section configuration. It includes: 'Enable Attendance Calculation' (checked), 'Restrict Half Day Considerations' (unchecked), 'Attendance Marking Type' (Normal), 'Max Punches To Be Considered' (First Punch Only), 'Bypass Finger/Palm/Face For Attendance' (Executive), 'Max Short Leaves Allowed' (Flexible), and 'OT/C-OFF Eligibility' (Present).

**Enable Attendance Calculation** - This field is checked by default. Uncheck this box if you want to disable attendance calculation for this User. This option has to be enabled for configuring any of the other parameters on this page.

**Restrict Half Day Considerations** - Enabling this option will restrict the half day markings and will consider only the full day attendance calculations.




*For Example:*

If the user has completed only the half of the required working hours, and **Restrict Half Day Considerations** is enabled for him, then his attendance will be considered as full day absent and the half day consideration will be restricted.

**Attendance Marking Type** - In case the attendance calculation is enabled then the user needs to select the attendance marking type from the drop down list.

The following options are available:

- **Normal:** type will be default for all users.
- **First Punch Only:** type users need only entry punch at the start of the shift. In this case the system will assume that the shift end time is the last out Punch for the day. All other calculations remain the same as for normal type users.
- **Executive:** type users will be marked full day present if at least one punch (entry/exit) is available in the day. There will not be any late/early & overtime calculation like it is done for normal and single punch type users.
- **Present:** category users do not require any punch for them to be marked full day present. All users belonging to this category are marked present by default.
- **Flexible:** category users' working will be checked against required minimum working and if it is more than required, full day attendance will be marked. In this case the minimum working hours required in a day for full day attendance and half day attendance can also be defined for each user as explained below.
- **Minimum Working Hours Required** - In the event of selecting the Flexible type for a user the administrator can also specify the minimum working hours required in a day to be marked **Full Day** or **Half Day** present. Specify the hours in hh:mm format.

Attendance		Policy	
Enable Attendance Calculation	<input checked="" type="checkbox"/>		
Restrict Half Day Considerations	<input type="checkbox"/>		
Attendance Marking Type	Flexible 		
<b>Min Working Hours Required</b>			
	Half Day	<input type="text" value="02:00"/>	
	Full Day	<input type="text" value="04:00"/>	
Max Punches To Be Considered	2 		
Bypass Finger/Palm/Face For Attendance	<input type="checkbox"/>		

**Max Punches to be Considered** - This parameter specifies the maximum entry/exit events per user to be considered in a day for attendance calculation.

Specify a value in this field if the value defined at the global level is to be overridden for this user. The options available are 2, 4, 6, 8, 10, 12 and N-Punch. N-Punch allows unlimited number of punches in IN/OUT pair.

**Bypass Finger/Palm/Face For Attendance** - On checking this option, the user can punch in or out using any of the assigned credentials and the same will be considered for attendance calculation. On selection of this option, finger/palm/face identification is not required for marking attendance. The user can use pin or card to mark the attendance.

**Max Short Leaves Allowed** - This parameter specifies the maximum number of short leaves (personal hours) to be allowed to selected users in an attendance period. This parameter is also defined at the global system configuration level and can be overridden for specific users using this option. The administrator can specify a value of a maximum two digits in this field.

**OT/C-OFF Eligibility:** This parameter enables the administrator to determine whether the overtime authorization for this user is to be done in one of the following ways:

- **None** - Extra work cannot be authorized as overtime or C-OFF for user.
- **Only Overtime** - Extra Work can only be authorized as overtime.
- **Only C-OFF** - Extra Work can only be authorized as C-OFF.
- **Both** - Extra Work can be authorized both as overtime and C-OFF.

On selecting **Both**, user can set the extra hours to be authorized as OT or C-OFF separately for Normal Day, WO, PH, WO/PH, FB and RD.



For detailed configuration to authorize OT/C-OFF, [See “Configuration to give OT and C-OFF to user” on page 1931.](#)

*If only Compensatory off is to be given to the user, then you must select Only C-OFF option.*

*To know more about authorization of extra hours as OT/C-OFF, [See “Overtime/C-OFF Approval” on page 2025.](#)*

**Bus Route:** Click on the Picklist button and select the bus route to be assigned to the user.

**Enable Site Based Auto Tour Application:** Select this checkbox so that tour application will be automatically applied for a particular user, if he punches from some site other than the Base Site.

Enable Site Based Auto Tour Application ☒

Tour T1 - Tour1

Base Site Selection ID Name

Auto Authorize Site Based Tour Application ☒

1 Site(s) are Selected

- **Tour:** Select the tour application from the drop-down list which will be automatically applied.
- **Base Site Selection:** Select the base site to be assigned to the user. You can select particular sites or can select all the sites at once.

Click the **Base Site Selection** picklist. The **Picklist for Site** pop-up appears.

Picklist For Site

Total Selected: 0 Records

Search

Show Selected

☐ Select All

<input type="checkbox"/>	Site ID	Name
<input type="checkbox"/>	1	Factory
<input type="checkbox"/>	2	HO
<input type="checkbox"/>	3	RnD1
<input type="checkbox"/>	4	RnD2
<input type="checkbox"/>	5	Site 5
<input type="checkbox"/>	6	Site 6
<input type="checkbox"/>	7	Site 7
<input type="checkbox"/>	8	Site 8
<input type="checkbox"/>	9	Site 9
<input type="checkbox"/>	10	Site 10

1 - 10 of 11 records

1 2

OK Cancel

You can either select particular sites or can select all the sites at once.

To select particular sites, select the check boxes of the desired sites.

The 'Picklist For Site' dialog box displays a table with 10 rows. The first two rows are selected, indicated by checked checkboxes in the first column. The table has columns for 'Site ID' and 'Name'. The 'Total Selected: 2 Records' status is shown at the top. The 'Select All' checkbox is unchecked. The pagination shows '1 - 10 of 11 records' and the first page is active.


<input type="checkbox"/>	Site ID ▲	Name
<input checked="" type="checkbox"/>	1	Factory
<input checked="" type="checkbox"/>	2	HO
<input type="checkbox"/>	3	RnD1
<input type="checkbox"/>	4	RnD2
<input type="checkbox"/>	5	Site 5
<input type="checkbox"/>	6	Site 6
<input type="checkbox"/>	7	Site 7
<input type="checkbox"/>	8	Site 8
<input type="checkbox"/>	9	Site 9
<input type="checkbox"/>	10	Site 10

OR

To select all the sites, select the **Select All** check box. The sites on all the pages will be selected.

The 'Picklist For Site' dialog box displays the same table as the previous screenshot, but now all 10 rows are selected, indicated by checked checkboxes in the first column. The 'Total Selected: 11 Records' status is shown at the top. The 'Select All' checkbox is now checked. The pagination shows '1 - 10 of 11 records' and the first page is active.

<input checked="" type="checkbox"/>	Site ID ▲	Name
<input checked="" type="checkbox"/>	1	Factory
<input checked="" type="checkbox"/>	2	HO
<input checked="" type="checkbox"/>	3	RnD1
<input checked="" type="checkbox"/>	4	RnD2
<input checked="" type="checkbox"/>	5	Site 5
<input checked="" type="checkbox"/>	6	Site 6
<input checked="" type="checkbox"/>	7	Site 7
<input checked="" type="checkbox"/>	8	Site 8
<input checked="" type="checkbox"/>	9	Site 9
<input checked="" type="checkbox"/>	10	Site 10

Click **OK**. Hover over the Info  icon. It displays the number of sites selected.

- **Auto Authorize Site Based Tour Application:** Select this check box to automatically authorize the tour application for a particular user, if auto tour application feature is enabled.

- **Enable Location Based Auto Tour Application:** Select this check box so that tour application will be automatically applied for a particular user, if he punches from some location other than the Base location.

If a user goes for official activity to some location other than base location; then new location can be assigned to the user and tour application will be automatically applied for that day when event is generated from the new location.

The screenshot shows a configuration window with the following elements:

- Enable Location Based Auto Tour Application:** A checked checkbox.
- Tour:** A dropdown menu showing "T2 - Tour2".
- Base Location Assignment:** A dropdown menu showing "Selected".
- Location:** Two input fields labeled "Code" and "Name", followed by a picklist icon. An information icon is also present.
- Location Group:** Two input fields labeled "ID" and "Name", followed by a picklist icon. A status box indicates "1 Location(s) are selected".
- Auto Authorize Location Based Tour Application:** An unchecked checkbox.
- Show Attendance Details On Device:** A checked checkbox.

- **Tour:** Select the tour application from the drop-down list which will be automatically applied when user goes to other location. The Tour application will be available in the drop-down only if it is added in the Leave Group assigned to the user.
- **Base Location Assignment:** Select the base location to be assigned to the user as **All** or **Selected**.
  - If you select **All**, all the locations configured in Location Master will be assigned to the user. When new location is added in the Location Master then it will be assigned to the user automatically.
  - If you select **Selected**, you can assign Locations as well as Location Group/s to the user.
- **Location:** You can assign particular locations or assign all the locations at once.

Click the **Location** picklist. The **Picklist for Location** pop-up appears.

The screenshot shows the "Picklist For Location" pop-up window. It includes a search bar, a "Show Selected" button, and a table of locations. At the bottom, there are "OK" and "Cancel" buttons.

	Code	Name
<input type="checkbox"/>	RnDGPS	RnD1 GPS
<input type="checkbox"/>	RnD2GP	RnD2 GPS
<input type="checkbox"/>	I9	Location 7
<input type="checkbox"/>	I8	Location 6
<input type="checkbox"/>	I7	Location 5
<input type="checkbox"/>	I6	Location 4
<input type="checkbox"/>	I13	Location 3
<input type="checkbox"/>	I12	Location 2
<input type="checkbox"/>	I11	Factory 2
<input type="checkbox"/>	I10	RnD 2

1 - 10 of 14 records

You can either select particular locations or can select all the location at once.

To select particular location, select the check boxes of the desired location.

The screenshot shows a dialog box titled "Picklist For Location". At the top, a green bar indicates "Total Selected: 1 Records". Below this is a search bar and a "Show Selected" link. A "Select All" checkbox is present and unchecked. A table lists 14 records with columns "Code" and "Name". The first record, "RnD1 GPS" with code "RnDGPS", is selected with a blue checkmark. The other 13 records are not selected. At the bottom, it shows "1 - 10 of 14 records" and a pagination control with "1" selected. "OK" and "Cancel" buttons are at the bottom.

<input type="checkbox"/>	Code ▼	Name
<input checked="" type="checkbox"/>	RnDGPS	RnD1 GPS
<input type="checkbox"/>	RnD2GP	RnD2 GPS
<input type="checkbox"/>	I9	Location 7
<input type="checkbox"/>	I8	Location 6
<input type="checkbox"/>	I7	Location 5
<input type="checkbox"/>	I6	Location 4
<input type="checkbox"/>	I13	Location 3
<input type="checkbox"/>	I12	Location 2
<input type="checkbox"/>	I11	Factory 2
<input type="checkbox"/>	I10	RnD 2

OR

To select all the locations, select the **Select All** check box. The location on all the pages will be selected.

The screenshot shows the same "Picklist For Location" dialog box, but now the "Select All" checkbox is checked. The table shows all 14 records with blue checkmarks in the selection column. The green bar at the top now indicates "Total Selected: 14 Records". The pagination control still shows "1" selected, and the "OK" and "Cancel" buttons are at the bottom.

<input checked="" type="checkbox"/>	Code ▼	Name
<input checked="" type="checkbox"/>	RnDGPS	RnD1 GPS
<input checked="" type="checkbox"/>	RnD2GP	RnD2 GPS
<input checked="" type="checkbox"/>	I9	Location 7
<input checked="" type="checkbox"/>	I8	Location 6
<input checked="" type="checkbox"/>	I7	Location 5
<input checked="" type="checkbox"/>	I6	Location 4
<input checked="" type="checkbox"/>	I13	Location 3
<input checked="" type="checkbox"/>	I12	Location 2
<input checked="" type="checkbox"/>	I11	Factory 2
<input checked="" type="checkbox"/>	I10	RnD 2

- Click **OK**.
- **Location Group:** You can assign particular location group or assign all the location groups at once. If a Location Group is assigned to user, then whenever new location is added to this group then this new location will also be assigned to the user.



Click the **Location** picklist. The **Picklist for Location** pop-up appears.

Picklist For Location Group

Total Selected: 0 Records

Search  Show Selected

☐ Select All

<input type="checkbox"/>	ID ▲	Name
<input type="checkbox"/>	1	Matrix
<input type="checkbox"/>	2	Location Group 2
<input type="checkbox"/>	3	Location Group 3
<input type="checkbox"/>	4	Location Group 4
<input type="checkbox"/>	5	Location Group 5
<input type="checkbox"/>	6	Location Group 6
<input type="checkbox"/>	7	Location Group 7
<input type="checkbox"/>	8	Location Group 8
<input type="checkbox"/>	9	Location Group 9
<input type="checkbox"/>	10	Location Group 10

1 - 10 of 12 records

« < 1 2 > »

OK Cancel

You can either select particular location group or can select all the location group at once.

To select particular location groups, select the check boxes of the desired location groups.

Picklist For Location Group

Total Selected: 1 Records

Search  Show Selected

☐ Select All

<input type="checkbox"/>	ID ▲	Name
<input checked="" type="checkbox"/>	1	Matrix
<input type="checkbox"/>	2	Location Group 2
<input type="checkbox"/>	3	Location Group 3
<input type="checkbox"/>	4	Location Group 4
<input type="checkbox"/>	5	Location Group 5
<input type="checkbox"/>	6	Location Group 6
<input type="checkbox"/>	7	Location Group 7
<input type="checkbox"/>	8	Location Group 8
<input type="checkbox"/>	9	Location Group 9
<input type="checkbox"/>	10	Location Group 10

1 - 10 of 12 records

« < 1 2 > »

OK Cancel

OR

To select all the location groups, select the **Select All** check box. The location group on all the pages will be selected.

Picklist For Location Group

Total Selected: 12 Records

Search  Show Selected

☒ Select All

<input checked="" type="checkbox"/>	ID ▲	Name
<input checked="" type="checkbox"/>	1	Matrix
<input checked="" type="checkbox"/>	2	Location Group 2
<input checked="" type="checkbox"/>	3	Location Group 3
<input checked="" type="checkbox"/>	4	Location Group 4
<input checked="" type="checkbox"/>	5	Location Group 5
<input checked="" type="checkbox"/>	6	Location Group 6
<input checked="" type="checkbox"/>	7	Location Group 7
<input checked="" type="checkbox"/>	8	Location Group 8
<input checked="" type="checkbox"/>	9	Location Group 9
<input checked="" type="checkbox"/>	10	Location Group 10

1 - 10 of 12 records

OK Cancel

- Click **OK**.
- **Auto Authorize Location Based Tour Application:** Select this check box to automatically authorize the auto generated tour application for a particular user who has punched from location other than base location. The auto approved application will appear in the Approved list. As it is automatically approved; no sms or email will be sent for approval to reporting in-charge.

**Example:** Consider a user Chirag for whom “Location Based Auto Tour Application” is enabled. Tour1 is selected and one location (HO) is assigned as the base location.

Enable Location Based Auto Tour Application ☒

Tour

Base Location Assignment

Location

Location Group

Auto Authorize Location Based Tour Application ☐

Show Attendance Details On Device ☒

1 Location(s) are selected

Picklist For Location

1 selected of 3 records

Search

<input type="checkbox"/>	Code ▲	Name
<input checked="" type="checkbox"/>	HO	Head Office
<input type="checkbox"/>	HOM	HO Matrix
<input type="checkbox"/>	RnD	RnD Makarpura

When user punches from location other than assigned base location then event will be generated as shown below.

User Events

←

Date\*

27/06/2018

27/06/2018

Filter By

All

Group/User

ID

Name

View

Attendance Events (1)

Search

User ID ▲	User Name	Date-Time	Device Name	I/O	Access	Source	Source Details	Location Details	View Image
1	Chirag	27/06/2018 15:45		Entry	Allowed	Others		+22.2575, +073.1051	

Access Control Events (0)

Visitor Events (0)

This event will automatically generate the tour application. The reporting in-charge of the user can view the application and give the verdict.

101

Khushbu

Basic

Time Attendance

Leave Management

Group Details

Approval/Authorization

Attendance Authorization

Short Leave/Official In-Out Authorization

Overtime/Coff Authorization

Attendance Correction Authorization

Leave Application Approval

Tour Application Approval

C-Off Application Approval

Visitor Pre-Registration Approval

Tour Application Approval

Show All Pending Applications

Tour Date

From Date

To Date

Filter Users

All

Group/User

ID

Name

View

Pending (1)

Search

User ▲	Name	From Date	To Date	Tour	Application Type	Application Date	Posted Days	Approve	Reject	Remark	Details
1	Chirag	27/06/2018	27/06/2018	Tour1	New	27/06/2018	1.0	<input type="checkbox"/>	<input type="checkbox"/>		

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Click on **Details** button to view the tour application details.

**Tour Application Detail**

User: 1 Chirag

Tour: TR Tour1

**Application Details**

Application Date: 27/06/2018

Half Day Consideration: Both

From Date: 27/06/2018 Full Day

To Date: 27/06/2018 Full Day

Applied Days: 1.0

Posted Days: 1.0

Reason: Auto Tour Application by System

Address:

Contact Number:

Location Details: GPS - (+22.2575, +073.1851)

View Map

The SMS and Email Alert can be configured from Alert Message configuration which will notify the reporting in-charge of the user who has punched from location other than base location. The SMS and Email must be configured from SMS configuration and Email configuration respectively.

**Alert Message Configuration**

Alert Filter: Leave Management

Event: Leave Application

Header Message: Dear User,

Footer Message: From COSEC Software

Additional Message Parameters:

Message Preview:

Assign Alert:

Select Users: Randomly

User: ID Name

User ID	Name	SMS	Email
101	Khushbu	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Search:

ID	Event
1	Monthly Attendance
2	Leave Approval
3	Leave Rejection
4	User Events
5	Leave Application
6	Missing In Punch - Users
7	Missing In Punch - Group Incharge
8	Missing Out Punch - Users
9	Missing Out Punch - Group Incharge
10	User Allowed
11	User Denied
12	Door Force Open
15	New Joining - Confirmation
16	Visitor Arrival
17	Visitor Pre-Registration

1 - 15 of 33 records



1. Ensure that Email ID and Mobile number are specified in User profile of Reporting in-charge.
2. Ensure that Alert service must be properly assigned from the Admin Portal and Alert service must be running to get the alert notification.



## Posting of Tour Application

1. If user is marked as 'PR' on one of the half day then Tour will be applied for other half of the day.
2. If leave application is pending for either half of day then tour will be applied on another half of day.
3. If leave application is pending for either half of day and approved C-OFF application for another half of day; then tour will not be applied on that day.

**Show Attendance Details on Device:** Select the check-box to display the attendance summary of the user on Vega direct door and FMX door. Hence the Vega/FMX direct doors assigned to the user will display the current month's data (as per device time) when the user is allowed access to the door.

See details in *Device Configuration > Advanced > Settings (of Vega Door/ FMX door)*

In the **Policy** section assign different Policies to the selected user. This page will be available only with the **Time & Attendance** add on module.

Attendance	Policy	
Attendance Policy	<input type="text" value="1"/>	<input type="text" value="Attendance Policy-1"/>
Absentee Policy	<input type="text" value="1"/>	<input type="text" value="Absentee Policy-1"/>
Overtime Policy	<input type="text" value="1"/>	<input type="text" value="OverTime Policy-1"/>
Late-IN Policy	<input type="text" value="2"/>	<input type="text" value="Late-In 2"/>
Early-OUT Policy	<input type="text" value="1"/>	<input type="text" value="Early Out Policy-1"/>
C-OFF Policy	<input type="text" value="1"/>	<input type="text" value="COFF Policy-1"/>

The default policies will automatically be assigned to the new user. It will be displayed in the respective fields as shown above.

To change the policies from current date, click the respective picklist and select the policy to be assigned to the user. If the policies (other than Attendance Policy) are to be assigned from previous date, then go to T&A > Utilities > Change Policy.



To configure the Policies go to *T&A > Policies*.

## Access Control

On selection of the **Access Control** tab, the following page is displayed:

The screenshot displays the 'User Configuration' window. On the left is a sidebar menu with options: Profile, Devices, Credentials, Group, T&A, Access Control (highlighted), ESS, Cafeteria, Job Costing, Field Visit Management, Face Recognition, Visitor Management, and Events. The main area is titled 'User Configuration' and shows details for user 'U1\_Smita' (Active). It has two tabs: 'Basic' and 'Advance'. The 'Basic' tab is active, showing configuration options: 'Bypass Finger' (checkbox), 'Bypass Palm' (checkbox), 'Access Validity' (checkbox), 'Access Validity Date' (calendar icon), 'Access Level' (dropdown menu showing '8'), 'Shift Schedule' (dropdown menu showing 'Schedule Group'), 'Start Shift' (dropdown menu showing 'General Shift'), 'Holiday Schedule' (dropdown menu showing 'Schedule 1'), and 'Access Cluster Checking' (checkbox).

### Basic

In the **Basic** section, the administrator can define access parameters for the selected user. This tab offers the following sections for configuration:

**Bypass Finger** - This option can be enabled in the event of the Finger Print image not being in order and the system thus has problems identifying the user. In such cases, the system administrator can disable the Finger Print check for the user thus enabling the user to gain access using either the assigned pin or card.

**Bypass Palm** - This option can be enabled in the event of the Palm Vein image not being in order and the system thus has problems identifying the user. In such cases, the system administrator can disable the Palm vein check for the user thus enabling the user to gain access using either the assigned pin or card.

**Access Validity** - Enable this option if the user credential is to be activated for a predefined period.

**Access Validity Date** - Specify the end date of the validity in this field.

**Access Level** - Specify the access level for which the Smart Identification feature will be applicable to the user.

**Shift Schedule** - Assign a shift schedule to the selected user from the drop-down list.

**Start Shift** - In case of multiple shifts in the schedule group, the starting shift needs to be selected from the drop down list.

**Holiday Schedule** - Select the Holiday schedule to be assigned to the user from the drop down list.

**Access Cluster Checking** - Select this checkbox to enable checking for access cluster restrictions for the selected user. It is available only with the Access Control add-on license.

## Advance

The **Advance** section is available only with the Access Control add-on module. Here, the administrator can define access parameters for the selected user. The **Advance** page appears as follows:

ID	Name
13	test
15	test2

**Enable Advance Access Control:** Check this box to enable the advance access control feature.

**Shift based Access:** This parameter allows the administrator to enable user access based on the shift working time of the user.



*In the event of not selecting the **Shift Based Access** option then the system will apply the **Default Access Settings** as defined on a Panel200 as the access settings for the user.*

**Smart Access Route** - Select the Smart Access Route to be assigned to the user from the Access Route picklist window. The user can access the assigned route using the smart card enrolled with Smart Access Route. The card can be configured to include Smart Access Route from Card Personalization.

**Max Route Level:** Select the route level up to which the user is to be allowed access from the drop down list.

**Enable Elevator Access Control:** Check this box to enable the Elevator access control feature for the user.

**Elevator Floor Group:** Click the picklist and select the Elevator floor group to be assigned to the user. The user can access the floors of the Elevators included in Elevator Floor Group.

The Elevator Floor group is created from Access Control> Elevator Access Control> Elevator floor group



*Certain parameters when configured for a specific user may over-ride corresponding parameters pre-defined at the Global Policy level.*

**Access Rule List:** The table displays the list of Access Rule/s assigned to the user.

## ESS

To enable and configure ESS account access for the selected user. On selection of the **ESS** tab, the following page is displayed:

## Settings

The **Settings** section under the **ESS** tab offers the following parameters for configuration:

**Enable Account** - Select this checkbox to enable ESS account access for the selected user.

**Edit Basic Details** - Select this checkbox to enable the selected users to edit basic details on their respective ESS accounts.

**Punch marking via ESS** - Select this checkbox to enable users to mark their attendance punch manually from their respective ESS accounts.

**ESS Role Rights**- Select the Role Rights from the picklist to be assigned to the user.

**Preferred Language**- Specifies the language preferred for the selected ESS Users as *English, Arabic, Spanish, Albanian, Turkish or Vietnamese*.

**Login via Active Directory** - Select this checkbox to enable the selected ESS user to login using his Active Directory credentials.

- **Username** - Assign a username to the selected ESS user for Active Directory login.
- **Domain** - Specify the Active Directory domain name in this field for Active Directory login.

**Auto -Authorize IMEI Registration** -Select this checkbox to automatically authorize the user request through device with registered IMEI number in COSEC database.

**Mobile Identification Number** - Specify the Mobile Identification Number which is the unique number of the mobile device from which the ESS application is to be used. This can consist of maximum 40 alphanumeric characters.

**Punch Marking Via API** - Select this checkbox to enable user to mark punches by firing API. Auto-Punch and Manual-Punch marking checkbox will be activated only if Punch marking via API is enabled.



**Mark Punch As Per-** Select the option of Time Zone which is to be applied for punch time (punch marked from API)

- **Server Time Zone-** The date- time of the punch will be as per the server time zone.
- **Local Time Zone-** The date-time of the punch will be as per the time zone of the place from where the punch is marked.

**Auto-Punch Marking** - Select this checkbox to enable the auto-attendance marking feature for the selected user from the COSEC APTA mobile application. On enabling this feature, if the user's current location matches any of the assigned locations; a punch will be marked automatically for the user from the mobile application.

**Manual Punch Marking** - Select this checkbox to enable manual punch marking from the COSEC APTA mobile application.

**Face Mandatory For Punch** - When Manual Punch Marking and Face Recognition feature is enabled for user then you can select the specific option for which face is to be made mandatory for the punch. The options are **Attendance, Access Control, Both** and **None**.

For Access Control and Both option; you must enable **Allow Door Access Through API** checkbox.

**APTA Face Anti-Spoofing:** When **Manual Punch Marking** is enabled and **Face Mandatory For Punch** is selected as — **Attendance, Access Control** or **Both** — then select **APTA Face Anti-Spoofing** checkbox to enable **Face Anti-Spoofing** feature via COSEC APTA Application to prevent false face verification by using a photo, video, mask or a different substitute for an unauthorized person's face.

**Capture Photo** - This checkbox is activated only when **Punch marking via API** and **Manual Punch Marking** are enabled. This allows the user to capture snapshot while punching through COSEC APTA.

**Allow Offline Punch** - This checkbox is activated only when "Punch marking via API" and "Manual Punch Marking" are enabled. This allows users to apply for offline punches.

In Mobile devices, when there is no connectivity between server and the Mobile device, the punches, with their timings can be stored through offline punch and send to server when connectivity is restored.

**Location Mandatory For Punch** - This field determines if information regarding the source location from where the punch has been marked should accompany a punch marking by user.

- Select **None** if location information should not accompany a punch.
- For *Manual Punch Marking*, select **Any Location** (locations need not be configured).
- For *Auto-Punch Marking* (auto-attendance feature), select **Configured Locations Only** (locations must be configured on "Location Master").

**Reason For Punching From Unassigned Location:** This checkbox will be activated only when 'Location Mandatory For Punch' has either **None** or **Any Location** as values. By enabling this checkbox, the Incharge Users can know the reason for which the punch is made from unassigned location by the employee user.

**Location Assignment:** Select the option as "All" or "Selected" for assigning location to user.

1. For **All** option; all the locations configured in Location Master will be assigned to the user. When new location is added to Location master then it will be automatically assigned to the user if "All" is selected.
2. For **Selected** option; Location and Location Group will be enabled for the selection which is to be assigned to the user.

- **Location:** Select the **Location** pick-list. You can select particular locations or can select all the locations at once.
- Click the location picklist, the **Picklist For Location** pop-up appears.

The screenshot shows the 'Picklist For Location' dialog box. At the top, a green bar indicates 'Total Selected: 0 Records'. Below this is a search bar and a 'Show Selected' link. A 'Select All' checkbox is present. The main area contains a table with 14 records, each with a checkbox, a code, and a name. The records are:

<input type="checkbox"/>	Code	Name
<input type="checkbox"/>	RnDGPS	RnD1 GPS
<input type="checkbox"/>	RnD2GP	RnD2 GPS
<input type="checkbox"/>	I9	Location 7
<input type="checkbox"/>	I8	Location 6
<input type="checkbox"/>	I7	Location 5
<input type="checkbox"/>	I6	Location 4
<input type="checkbox"/>	I13	Location 3
<input type="checkbox"/>	I12	Location 2
<input type="checkbox"/>	I11	Factory 2
<input type="checkbox"/>	I10	RnD 2

At the bottom, it shows '1 - 10 of 14 records' and a pagination control with '1' selected. There are 'OK' and 'Cancel' buttons at the very bottom.

You can either select particular location or can select all the location at once.

To select particular locations, select the check boxes of the desired locations.

The screenshot shows the 'Picklist For Location' dialog box with one record selected. The green bar at the top now indicates 'Total Selected: 1 Records'. The checkbox for 'RnDGPS' is checked. The table content is the same as in the previous screenshot:

<input type="checkbox"/>	Code	Name
<input checked="" type="checkbox"/>	RnDGPS	RnD1 GPS
<input type="checkbox"/>	RnD2GP	RnD2 GPS
<input type="checkbox"/>	I9	Location 7
<input type="checkbox"/>	I8	Location 6
<input type="checkbox"/>	I7	Location 5
<input type="checkbox"/>	I6	Location 4
<input type="checkbox"/>	I13	Location 3
<input type="checkbox"/>	I12	Location 2
<input type="checkbox"/>	I11	Factory 2
<input type="checkbox"/>	I10	RnD 2

The rest of the interface, including the pagination and buttons, remains the same.

OR

To select all the locations, select the **Select All** check box. The location on all the pages will be selected.

Picklist For Location

Total Selected: 14 Records

Search  Show Selected


☒ Select All

<input checked="" type="checkbox"/>	Code ▼	Name
<input checked="" type="checkbox"/>	RnDGPS	RnD1 GPS
<input checked="" type="checkbox"/>	RnD2GP	RnD2 GPS
<input checked="" type="checkbox"/>	I9	Location 7
<input checked="" type="checkbox"/>	I8	Location 6
<input checked="" type="checkbox"/>	I7	Location 5
<input checked="" type="checkbox"/>	I6	Location 4
<input checked="" type="checkbox"/>	I13	Location 3
<input checked="" type="checkbox"/>	I12	Location 2
<input checked="" type="checkbox"/>	I11	Factory 2
<input checked="" type="checkbox"/>	I10	RnD 2

1 - 10 of 14 records

« < 1 2 > »

OK Cancel

Click **OK**. Hover over the Info  icon. It displays the number of selected locations.

- **Location Group:** Similarly, you can select particular location groups or all the groups. If Selected Location groups are assigned to user and whenever new location is added to the location group then newly added location in location group will also be assigned to the user.
- Click the location group picklist, the **Picklist For Location Group** pop-up appears.

Picklist For Location Group

Total Selected: 0 Records

Search  Show Selected

☐ Select All

<input type="checkbox"/>	ID ▲	Name
<input type="checkbox"/>	1	Matrix
<input type="checkbox"/>	2	Location Group 2
<input type="checkbox"/>	3	Location Group 3
<input type="checkbox"/>	4	Location Group 4
<input type="checkbox"/>	5	Location Group 5
<input type="checkbox"/>	6	Location Group 6
<input type="checkbox"/>	7	Location Group 7
<input type="checkbox"/>	8	Location Group 8
<input type="checkbox"/>	9	Location Group 9
<input type="checkbox"/>	10	Location Group 10

1 - 10 of 12 records

« < 1 2 > »

OK Cancel

You can either select particular location or can select all the locations at once.

To select particular location groups, select the check boxes of the desired location groups

Picklist For Location Group

Total Selected: 1 Records

Search  Show Selected

☐ Select All

<input type="checkbox"/>	ID ▲	Name
<input checked="" type="checkbox"/>	1	Matrix
<input type="checkbox"/>	2	Location Group 2
<input type="checkbox"/>	3	Location Group 3
<input type="checkbox"/>	4	Location Group 4
<input type="checkbox"/>	5	Location Group 5
<input type="checkbox"/>	6	Location Group 6
<input type="checkbox"/>	7	Location Group 7
<input type="checkbox"/>	8	Location Group 8
<input type="checkbox"/>	9	Location Group 9
<input type="checkbox"/>	10	Location Group 10

1 - 10 of 12 records

« < 1 2 > »

OK Cancel

OR

To select all the location groups, select the **Select All** check box. Th location groups on all the pages will be selected.

Picklist For Location

Total Selected: 14 Records

Search  Show Selected

☒ Select All

<input checked="" type="checkbox"/>	Code ▼	Name
<input checked="" type="checkbox"/>	RnDGPS	RnD1 GPS
<input checked="" type="checkbox"/>	RnD2GP	RnD2 GPS
<input checked="" type="checkbox"/>	I9	Location 7
<input checked="" type="checkbox"/>	I8	Location 6
<input checked="" type="checkbox"/>	I7	Location 5
<input checked="" type="checkbox"/>	I6	Location 4
<input checked="" type="checkbox"/>	I13	Location 3
<input checked="" type="checkbox"/>	I12	Location 2
<input checked="" type="checkbox"/>	I11	Factory 2
<input checked="" type="checkbox"/>	I10	RnD 2

1 - 10 of 14 records

« < 1 2 > »

OK Cancel

Click **OK**. Hover over the Info  icon. It displays the number of selected location groups.



Locations can be configured from *COSEC Web Application > Admin > System Configuration > Location Master*.

**Allow Door Access Through API-** Select this check box to allow the access to device through API.

**PIN Authentication For Door Access-** Enable this check-box for Dual Authentication with PIN when Bluetooth or QR based access is used for Access control feature in COSEC APTA mobile application.



*Pin Authentication For Door Access can be enabled only when Allow Door Access Through API is enabled.*

## Cafeteria

The cafeteria section allows to enable the cafeteria account for the user and configure the related parameters.

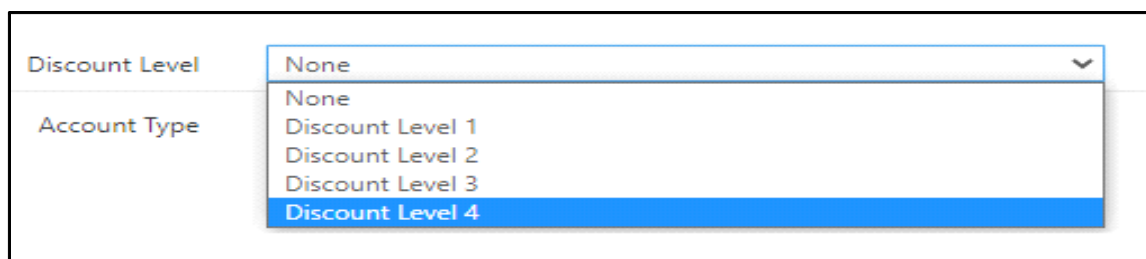
## Settings

**Enable Account** - Select this checkbox to enable Cafeteria account access for the selected user.

**Enable Offline Transaction-** Select the desired option from the drop-down list for the user to perform the offline transaction

- Select **None**, if you do not want to allow transactions to be made by the user when the device is in offline mode.
- Select **Allow With Discount**, if you want to allow transactions with discount to be made by the user, when the device is in offline mode.
- Select **Allow Without Discount**, if you want to allow transactions without discount to be made by the user, when the device is in offline mode.

**Discount Level** - Select the appropriate discount level from the drop down list as shown.



Discount Level	None
Account Type	None
	Discount Level 1
	Discount Level 2
	Discount Level 3
	Discount Level 4

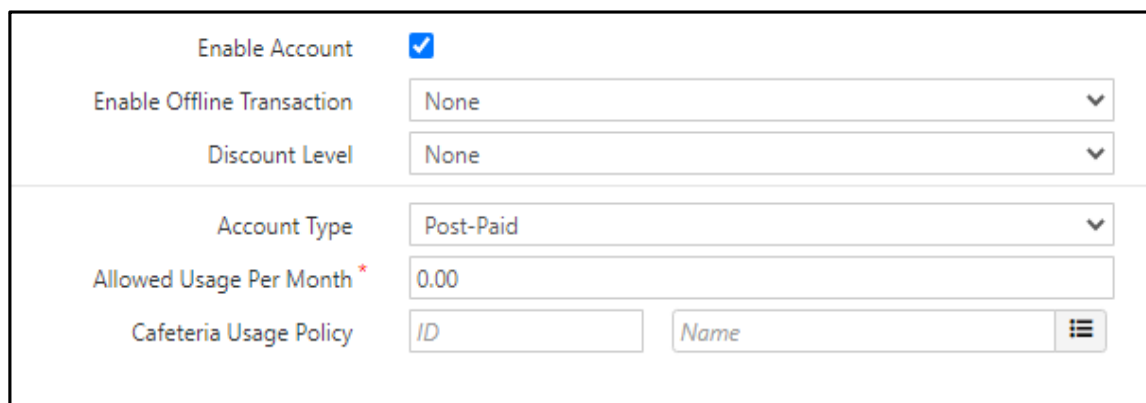
**Account Type** - Specify the account type as **Pre-Paid** or **Post-Paid** by selecting from the drop down list.

#### **Pre-paid Account**

- For **Pre-Paid** account type, specify whether the **Balance Management** should be **Device-based** or **Server-based**.
- When Balance Management is selected as **Server based**, then you can enable **Device-Server Balance Check**. This will allow Device to check Server-side balance before allowing transaction. For this, Device and Server must be connected.

#### **Post-paid Account**

- For **Post-Paid** account type, enter the **Allowed Usage Per Month** based on which monthly dues for the user can be calculated.



Enable Account	<input checked="" type="checkbox"/>
Enable Offline Transaction	None
Discount Level	None
Account Type	Post-Paid
Allowed Usage Per Month *	0.00
Cafeteria Usage Policy	ID <input type="text"/> Name <input type="text"/>

**Cafeteria Usage Policy**- Select the cafeteria usage policy to assign to the user based on which cafeteria transaction restrictions will be applied to the user.

### **Contract Worker Management (CWM)**

This tab is available for configuration only for the *Contract Worker Management* (CWM) module user when a existing worker is selected from the *User List*. This enables the administrator to assign Contractor, Work Order, Skills and PPE (Personal Protective Equipment) to the selected worker as well as add ID Proof and Address Proof.

The CWM tab for the worker is shown as below.

The screenshot shows the 'User Configuration' window with the 'Assignment' tab selected. The user profile on the left shows 'Parth' as 'Active'. The 'Other Details' section on the right contains the following fields:

Skill	1	Skill-1
Contractor	Ct2	Contractor2
Work Order	W11	Work order11
Assignment Period	31/03/2017	04/05/2017
Assignment Status		
Approval Stage	1	Approval Stage-1

Below these fields is a table with the following structure:

Level	Induction Level Name	Status	Details
No Data			



To know about the configuration of worker in CWM tab for Assignment and Other Details ,see CWM section in “Worker Profile”

## Job Costing

There are two tabs displayed namely:

- “Job Management”
- “Assigned Job Schedules”

### Job Management

To assign jobs to the user,

- Click **Job Costing > Job Management**.

The screenshot shows the 'User Configuration' window with the 'Job Management' tab selected. The user profile on the left shows 'User 1' as 'Active'. The 'Assigned Job Schedules' section on the right contains a 'Job Costing' dropdown menu currently set to 'Disabled'.

- **Job Costing:** Select the option **Enabled** from the drop down list to enable Job Costing feature for the user.

- **Device Based Job Assignment:** Select this check box to assign jobs to the user based on the devices assigned to the user.

If Job Costing is enabled and Device Based Job Assignment is selected, then the it will work in mixed mode.

When this check box is enabled, then the system will check for the Jobs configured on the assigned Device only and not to the users. In this case user can punch in the assigned Default Job or is displayed a list of jobs on the device display from which they can select the desired Job. They can also select few additional options like 'Continue Current Job' and 'Start Default Job'. For more details, refer to Device Configuration > Job Costing of the desired device.

If this check box is disabled, then the system will check for the Jobs assigned to the User. For details refer to ["Default Jobs"](#).

## Default Jobs

Jobs can be assigned to the user manually or via Job Scheduler.

- To assign jobs manually, refer to ["Manual Job Assignment"](#).
- To assign jobs via Job Scheduler, refer to ["Job Scheduler"](#).



*Default Jobs (Manual Job Assignment) and Job Schedulers assigned from Enterprise Structure Module > Enterprise Groups > Association Mapping > Job Costing will appear here when the same enterprise group is assigned to the user.*

*Once the Job Scheduler assignment is done and If Job Costing is disabled and is enabled again, then all the Job Schedulers assigned to the user will be revoked. You need to re-assign the Job Schedulers to the user from the ["Job Scheduler"](#) page again.*

*Jobs assigned via Job Schedulers cannot be deleted. However, Job Schedulers assigned to users can be deleted/changed. If jobs have already been assigned using Job Schedulers and then the Job Scheduler is deleted or the Enterprise Group assigned to the user is changed, the jobs already assigned will not be deleted. However, new jobs will not be assigned to users using the same Job Scheduler. New jobs will be assigned to the user via the new Job Scheduler assigned to the users via change of Enterprise Group.*

*Enterprise Group - Organization 1, has Job Scheduler J1 and J2*

*Enterprise Group - Organization 2, has Job Scheduler J3 and J4*

*Enterprise Group - Organization 3, has no Job Scheduler*

- *If the Enterprise Group of the user is Organization 1, then Job Schedulers J1 and J2 will be assigned to the user.*
- *If you change the Enterprise Group of the user to Organization 2, then Job Schedulers J3 and J4 will be assigned to the user and J1/J2 will be removed.*
- *If you change the Enterprise Group of the user to Organization 3, as there are no Job Schedulers in Organization 3, the assigned Job Schedulers J3 and J4 will be retained.*

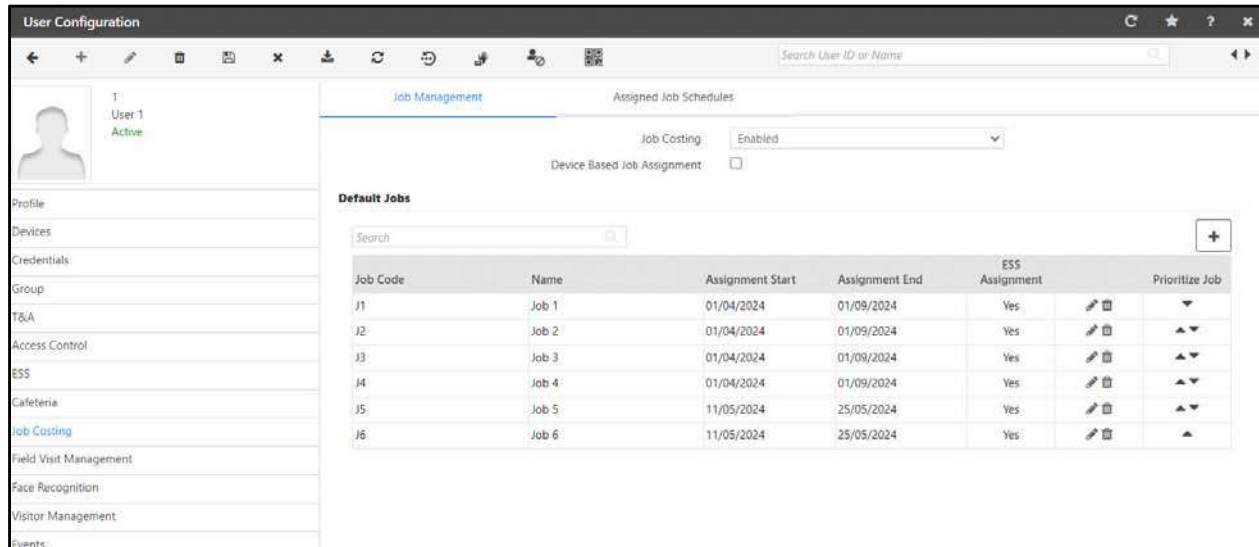
The Default Jobs will display all the jobs assigned manually or via Job Scheduler.

If you have added jobs manually and then run the Job Scheduler, in such cases, the jobs assigned via Job Scheduler will appear above manually assigned jobs in the same sequence as configured in the Job Scheduler.



Let us understand this with the help of an example,  
 Jobs assigned manually — J5 and J6.  
 Jobs assigned via Job Scheduler — J1, J2, J3 and J4.

Once the Job Scheduler is run, the jobs will appear under Default Jobs as shown below:



You can change the priority manually, if required.

- Under **Prioritize Job**, click the **Up** arrow button to move a job upwards in the list. Similarly, click the **Down** arrow button to move a job downwards in the list.

If there are overlapping dates in multiple jobs, then by default, the users punch will be marked in the job with the highest priority.

When Jobs are assigned via Job Scheduler then the Assignment Start / End Date will be the Start/ End Date of the Job as configured in the Job Scheduler. The ESS Assignment check box for the jobs assigned via Job Scheduler will be selected by default.



*If a Job is assigned manually to a user and the same is assigned again via Job Scheduler, following scenarios are possible:*

- *Jobs may have different Job Codes but they have the same Start/End Date, then the system will create a new job.*
- *Jobs may have same Job Codes but they have a different Start/End Date, then the system will create a new job.*
- *Jobs may have same Job Codes and they have the same Start/End Date, then the system will not create a new job.*

### Manual Job Assignment

Multiple default jobs can be assigned with overlapping Assignment Date Ranges. You can also set the priority of the assigned jobs if required. If you have jobs with overlapping dates and you have set their priority as per your requirement, then the first job will be considered as the default job.



*Jobs are created from Job Processing and Costing module > Project Management> Job.*

**User Configuration**

6 User 6 Active

**Job Management** Assigned Job Schedules

Job Costing: Enabled

Device Based Job Assignment: ☐

**Default Jobs**

Search: [ ] +

Job Code	Name	Assignment Start	Assignment End	ESS Assignment	Prioritize Job
No Data					

- Click **Add** . Click the picklist under **Job Code/Name** to select the desired Jobs.

The **Picklist For Job** appears.

**Picklist For Job**

Search: [ ] Ended Days (1-999): [ ] Active: **Active**

Job Code	Name	Start	End
J1	Job 1	01/04/2024	01/09/2024
J2	Job 2	01/04/2024	01/09/2024
J3	Job 3	01/04/2024	01/09/2024
J4	Job 4	01/04/2024	01/09/2024
J5	Job 5	11/05/2024	25/05/2024
J6	Job 6	11/05/2024	25/05/2024
J7	Job 7	01/04/2024	01/09/2024

Cancel

- By default, all the **Active** jobs are displayed. Click **Active** and select the desired option — **All**, **Active**, **Expired** — to filter the jobs. The jobs appear as per the set filter.

If you select **Expired**, you can set another filter.

Configure the number of days in Ended Days (1-999). The system will display the expired jobs, derived using the following: Current Date minus Number of days configured in Ended Days.

For example:

Ended Days configured = 2

Current Date= April 25, 2024

All the jobs expired between April 23, 2024 to April 25, 2024 (midnight), will be displayed.

Click to select the desired job from the list. You can also search for the desired job using the search bar.

The selected job appears in the grid.

- **Assignment Start and Assignment End:** The selected Jobs Start and End dates are displayed. You can change the Assignment Start and Assignment End dates of the job if required. To do so, click the calendar and select the desired start and end dates.
- **ESS Assignment:** The check box is enabled by default. This Job will be displayed in the list of Jobs assigned to the user through the ESS login. If you do not want this job to be displayed, clear the check box.



*The Jobs assigned here which are In-progress, Assigned and have the ESS Assignment check box enabled will be displayed in the **ESS login > Job** drop-down while Marking a Punch.*

*The ESS Assignment column will not be displayed if the **Show All Jobs while Punching** check box is enabled. For details, refer to [“Job Costing”](#) in [“Defining Global Policies”](#).*

Job Code	Name	Assignment Start	Assignment End	ESS Assignment	Prioritize Job
J1	Job 1	01/04/2024	01/09/2024	<input checked="" type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/>

- Click **OK**  to save the details.

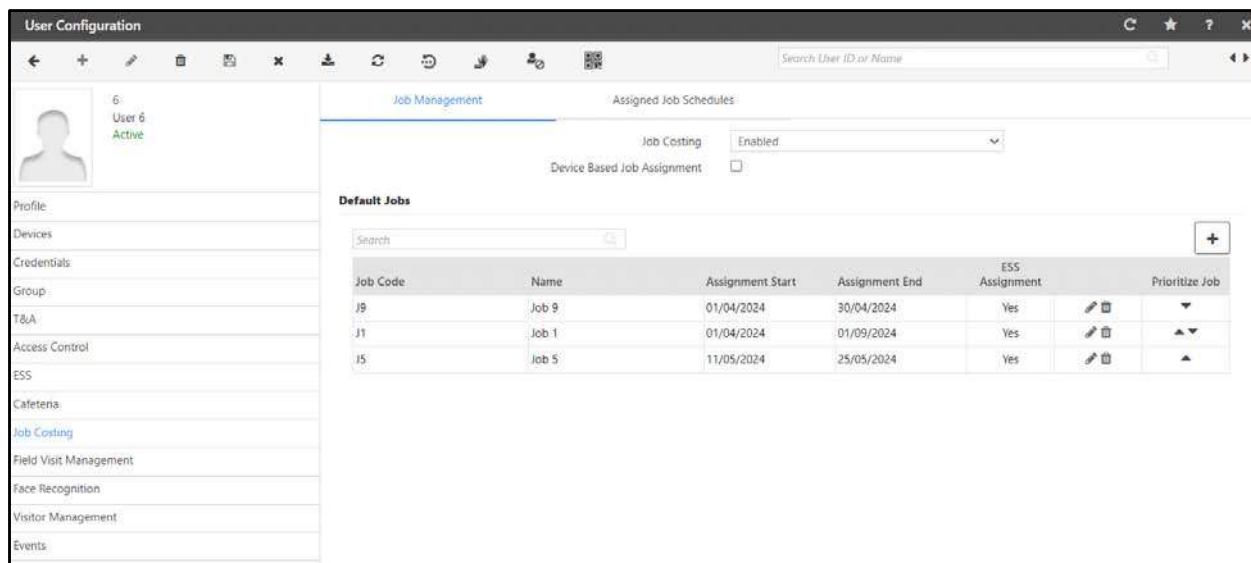
The **Default Jobs** grid will consist of all the jobs, that is, expired, in-progress as well as assigned.



*It is recommended to set job priority only if overlapping dates are assigned to the jobs.*

*If a new job is assigned, by default it will appear at the highest priority. You can change the priority later, if required.*

You can set the priority of the jobs as per your requirement. To do so,



- Under **Prioritize Job**, click the **Up** arrow button to move a job upwards in the list. Similarly, click the **Down** arrow button to move a job downwards in the list.

If you have overlapping dates assigned to Jobs, in such scenarios there will be multiple Jobs in which the punches are possible.

To resolve this set the Job with highest priority at the first position, so that when the system searches for the Job as per the date, the punch will be marked in the first Job in which the date is detected.

Let us understand this with the help of an example.

#### Example:

User 1 has been assigned the following jobs:

Job Code	Job Name	Assignment Start	Assignment End	Prioritize Job
J1	Job 1	01/10/2023	10/10/2023	1
J2	Job 2	09/10/2023	15/10/2023	2
J3	Job 3	17/10/2023	25/10/2023	3
J4	Job 4	25/10/2023	31/10/2023	4

Now, User 1 changes the priority of the assigned jobs as follows:

Job Code	Job Name	Assignment Start	Assignment End	Prioritize Job
J2	Job 2	09/10/2023	15/10/2023	1
J1	Job 1	01/10/2023	10/10/2023	2
J4	Job 4	25/10/2023	31/10/2023	3
J3	Job 3	17/10/2023	25/10/2023	4

When User 1 will punch on 09/10/2023, the punch will be marked against Job 2 as it has been set at priority number 1. Similarly, when User 1 will punch on 25/10/2023, the punch will be marked against Job 4 as it is at a higher priority than Job 3.



*Make sure that the assigned jobs are prioritized correctly to ensure that the punches are in place.*

*When Job Code is not assigned to user and user punches with that Job Code using Special function from door; then Reprocess Events should be enabled during Job Costing process to assign the actual Job Code to the job.*

*User configuration will be resent to devices only when there is some change in Job Assignment.*

*The Job Costing events for the past dates will be reflected only when Reprocess Attendance Events is enabled while processing Daily Attendance.*

## Assigned Job Schedules

To view the Job Schedulers assigned to the user,

- Click **Job Costing > Assigned Job Schedules**.

Scheduler ID	Scheduler Name	Scheduler Start Date	Scheduler End Date
5	Job Scheduler 5	11/05/2024	01/09/2024
7	Job Scheduler 7	11/05/2024	11/05/2024

- All the Job Schedulers assigned to the user from the “[Job Scheduler](#)” and “[Association Mapping](#)” of the Enterprise Groups appear here. You can view the Scheduler Name, Scheduler Start and End Date from this page.

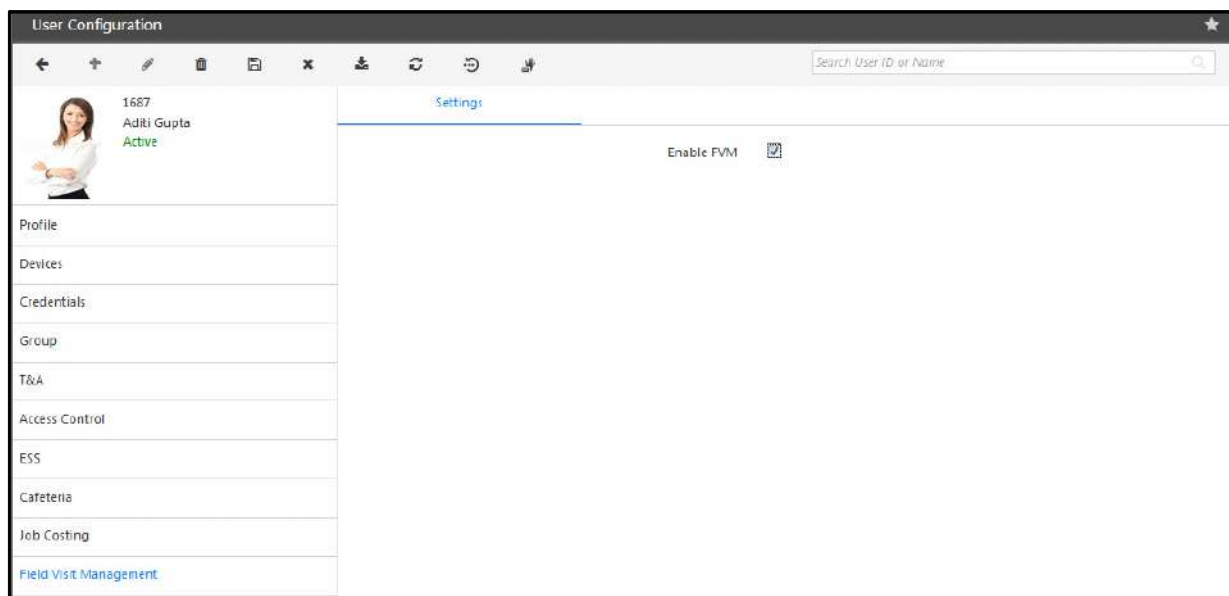


*Jobs assigned via Job Schedulers cannot be deleted. However, Job Schedulers assigned to users can be deleted/changed. If jobs have already been assigned using Job Schedulers and then the Job Scheduler is deleted or the Enterprise Group assigned to the user is changed, the jobs already assigned will not be deleted. However, new jobs will not be assigned to users using the same Job Scheduler. New jobs will be assigned to the user via the new Job Scheduler assigned to the users via change of Enterprise Group.*

## Field Visit Management

In this module, you can assign schedules to the users and keep a track of their activities, while on site and also check if the assigned tasks are being fulfilled correctly or not.

The Field Visit Management tab appears as shown below:

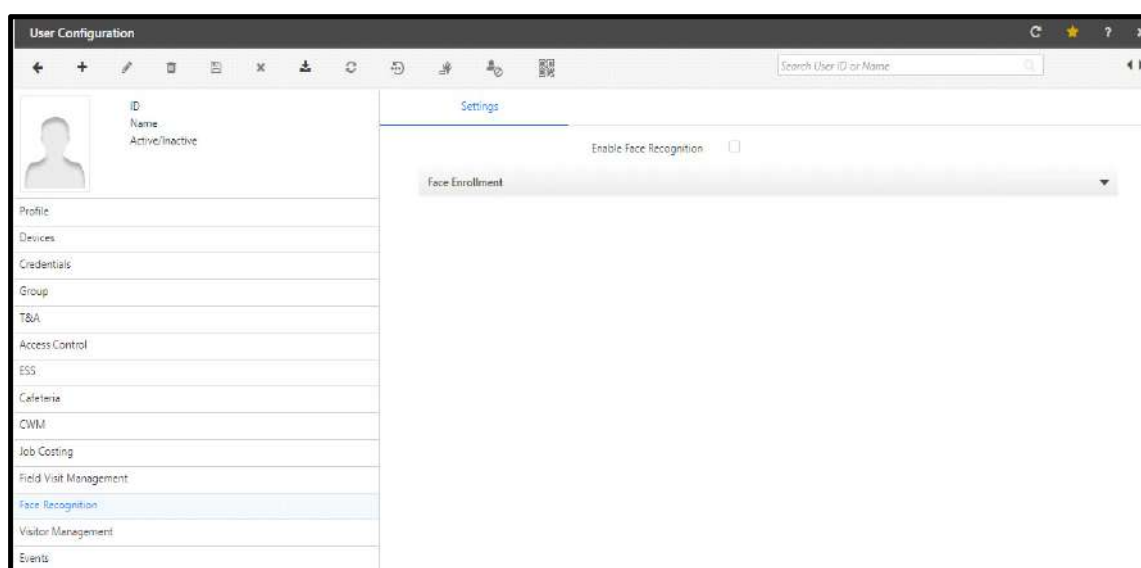


In the **Settings** tab, check the **Enable FVM** box to consider the selected user as FVM user. Then click **Save** button to save the changes.

## Face Recognition

In this feature, user can access the device or mark the attendance by verifying his Face as the credential.

The Face Recognition tab appears as shown below:



## Settings

**Enable Face Recognition:** Check this box to enable Face Recognition feature for the user.

1. Create a User. Enable Face Recognition feature.
2. Assign Vega, FMX, ARGO or AGRO FACE door to the user.
3. Connect the FR module and IP Camera to the network. Ensure that COSEC Device, FR Module and IP Camera are in the same subnet.

If you are connecting the ARGO FACE device, it has an in-built FR Module and camera.

4. Configure IP camera to be used for capturing face credential. Select the Capturing device as IP Camera in Video Surveillance section of Device Configuration and configure the snapshot URL.
5. Configure FR settings on Device. Go to Identification Server of Device Configuration. Enable FR and select the Face capturing mode. Select the FR mode as Local/Server-Assisted. Enter the FR Server Address as the IP address of FR module. Enter FR Server Port as 12000 which is default port for Identification Service.
6. Now Tap on Device screen. The motion streaming of camera will appear on COSEC Device.
7. Now Enroll the user for Face credential using Enroll Utility.
8. When you show your face in front of camera, the camera will capture your face and identify with the enrolled template. If it matches, you will be allowed access on the door.

Name	Site	IP/RS485 Address	MAC/UID	Type	Status
Panel Lite V2-Device-1		192.168.104.111	00:18:09:04:05:D1	Panel Lite V2	Disconnected
PVR as Panel Door	Site-1	192.168.104.113	00:18:09:03:F2:80	Panel Lite V2 Door	OFF-Line
NGT Direct Door	Site-1		DF:64:56:35:43:EB	NGT Direct Door	Disconnected
Wireless Door	Site-1		DF:0D:47:E5:FB:C5	Wireless Door	Disconnected
PVR Door- Direct Door	Site-1		34:36:37:75:E5:54	PVR Door	Disconnected
Vega Controller	Site-1		CD:E6:73:56:F5:65	Vega Controller	Disconnected
Vega Controller-Device-5	Site-1	192.168.104.71	00:18:09:05:96:89	Vega Controller	Connected
Panel V2 Device-1	Site-1	192.168.104.111	00:18:09:04:05:D1	Panel V2	Disconnected

Sr No.	Date Time	Type	Device	Category	Detail
527	07/12/2018 06:51:06 PM	Vega Controller	Vega Controller-Device-5	Request	← Login Request Received.
528	07/12/2018 06:51:06 PM	Vega Controller	Vega Controller-Device-5	ACK	→ Login Success Poll Duration: 3 Poll Interval: 2
529	07/12/2018 06:51:06 PM	Vega Controller	Vega Controller-Device-5	Request	← Message Request Received
530	07/12/2018 06:51:06 PM	Vega Controller	Vega Controller-Device-5	Command	→ Event Request for RollOver: 0 Event Seq. No.: 113
531	07/12/2018 06:51:06 PM	Vega Controller	Vega Controller-Device-5	Other	← Start Of Event
532	07/12/2018 06:51:07 PM	Vega Controller	Vega Controller-Device-5	Command	→ Set Date & Time
533	07/12/2018 06:51:07 PM	Vega Controller	Vega Controller-Device-5	ACK	← Set Date & Time Command Successful
534	07/12/2018 06:51:07 PM	Vega Controller	Vega Controller-Device-5	Other	→ End Of Message
535	07/12/2018 06:52:23 PM	Vega Controller	Vega Controller-Device-5	User	→ Allowed with FACE: User ID: 2 [3] Event Date Time: 07/12/2018 06:52:22 PM
536	07/12/2018 06:52:23 PM	Vega Controller	Vega Controller-Device-5	ACK	→ Event Ack for RollOver: 0 Event Seq. No.: 113
537	07/12/2018 06:52:25 PM	Vega Controller	Vega Controller-Device-5	System	→ Camera Event for Time Stamp [Fail] received for Event Sequence No: 113 and RollOver: 0 Event Date...
538	07/12/2018 06:52:25 PM	Vega Controller	Vega Controller-Device-5	ACK	→ Event Ack for RollOver: 0 Event Seq. No.: 114

## Face Enrollment

This functionality enables the SA to enroll face/s against a user. Face Enrollment can be done by either directly uploading the images of the desired user or by capturing and then uploading the images.



*To use the capture functionality for images, make sure you have a secure login, that is you have logged in using HTTPS.*

Using Face Enrollment you can:

- replace existing images (if any) with new images
- add new images
- remove enrolled images

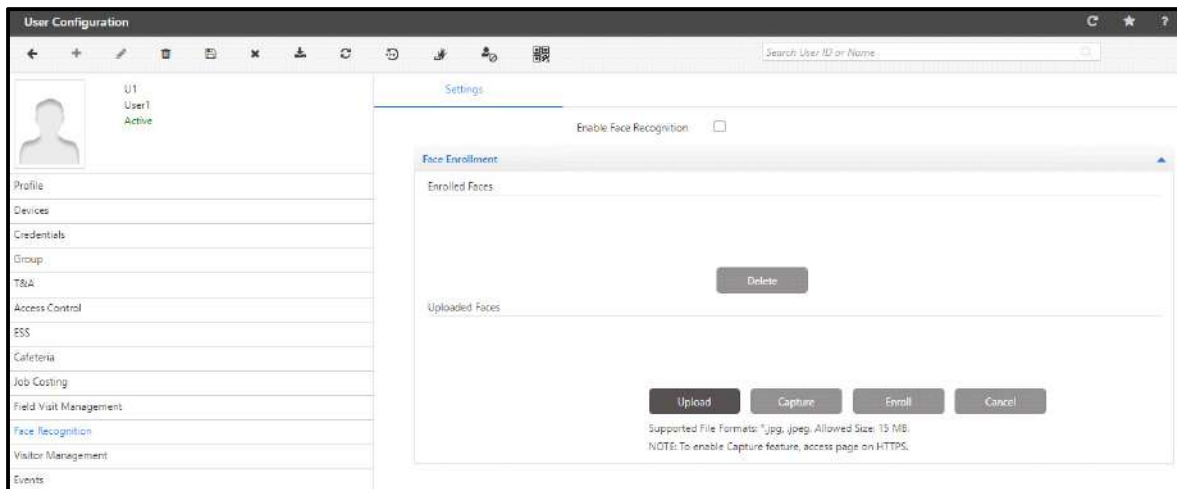
Click the **Face Enrollment** collapsible panel in order to enroll faces against a user.



*For Face Enrollment via Web feature to work, ensure that Identification Service is defined in COSEC Admin > License and Service. For more details refer Admin Management Portal User Manual.*

To Upload the images directly, refer **“Upload”**

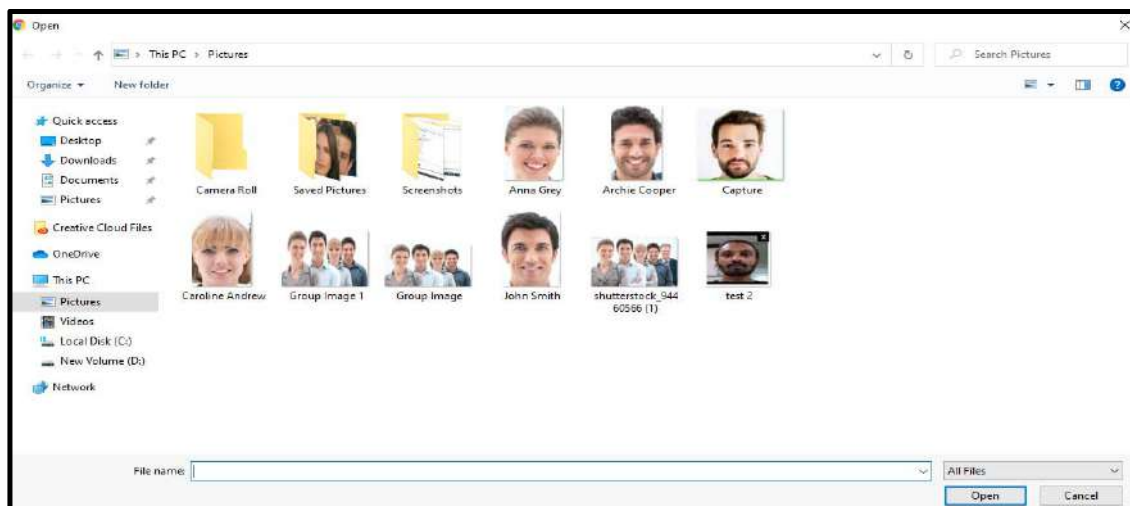
To Capture and then upload the images, refer **“Capture”**



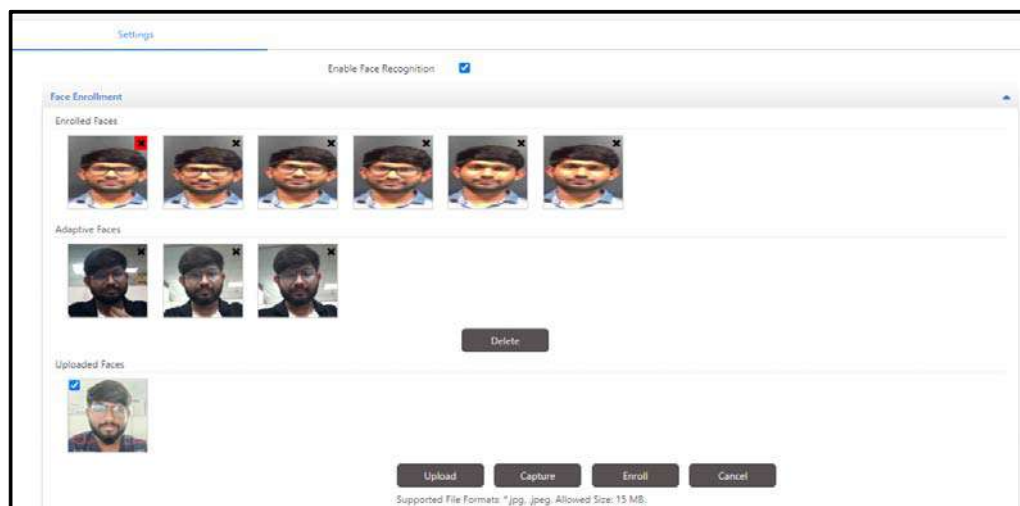
### Upload

- In order to upload face/s against a user click **Upload** in **Face Enrollment**.
- Browse to select the desired file from your local PC wherein the image is stored.
- Make sure the selected image is in the .jpg or .jpeg format.
- Click **Open**.

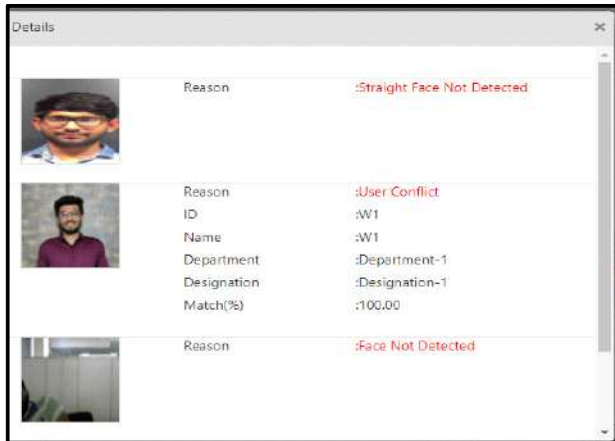




- All the faces that are uploaded will be reflected in **Uploaded Faces** Grid.
- Select the face/s that you want to enroll by clicking the checkbox provided on the top left corner of the uploaded face.

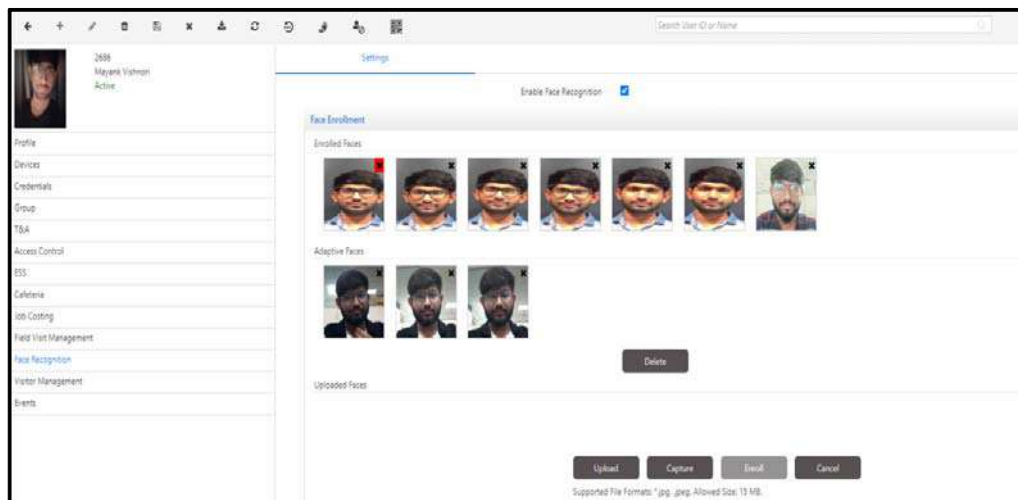


- While uploading a face if any error occurs, the **Info** icon will be displayed.
- On clicking the **Info** icon a pop up with the discarded face/s will be displayed along with the possible reason for discarding the image.

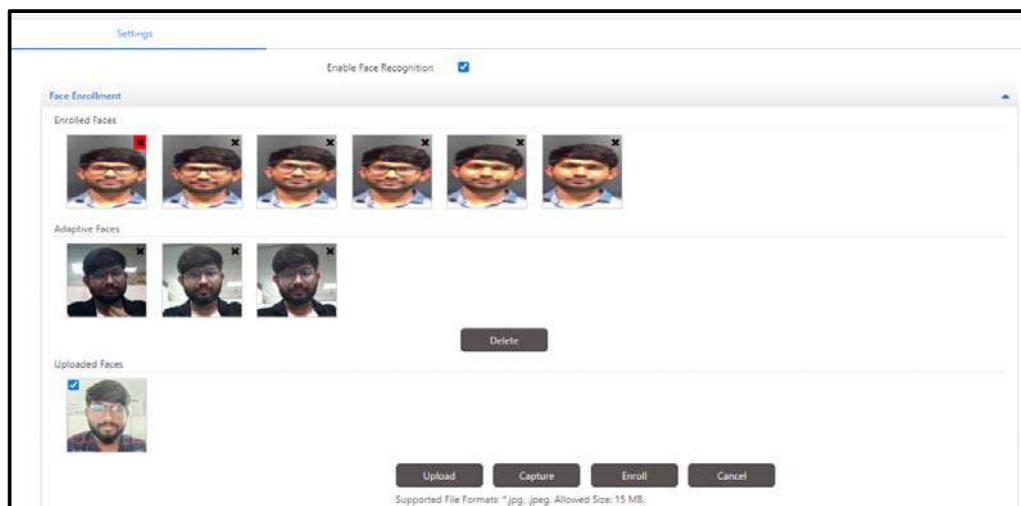


Let us understand this with the help of an example, you have uploaded 5 faces out of which 3 got discarded and then again you upload 5 more faces out of which 2 got discarded then the pop-up will display all the 5 discarded faces with the probable reasons for discarding.

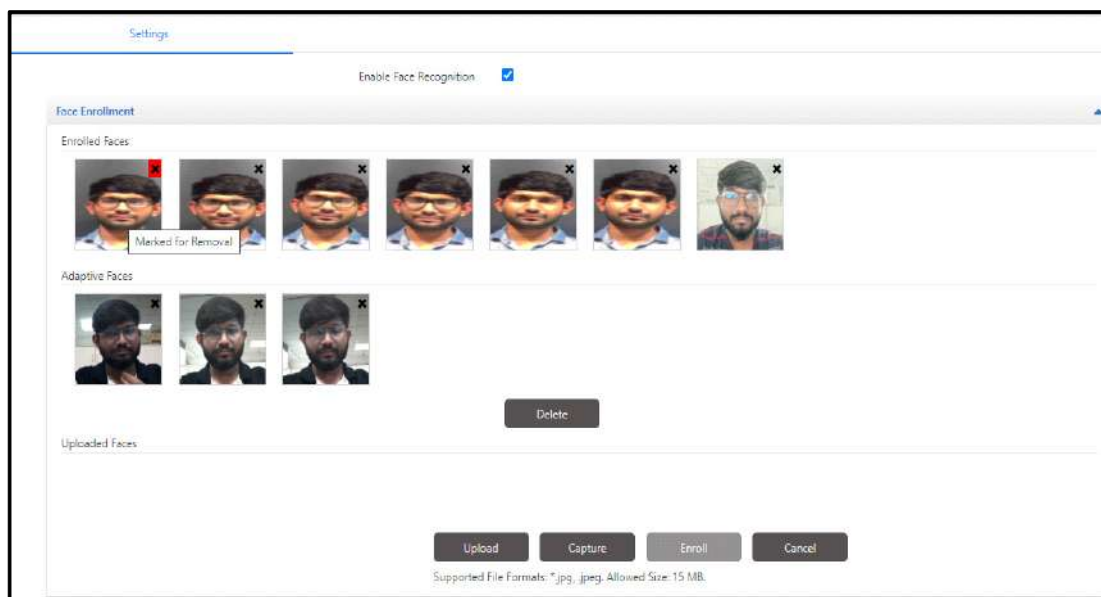
- To add the new image as the enrolled face,
- Select the check box of the desired image under **Uploaded Faces**.
- Click **Enroll** in order to enroll the selected face/s. The selected face/s will be reflected in the **Enrolled Faces** grid.




- To replace an existing enrolled faces,
- Click on the desired image, the red cross icon appears on the top right corner of the face under **Enrolled Faces**.
- Select the check box of the desired image under Uploaded Faces.
- Click **Enroll**.



- To remove an existing enrolled faces,
  - Click on the desired image, the red cross icon appears on the top right corner of the face under **Enrolled Faces**.
  - Click **Delete**.

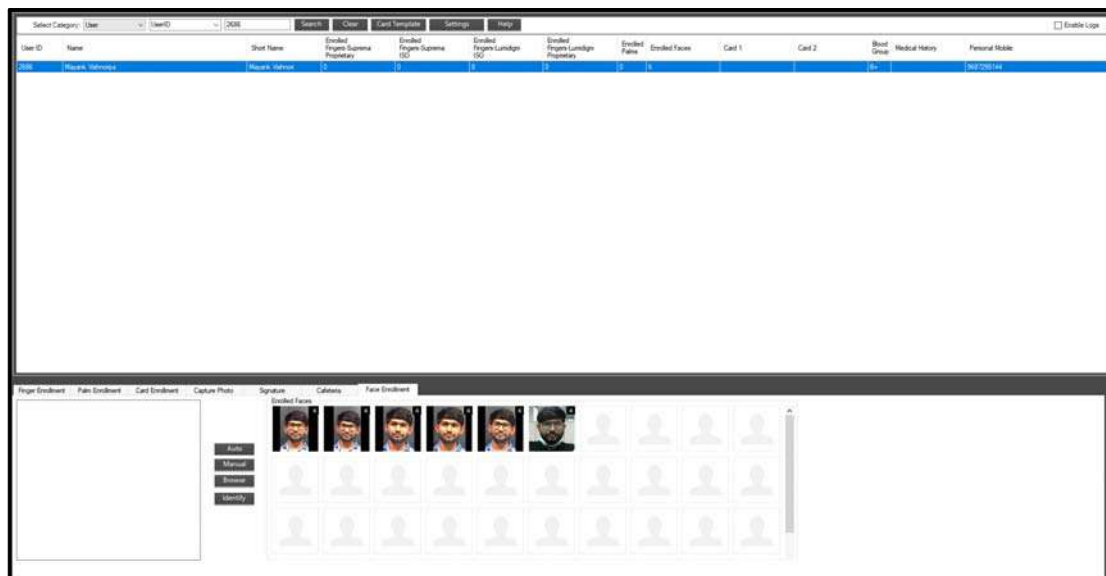


*Make sure the number of faces you consider for enrollment is lesser than or equal to the defined value in **Maximum No. of Faces** in Admin >System configuration> Global Policy >User.*

- If there is an occurrence of an adaptive face, it will be displayed under the **Adaptive Faces** grid, a sub-section under **Enrolled Faces** grid. If you desire, you may delete the image. To do so, follow the same instructions as mentioned above.
- Click the Save  in order to save all the enrolled faces. The faces will be successfully saved and considered for face recognition.

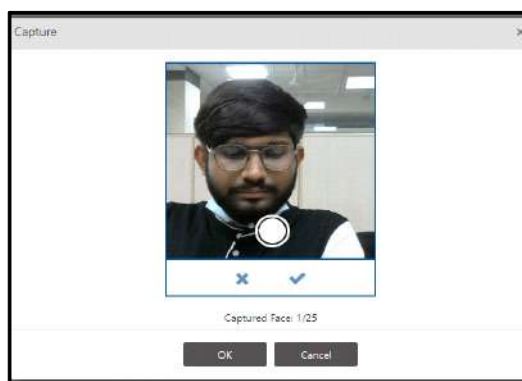


The enrolled faces of the user will be successfully reflected in the Enroll Utility under **Face Enrollment**. Refer the Enroll Utility Guide for more details.





### Capture

- In order to capture face/s, click **Capture** in Face Enrollment.
- The **Capture** pop-up will be displayed.



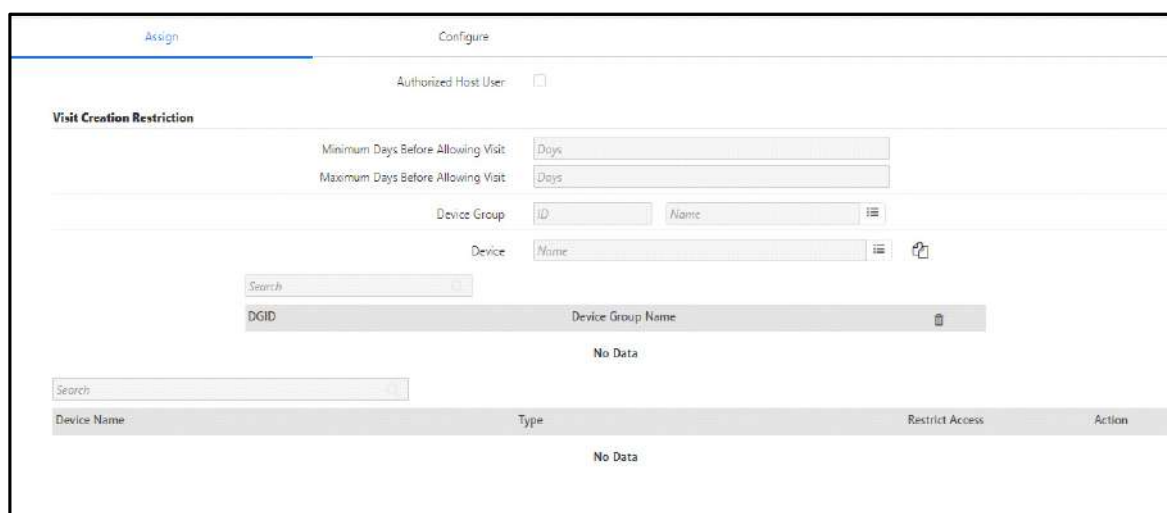
- Set the camera in a desired angle and capture the image.



- If the image captured is appropriate click the icon  . Now, you can again capture a new image if required.
- If the image clicked is not appropriate then click the icon  and a retake will be considered.
- After completing the capture, click **OK** to upload the image. Click **Cancel** if you desire to restart the **Capture**.
- The uploaded faces will be reflected in **Uploaded Faces** Grid.
- Now, refer to “[Upload](#)” for further instructions.

## Visitor Management

In this page you can authorize a host user, restrict the visitor pre-registration on the basis of no.of days and assign device groups and devices to the visitors.



### Assign

- **Authorized Host User:** Select the checkbox to authorize a Host user. Once you authorize the host, the host user will be added in the list of Authorized Host Users in *Visitor Management> Utilities> Authorized Host Users*. For more information, refer “[Authorized Host Users](#)”.

### Visit Creation Restriction

- **Minimum Days before Allowing Visit:** The minimum days configured in *Admin> System Configuration> Global Policy> Visitor Management* will be displayed here as the default value.

You can change the number of minimum days as per your requirement.

For more details, refer “[Visit Creation Restriction](#)” in *Admin> System Configuration> Global Policy> Visitor Management*.

- **Maximum Days Before Allowing Visit:** The maximum days configured in *Admin> System Configuration> Global Policy> Visitor Management* will be displayed here as the default value.

You can change the number of maximum days as per your requirement.

For more details, refer [“Visit Creation Restriction”](#) in *Admin> System Configuration> Global Policy> Visitor Management*.

- **Device Group:** Device Group can be a group of individual devices or a group of device groups. You can assign the same to the Visitor.

To do so, click the **Device Group** picklist. The **Picklist for Device Group** pop-up appears.

Picklist For Device Group

Total Selected: 0 Records

Search  Show Selected

☐ Select All

<input type="checkbox"/>	DGID ▲	Name
<input type="checkbox"/>	1	ACTA Devices
<input type="checkbox"/>	2	RnD1Visitor
<input type="checkbox"/>	3	Device Group 3
<input type="checkbox"/>	4	Device Group 4
<input type="checkbox"/>	5	Device Group 5
<input type="checkbox"/>	6	Device Group 6
<input type="checkbox"/>	7	Device Group 7
<input type="checkbox"/>	8	Device Group 8
<input type="checkbox"/>	9	Device Group 9
<input type="checkbox"/>	10	Device Group 10

1 - 10 of 12 records

OK Cancel

You can either select particular groups or can select all the groups at once.

To select particular groups, select the check boxes of the desired groups.

Picklist For Device Group

Total Selected: 2 Records

Search  Show Selected

☐ Select All

<input type="checkbox"/>	DGID ▲	Name
<input checked="" type="checkbox"/>	1	ACTA Devices
<input checked="" type="checkbox"/>	2	RnD1Visitor
<input type="checkbox"/>	3	Device Group 3
<input type="checkbox"/>	4	Device Group 4
<input type="checkbox"/>	5	Device Group 5
<input type="checkbox"/>	6	Device Group 6
<input type="checkbox"/>	7	Device Group 7
<input type="checkbox"/>	8	Device Group 8
<input type="checkbox"/>	9	Device Group 9
<input type="checkbox"/>	10	Device Group 10

1 - 10 of 12 records

OK Cancel

OR

To select all the groups at once, select the **Select All** check box. The device groups on all the pages will be selected.

Picklist For Device Group

Total Selected: 12 Records

Search

☒ Select All

DGID	Name
1	ACTA Devices
2	RnD1Visitor
3	Device Group 3
4	Device Group 4
5	Device Group 5
6	Device Group 6
7	Device Group 7
8	Device Group 8
9	Device Group 9
10	Device Group 10

1 - 10 of 12 records

« < 1 2 > »

OK Cancel

- Click **OK**.

The Device Groups appear in a grid.

Device Group: ID Name

Device: Name

Search

DGID	Device Group Name	
1	ACTA Devices	
2	RnD1Visitor	
3	Device Group 3	
4	Device Group 4	

You can also delete the desired device group/s. To do so, click **Delete** of the respective device group.

Then click **Save**. The devices belonging to the selected device group/s appear in the grid.

Assign Configure

Authorized Host User ☒

**Visit Creation Restriction**

Minimum Days Before Allowing Visit

Maximum Days Before Allowing Visit

Device Group: ID Name



Device: Name

Search

DGID	Device Group Name	
3	dg3	
4	dg2	

Search


Device Name	Type	Restrict Access	Action
Factory Vega Production-2	Vega Controller	<input type="checkbox"/>	
RnD1 ROOM BARRIER IN	Vega Controller	<input type="checkbox"/>	

Click **Edit**. You can un-assign the particular device from the assigned Device Group by clicking on  icon. Click on the  icon to assign the device again.

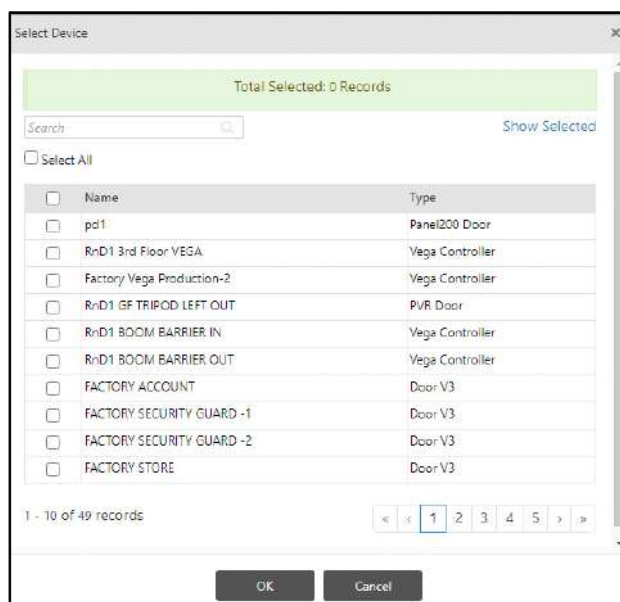


Device Name	Type	Restrict Access	Action
Factory Vega Production-2	Vega Controller	<input type="checkbox"/>	
RnD1 BOOM BARRIER IN	Vega Controller	<input type="checkbox"/>	

Select the corresponding Restrict Access check box to enable the restriction for the selected visitor on the selected device.

- **Device:** To add devices which are assigned to the host, click **Add Host's Devices**  .
- OR**

To assign a device to the visitor; click the **Device** picklist. The **Select Device** pop-up appears.



Select Device

Total Selected: 0 Records

Search

☐ Select All

Name	Type
<input type="checkbox"/> pd1	Panel200 Door
<input type="checkbox"/> RnD1 3rd Floor VEGA	Vega Controller
<input type="checkbox"/> Factory Vega Production-2	Vega Controller
<input type="checkbox"/> RnD1 GF TRIPOD LEFT OUT	PVR Door
<input type="checkbox"/> RnD1 BOOM BARRIER IN	Vega Controller
<input type="checkbox"/> RnD1 BOOM BARRIER OUT	Vega Controller
<input type="checkbox"/> FACTORY ACCOUNT	Door V3
<input type="checkbox"/> FACTORY SECURITY GUARD -1	Door V3
<input type="checkbox"/> FACTORY SECURITY GUARD -2	Door V3
<input type="checkbox"/> FACTORY STORE	Door V3

1 - 10 of 49 records

OK Cancel

You can either select particular devices or can select all the devices at once.



To select particular devices, select the check boxes of the desired devices.

The 'Select Device' dialog box displays a table with 95 records. The 'Total Selected' count is 2. The 'Select All' checkbox is unchecked. The table lists various door types, with two records selected.

<input type="checkbox"/>	Name	Type
<input checked="" type="checkbox"/>	ARCDC100_DD_Door	Panel200 Door
<input checked="" type="checkbox"/>	ARCDC100_DD_Door	Panel200 Door
<input type="checkbox"/>	ARCDC100_SD_Door	Panel200 Door
<input type="checkbox"/>	ARGO_PANEL	Panel200 Door
<input type="checkbox"/>	DoorV3	Panel200 Door
<input type="checkbox"/>	DoorV3_Door	Panel200 Door
<input type="checkbox"/>	DOORV4_PANEL	Panel200 Door
<input type="checkbox"/>	dummy	Panel200 Door
<input type="checkbox"/>	PATHV2_PANEL	Panel200 Door
<input type="checkbox"/>	PD_ARGO	Panel200 Door

1 - 10 of 95 records

OK Cancel

OR

To select all the devices at once, select the **Select All** check box. The devices on all the pages will be selected.

The 'Select Device' dialog box displays a table with 94 records. The 'Total Selected' count is 94. The 'Select All' checkbox is checked. The table lists various door types, with all records selected.

<input checked="" type="checkbox"/>	Name	Type
<input checked="" type="checkbox"/>	ARCDC100_DD_Door	Panel200 Door
<input checked="" type="checkbox"/>	ARCDC100_DD_Door	Panel200 Door
<input checked="" type="checkbox"/>	ARCDC100_SD_Door	Panel200 Door
<input checked="" type="checkbox"/>	ARGO_PANEL	Panel200 Door
<input checked="" type="checkbox"/>	DoorV3	Panel200 Door
<input checked="" type="checkbox"/>	DoorV3_Door	Panel200 Door
<input checked="" type="checkbox"/>	DOORV4_PANEL	Panel200 Door
<input checked="" type="checkbox"/>	dummy	Panel200 Door
<input checked="" type="checkbox"/>	PATHV2_PANEL	Panel200 Door
<input checked="" type="checkbox"/>	VEGA_PANEL	Panel200 Door

1 - 10 of 94 records

OK Cancel

- Click **OK**.

The device/s appear in the grid.

Search			
Device Name ▲	Type	Restrict Access	Action
ARCDC100_DD_Door	Panel200 Door	<input type="checkbox"/>	
ARCDC100_SD_Door	Panel200 Door	<input type="checkbox"/>	
ARGO_PANEL	Panel200 Door	<input type="checkbox"/>	
DoorV3	Panel200 Door	<input type="checkbox"/>	

You can also delete the desired device/s. To do so, click **Delete** of the respective device.

Then click **Save**. The devices belonging to the selected device group/s appear in the grid.

Assign

Configure

Authorized Host User

Visit Creation Restriction

Minimum Days Before Allowing Visit

Days

Maximum Days Before Allowing Visit

Days

Device Group

ID

Name

Device

Name

Search

DSID ▲

Device Group Name

4

Device Group 4

Search

Device Name ▲

Type

Restrict Access

Action

ARCDC100\_DD\_Door

Panel200 Door

☐

ARCDC100\_SD\_Door

Panel200 Door

☐

ARGO\_PANEL

Panel200 Door

☐

DoorV3

Panel200 Door

☐

RND1 BOOM SAMPLER IN

Vega Controller

☐

RND1 GP TRIPOD LEFT OUT

PVR Door

☐

Select the corresponding Restrict Access check box to enable the restriction for the selected visitor on the selected device.

## Configure

This option enables the Admin to change the settings of the devices assigned to the Visitor.

To know more about the configurations, refer [“Configure”](#) in *User> User Configuration> Devices*.

### Panel Door

Assign

Configure

Device

Panel

Type

Panel

Active

☒

VIP

☐

Access Profile

Access Group-1

Functional Group

Staff

Home Zone

Zone-1

Visit Zone

Select

Access Route

Select

## Direct Door

Configure	
Device	Argo Door
Type	ARGO
Active	<input checked="" type="checkbox"/>
VIP	<input type="checkbox"/>

## Events

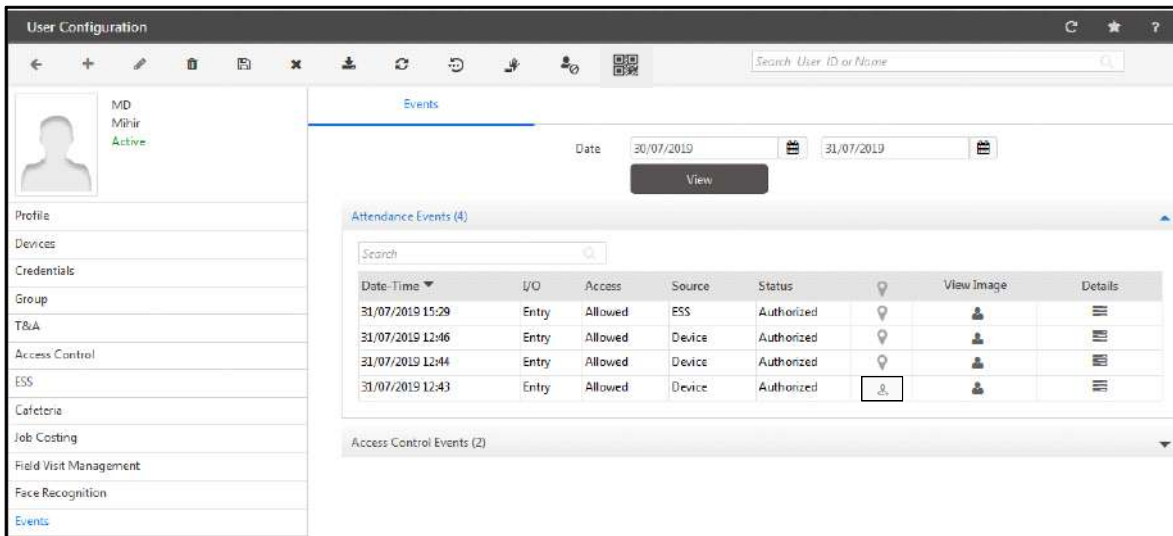
The Events tab is used for the security purpose by monitoring the users in the organization. The Attendance Events and Access Control Events can be viewed by filtering the date range.

In cases of infringement or suspicion; the security supervisor can blacklist, delete or inactivate the user creating problems in the organization.

The screenshot displays the 'User Configuration' window. On the left, a sidebar lists various configuration options: Profile, Devices, Credentials, Group, T&A, Access Control, ESS, Cafeteria, Job Costing, Field Visit Management, Face Recognition, and Events (which is currently selected). The main area shows the 'Events' tab. At the top of this tab, there are date selection fields: 'Date' with a start date of '01/04/2019' and an end date of '24/04/2019', followed by a 'View' button. Below the date range, there are two expandable sections: 'Attendance Events (06)' and 'Access Control Events (0)'. A search bar at the top right of the main area is labeled 'Search User ID or Name'.


**Date:** Select the date range for which events are to be viewed.

Click on **View** button to view the Attendance events and Access Control events.



The Attendance Events shows the Date and time when the event is generated along with the I/O, Access, Source, Status and Location details. It also displays Image and Details of the punch.

The location details will display Latitude/Longitude or MAC address from where event has generated.

- You can view the location on Map if the GPS/GSM location is configured in Location Master by clicking on View Map icon.
- If the location is not configured in Location Master then you can add this location by clicking on **Add this Location**  icon shown in above figure.

Now click on **Add Location** button which will redirect to Location Master page from where you can add this location.

Location on Google Maps

Latitude \*


+22.2575

Longitude \*

+073.1851

Add Location

Internet Connection is not available. Please try again later.

Click the **Details**  icon to view the event details of the corresponding user.

Details

Device Details

ARGO FACE-Device-2

Source Details

Location Details

Authorization Remark

Authorized Event

Reason

Job Details

J1 - Job1

The Status of event, i.e. whether it is authorized or unauthorized is displayed under Status.

- If the status is Unauthorized, it will display a link as shown below, which on clicking will be redirected to Events Authorization Page as per login user's rights.

User Configuration

1997

Dhruvani

Active

Profile

Devices

Credentials

Group

T&A

Access Control

ESS

Cafeteria

Job Costing

Field Visit Management

Face Recognition

Events

Events

Date

30/07/2019

30/07/2019

View

Attendance Events (1)

Search

Date-Time	I/O	Access	Source	Status		View Image	Details
30/07/2019 15:45	Entry	Allowed	App	Unauthorized			

Access Control Events (0)

- If the status is shown as NA, then Authorized status will be Null and the access will be shown as **Denied** as shown below:

Events

Date

31/07/2019

31/07/2019

View

Attendance Events (5)

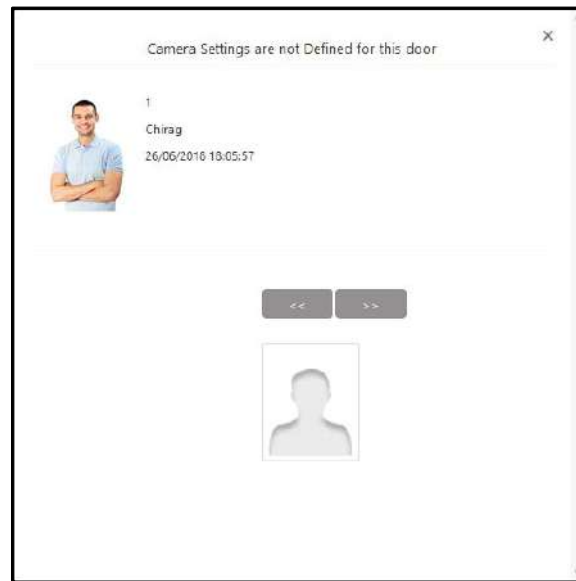
Search

Date-Time	I/O	Access	Source	Status		View Image	Details
31/07/2019 12:52	Entry	Allowed	ESS	Authorized			
31/07/2019 12:49	Entry	Denied	Device	NA			
31/07/2019 12:48	Entry	Denied	Device	NA			
31/07/2019 12:47	Entry	Denied	Device	NA			
31/07/2019 12:47	Entry	Denied	Device	NA			


Access Control Events (0)

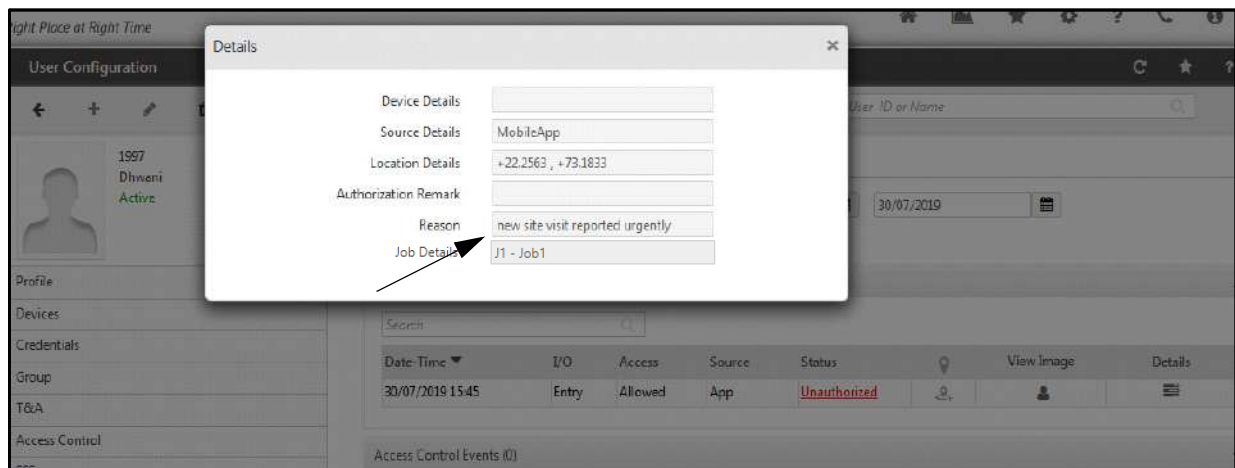
You can view the image captured by the Built-In Camera by clicking on **View Image** icon.

If there is camera to capture the image of the user punching on door; then his image will be captured and can be viewed for that event by clicking on View Image icon.



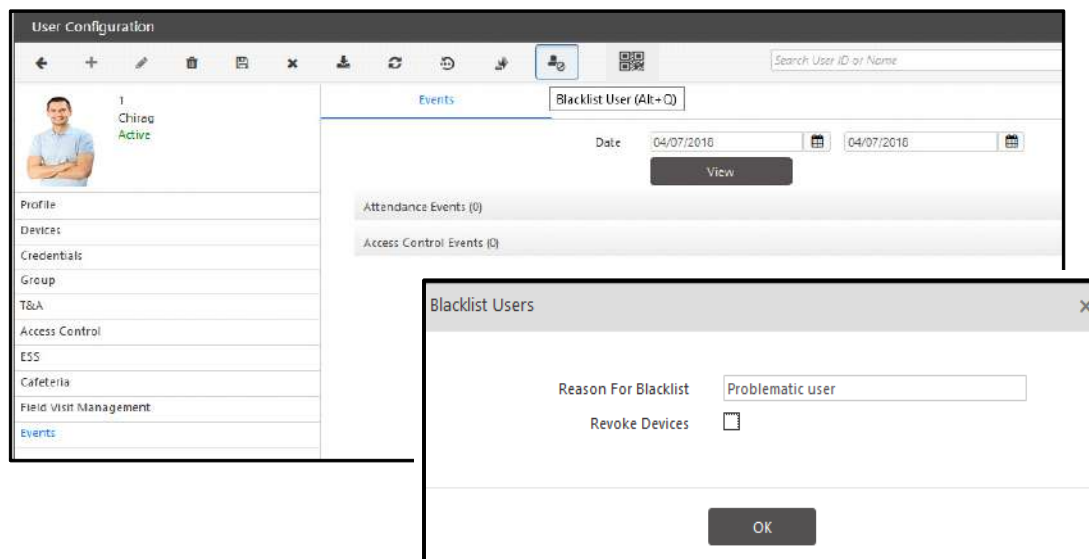
*If the event is generated by API then there will not be any image popup window on clicking View Image icon.*

The Reason for punching from unassigned location can be known by clicking on Details icon  as shown in the figure below:



## Blacklist

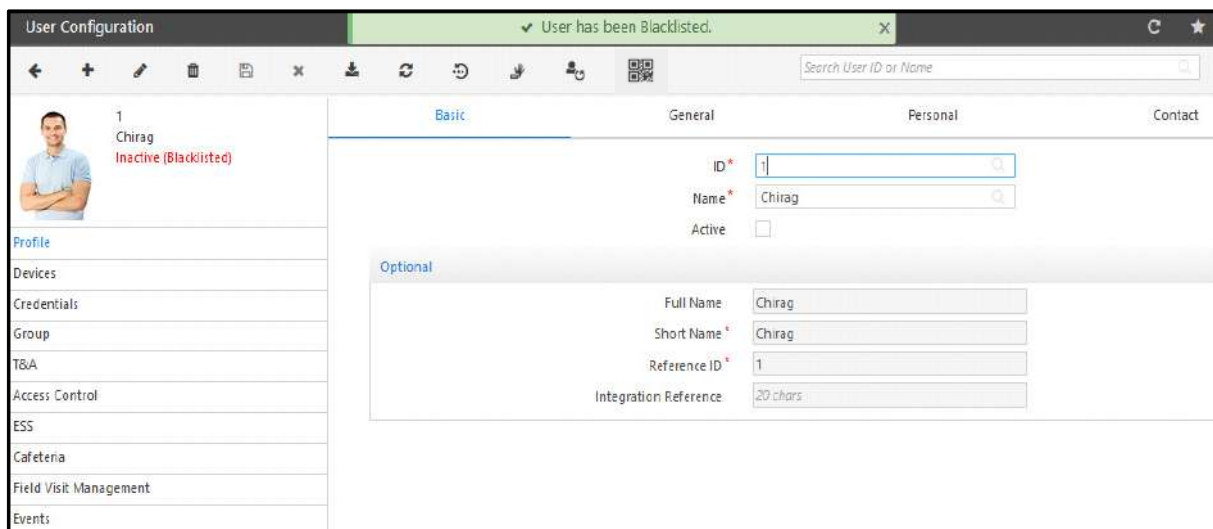
Click on the **Blacklist User** button. The Blacklist Users window appears.



Enter the **Reason** for Blacklisting the user.

Click on **Revoke Devices** to remove the assignment of devices from the user.

Click **OK** and **Save** button to save the changes. The user will be blacklisted and Inactive as shown below.



The blacklisted user can be revoked by clicking **Restore and Activate User** button. It will make the user active.





# Temporary Users

---

Temporary Users are users which can be auto-added from the desired devices connected with the system, with bare minimum parameters without the intervention of the Admin. Hence, this reduces the burden on the Admin to add as well as allow access to such users. Temporary Users can also be deleted/de-activated automatically after a desired time interval or converted into Normal Users.

Devices that support Temporary Users include the following Direct Doors and Panel Doors — ARGO, VEGA, ARGO FACE.



*The license consumption for Temporary Users will be the same as for Normal Users.*

*Temporary User is not applicable for Cafeteria mode of devices.*

*Make sure you enable the check box **Confirm before adding Temporary User** under **Temporary User** in the respective device, so that you get a confirmation message before enrolling a Temporary User.*

To add Temporary Users, you need to:

- Enable Temporary User and configure its parameters. For details refer to [“Temporary User”](#) in [“ARGO Door”](#), [“Temporary User”](#) in [“VEGA Door”](#) and [“Temporary User”](#) in [“ARGO FACE Door”](#).
- For Panel Doors, configure the Temporary User parameters in the Panel as well as Panel Doors. For details refer to [“Temporary User”](#) in [“Panel200”](#), [“Temporary User”](#) in [“ARGO Door”](#), [“Temporary User”](#) in [“VEGA Door”](#) and [“Temporary User”](#) in [“ARGO FACE Door”](#)
- Make sure the credentials (Finger) of the unknown user are presented on the desired device 3 times consecutively for enrollment.
- For Direct Doors make sure the User Access Mode in Device Configuration (of the respective device) > Profile is selected as — Face, Biometrics or Card.
- For Panel Doors, you need to set the User Access Mode (Door) in Panel Configuration > Zones as — Face, Biometrics or Card.
- Configure the Auto Generate User ID in Global Policy, if required. For details refer to [“Generate User ID”](#).
- Configure the Alerts to receive notifications when the Temporary User is added, if required. To do so, click Admin > Alert Message Configuration, in *Alert Filter* select *System* and in *Event* select *Temporary User/ Worker Added*. For details refer to [“Configuring Alert Messages”](#).
- Configure the Task Scheduler to delete/de-activate Temporary Users automatically or convert Temporary Users to Normal Users automatically. For details refer to [“For Schedule Parameter: Temporary User/ Worker”](#).
- When the Temporary Users are deleted/de-activated or converted to Normal Users using Task Schedulers the logs of these tasks can be seen in the Scheduler Log. For details, refer to [“Scheduler Log”](#).

After such users are enrolled, to view the list of Temporary Users, click **Users > Temporary User**.



*You can also view Temporary Users from the User List. For details, refer to [“User List”](#).*

The **Temporary User** page appears.

## Setting the Filters

- **Date:** Select the desired date range to display the temporary users created during that duration.
- **Filter:** Select the desired option — All, Device or Group Wise — as per which you wish to view the temporary users.

Select **All**, if you wish to view all the temporary users added during the selected date range


Select **Device**, if you wish to view the temporary users added using a particular device. Click the picklist to select the desired device.

Select **Group Wise**, if you wish to view the temporary users as per the desired Enterprise Group. Click the picklist to select the desired group.

- Click **View**. The temporary users will appear as per the set filters.

## Filtered Records

The grid displays the temporary users with the following details:

- **ID:** Displays the ID assigned to the temporary user. This can be auto-generated, if required. To auto-generate the ID, you must enable the **Auto Generate User ID** check box in Global Policy.  
Only if you have enabled this check box the **Auto-Generate as per Global Policy**  icon appears here. For details refer to “[Generate User ID](#)” in Global Policy.
- **Name:** Displays the name of the temporary user.
- **Photo:** Displays the image of the temporary user.



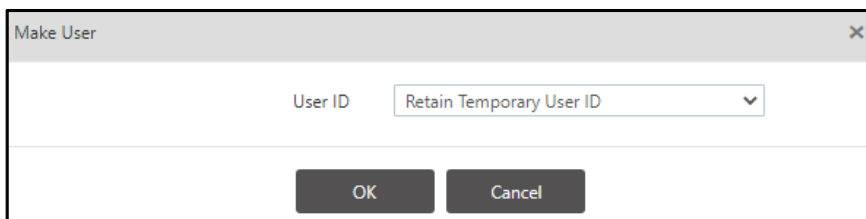
If GDPR is enabled a dummy photo will be displayed as Photo. For details refer to “[GDPR Reflections](#)”.

- **Status:** Displays the Status of the temporary user — Active, Inactive.

- **Auto-Registered Date & Time:** Displays the auto-registration date and time of the temporary user.
- **Auto-Registered via Device:** Displays the name of the device via which the temporary user is auto-registered.
- **Auto-Registered via Credential:** Displays the credential using which the temporary user is auto-registered.
- **Make User:** You can convert a temporary user to a normal user, if required.

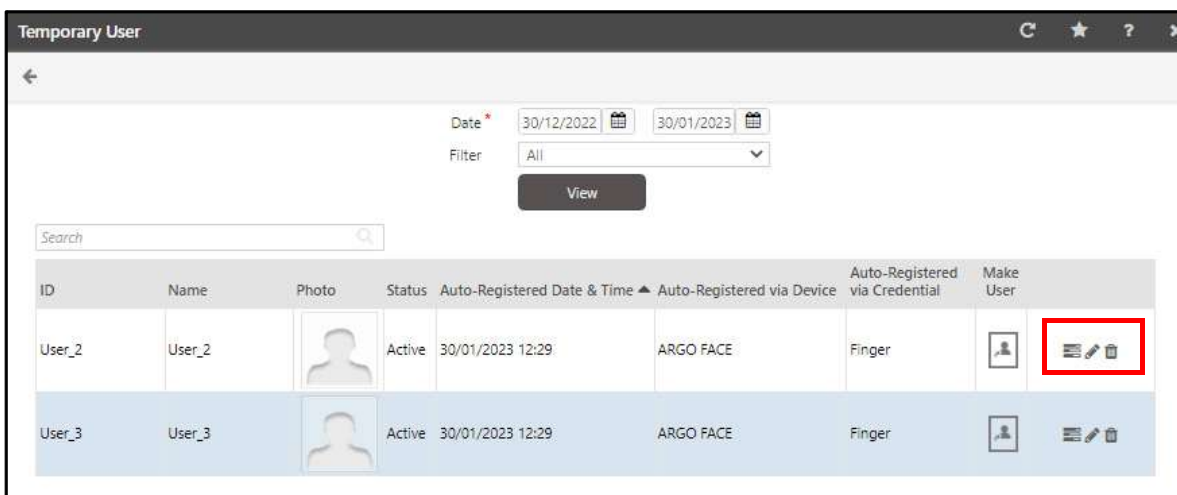
To do so, click **Make User** .

If you have enabled **Auto Generate User ID**, then the **Make User** pop-up appears.













The 'Make User' dialog box has a title bar with a close button. It contains a 'User ID' label and a dropdown menu currently showing 'Retain Temporary User ID'. At the bottom are 'OK' and 'Cancel' buttons.





- Select the desired **User ID** option — Retain Temporary User ID, Auto Generate as per Global Policy — from the drop-down list.
- Click **OK** to save the changes or click **Cancel**.
- The temporary user is added as a normal user and appears in the User List.
- You can also perform the following actions on each record — Details, Edit, Delete.



The 'Temporary User' interface includes a search bar, date range filters (30/12/2022 to 30/01/2023), a filter dropdown set to 'All', and a 'View' button. Below is a table with columns: ID, Name, Photo, Status, Auto-Registered Date & Time, Auto-Registered via Device, Auto-Registered via Credential, and Make User. The 'Make User' column contains icons for Details, Edit, and Delete. The Edit and Delete icons for the first two rows are highlighted with a red box.

ID	Name	Photo	Status	Auto-Registered Date & Time	Auto-Registered via Device	Auto-Registered via Credential	Make User
User_2	User_2		Active	30/01/2023 12:29	ARGO FACE	Finger	  
User_3	User_3		Active	30/01/2023 12:29	ARGO FACE	Finger	  

- Click **Details**  of the desired temporary user, if you wish to edit various user parameters. The User Configuration page appears with the relevant details of temporary user. You can edit the parameters as per your requirement.
- Click **Edit**  of the desired temporary user, if you wish to edit the:
  - Name

- ID, that is, you can click **Auto-Generate as per Global Policy**  , if required.
- Click **OK**  to save the changes or click **Cancel**  to discard.
- Click **Delete**  , if you wish to delete the temporary user.



*You can also Edit the parameters of the Temporary Users or Delete Temporary Users from the User List. To do so, Click Users > User. Click on the desired entry. You can edit or delete it. For details, refer to [“User List”](#).*

# Multi-User Configuration

COSEC provides the option for an HR administrator to apply a common configuration to multiple users at one go. This is not only convenient, but also saves the time required to configure each user individually. This feature can be useful when the same user configuration is applicable to more than one user defined in the COSEC database.

To access this functionality, select the **Users module > Multi-User Options > User Configuration**.

The **Multi-User Configuration** page opens as shown below.

## User Selection

Select the users based on the filters of

- **User Wise:** Select random users by selecting the user from picklist.
- **Group Wise:** Select all users in an enterprise group using the **Select Group** drop down list.
- **All:** Select all active users in the system.

Click the **Update** button to apply all configurations on the selected users.



Configurable parameters on the **Multi-User Configuration** page can be activated using the **Update** checkbox for each option. Selecting this checkbox will make the parameter enabled for modification using the **Set New Value** column.

Update	Field Name	Set New Value
<input checked="" type="checkbox"/>	Active	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	Birthday Message	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Personal Mobile	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Personal Email	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Official Mobile	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Official Email	<input checked="" type="checkbox"/>

The **Multi-User Configuration** page is divided into following sections. Select the individual sections and set the necessary configuration for the selected multiple users. The detailed configuration has been explained in the following sections.

- [“Profile”](#)
- [“Devices”](#)
- [“Credentials”](#)
- [“Group”](#)
- [“T&A”](#)
- [“Access Control Basic”](#)
- [“Access Control Advance”](#)
- [“ESS”](#)
- [“Cafeteria”](#)
- [“Job Costing”](#)
- [“Field Visit Management”](#)
- [“Face Recognition”](#)
- [“Visitor Management”](#)

To configure the parameters of the following tabs, you need to first select the **Update** checkbox of the desired parameter.

## Profile

To update the profile of multiple users, select **Multi-User Configuration > Profile**.

Update	Field Name	Set New Value
<input checked="" type="checkbox"/>	Active	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	Birthday Message	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Personal Mobile	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Personal Email	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Official Mobile	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Official Email	<input checked="" type="checkbox"/>

**Update**

1. Select the **Active** checkbox to activate all selected users.
2. Enable the **Birthday Message** checkbox for the selected users to receive a birthday message on NGT direct door.
3. Select the appropriate checkboxes to specify which contact details must be enabled for alert messages to be sent to selected users.
4. Click on **Update** to update the profile for selected users.

## Devices

The **Devices** section enables the administrator to add and assign/revoke a device group and/or randomly selected devices to multiple users at the same time.

To access this configuration, On the **Multi-User Configuration** page, select the **Devices** section as shown below.

To assign Device/Device Group to multiple users at the same time,

- Select the **Assign Device/Device Group** option.
- Under **Update**, select the **Device Group** check box to enable.

Under **Set New Value**, you can assign particular groups or all the groups to the users.

To do so, click the **Device Group** picklist. The **Picklist for Device Group** pop-up appears.

You can either select particular device groups or can select all the device groups at once.

To select particular groups, select the check boxes of the desired groups.

The screenshot shows a dialog box titled "Picklist For Device Group". At the top, a green bar indicates "Total Selected: 2 Records". Below this is a search bar and a "Show Selected" link. A "Select All" checkbox is unchecked. A table lists 10 device groups. The first two, "ACTA Devices" (DGID 1) and "RnD1Visitor" (DGID 2), are selected with blue checkmarks. The remaining groups (3-10) are not selected. At the bottom, it shows "1 - 10 of 12 records" and a pagination control with "1" selected. "OK" and "Cancel" buttons are at the bottom.

<input type="checkbox"/>	DGID ▲	Name
<input checked="" type="checkbox"/>	1	ACTA Devices
<input checked="" type="checkbox"/>	2	RnD1Visitor
<input type="checkbox"/>	3	Device Group 3
<input type="checkbox"/>	4	Device Group 4
<input type="checkbox"/>	5	Device Group 5
<input type="checkbox"/>	6	Device Group 6
<input type="checkbox"/>	7	Device Group 7
<input type="checkbox"/>	8	Device Group 8
<input type="checkbox"/>	9	Device Group 9
<input type="checkbox"/>	10	Device Group 10

OR

To select all the groups at once, select the **Select All** check box. The devices on all the pages will be selected.

The screenshot shows the same dialog box, but now the "Select All" checkbox is checked. The table shows all 10 device groups selected with blue checkmarks. The green bar at the top now indicates "Total Selected: 12 Records". The pagination control still shows "1 - 10 of 12 records" with "1" selected. "OK" and "Cancel" buttons are at the bottom.

<input checked="" type="checkbox"/>	DGID ▲	Name
<input checked="" type="checkbox"/>	1	ACTA Devices
<input checked="" type="checkbox"/>	2	RnD1Visitor
<input checked="" type="checkbox"/>	3	Device Group 3
<input checked="" type="checkbox"/>	4	Device Group 4
<input checked="" type="checkbox"/>	5	Device Group 5
<input checked="" type="checkbox"/>	6	Device Group 6
<input checked="" type="checkbox"/>	7	Device Group 7
<input checked="" type="checkbox"/>	8	Device Group 8
<input checked="" type="checkbox"/>	9	Device Group 9
<input checked="" type="checkbox"/>	10	Device Group 10

- Click **Update**.



The Device Groups appear in a grid.


✓ Process Completed

Assign Device/Device Group    Revoke Device/Device Group

Update	Field Name	Set New Value
<input checked="" type="checkbox"/>	Device Group	ID: <input type="text"/> Name: <input type="text"/>
<input type="checkbox"/>	Device	Name: <input type="text"/>

Search

DGID	Device Group Name
3	Device Group 3

You can also delete the desired device group/s. To do so, click **Delete**  of the respective device group.

- You can also select particular devices. By default, under **Update** the **Device** check box is enabled.

Under **Set New Value**, you can assign particular devices or all the devices to the selected users

To do so, click the **Device** picklist. The **Select Device** pop-up appears.

Select Device

Total Selected: 0 Records

Search  Show Selected

☐ Select All

<input type="checkbox"/>	Name	Type
<input type="checkbox"/>	ARCDC100_DD_Door	Panel200 Door
<input type="checkbox"/>	ARCDC100_DD_Door	Panel200 Door
<input type="checkbox"/>	ARCDC100_SD_Door	Panel200 Door
<input type="checkbox"/>	ARGO_PANEL	Panel200 Door
<input type="checkbox"/>	DoorV3	Panel200 Door
<input type="checkbox"/>	DoorV3_Door	Panel200 Door
<input type="checkbox"/>	DOORV4_PANEL	Panel200 Door
<input type="checkbox"/>	dumy	Panel200 Door
<input type="checkbox"/>	PATHV2_PANEL	Panel200 Door
<input type="checkbox"/>	VEGA_PANEL	Panel200 Door

1 - 10 of 89 records

OK Cancel

You can either select particular devices or can select all the devices at once.

To select particular devices, select the check boxes of the desired devices.

The 'Select Device' dialog box displays a table of devices. The 'Total Selected' count is 2. The 'Select All' checkbox is unchecked. The table lists 10 devices, all of type 'Panel200 Door'. The first two devices, 'ARCDC100\_DD\_Door', are selected. The pagination shows '1 - 10 of 89 records'.

<input type="checkbox"/>	Name	Type
<input checked="" type="checkbox"/>	ARCDC100_DD_Door	Panel200 Door
<input checked="" type="checkbox"/>	ARCDC100_DD_Door	Panel200 Door
<input type="checkbox"/>	ARCDC100_SD_Door	Panel200 Door
<input type="checkbox"/>	ARGO_PANEL	Panel200 Door
<input type="checkbox"/>	DoorV3	Panel200 Door
<input type="checkbox"/>	DoorV3_Door	Panel200 Door
<input type="checkbox"/>	DOORV4_PANEL	Panel200 Door
<input type="checkbox"/>	dummy	Panel200 Door
<input type="checkbox"/>	PATHV2_PANEL	Panel200 Door
<input type="checkbox"/>	VEGA_PANEL	Panel200 Door

OR

To select all the devices at once, select the **Select All** check box. The devices on all the pages will be selected.

The 'Select Device' dialog box displays a table of devices. The 'Total Selected' count is 95. The 'Select All' checkbox is checked. The table lists 10 devices, all of type 'Panel200 Door'. All devices are selected. The pagination shows '1 - 10 of 95 records'.

<input checked="" type="checkbox"/>	Name	Type
<input checked="" type="checkbox"/>	ARCDC100_DD_Door	Panel200 Door
<input checked="" type="checkbox"/>	ARCDC100_DD_Door	Panel200 Door
<input checked="" type="checkbox"/>	ARCDC100_SD_Door	Panel200 Door
<input checked="" type="checkbox"/>	ARGO_PANEL	Panel200 Door
<input checked="" type="checkbox"/>	DoorV3	Panel200 Door
<input checked="" type="checkbox"/>	DoorV3_Door	Panel200 Door
<input checked="" type="checkbox"/>	DOORV4_PANEL	Panel200 Door
<input checked="" type="checkbox"/>	dummy	Panel200 Door
<input checked="" type="checkbox"/>	PATHV2_PANEL	Panel200 Door
<input checked="" type="checkbox"/>	PD_ARGO	Panel200 Door

- Click **Update**.

The selected devices appear in a grid.

The screenshot shows a window titled 'Process Completed' with a green header bar. Below the header, there are two radio buttons: 'Assign Device/Device Group' (selected) and 'Revoke Device/Device Group'. Below these, there is a table with columns 'Update', 'Field Name', and 'Set New Value'. The 'Update' column has a checked checkbox. The 'Field Name' column has 'Device Group' and 'Device'. The 'Set New Value' column has input fields for 'ID', 'Name', and 'Name'. Below the table, there is a search bar and a table of devices. The table has columns 'Device Name', 'Type', and 'Delete'. The devices listed are 'ARCDC100\_DD\_Door' and 'ARCDC100\_DD\_Door'.

Device Name	Type	Delete
ARCDC100_DD_Door	Panel200 Door	
ARCDC100_DD_Door	Panel200 Door	

- Click **Configure** to configure the selected device for multiple users.

The Configuration page of the selected Device appears.

The screenshot shows a dialog box titled 'Panel Lite V2 - Configuration'. It contains the following fields and controls:

- Device: Panel Lite V2
- Type: Panel Lite V2
- Active: ☒
- VIP: ☐
- Absentee Rule: ☐
- Absent Day(s) Count: 60
- Access Profile: Group-1
- Functional Group: Staff
- Home Zone: Zone-1
- Visit Zone: Select
- Access Route: Select

At the bottom, there are 'OK' and 'Close' buttons.



*The Device and Type will be shown as per the device selected from the grid.*

You can enable and configure Access Control features from the Configuration page.

- Click **OK**.
- You can also delete the desired device. To do so, click **Delete** of the respective device.
- Click **Update** to assign the selected devices/device groups with configuration to multiple users.

Similarly to revoke Device/Device Group from multiple users at the same time,

- Select the **Revoke Device/Device Group** option.



- While Revoking Devices, if they are a part of any Access Rule/s assigned to User/s, then such devices will be retained.
- While Revoking Device Groups, if the devices within the group are a part of any Access Rule/s assigned to User/s, then such devices will be retained however the Device Group will be revoked.

- Under **Update**, select the **Device Group** check box to enable.

Under **Set New Value**, you can revoke particular groups or all the groups from the users.

To do so, click the **Device Group** picklist. The **Picklist for Device Group** pop-up appears.

You can either select particular device group or can select all the device groups at once.

To select particular groups, select the check boxes of the desired groups.

Picklist For Device Group

Total Selected: 2 Records

Search  Show Selected

☐ Select All

<input type="checkbox"/>	DGID ▲	Name
<input checked="" type="checkbox"/>	1	ACTA Devices
<input checked="" type="checkbox"/>	2	RnD1Visitor
<input type="checkbox"/>	3	Device Group 3
<input type="checkbox"/>	4	Device Group 4
<input type="checkbox"/>	5	Device Group 5
<input type="checkbox"/>	6	Device Group 6
<input type="checkbox"/>	7	Device Group 7
<input type="checkbox"/>	8	Device Group 8
<input type="checkbox"/>	9	Device Group 9
<input type="checkbox"/>	10	Device Group 10

1 - 10 of 12 records

« < 1 2 > »

OK Cancel

OR

To select all the groups, select the **Select All** check box. The devices on all the pages will be selected.

- Click **Update**.

The Device Groups appear in a grid.


Process Completed

Assign Device/Device Group Revoke Device/Device Group

Update	Field Name	Set New Value
<input checked="" type="checkbox"/>	Device Group	ID Name
<input type="checkbox"/>	Device	Name

Search

DGID ▲	Device Group Name	
1	ACTA Devices	

You can also delete the desired device group/s. To do so, click **Delete**  of the respective device group.

- You can also select particular devices. By default, under **Update** the **Device** check box is enabled.

Under **Set New Value**, you can revoke particular devices or all the devices from the selected users.

To do so, click the **Device** picklist. The **Select Device** pop-up appears.

The 'Select Device' pop-up window displays a search bar, a 'Show Selected' link, and a table of devices. The 'Total Selected' status is 0 Records. The table lists 10 devices, all of type 'Panel200 Door'. The 'Select All' checkbox is unchecked. The pagination shows '1 - 10 of 89 records'.

<input type="checkbox"/>	Name	Type
<input type="checkbox"/>	ARCDC100_DD_Door	Panel200 Door
<input type="checkbox"/>	ARCDC100_DD_Door	Panel200 Door
<input type="checkbox"/>	ARCDC100_SD_Door	Panel200 Door
<input type="checkbox"/>	ARGO_PANEL	Panel200 Door
<input type="checkbox"/>	DoorV3	Panel200 Door
<input type="checkbox"/>	DoorV3_Door	Panel200 Door
<input type="checkbox"/>	DOORV4_PANEL	Panel200 Door
<input type="checkbox"/>	dummy	Panel200 Door
<input type="checkbox"/>	PATHV2_PANEL	Panel200 Door
<input type="checkbox"/>	VEGA_PANEL	Panel200 Door

You can either select particular devices or can select all the devices at once.

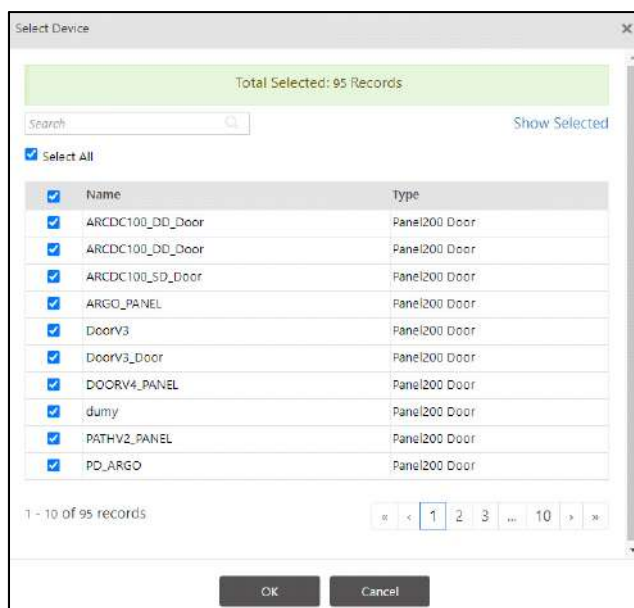
To select particular devices, select the check boxes of the desired groups.

The 'Select Device' pop-up window displays a search bar, a 'Show Selected' link, and a table of devices. The 'Total Selected' status is 2 Records. The table lists 10 devices, all of type 'Panel200 Door'. The 'Select All' checkbox is unchecked. The first two rows are selected. The pagination shows '1 - 10 of 89 records'.

<input type="checkbox"/>	Name	Type
<input checked="" type="checkbox"/>	ARCDC100_DD_Door	Panel200 Door
<input checked="" type="checkbox"/>	ARCDC100_DD_Door	Panel200 Door
<input type="checkbox"/>	ARCDC100_SD_Door	Panel200 Door
<input type="checkbox"/>	ARGO_PANEL	Panel200 Door
<input type="checkbox"/>	DoorV3	Panel200 Door
<input type="checkbox"/>	DoorV3_Door	Panel200 Door
<input type="checkbox"/>	DOORV4_PANEL	Panel200 Door
<input type="checkbox"/>	dummy	Panel200 Door
<input type="checkbox"/>	PATHV2_PANEL	Panel200 Door
<input type="checkbox"/>	VEGA_PANEL	Panel200 Door

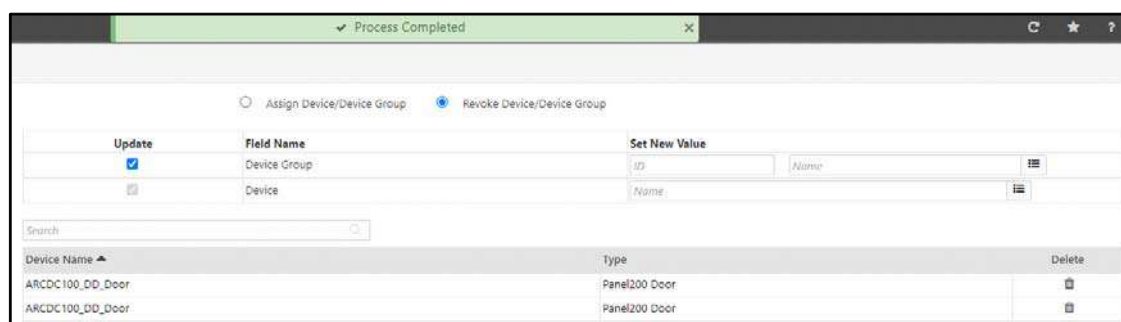
**OR**


To select all the devices, select the **Select All** check box. The devices on all the pages will be selected.



- Click **Update**.

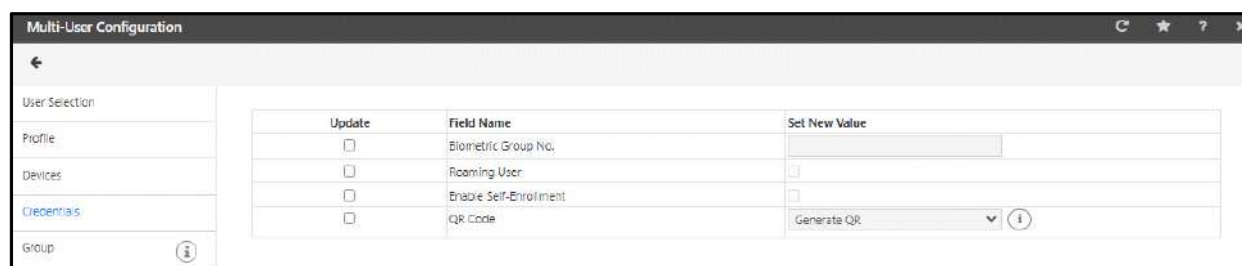
The selected devices appear in a grid.



- You can also delete the desired device. To do so, click **Delete**  of the respective device.
- Click **Update** to revoke the selected devices/device groups from multiple users.

## Credentials

To update the credentials for multiple user, select the **Credentials** section as shown below.



1. Enter the **Biometric Group No.** to be assigned to the users. It is a number allotted to a group of users assigned on a device. This enables the device to match a finger/palm credential against only those users who are part of the same Biometric Group thus reducing processing time.

This value is used for Finger/Palm Identification of user on Identification Server in shorter time span considering user first specifies Group No and then punches on the device.

Identification Server will be allocating templates to its child threads on the basis of this field.

2. You can mark the user as **Roaming user** for the users who are field engineers, partners etc who report to office rarely. When such users mark their punch after pressing 0 on door, then they will be identified from the Roaming user group.

The Identification server will maintain a list of users along with their templates to be considered as roaming/remote users.

3. Select the **Enable Self-Enrollment** check box to allow users to enroll themselves in COSEC using already provided access cards/PIN. The self-enrollment feature can be especially beneficial for organizations with large number of employees.
4. Users can access the device using **QR Code**. For QR Code functionality, make sure:
  - you have enabled **Allow Access Via QR** in the desired ARGO FACE (Direct Door / Panel Door) device as well as configured the Image Setting parameters. For details refer to "[Face/Image Settings](#)".
  - enabled the Alert, so that the generated/re-generated QR can be sent to the desired users/workers using SMS/Email/WhatsApp. Make sure you select the Alert Filter as **Users** and Event as **User Access - QR Credentials**. For details, refer to "[Configuring Alert Messages](#)".



*Access Via QR feature is not applicable for Temporary Users.*

If you wish to provide access to multiple users using **QR Code**, select the desired option — Generate QR, Regenerate QR.

After you click **Update**,

- if you have selected the **Generate QR** option, for all the selected users the QR will be generated and it will be displayed as a value in Users > User Configuration > Credentials > Access Card2.
- if you have selected the **Regenerate QR** option, then for all the selected users the QR will be regenerated and the value in Users > User Configuration > Credentials > Access Card2 will be over-written with this new value.

Alerts with the QR Code will be sent to users/workers using which they can access the devices.



## Group

This section enables the administrator to select Enterprise groups, Reporting group, Approval Policy, Leave group and Week off for assigning to multiple users. To access this configuration, select the **Group** section as shown.

The screenshot shows the 'Multi-User Configuration' window with the 'Group' section selected in the left sidebar. The main area displays a table for configuring groups. The table has columns for 'Update', 'Field Name', and 'Set New Value'. The 'Set New Value' column is further divided into 'ID' and 'Name' sub-columns. The 'Group' section is highlighted with an information icon (i).

Update	Field Name	ID	Name
<input type="checkbox"/>	Organization	ID	Name
<input type="checkbox"/>	Branch	ID	Name
<input type="checkbox"/>	Department	ID	Name
<input type="checkbox"/>	Section	ID	Name
<input type="checkbox"/>	Category	ID	Name
<input type="checkbox"/>	Grade	ID	Name
<input type="checkbox"/>	Designation	ID	Name
<input type="checkbox"/>	Custom Group 1	ID	Name
<input type="checkbox"/>	Custom Group 2	ID	Name
<input type="checkbox"/>	Custom Group 3	ID	Name
<input checked="" type="checkbox"/>	Reporting Group	2	ACTA Group
<input checked="" type="checkbox"/>	Approval Policy	5	Matrix Approval Policy
<input type="checkbox"/>	Leave Group	ID	Name
<input type="checkbox"/>	Week Off Group	ID	Name

An 'Update' button is located at the bottom right of the configuration area.

1. Select a group from the respective group picklist to be assigned to the user.
2. Click on **Update** to update the group change for the users.



The **Leave Group** and **Week Off Group** option is available for multi-user configuration only with the **T&A** add-on module.

For detailed description refer to User Configuration> Group

The picklist options that appear in each enterprise group will be as per the rights assigned to the SA. For details, refer to [“Assigning Group-Wise Rights”](#) under [“System Accounts”](#).

## T&A

The T&A section enables the administrator to set attendance configuration for multiple users and to specify T&A policies to be assigned. This section is available only with a *Time and Attendance* add-on module license.

To access this configuration, select the **T&A** section as shown below.

User Selection	Update	Field Name	Set New Value
Profile	<input type="checkbox"/>	Enable Attendance Calculation	<input type="checkbox"/>
Devices	<input type="checkbox"/>	Restrict Half Day Considerations	<input type="checkbox"/> ⓘ
Credentials	<input type="checkbox"/>	Attendance Marking Type	Normal ▾
Group ⓘ	<input type="checkbox"/>	Min Working Hours Required For Full Day	<input type="text"/>
<b>T&amp;A</b>	<input type="checkbox"/>	Min Working Hours Required For Half Day	<input type="text"/>
Access Control Basic	<input type="checkbox"/>	Max Punches To Be Considered	Select ▾
Access Control Advance	<input type="checkbox"/>	Bypass Finger/Palm/Face For Attendance	<input type="checkbox"/>
ESS	<input type="checkbox"/>	Max Short Leaves Allowed	<input type="text"/>
Cafeteria	<input type="checkbox"/>	OT/C-OFF Eligibility	None ▾
Job Costing	<input type="checkbox"/>	Authorize C-OFF On	<input type="checkbox"/> WO <input type="checkbox"/> PH <input type="checkbox"/> WO/PH <input type="checkbox"/> FB <input type="checkbox"/> RD <input type="checkbox"/> Normal Day
Field Visit Management	<input type="checkbox"/>	Bus Route	ID <input type="text"/> Name <input type="text"/> ⓘ
Face Recognition	<input type="checkbox"/>	Enable Site Based Auto Tour Application	<input type="checkbox"/>
	<input type="checkbox"/>	Tour	Select ▾
	<input type="checkbox"/>	Base Site Selection	ID <input type="text"/> Name <input type="text"/> ⓘ
	<input type="checkbox"/>	Auto Authorize Site Based Tour Application	<input type="checkbox"/>

<input type="checkbox"/>	Enable Location Based Auto Tour Application	<input type="checkbox"/>
<input type="checkbox"/>	Tour	Select ▾
<input type="checkbox"/>	Base Location Assignment	All ▾
<input type="checkbox"/>	Location	Code <input type="text"/> Name <input type="text"/> ⓘ
<input type="checkbox"/>	Location Group	ID <input type="text"/> Name <input type="text"/> ⓘ
<input type="checkbox"/>	Auto Authorize Location Based Tour Application	<input type="checkbox"/>
<input type="checkbox"/>	Show Attendance Details On Device	<input type="checkbox"/>
<input type="checkbox"/>	Attendance Policy	ID <input type="text"/> Name <input type="text"/> ⓘ
<input type="checkbox"/>	Late-IN Policy	ID <input type="text"/> Name <input type="text"/> ⓘ
<input type="checkbox"/>	Overtime Policy	ID <input type="text"/> Name <input type="text"/> ⓘ
<input type="checkbox"/>	Absentee Policy	ID <input type="text"/> Name <input type="text"/> ⓘ
<input type="checkbox"/>	Early-OUT Policy	ID <input type="text"/> Name <input type="text"/> ⓘ
<input type="checkbox"/>	C-OFF Policy	ID <input type="text"/> Name <input type="text"/> ⓘ

**Update**

1. Select the **Enable Attendance Calculation** checkbox to enable attendance calculation on the system for the selected users. This option has to be enabled for configuring any of the other parameters in this section.
2. In case the attendance calculation is enabled then the user needs to select the **Attendance Marking Type** from the drop down list.

The following options are available:

- **Normal:** This type will be default for all users.

- **First Punch Only:** This type users need only entry punch at the start of the shift. In this case the system will assume that the shift end time is the last out Punch for the day. All other calculations remain the same as for normal type users.
  - **Executive:** This type users will be marked full day present if at least one punch (entry/exit) is available in the day. There will not be any late/early & overtime calculation like it is done for normal and single punch type users.
  - **Flexible:** This category of users working will be checked against required minimum working and if it is more than required, full day attendance will be marked. In this case the minimum working hours required in a day for full day attendance and half day attendance can also be defined for each user as explained below.
  - **Present:** category users do not require any punch for them to be marked full day present. All users belonging to this category are marked present by default.
3. The **Min Working Hours Required** section is enabled for configuration only when the *Flexible* Attendance Marking type is selected for a user. The administrator can specify the minimum working hours required in a day for users to be marked *Full Day* or *Half Day* present. Specify the hours in *HH:MM* format as shown below.

Update	Field Name	Set New Value
<input checked="" type="checkbox"/>	Enable Attendance Calculation	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	Attendance Marking Type	Flexible
<input checked="" type="checkbox"/>	Min Working Hours Required For Full Day	08:00
<input checked="" type="checkbox"/>	Min Working Hours Required For Half Day	04:00
<input type="checkbox"/>	Max Punches To Be Considered	Select

4. The **Max Punches to be Considered** parameter specifies the maximum entry/exit events per user to be considered in a day for attendance calculation.

<input checked="" type="checkbox"/>	Max Punches To Be Considered	Select	
<input type="checkbox"/>	Bypass Finger/Palm/Face For Attendance	Select	
<input type="checkbox"/>	Max Short Leaves Allowed	2	
<input type="checkbox"/>	OT/C-OFF Eligibility	4	
<input type="checkbox"/>	Authorize C-OFF On	6	
<input type="checkbox"/>	Bus Route	8	
<input type="checkbox"/>	Enable Site Based Auto Tour Application	10	
<input type="checkbox"/>	Tour	12	
		N-Punch	
		Select	

☐ WO/PH  
☐ Normal Day

Specify a value in this field if the value defined at the global level is to be overridden for this user. The options available are 2, 4, 6, 8, 10, 12 and N-Punch. N-Punch allows unlimited number of punches in IN/OUT pair.

5. On checking the **Bypass Finger/Palm/Face For Attendance** option, the user can punch IN or OUT using any of the assigned credentials and the same will be considered for attendance calculation. On selection of this option, finger/palm /face identification is no longer must for marking attendance.
6. The **Max Short Leaves Allowed** parameter specifies the maximum number of short leaves (personal hours) to be allowed to selected users in an attendance period. This parameter is also defined at the global

system configuration level and can be overridden for specific users using this option. The administrator can specify a value of a maximum of two digits in this field.

7. The **OT/C-OFF Eligibility** parameter enables the administrator to define whether the overtime authorization for this user is to be done as:

- None
- Only Overtime
- Only Compensatory Off
- Both

For **Both** option you can select the days on which C-OFF is to be authorized.

8. Click the **Bus Route** picklist button and select the bus route to be assigned to selected users.
9. **Enable Site Based Auto Tour Application:** Select this check box so that tour application will be automatically applied for a particular user, if he punches from some site other than the Base Site.

<input checked="" type="checkbox"/>	Enable Site Based Auto Tour Application	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	Tour	T1 - tour1
<input checked="" type="checkbox"/>	Base Site Selection	ID <input type="text"/> Name <input type="text"/>
<input checked="" type="checkbox"/>	Auto Authorize Site Based Tour Application	1 Site(s) are Selected

- **Tour:** Select the tour application from the drop-down list which will be automatically applied.
- **Base Site Selection:** Select the base site to be assigned to the user. You can select particular sites or can select all the sites at once.

Click the **Base Site Selection** picklist. The **Picklist for Site** pop-up appears.

Select Sites

Total Selected: 0 Records

Search:  Show Selected

☐ Select All

<input type="checkbox"/>	ID	Name
<input type="checkbox"/>	1	Factory
<input type="checkbox"/>	2	HO
<input type="checkbox"/>	3	RnD1
<input type="checkbox"/>	4	RnD2
<input type="checkbox"/>	5	site5
<input type="checkbox"/>	6	site6
<input type="checkbox"/>	7	site7
<input type="checkbox"/>	8	site8
<input type="checkbox"/>	9	site9
<input type="checkbox"/>	10	site10

1 - 10 of 11 records

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1

2

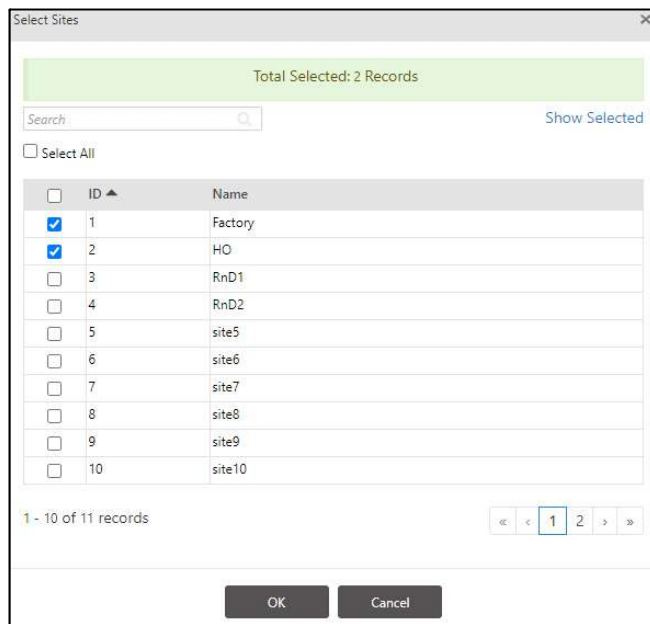
>

OK

Cancel

You can either select particular sites or can select all the sites at once.

To select particular sites, select the check boxes of the desired sites.

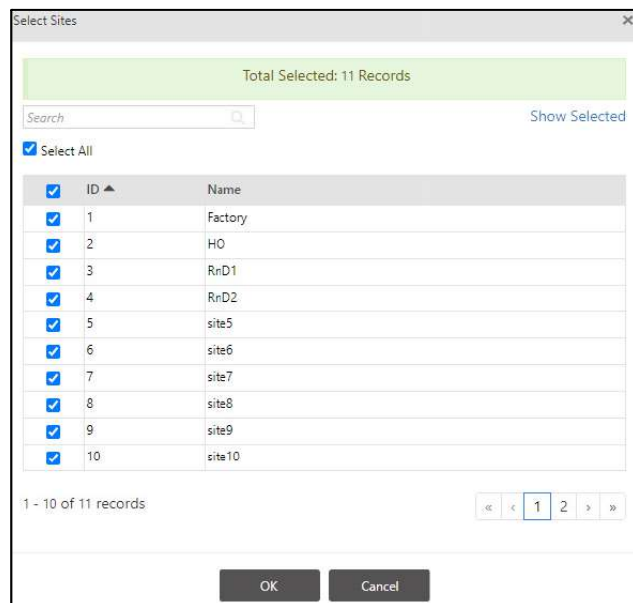


The 'Select Sites' dialog box displays a table with 11 records. The first two records, 'Factory' (ID 1) and 'HO' (ID 2), have their checkboxes selected. The 'Total Selected' bar at the top indicates 2 records. The 'Select All' checkbox is unchecked. The table columns are 'ID' and 'Name'. The bottom of the dialog shows '1 - 10 of 11 records' and pagination controls.

ID	Name
1	Factory
2	HO
3	RnD1
4	RnD2
5	site5
6	site6
7	site7
8	site8
9	site9
10	site10

OR


To select all the sites, select the **Select All** check box. The sites on all the pages will be selected.



The 'Select Sites' dialog box displays the same table as before, but now all 11 records have their checkboxes selected. The 'Total Selected' bar at the top indicates 11 records. The 'Select All' checkbox is checked. The bottom of the dialog shows '1 - 10 of 11 records' and pagination controls.

ID	Name
1	Factory
2	HO
3	RnD1
4	RnD2
5	site5
6	site6
7	site7
8	site8
9	site9
10	site10




Click **OK**.

Hover over the **Info**  icon. It displays the number of sites selected.

- **Auto Authorize Site Based Tour Application:** Select this check box to automatically authorize the tour application for a particular user, if auto tour application feature is enabled.

**10. Enable Location Based Auto Tour Application:** Select this check box so that tour application will be automatically applied for a particular user, if he punches from some location other than the Base location.

If a user goes for official activity to some location other than base location; then new location can be assigned to the user and tour application will be automatically applied for that day when event is generated from the new location.

<input checked="" type="checkbox"/>	Enable Location Based Auto Tour Application	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	Tour	T2 - tour2
<input checked="" type="checkbox"/>	Base Location Assignment	Selected
<input checked="" type="checkbox"/>	Location	Code Name  
<input checked="" type="checkbox"/>	Location Group	ID Name 
<input checked="" type="checkbox"/>	Auto Authorize Location Based Tour Application	<input checked="" type="checkbox"/>

1 Location(s) are selected

- **Tour:** Select the tour application from the drop-down list which will be automatically applied when user goes to other location. The Tour application will be available in the drop-down only if it is added in the leave group assigned to the user.
- **Base Location Assignment:** Select the base location to be assigned to the user as **All** or **Selected**.
  - If you select **All**, all the locations configured in Location Master will be assigned to the user. When new location is added in the Location Master then it will be assigned to the user automatically.
  - If you select **Selected**, you can assign Locations as well as Location Group/s to the user.
- **Location:** You can assign particular locations or assign all the locations at once.

Click the **Location** picklist. The **Picklist for Location** pop-up appears.

Picklist For Location

Total Selected: 0 Records

☐ Select All

<input type="checkbox"/>	Code ▲	Name
<input type="checkbox"/>	I8	Location 6
<input type="checkbox"/>	I9	Location 7
<input type="checkbox"/>	RnD2GP	RnD2 GPS
<input type="checkbox"/>	RnDGPS	RnD1 GPS

11 - 14 of 14 records

<< < 1 2 > >>

You can either select particular location or can select all the locations at once.

To select particular locations, select the check boxes of the desired locations.

The screenshot shows a dialog box titled "Picklist For Location". At the top, a green bar indicates "Total Selected: 1 Records". Below this is a search bar with the text "Search" and a magnifying glass icon, and a "Show Selected" link. A "Select All" checkbox is present and is currently unchecked. Below the checkbox is a table with two columns: "Code" and "Name". The table contains four rows: "I8" (Location 6), "I9" (Location 7), "RnD2GP" (RnD2 GPS), and "RnDGP" (RnD1 GPS). The checkbox for "I8" is checked. Below the table, it says "11 - 14 of 14 records". At the bottom are "OK" and "Cancel" buttons.

<input type="checkbox"/>	Code ▲	Name
<input checked="" type="checkbox"/>	I8	Location 6
<input type="checkbox"/>	I9	Location 7
<input type="checkbox"/>	RnD2GP	RnD2 GPS
<input type="checkbox"/>	RnDGP	RnD1 GPS

OR

To select all the locations, select the **Select All** check box. The location on all the pages will be selected.

The screenshot shows the same "Picklist For Location" dialog box, but now the "Select All" checkbox is checked. The green bar at the top now indicates "Total Selected: 14 Records". In the table, all four rows have their checkboxes checked. The rest of the interface remains the same.

<input checked="" type="checkbox"/>	Code ▲	Name
<input checked="" type="checkbox"/>	I8	Location 6
<input checked="" type="checkbox"/>	I9	Location 7
<input checked="" type="checkbox"/>	RnD2GP	RnD2 GPS
<input checked="" type="checkbox"/>	RnDGP	RnD1 GPS

- Click **OK**.

Hover over the **Info**  icon. It displays the number of Location selected.

- **Location Group:** You can assign particular location group or assign all the location groups at once. If a Location Group is assigned to user, then whenever new location is added to this group then this new location will also be assigned to the user.

Click the **Location** picklist. The **Picklist for Location Group** pop-up appears.

ID	Name
<input type="checkbox"/> 1	Matrix
<input type="checkbox"/> 2	Location Group 2
<input type="checkbox"/> 3	Location Group 3
<input type="checkbox"/> 4	Location Group 4
<input type="checkbox"/> 5	Location Group 5
<input type="checkbox"/> 6	Location Group 6
<input type="checkbox"/> 7	Location Group 7
<input type="checkbox"/> 8	Location Group 8
<input type="checkbox"/> 9	Location Group 9
<input type="checkbox"/> 10	Location Group 10

You can either select particular location group or can select all the location group at once.


To select particular location groups, select the check boxes of the desired location groups.

ID	Name
<input checked="" type="checkbox"/> 1	Matrix
<input type="checkbox"/> 2	Location Group 2
<input type="checkbox"/> 3	Location Group 3
<input type="checkbox"/> 4	Location Group 4
<input type="checkbox"/> 5	Location Group 5
<input type="checkbox"/> 6	Location Group 6
<input type="checkbox"/> 7	Location Group 7
<input type="checkbox"/> 8	Location Group 8
<input type="checkbox"/> 9	Location Group 9
<input type="checkbox"/> 10	Location Group 10

**OR**




Total Selected: 12 Records



Show Selected

☒ Select All

<input checked="" type="checkbox"/>	ID 	Name
<input checked="" type="checkbox"/>	1	Matrix
<input checked="" type="checkbox"/>	2	Location Group 2
<input checked="" type="checkbox"/>	3	Location Group 3
<input checked="" type="checkbox"/>	4	Location Group 4
<input checked="" type="checkbox"/>	5	Location Group 5
<input checked="" type="checkbox"/>	6	Location Group 6
<input checked="" type="checkbox"/>	7	Location Group 7
<input checked="" type="checkbox"/>	8	Location Group 8
<input checked="" type="checkbox"/>	9	Location Group 9
<input checked="" type="checkbox"/>	10	Location Group 10

1 - 10 of 12 records

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OK

Cancel

- Hover over the **Info**  icon. It displays the number of Location Groups selected.

12. Select a **Policy** from the respective policy picklist as shown in the following example:

[illegible]

## Access Control Basic

This section enables the administrator to configure basic access control parameters for multiple users. To access this configuration, select the **Access Control Basic** section as shown below.

The screenshot shows the 'Multi-User Configuration' interface. On the left is a sidebar menu with options: User Selection, Profile, Devices, Credentials, Group (with an info icon), T&A, Access Control Basic (highlighted in blue), Access Control Advance, ESS, Cafeteria, Job Costing, Field Visit Management, Face Recognition, and Visitor Management. The main area displays a table with three columns: 'Update', 'Field Name', and 'Set New Value'. The table contains the following rows:

Update	Field Name	Set New Value
<input type="checkbox"/>	Bypass Finger	<input type="checkbox"/>
<input type="checkbox"/>	Bypass Palm	<input type="checkbox"/>
<input type="checkbox"/>	Access Validity	<input type="checkbox"/>
<input type="checkbox"/>	Access Validity Date	<input type="text"/>
<input type="checkbox"/>	Access Level For Smart Identification (SI)	8
<input type="checkbox"/>	Shift Schedule	Schedule Group
<input type="checkbox"/>	Start Shift	General Shift
<input type="checkbox"/>	Holiday Schedule	Schedule 1
<input type="checkbox"/>	Access Cluster Checking	<input type="checkbox"/>

An 'Update' button is located at the bottom right of the configuration area.

1. The **Bypass Finger** option can be enabled in the event of the Finger Print image not being in order and the system thus has problems identifying the user. In such cases, the system administrator can disable the Finger Print check for the user thus enabling the user to gain access using either the assigned pin or card.
2. The **Bypass Palm** option can be enabled in the event of the Palm Vein image not being in order and the system thus has problems identifying the user. In such cases, the system administrator can disable the Palm vein check for the user thus enabling the user to gain access using either the assigned pin or card.
3. Enable the **Access Validity** option if the user credential is to be activated for a predefined period.

Specify the end date of the validity in the **Access Validity Date** field.

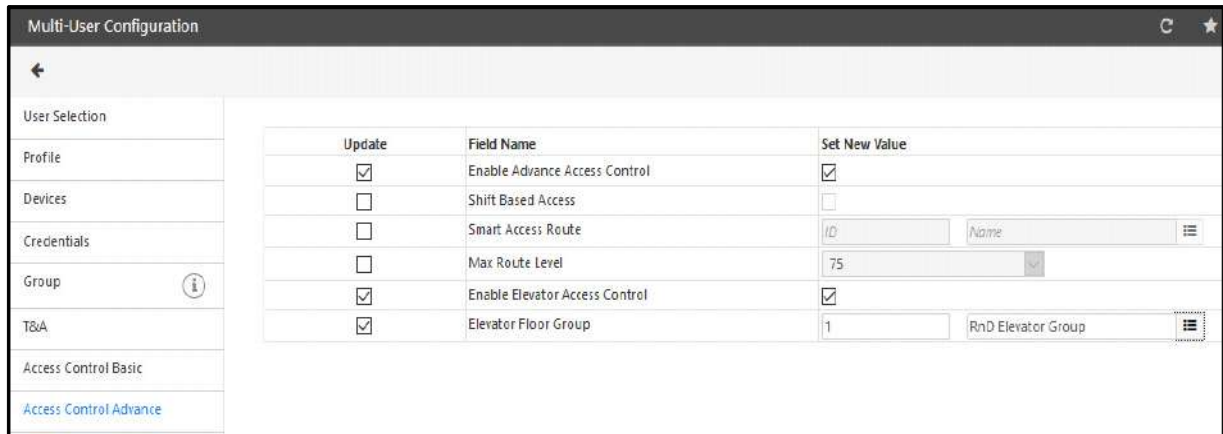
4. Specify an access level from the **Access Level For Smart Identification (SI)** drop down list, for which the Smart Identification feature will be applicable to the selected users.
5. Assign a **Shift Schedule** to the selected users from the dropdown list.

In case of multiple shifts in the schedule group, the **Start Shift** needs to be selected from the drop down list.

6. Select the **Holiday Schedule** to be assigned to the user from the drop down list.
7. Select the **Access Cluster Checking** option to enable checking for access cluster restrictions for the selected users.

## Access Control Advance

This section enables the administrator to set advance access control parameters for multiple users. The **Access Control Advance** section is available only with the *Access Control* add-on module license. To access this configuration, select the **Access Control Advance** section as shown below.



The screenshot shows the 'Multi-User Configuration' window with the 'Access Control Advance' section selected. The window contains a table for configuring access parameters for multiple users.

Update	Field Name	Set New Value
<input checked="" type="checkbox"/>	Enable Advance Access Control	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Shift Based Access	<input type="checkbox"/>
<input type="checkbox"/>	Smart Access Route	ID <input type="text"/> Name <input type="text"/>
<input type="checkbox"/>	Max Route Level	75 <input type="text"/>
<input checked="" type="checkbox"/>	Enable Elevator Access Control	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	Elevator Floor Group	1 <input type="text"/> RnD Elevator Group <input type="text"/>

1. **Enable Advance Access Control:** Check this box to enable the advance access control feature.
2. The **Shift Based Access** parameter allows the administrator to enable user access based on the shift working time of the users.



*In the event of not selecting the **Shift Based Access** option, the system will apply the default access settings applicable to the user.*

3. Select the **Smart Access Route** to be assigned to the user from the *Access Route* picklist.
4. Select the route level up to which the user is to be allowed access from the **Max Route Level** drop down list.
5. **Enable Elevator Access Control:** Check this box to enable the Elevator access control feature for the users.
6. **Elevator Floor Group:** Click the picklist and select the Elevator floor group to be assigned to the users. The users can access the floors of the Elevators included in Elevator Floor Group. The Elevator Floor group is created from Access Control> Elevator Access Control> Elevator floor group



*Some parameters, when configured for a specific user, may over-ride corresponding parameters pre-defined at the Global Policy level.*

## ESS

The **ESS** section is available only with the ESS add-on module license. It enables the administrator to set up ESS accounts for new users. To access this configuration, select the **ESS** section as shown.

The screenshot shows the 'Multi-User Configuration' window. On the left is a sidebar with a 'User Selection' section containing a list of categories: Profile, Devices, Credentials, Group, TBA, Access Control Basic, Access Control Advance, **ESS** (highlighted), Cafeteria, Job Costing, Field Visit Management, Face Recognition, and Visitor Management. The main area is divided into three columns: 'Update', 'Field Name', and 'Set New Value'. The 'Update' column contains checkboxes for various settings. The 'Field Name' column lists the corresponding settings. The 'Set New Value' column contains input fields and dropdown menus for configuring these settings. At the bottom right of the main area is an 'Update' button.

Update	Field Name	Set New Value
<input type="checkbox"/>	Enable Account	<input type="checkbox"/>
<input type="checkbox"/>	Edit Basic Details	<input type="checkbox"/>
<input type="checkbox"/>	Punch Marking Via ESS	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Punch Marking Via API	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Mark Punch As Per	Server Time Zone
<input type="checkbox"/>	Auto-Punch Marking	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Manual Punch Marking	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Face Mandatory for Punch	Name
<input type="checkbox"/>	APTA Face Anti-Spoofing	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Capture Photo	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Allow Offline Punch	None
<input type="checkbox"/>	Location Mandatory for Punch	<input type="checkbox"/>
<input type="checkbox"/>	Reason For Punching From Unassigned Location	All
<input type="checkbox"/>	Location Assignment	Code
<input type="checkbox"/>	Location	None
<input type="checkbox"/>	Location Group	ID
<input type="checkbox"/>	Allow Door Access Through API	None
<input type="checkbox"/>	PIN Authentication For Door Access	<input type="checkbox"/>
<input type="checkbox"/>	Domain	<input type="text"/>
<input type="checkbox"/>	Auto Authorize IMEI Registration	<input type="checkbox"/>
<input type="checkbox"/>	Reset Password	<input type="checkbox"/>
<input type="checkbox"/>	Preferred Language	English

1. Select the **Enable Account** check-box to enable ESS account access for the selected users.
2. Select the **Edit Basic Details** check-box to enable the selected users to edit basic details on their respective ESS accounts.
3. Select the **Punch Marking Via ESS** check-box to enable users to mark their attendance manually from their respective ESS accounts.
4. Select the **Punch Marking Via API** check-box to enable user to mark punches by firing API. Auto-Punch and Manual-Punch marking check-box will be activated only if Punch marking via API is enabled.
5. Select the **Mark Punch As Per** check-box to select the time zone which is to be applied for punch time (punch marked from API)
  - **Server Time Zone**- The date- time of the punch will be as per the server time zone.
  - **Local Time Zone**- The date-time of the punch will be as per the time zone of the place from where the punch is marked.
6. Select the **Auto-Punch Marking** check-box to enable the auto-attendance marking feature for the selected user from the COSEC APTA mobile application. On enabling this feature, if the user's current location matches any of the assigned locations; a punch will be marked automatically for the user from the mobile application.



Locations can be configured from *COSEC Web Application > Admin > System Configuration > Location Master*.

- **Location Assignment**- Select the option as “All” or “Selected” for assigning location to users.

- For **All** option; all the locations configured in Location Master will be assigned to the users. When new location is added to Location master then it will be automatically assigned to the users if “All” is selected.
- For **Selected** option; **Location** and **Location Group** will be enabled for the selection which is to be assigned to the users.
- If you select **Selected**, you can assign Locations as well as Location Group/s to the user.
- **Location**: Click the **Location** picklist. The **Picklist for Location** pop-up appears.

Picklist For Location

Total Selected: 0 Records

Search Q [Show Selected](#)

☐ Select All

<input type="checkbox"/> Code ▲	Name
<input type="checkbox"/> I8	Location 6
<input type="checkbox"/> I9	Location 7
<input type="checkbox"/> RnD2GP	RnD2 GPS
<input type="checkbox"/> RnDGPS	RnD1 GPS

11 - 14 of 14 records

« < 1 2 > »

OK Cancel

You can either select particular location or can select all the location at once.

To select particular locations, select the check boxes of the desired locations.

The screenshot shows a dialog box titled "Picklist For Location". At the top, a green bar indicates "Total Selected: 1 Records". Below this is a search bar with the placeholder "Search" and a "Show Selected" link. A "Select All" checkbox is present and unchecked. A table lists four location groups: "I8" (Location 6), "I9" (Location 7), "RnD2GP" (RnD2 GPS), and "RnDGPS" (RnD1 GPS). The checkbox for "I8" is checked. At the bottom, there are "OK" and "Cancel" buttons. A pagination bar shows "11 - 14 of 14 records" and a page selector with "2" highlighted.

<input type="checkbox"/>	Code ▲	Name
<input checked="" type="checkbox"/>	I8	Location 6
<input type="checkbox"/>	I9	Location 7
<input type="checkbox"/>	RnD2GP	RnD2 GPS
<input type="checkbox"/>	RnDGPS	RnD1 GPS

OR

To select all the locations, select the **Select All** check box. The location on all the pages will be selected.

This screenshot shows the same "Picklist For Location" dialog box, but now the "Select All" checkbox is checked. The green bar at the top now indicates "Total Selected: 14 Records". In the table, all four location groups ("I8", "I9", "RnD2GP", and "RnDGPS") have their checkboxes checked. The "OK" and "Cancel" buttons remain at the bottom, and the pagination bar still shows "11 - 14 of 14 records" with "2" highlighted.

<input checked="" type="checkbox"/>	Code ▲	Name
<input checked="" type="checkbox"/>	I8	Location 6
<input checked="" type="checkbox"/>	I9	Location 7
<input checked="" type="checkbox"/>	RnD2GP	RnD2 GPS
<input checked="" type="checkbox"/>	RnDGPS	RnD1 GPS

- Click **OK**.

Hover over the **Info**  icon. It displays the number of Locations selected.

- **Location Group:** You can assign particular location group or assign all the location groups at once. If a Location Group is assigned to user, then whenever new location is added to this group then this new location will also be assigned to the user.

Click the **Location Group** picklist. The **Picklist for Location Group** pop-up appears.

Picklist For Location Group

Total Selected: 0 Records

Search  Show Selected

☐ Select All

<input type="checkbox"/>	ID ▲	Name
<input type="checkbox"/>	1	Matrix
<input type="checkbox"/>	2	Location Group 2
<input type="checkbox"/>	3	Location Group 3
<input type="checkbox"/>	4	Location Group 4
<input type="checkbox"/>	5	Location Group 5
<input type="checkbox"/>	6	Location Group 6
<input type="checkbox"/>	7	Location Group 7
<input type="checkbox"/>	8	Location Group 8
<input type="checkbox"/>	9	Location Group 9
<input type="checkbox"/>	10	Location Group 10

1 - 10 of 12 records

OK Cancel

You can either select particular location group or can select all the location group at once.

To select particular location groups, select the check boxes of the desired location groups.

Picklist For Location Group

Total Selected: 1 Records

Search  Show Selected

☐ Select All

<input type="checkbox"/>	ID ▲	Name
<input checked="" type="checkbox"/>	1	Matrix
<input type="checkbox"/>	2	Location Group 2
<input type="checkbox"/>	3	Location Group 3
<input type="checkbox"/>	4	Location Group 4
<input type="checkbox"/>	5	Location Group 5
<input type="checkbox"/>	6	Location Group 6
<input type="checkbox"/>	7	Location Group 7
<input type="checkbox"/>	8	Location Group 8
<input type="checkbox"/>	9	Location Group 9
<input type="checkbox"/>	10	Location Group 10

1 - 10 of 12 records

OK Cancel

OR

To select all the Location Groups, select the **Select All** check box. The location group on all the pages will be selected.

Picklist For Location Group

Total Selected: 12 Records

Search  Show Selected


☒ Select All

<input checked="" type="checkbox"/>	ID	Name
<input checked="" type="checkbox"/>	1	Matrix
<input checked="" type="checkbox"/>	2	Location Group 2
<input checked="" type="checkbox"/>	3	Location Group 3
<input checked="" type="checkbox"/>	4	Location Group 4
<input checked="" type="checkbox"/>	5	Location Group 5
<input checked="" type="checkbox"/>	6	Location Group 6
<input checked="" type="checkbox"/>	7	Location Group 7
<input checked="" type="checkbox"/>	8	Location Group 8
<input checked="" type="checkbox"/>	9	Location Group 9
<input checked="" type="checkbox"/>	10	Location Group 10

1 - 10 of 12 records

OK Cancel

- Click **OK**.

Hover over the **Info**  icon. It displays the number of Location Groups selected.

7. Select the **Manual Punch Marking** check-box to enable manual punch marking from the COSEC APTA mobile application.
8. **Face Mandatory For Punch** - When Manual Punch Marking and Face Recognition feature is enabled for user then you can select the specific option for which face is to be made mandatory for the punch. The options are **Attendance**, **Access Control**, **Both** and **None**.

For Access Control and Both option; you must enable “Allow Door Access Through API” checkbox.

9. **APTA Face Anti-Spoofing**: When **Manual Punch Marking** is enabled and **Face Mandatory For Punch** is selected as — **Attendance**, **Access Control** or **Both** — then select **APTA Face Anti-Spoofing** checkbox to enable **Face Anti-Spoofing** feature via COSEC APTA Application to prevent false face verification by using a photo, video, mask or a different substitute for an unauthorized person’s face.
10. **Capture Photo**- This checkbox is activated only when **Punch marking via API** and **Manual Punch Marking** are enabled. This allows the user to capture snapshot while punching through COSEC APTA.
11. **Allow Offline Punch** - This checkbox is activated only when **Punch marking via API** and **Manual Punch Marking** are enabled. This allows users to apply for offline punches.

In Mobile devices, when there is no connectivity between server and the Mobile device, the punches, with their timings can be stored through offline punch and send to server when connectivity is restored.

12. The **Location Mandatory For Punch** field determines if information regarding the source location from where the punch has been marked should accompany a punch marking by user. Select None if location information should not accompany a punch. For *Manual Punch Marking*, select Any Location (locations



need not be configured). For *Auto-Punch Marking* (auto-attendance feature), select **Configured Locations Only** (locations must be configured on "Location Master").

13. **Reason For Punching From Unassigned Location:** This checkbox will be activated only when 'Location Mandatory For Punch' has either **None** or **Any Location** as values. By enabling this checkbox, the Incharge Users can know the reason for which the punch is made from unassigned location by the employee users.
14. **Location Assignment-** Select the option as "All" or "Selected" for assigning location to users.
  - For **All** option; all the locations configured in Location Master will be assigned to the users. When new location is added to Location master then it will be automatically assigned to the users if "All" is selected.
  - For **Selected** option; Location and Location Group will be enabled for the selection which is to be assigned to the users.
    - **Location-** Select the Location pick-list and select the locations to be assigned to the users.
    - **Location Group-** Select the Location group pick-list and select the groups to be assigned to the users. If Selected Location groups are assigned to users and whenever new location is added to the location group then newly added location in location group will also be assigned to the users.
15. Select the **Allow Door Access Through API** to allow the access to device through API.
16. Select the **PIN Authentication For Door Access** for Dual Authentication with PIN when Bluetooth or QR based access is used for Access control feature in COSEC APTA mobile application.
17. Specify the Active Directory domain name in the **Domain** field for Active Directory login.
18. Select the **Auto-Authorize IMEI Registration** checkbox to enable automatic authorization of IMEI numbers newly registered on COSEC, for the selected users.
19. The administrator can click the **Reset Password** button to reset the selected ESS users' login password.
20. Specify the **Preferred Language** for the selected ESS Users as *English, Arabic, Spanish, Albanian, Turkish or Vietnamese*.

## Cafeteria

This section is available only with the Cafeteria add-on module license. To access this configuration, select the **Cafeteria** section as shown.

Update	Field Name	Set New Value
<input type="checkbox"/>	Enable Account	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Enable Offline Transaction	None
<input checked="" type="checkbox"/>	Discount Level	None
<input checked="" type="checkbox"/>	Account Type	Pre-Paid
<input type="checkbox"/>	Balance Management	Device Based
<input type="checkbox"/>	Device-Server Balance Check	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Cafeteria Usage Policy	ID <input type="text"/> Name <input type="text"/>

1. Select the **Enable Account** checkbox to enable Cafeteria account access for the selected user.
2. Select the desired option to perform offline transaction from the **Enable Offline Transaction** drop down list.
  - Select **None**, if you do not want to allow transactions to be made by the users when the device is in offline mode.
  - Select **Allow With Discount**, if you want to allow transactions with discount to be made by the users, when the device is in offline mode.
  - Select **Allow Without Discount**, if you do not want to allow transactions without discount to be made by the users, when the device is in offline mode.
3. Select the appropriate discount level from the **Discount Level** drop down list.
4. Select the **Account Type** as **Pre-Paid** or **Post-Paid**.
  - For **Pre-Paid** account type, specify whether the **Balance Management** should be Device-based or Server-based.
  - When Balance Management is selected as **Server based**, then you can enable **Device-Server Balance Check**. This will allow Device to check Server-side balance before allowing transaction. For this, Device and Server must be connected.
  - For **Post-Paid** account type, enter the **Allowed Usage Per Month** based on which monthly dues for the user can be calculated.
5. **Cafeteria Usage Policy**- Select the cafeteria usage policy to assign to the multiple users based on which cafeteria transaction restrictions will be applied to the users.

## Job Costing



*In case the job added is same as existing job assigned to the user and the date range provided is also the same, then only the ESS Assignment flag is updated for users through Multi User Configuration.*

*To assign new job through Multi User Configuration, make sure that the new job does not fall within the date range of already assigned job(s).*

This section is available with Job Processing and Costing license.

To set Job costing related parameters for multiple users, click **User Module >Multi-User Options >User Configuration >Job Costing**.

The screenshot shows the 'Multi-User Configuration' window with the 'Job Costing' option selected in the left sidebar. The main area contains a table with columns 'Update', 'Field Name', and 'Set New Value'. The 'Update' checkbox for 'Job Costing' is currently unchecked. The 'Set New Value' dropdown for 'Job Costing' is set to 'Disabled'. Other fields like 'Device Based Job Assignment', 'Job', 'Assignment Date', and 'ESS Assignment' are also listed with their respective update checkboxes and value settings.

Update	Field Name	Set New Value
<input type="checkbox"/>	Job Costing	Disabled
<input type="checkbox"/>	Device Based Job Assignment	<input type="checkbox"/>
<input type="checkbox"/>	Job	ID: <input type="text"/> Name: <input type="text"/>
<input type="checkbox"/>	Assignment Date	Start Date: <input type="text"/> End Date: <input type="text"/>
<input type="checkbox"/>	ESS Assignment	<input type="checkbox"/>

- **Job Costing:** Select the check box under **Update** to enable. Select **Enabled** from the drop-down under **Set New Value**.

The screenshot shows the 'Multi-User Configuration' window with the 'Job Costing' option selected in the left sidebar. The main area contains a table with columns 'Update', 'Field Name', and 'Set New Value'. The 'Update' checkbox for 'Job Costing' is now checked. The 'Set New Value' dropdown for 'Job Costing' is set to 'Enabled'. Other fields like 'Device Based Job Assignment', 'Job', 'Assignment Date', and 'ESS Assignment' are also listed with their respective update checkboxes and value settings.

Update	Field Name	Set New Value
<input checked="" type="checkbox"/>	Job Costing	Enabled
<input type="checkbox"/>	Device Based Job Assignment	<input type="checkbox"/>
<input type="checkbox"/>	Job	ID: <input type="text"/> Name: <input type="text"/>
<input type="checkbox"/>	Assignment Date	Start Date: <input type="text"/> End Date: <input type="text"/>
<input type="checkbox"/>	ESS Assignment	<input type="checkbox"/>

- **Device Based Job Assignment:** Select the check box under **Update** to enable. Select the check box under **Set New Value**. Job codes will be assigned to the user as per device configuration on which user punches.

The screenshot shows the 'Multi-User Configuration' window. On the left is a sidebar with various configuration categories. The main area displays the 'Job Assignment Type' configuration. It includes a table with columns for 'Update' (checkboxes), 'Field Name', and 'Set New Value' (checkboxes and input fields). The 'Job Assignment Type' and 'Device Based Job Assignment' rows have their 'Update' checkboxes checked. The 'Set New Value' section for 'Device Based Job Assignment' has its checkbox checked, and the 'Job' field is selected from a picklist. Below the table is an 'Update' button.

Update	Field Name	Set New Value
<input checked="" type="checkbox"/>	Job Assignment Type	Enabled
<input checked="" type="checkbox"/>	Device Based Job Assignment	<input checked="" type="checkbox"/> <input type="text" value="Job"/>
<input type="checkbox"/>	Job	<input type="text" value="ID"/> <input type="text" value="Name"/>
<input type="checkbox"/>	Assignment Date	<input type="text" value="Start Date"/> <input type="text" value="End Date"/>
<input type="checkbox"/>	ESS Assignment	<input type="checkbox"/>

- **Job:** Click the **Job** picklist to select the desired jobs.

The **Picklist For Job** appears.

The screenshot shows the 'Picklist For Job' dialog box. It has a search bar, a filter for 'Ended Days (1-999)', and a dropdown for 'Active'. Below is a table with columns for 'Job Code', 'Name', 'Start', and 'End'. The table lists three jobs: J5, J6, and J7. A 'Cancel' button is at the bottom.

Job Code	Name	Start	End
J5	J5	01/12/2023	09/12/2023
J6	J6	10/12/2023	16/12/2023
J7	J7	22/12/2023	23/12/2023

- By default, all the **Active** jobs are displayed. Click **Active** and select the desired option — **All**, **Active**, **Expired** — to filter the jobs. The jobs appear as per the set filter. Click to select the desired job from the list. You can also search for the desired job using the search bar.

The selected job appears in the grid.

- **Assignment Date:** The selected Jobs Start and End dates are displayed. You can change the Assignment Start and Assignment End dates of the job if required. To do so, click the calendar and select the desired start and end dates.
- **ESS Assignment:** Select the check box to Enable. This job will be displayed in the list of Jobs assigned to the user through the ESS login. If you do not want this job to be displayed, clear the check box.



The ESS Assignment check box will not be displayed if the **Show All Jobs while Punching** check box is enabled. For details, refer to [“Job Costing”](#) in [“Defining Global Policies”](#).

- Click **Update** to apply **Job Costing** configurations for the selected user.

The screenshot shows the 'Multi-User Configuration' window. On the left is a sidebar with a 'User Selection' section containing a list of categories: Profile, Devices, Credentials, Group (with an info icon), TSA, Access Control Basic, Access Control Advance, ESS, Cafeteria, Job Assignment Type (highlighted in blue), Field Visit Management, Face Recognition, and Visitor Management. The main area displays a configuration table for 'Job Assignment Type'.

Update	Field Name	Set New Value
<input checked="" type="checkbox"/>	Job Assignment Type	Enabled
<input checked="" type="checkbox"/>	Device Based Job Assignment	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Job	J1
<input type="checkbox"/>	Assignment Date	05/12/2023 - 10/01/2024
<input checked="" type="checkbox"/>	ESS Assignment	<input checked="" type="checkbox"/>

At the bottom right of the main area is an 'Update' button.



Jobs are created from **Job Processing and Costing module > Project Management> Job**.

## Field Visit Management

In this module, you can assign schedules to the users and keep a track of their activities, while on site and also check if the assigned tasks are being fulfilled correctly or not.

The screenshot shows the 'Multi-User Configuration' window with a sidebar menu on the left. The 'Field Visit Management' option is selected and highlighted in blue. The main content area contains a table with the following structure:

Update	Field Name	Set New Value
<input checked="" type="checkbox"/>	Enable FVM	<input checked="" type="checkbox"/>

Below the table, there is an 'Update' button.

Check the **Enable FVM** box to consider multiple user as FVM user.

## Face Recognition

In this feature, user can access the device or mark the attendance by verifying his Face as the credential. The Face Recognition tab appears as shown below:

The screenshot shows the 'Multi-User Configuration' window with a sidebar menu on the left. The 'Face Recognition' option is selected and highlighted in blue. The main content area contains a table with the following structure:

Update	Field Name	Set New Value
<input checked="" type="checkbox"/>	Enable Face Recognition	<input checked="" type="checkbox"/>

Below the table, there is an 'Update' button.

**Enable Face Recognition:** Check this box to enable Face Recognition feature for the user.

## Visitor Management

In this feature you can authorize a host user, restrict the visitor pre-registration on the basis of no.of days and assign device groups and devices to the visitors.

Update	Field Name	Set New Value
<input type="checkbox"/>	Authorized Host User	<input type="checkbox"/>
<input type="checkbox"/>	Minimum Days Before Allowing Visit	<input type="text" value="Days"/>
<input type="checkbox"/>	Maximum Days Before Allowing Visit	<input type="text" value="Days"/>

☒ Assign Device/Device Group
 ☐ Revoke Device/Device Group

Update	Field Name	Set New Value
<input type="checkbox"/>	Device Group	<input type="text" value="ID"/> <input type="text" value="Name"/> <input type="button" value="⋮"/>
<input checked="" type="checkbox"/>	Device	<input type="text" value="Name"/> <input type="button" value="⋮"/>

- Under **Update**, select the **Authorized Host User** check box to enable. Under **Set New Value**, select the check box to enable the selected users to function as Authorized Host Users.
- To restrict the visitor pre-registration on the basis of number of days,
  - Under **Update**, select the **Minimum Days Before Allowing Visit** check box to enable. Under **Set New Value** configure the desired number of days.
  - Under **Update**, select the **Maximum Days Before Allowing Visit** check box to enable. Under **Set New Value** configure the desired number of days.
- To assign Device/Device Group to multiple users at the same time,
  - Select the **Assign Device/Device Group** option.

☒ Assign Device/Device Group
 ☐ Revoke Device/Device Group

Update	Field Name	Set New Value
<input type="checkbox"/>	Device Group	<input type="text" value="ID"/> <input type="text" value="Name"/> <input type="button" value="⋮"/>
<input checked="" type="checkbox"/>	Device	<input type="text" value="Name"/> <input type="button" value="⋮"/>

- Under **Update**, select the **Device Group** check box to enable.

Under **Set New Value**, you can select particular groups or can select all the groups at once to assign the same to the users.

Click the picklist, the **Picklist for Device Group** appears.

Picklist For Device Group

Total Selected: 0 Records

Search  Show Selected

☐ Select All

<input type="checkbox"/>	DGID ▲	Name
<input type="checkbox"/>	1	ACTA Devices
<input type="checkbox"/>	2	RnD1Visitor
<input type="checkbox"/>	3	Device Group 3
<input type="checkbox"/>	4	Device Group 4
<input type="checkbox"/>	5	Device Group 5
<input type="checkbox"/>	6	Device Group 6
<input type="checkbox"/>	7	Device Group 7
<input type="checkbox"/>	8	Device Group 8
<input type="checkbox"/>	9	Device Group 9
<input type="checkbox"/>	10	Device Group 10

1 - 10 of 12 records

« < 1 2 > »

OK Cancel

You can either select particular device or can select all the devices at once.

To select particular groups, select the check boxes of the desired groups.

Picklist For Device Group

Total Selected: 2 Records

Search  Show Selected

☐ Select All

<input type="checkbox"/>	DGID ▲	Name
<input checked="" type="checkbox"/>	1	ACTA Devices
<input checked="" type="checkbox"/>	2	RnD1Visitor
<input type="checkbox"/>	3	Device Group 3
<input type="checkbox"/>	4	Device Group 4
<input type="checkbox"/>	5	Device Group 5
<input type="checkbox"/>	6	Device Group 6
<input type="checkbox"/>	7	Device Group 7
<input type="checkbox"/>	8	Device Group 8
<input type="checkbox"/>	9	Device Group 9
<input type="checkbox"/>	10	Device Group 10

1 - 10 of 12 records

« < 1 2 > »

OK Cancel

**OR**



To select all the groups, select the **Select All** check box. The devices on all the pages will be selected.

Picklist For Device Group

Total Selected: 12 Records

Search  Show Selected

☒ Select All

<input checked="" type="checkbox"/>	DGID ▲	Name
<input checked="" type="checkbox"/>	1	ACTA Devices
<input checked="" type="checkbox"/>	2	RnD1Visitor
<input checked="" type="checkbox"/>	3	Device Group 3
<input checked="" type="checkbox"/>	4	Device Group 4
<input checked="" type="checkbox"/>	5	Device Group 5
<input checked="" type="checkbox"/>	6	Device Group 6
<input checked="" type="checkbox"/>	7	Device Group 7
<input checked="" type="checkbox"/>	8	Device Group 8
<input checked="" type="checkbox"/>	9	Device Group 9
<input checked="" type="checkbox"/>	10	Device Group 10

1 - 10 of 12 records

« < 1 2 > »

OK Cancel

Click **OK**.

The selected device group appears in the grid.


Assign Device/Device Group Revoke Device/Device Group

Update ☒

Field Name	Set New Value
Device Group	ID <input type="text"/> Name <input type="text"/>
Device	Name <input type="text"/>

Search

DGID ▲	Device Group Name	Delete
1	ACTA Devices	
2	RnD1Visitor	
3	Device Group 3	

You can also delete the desired device group. To do so, click the **Delete**  icon of the respective device group.

- You can also select individual devices. By default, under **Update** the **Device** check box is enabled.

Under **Set New Value** from the **Device** picklist, the **Select Device** pop-up appears.

The 'Select Device' pop-up window displays a table with 10 records. The 'Total Selected' count is 0. The table columns are 'Name' and 'Type'. The records are as follows:

<input type="checkbox"/>	Name	Type
<input type="checkbox"/>	ARCDC100_DD_Door	Panel200 Door
<input type="checkbox"/>	ARCDC100_DD_Door	Panel200 Door
<input type="checkbox"/>	ARCDC100_SD_Door	Panel200 Door
<input type="checkbox"/>	ARGO_PANEL	Panel200 Door
<input type="checkbox"/>	DoorV3	Panel200 Door
<input type="checkbox"/>	DoorV3_Door	Panel200 Door
<input type="checkbox"/>	DOORV4_PANEL	Panel200 Door
<input type="checkbox"/>	dumy	Panel200 Door
<input type="checkbox"/>	PATHV2_PANEL	Panel200 Door
<input type="checkbox"/>	VEGA_PANEL	Panel200 Door

At the bottom, there is a pagination bar showing '1 - 10 of 89 records' and a 'Show Selected' button. The 'OK' and 'Cancel' buttons are at the bottom right.

You can either select particular devices or can select all the devices at once.

To select particular device, select the check boxes for the desired devices.

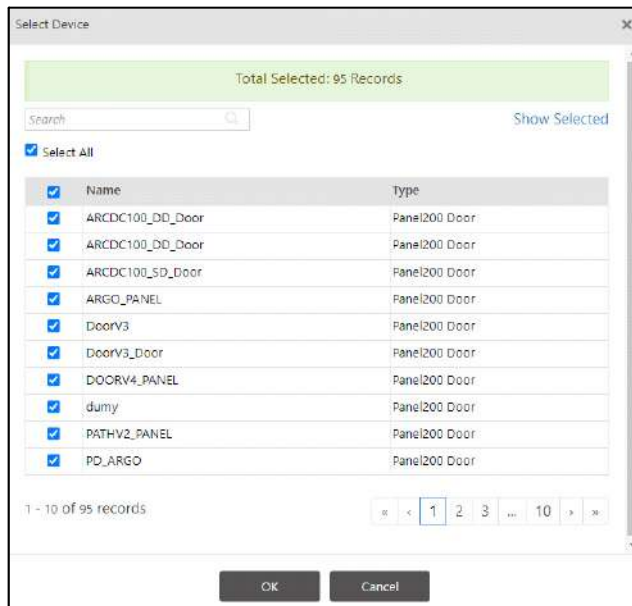
The 'Select Device' pop-up window displays the same table as the previous screenshot, but with the first two records selected. The 'Total Selected' count is now 2. The records are as follows:

<input type="checkbox"/>	Name	Type
<input checked="" type="checkbox"/>	ARCDC100_DD_Door	Panel200 Door
<input checked="" type="checkbox"/>	ARCDC100_DD_Door	Panel200 Door
<input type="checkbox"/>	ARCDC100_SD_Door	Panel200 Door
<input type="checkbox"/>	ARGO_PANEL	Panel200 Door
<input type="checkbox"/>	DoorV3	Panel200 Door
<input type="checkbox"/>	DoorV3_Door	Panel200 Door
<input type="checkbox"/>	DOORV4_PANEL	Panel200 Door
<input type="checkbox"/>	dumy	Panel200 Door
<input type="checkbox"/>	PATHV2_PANEL	Panel200 Door
<input type="checkbox"/>	VEGA_PANEL	Panel200 Door

The pagination bar and 'Show Selected' button remain the same. The 'OK' and 'Cancel' buttons are at the bottom right.

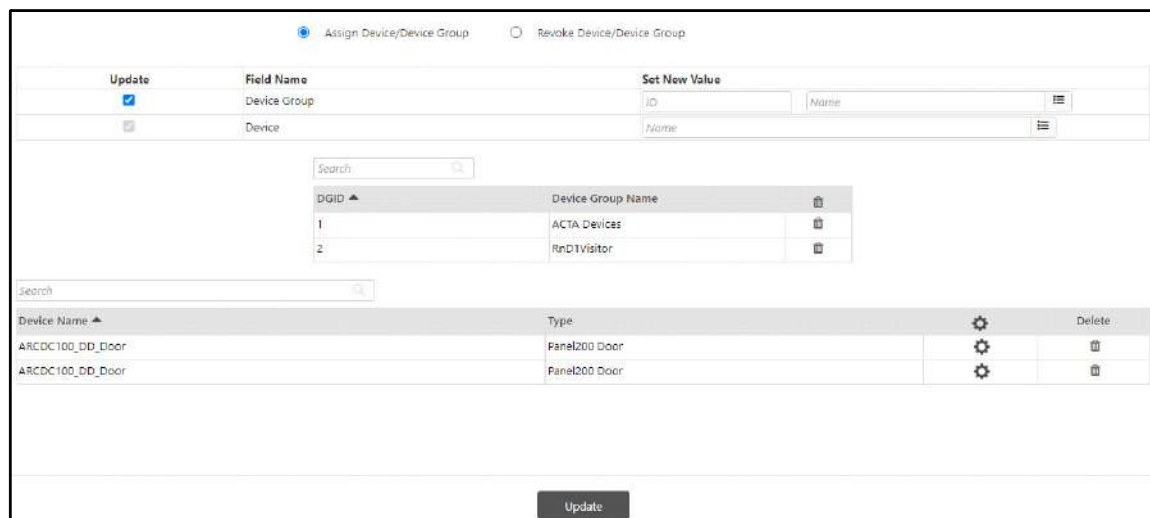
**OR**


To select all the devices at once, select the **Select All** check box. The devices on all the pages will be selected.



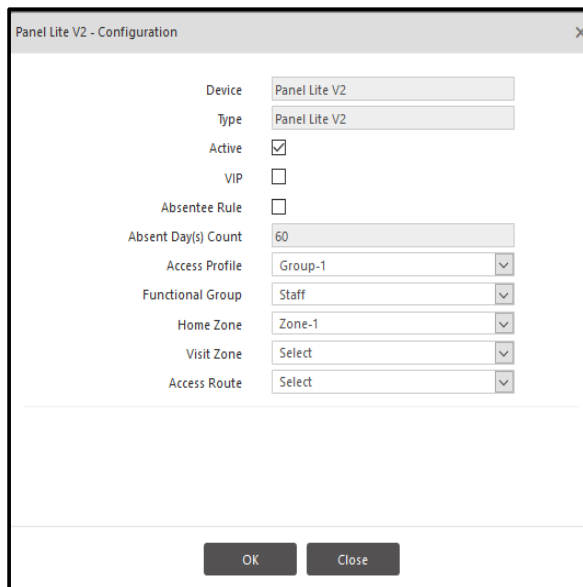
Click **OK**.

The selected devices appear in the grid.



- Click **Configure**  to configure the selected device for multiple users.

The Configuration page of the selected Device appears.



Panel Lite V2 - Configuration

Device: Panel Lite V2

Type: Panel Lite V2

Active: ☒

VIP: ☐

Absentee Rule: ☐

Absent Day(s) Count: 60

Access Profile: Group-1

Functional Group: Staff

Home Zone: Zone-1

Visit Zone: Select


Access Route: Select

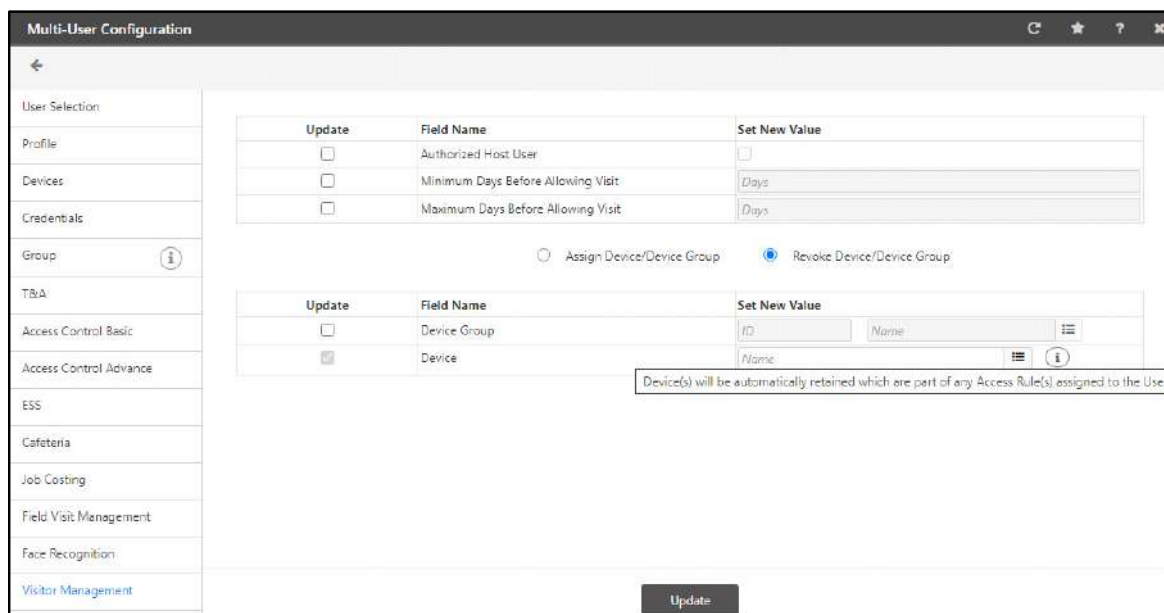
OK Close



*The Device and Type will be shown as per the device selected from the grid.*

You can enable and configure Access Control features from the Configuration page.

- Click **OK**.
- You can also delete the desired devices. To do so, click the **Delete**  icon of the respective device.
- Click **Update** to assign the selected devices/device groups with configuration to multiple users.
- Similarly, to revoke Device/Device Group from multiple users at the same time,



Multi-User Configuration

User Selection

Profile

Devices

Credentials

Group

T&A

Access Control Basic

Access Control Advance

ESS

Cafeteria

Job Costing

Field Visit Management

Face Recognition

Visitor Management

Update

Update	Field Name	Set New Value
<input type="checkbox"/>	Authorized Host User	<input type="checkbox"/>
<input type="checkbox"/>	Minimum Days Before Allowing Visit	Days
<input type="checkbox"/>	Maximum Days Before Allowing Visit	Days

☐ Assign Device/Device Group ☒ Revoke Device/Device Group


Update	Field Name	Set New Value
<input type="checkbox"/>	Device Group	ID Name
<input checked="" type="checkbox"/>	Device	Name

Device(s) will be automatically retained which are part of any Access Rule(s) assigned to the User




- While Revoking Devices, if they are a part of any Access Rule/s assigned to User/s, then such devices will be retained.
- While Revoking Device Groups, if the devices within the group are a part of any Access Rule/s assigned to User/s, then such devices will be retained however the Device Group will be revoked.
- Select the **Revoke Device/Device Group** option.
- Under **Update**, select the **Device Group** check box to enable.

Under **Set New Value**, select the desired device group from the **Device Group** picklist you wish to revoke from the selected users.

- The selected device group appears in the grid. You can also delete the desired device group. To do so, click **Delete**  of the respective device group.
- You can also select individual devices. By default, under **Update** the **Device** check box is enabled.

Under **Set New Value** from the **Device** picklist, select the desired devices you wish to revoke from the selected users.

The selected devices appear in the grid. You can also delete the desired device group. To do so, click **Delete**  of the respective device group.

- Click **Update** to revoke the selected devices/device groups from multiple users.

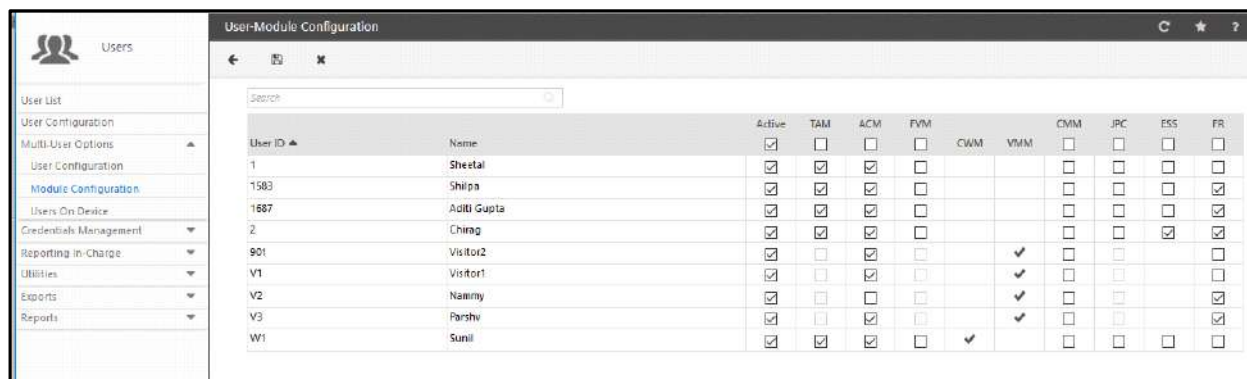
For more information about the configurations, refer "[Visitor Management](#)" in *Users> User Configuration> Visitor Management*.

# User-Module Configuration

COSEC provides the option to activate/deactivate different modules for multiple users at the same time. You can Enable/Disable Attendance Calculation, Cafeteria Account, Job Costing Account, FVM Account, ESS and Face Recognition for multiple users.

To access this functionality, select the **Users module > Multi-User Options > Module Configuration**.

The **Module Configuration** page opens as shown below.



User ID	Name	Active	TAM	ACM	FVM	CWM	VMM	CMM	JPC	ESS	FR
1	Sheetal	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
1583	Shilpa	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
1687	Aditi Gupta	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
2	Chirag	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
901	Visitor2	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
V1	Visitor1	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
V2	Naminy	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
V3	Panshi	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
W1	Sunil	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Check the **Active** box to configure the module for the user. The ACM box will get checked. Now you can enable TAM and ESS module.

If TAM module license is activated then you can enable FVM and JPC module.



For a user, when check box is checked but disabled in grid for a particular module; then it indicates that user does not have rights for accessing that module.

For visitor; if Active box is enabled; then you can enable CWM module.

You can also enable CMM module and FR module for the required user.



When check-box of FR is enabled for a user then Face Recognition check-box will get enabled for that user in User Configuration > Face Recognition and “Face Recognition For” drop down will be set as “**For Both**” for the user.

# Users on Device

The **Users** module allows the system administrator to assign multiple users to a selected Panel200 or Direct Door device at a time.

To do this, Select the **Users module > Multi-User Options > Users On Device**.

## Assign Users

The **Users On Device** page appears on your screen as follows:

The screenshot shows the 'Users On Device' page. On the left, there is a sidebar with 'Assign Users' and 'Revoke Users' buttons. The main area contains a form with the following fields: 'Device' (with ID and Name sub-fields), 'Device Type', 'Users On Device', 'Select Users' (with a dropdown set to 'User Wise'), and 'User' (with ID and Name sub-fields). An 'Add' button is located below the 'User' fields.

**Device:** Select a Device from the picklist to which users are to be assigned.

On selection of a device, the **Device Type** and **Users On Device** (number of users on the device) will be displayed in the respective fields as shown below.

The already assigned users on the device is also shown in the grid.

The screenshot shows the 'Users On Device' page with the form filled. The 'Device' field is set to '3' and 'NGT Ground Floor'. The 'Device Type' is 'NGT Direct Door' and 'Users On Device' is '4/10000'. The 'Select Users' dropdown is still 'User Wise'. Below the form, there is a table of assigned users:

User ID	Name
07	Aditi
1	Shailini
101	Khushbu
2	Chirag

**Select Users:** Select the users from the filter options of User Wise, Group Wise or All.

Select Users User Wise

User \*

ID

Name

Search


User ID ▲	Name	✕
1678	Supriya	✕
3	Isha	✕
NP	Nisha	✕

Add

Search

User ID ▲	Name	⚙
07	Aditi	⚙
1	Shalini	⚙
101	Khushbu	⚙
2	Chirag	⚙

Click the **Add** button. The selected users will appear in the grid list. Click on **Save** button to save the assignment of users on device.

Now click the **Settings**  icon next to a user to additionally configure *Access Control* parameters for the device. The following pop up window appears on your screen:

User ID ▲	Name	⚙
07	Aditi	⚙
1	Shalini	⚙
101	Khushbu	⚙
1678	Supriya	⚙
2	Chirag	⚙

Device Options
✕

Device Name \*
NGT Ground Floor

User ID
1678

Active
☒

VIP
☐

Absentee Rule
☐

Day(s) Count \*
60

Save

Cancel

You can edit and save the *Device Options*, if required.

Click the **Save** button to assign the selected users on device successfully.



## Revoke Users

To revoke a user from the selected device, select the **Revoke Users** tab.

The screenshot shows the 'Users On Device' window with the 'Revoke Users' tab selected. The sidebar on the left has 'Assign Users' and 'Revoke Users' tabs. The main area contains the following fields and controls:

- Device**: A text field with the value 'Name' and a dropdown arrow.
- Device Type**: A text field.
- Users On Device**: A text field.
- Select Users**: A dropdown menu with 'User Wise' selected.
- User**: A text field with 'ID' and 'Name' options, and a dropdown arrow.
- Select**: A button at the bottom.

**Device:** Select a Device from the picklist from which users are to be removed.

On selection of a device, the **Device Type** and **Users On Device** (number of users on the device) will be displayed in the respective fields as shown below.

The assigned users on the device is shown in the grid.

The screenshot shows the 'Users On Device' window with the 'Revoke Users' tab selected. The sidebar on the left has 'Assign Users' and 'Revoke Users' tabs. The main area contains the following fields and controls:

- Device**: A text field with the value '4' and a dropdown arrow.
- Device Type**: A text field with the value 'Vega Direct Door'.
- Users On Device**: A text field with the value 'Vega Controller'.
- Select Users**: A dropdown menu with 'User Wise' selected.
- User**: A text field with 'ID' and 'Name' options, and a dropdown arrow.
- Select**: A button at the bottom.

Below the 'Select' button, a table displays the assigned users on the device:

User ID	Name	Revoke
07	Aditi	<input type="checkbox"/>
1	Shalini	<input type="checkbox"/>
101	Khushbu	<input type="checkbox"/>
2	Chirag	<input type="checkbox"/>

**Select Users:** Select the users from the filter options of User Wise, Group Wise or All.

Now click on **Revoke** button for the user who is to be revoked from the device.

User ID	Name	Revoke
07	Aditi	<input checked="" type="checkbox"/>
1	Shalini	<input type="checkbox"/>
101	Khushbu	<input type="checkbox"/>
2	Chirag	<input type="checkbox"/>

Click the **Save** button to revoke the selected users successfully. The user will be removed from the assigned list as shown below.

Users On Device

✓ Saved Successfully

✕

★ ?

←

✎

📄

✕

Assign Users

Revoke Users

Device \*4Vega Direct Door

Device TypeVega Controller

Users On Device3/50000

Select Users

User Wise

User \*IDName

Select

Search

User ID ▲	Name	Revoke
1	Shalini	<input type="checkbox"/>
101	Khushbu	<input type="checkbox"/>
2	Chirag	<input type="checkbox"/>

600

Matrix COSEC System Manual

# Enrolling Users

Once the users have been added to the database the administrator can start the enrollment process and assign credentials to the users. Enrollment can be defined as a process wherein the COSEC system accepts and stores the user credentials against a particular user. The COSEC access control system supports enrollment of user cards, finger print templates, palm templates and special cards.

The enrollment process can be initiated either from the COSEC application as described here or from the Door Controller by using special cards or Menu. However, the administrator needs to ensure that the **COSEC Monitor** application is running before starting the enrollment process.



*The Smart Card Detail section will not be available with the COSEC Application basic platform license.*

To start the enrollment process, select the **Users module > Credentials Management > Enrollment**.

## User Enrollment

Select the **User** tab for enrolling user credentials on selected device.

The page opens as follows:

A screenshot of the 'Enrollment' web application interface. The interface has a dark header with the title 'Enrollment' and navigation icons. On the left is a sidebar with two tabs: 'User' (selected) and 'Special Card'. The main content area is divided into sections. The top section is labeled 'Door' and contains a pick-list for selecting a door. Below this is a section labeled 'Device Readers' with a scrollable list of readers. The next section is labeled 'User' and contains a pick-list for selecting a user. Below that is a section labeled 'User Enrollment Status' with a scrollable list. The bottom section contains several dropdown menus for configuring enrollment: 'Enrollment Type' (Set to 'Select'), 'Number of Cards' (Set to 'One'), 'Number of Fingers' (Set to 'One'), 'Number of Palms' (Set to 'Two'), 'Access Card Selection' (Set to 'Access Card 1'), and 'Number of Faces' (Set to '1'). At the bottom center is a large 'Enroll' button.

- **Door:** Select the desired door from the pick-list on which the enrollment is to done.

### Device Readers

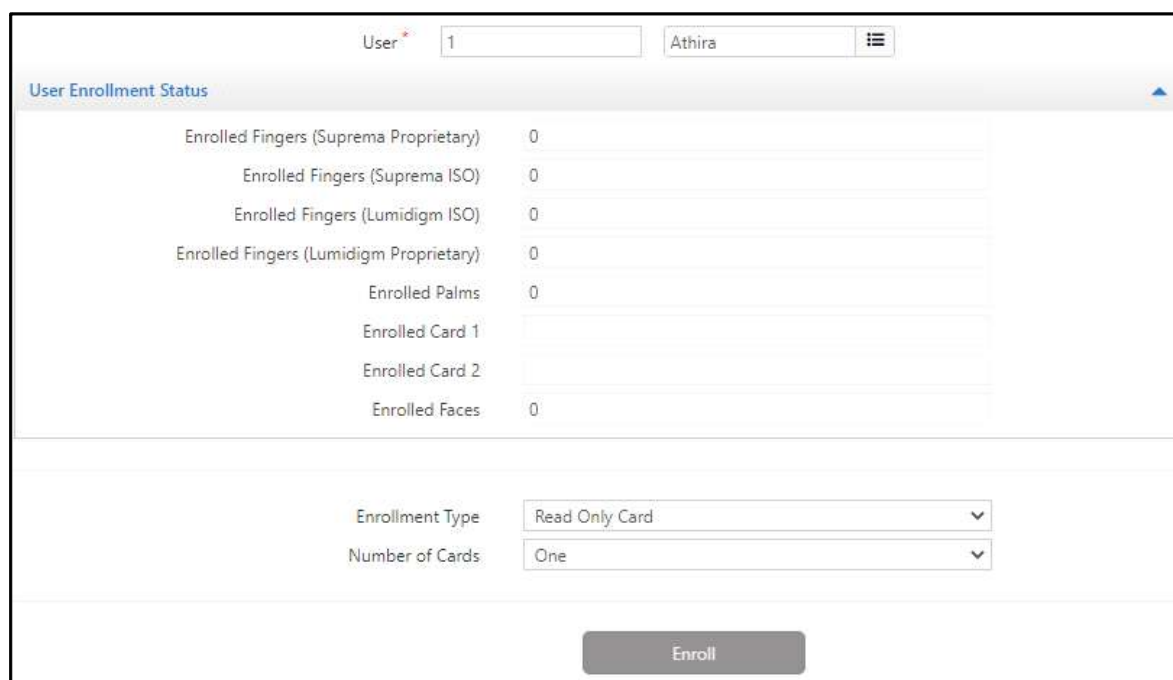
Device Readers displays the information of the readers configured in the selected **Door**.



Card Reader	MiFare Reader
Biometric Reader	None
External Reader	MiFare-U Reader

Card Reader, Biometric Reader and External Reader information are displayed here.

- **User:** Select the desired user from the pick-list for whom the enrollment is to be done.



User	1	Athira
------	---	--------

Enrolled Fingers (Suprema Proprietary)	0
Enrolled Fingers (Suprema ISO)	0
Enrolled Fingers (Lumidigm ISO)	0
Enrolled Fingers (Lumidigm Proprietary)	0
Enrolled Palms	0
Enrolled Card 1	
Enrolled Card 2	
Enrolled Faces	0

Enrollment Type	Read Only Card
Number of Cards	One

### User Enrollment Status

User Enrollment Status displays the information related to the number of already enrolled credentials of the user like fingers, palms, cards and faces.

Details like — **Enrolled Fingers (Suprema Proprietary)**, **Enrolled Fingers (Suprema ISO)**, **Enrolled Fingers (Lumidigm ISO)**, **Enrolled Fingers (Lumidigm Proprietary)**, **Enrolled Palms**, **Enrolled Card 1**, **Enrolled Card 2** and **Enrolled Faces** — are displayed here.

- **Enrollment Type:** From the dropdown list, select the desired enrollment type — **Read Only Card**, **Smart Card**, **Face**, **Biometrics**, **BiometricsThenCard**, **Mobile**, or **Duress Finger**.

Based on the selection of the **Door** and **Enrollment Type**, below parameters will be displayed for configuration.



*When Enrollment Type selected is Smart card or BiometricThenCard, Duress Finger Templates will not be written in the Smart Card.*

*Below parameters also depend on the Readers configured in the Door. To configure the desired Reader, refer Readers section under Devices > Device Configuration (of the desired Door) > Profile > Readers.*

## 1. Enrollment Type = Read Only Card

**Number of Cards:** Select the desired number of cards from the drop-down list.

Enrollment Type	Read Only Card
Number of Cards	One

## 2. Enrollment Type = Smart Card

**Number of Cards:** Select the desired number of cards from the drop-down list.

### Details on Smart Card

Select the desired check boxes of the parameters — **User ID**, **Facility Code (FC)**, **Additional Security Code (ASC)** — which are to be displayed on the Smart Card.

Select the desired number of **Finger Templates** from the drop-down list.

If **Door** is selected as PVR Door, **Palm Templates** parameter will be visible. Select the check box of this parameter if you wish to display it on the Smart Card.

To store the palm templates, MiFare 4k reader must be configured in the PVR Door.



*Door PVR must be set in the Adaptive mode (configure from Admin> System Configuration> Global Policy) for the palm templates to be saved into the Smart Card.*

### Additional Details on Smart Card

Other than the parameters mentioned in the Details on Smart Card, you can display additional details on Smart Card.

Select the desired check boxes of the parameters — **Short Name, Branch, Department, Designation, Emergency Contact, Blood Group** and **Medical History**— which are to be displayed on the Smart Card.

The values of these additional details are displayed as well. Make sure the values of these additional details are not blank for successful enrollment process.

**3. Enrollment Type = Face**

**Number of Faces:** Select the desired number of face from the dropdown list.

Enrollment Type	Face
Number of Faces	1

**4. Enrollment Type = Biometrics**

**Number of Fingers/ Number of Palms:** Select the desired number of fingers or palms from the dropdown list.

Enrollment Type	Biometrics
Number of Fingers	One

Enrollment Type	Biometrics
Number of Palms	One

**5. Enrollment Type = BiometricsThenCard**

**Number of Cards:** Select the desired number of cards from the drop-down list.

**Number of Fingers/ Number of Palms:** Select the desired number of fingers or palms from the drop-down list.

### Details on Smart Card

Select the desired check boxes of the parameters — **User ID**, **Facility Code (FC)**, **Additional Security Code (ASC)** — which are to be displayed on the Smart Card.

Select the desired number of **Finger Templates** from the drop-down list.

If the **Door** is selected as PVR Door, **Palm Templates** parameter will be visible. Select the check box of this parameter if you wish to display it on the Smart Card.

To store palm templates, MiFare 4k reader must be configured in the PVR Door.



*Door PVR must be set in the Adaptive mode (configure from Admin> System Configuration> Global Policy) for the palm templates to be saved into the Smart Card.*

### Additional Details on Smart Card

Other than the parameters mentioned in the Details on Smart Card, you can display additional details on Smart Card.

Select the desired check boxes of the parameters — **Short Name**, **Branch**, **Department**, **Designation**, **Emergency Contact**, **Blood Group** and **Medical History**— which are to be displayed on the Smart Card.

The values of these additional details are displayed as well. Make sure the values of these additional details are not blank for successful enrollment process.

## 6. Enrollment Type = Mobile



To select **Enrollment Type** as **Mobile**, the particular device must have **BLE** support and ensure **Bluetooth** is **ON** in the mobile.

**Access Card Selection:** Select the desired Access Card from the drop-down list.

Enrollment Type: Mobile  
Access Card Selection: Access Card 1  
Facility Code (FC): ☐

Facility Code (FC): Select this check box to enroll the Facility Code (FC) against the user.

#### 7. **Enrollment Type** = Duress Finger

**Number of Fingers:** Select the desired number of fingers that you want to enroll as **Duress Finger** from the drop-down list— **One** or **Two**.

Matrix COSEC  
Right People in Right Place at Right Time

Users

Enrollment

Door: 1 ARGO Device-1

User: 1234 Duress User

User Enrollment Status

Enrollment Type: Duress Finger

Number of Fingers: One, Two

Enroll

**Click Enroll to initiate the enrollment process.**

After the enrollment process, the user must tap on **Tap to Register > Matrix Device** from the ACS Application installed on respective mobile phone and select the same configured Door from **Available Doors**. Thereafter, that user can access the device through ACS application for Access Control purpose.

The value in Access Card selected will be consider as Access ID of the user. If Access Card selected has no value i.e blank, then after the enrollment process, the system will auto-generate 18 digits number as user Access ID and store the same value as shown below:



**User Configuration**

Search User ID or Name

user1  
user1  
Active

**Credentials**

PIN:

Biometric Group No.: 33

Roaming User: ☐

Access Card 1: 154574845265985

Access Card 2:

Enrolled Fingers (Suprema Proprietary): 0

Enrolled Fingers (Suprema ISO): 0

Enrolled Fingers (Lumidigm ISO): 0

Enrolled Fingers (Lumidigm Proprietary): 0

Enrolled Palm: 0

Enrolled Face: 0

Enable Self-Enrollment: ☐

Click **Enroll** to initiate the enrollment process and the enrollment command is sent to the Door.

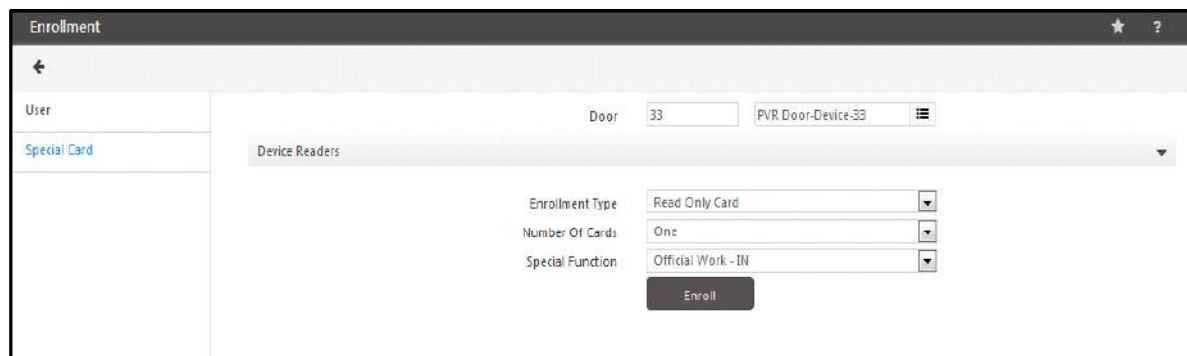
For Panel Door the command is sent to the Panel200 which will communicate further to the Door.

Once all the required credentials of an user are enrolled, the number of credentials enrolled will be displayed in the *Users > User Configuration (Select the particular user) > Credentials*.

## Enrolling Special Cards

This functionality enables the Administrator to enroll special cards for activated special functions. To know more about special cards, refer to [“Special Cards”](#).

To enroll *Special Cards*, select the **Special Card** tab as shown below:

The screenshot shows a web application window titled "Enrollment". On the left is a sidebar with a "Special Card" tab selected. The main area contains a form for enrolling a special card. At the top, there's a "Door" field with the value "33" and a dropdown menu showing "PVR Door-Device-33". Below this is a "Device Readers" section with a dropdown arrow. Further down are three fields: "Enrollment Type" with a dropdown menu showing "Read Only Card", "Number Of Cards" with a dropdown menu showing "One", and "Special Function" with a dropdown menu showing "Official Work - IN". At the bottom of these fields is an "Enroll" button.

Select a **Door** on which the special card enrollment is to be performed.

Expand the **Device Readers** panel to view the Internal and External Reader information for the selected device.

In the **Enrollment Type** drop-down list, specify whether a **ReadOnlyCard** or **SmartCard** is to be enrolled as a special card.

Specify the **Number of Cards** to be enrolled for a special function from the drop-down list. A maximum of upto four cards can be enrolled for a single special function.

Select a **Special Function** from the drop-down list for which the special card is to be enrolled.

Click the **Enroll** button to initiate the Enrollment process at the selected Panel200 or door.

# Set and Sync Credentials

The COSEC system has six major types of user credentials which can be assigned to users:

- PIN
- Cards (Read only and Smart Cards)
- Fingerprint Templates (Finger print and Duress)
- Palm Templates
- User Photo
- Face Template

The **Set and Sync Credential** option provides a simple method of setting user credentials to devices. However the administrator needs to ensure that the users have been created on the system using the **User Configuration** option of the Basic module.

To access this functionality, Select the **Users module > Credential Management> Set and Sync Credentials**.

The **Set and Sync Credentials** page appears on your screen as follows:

## Single User

Set And Sync Credentials

Single User

Multiple Users

User: 03 Anushi

Credential: FP Template

FP Templates (Suprema Proprietary): 1

FP Templates (Suprema ISO): 0

FP Templates (Lumidigm ISO): 0

Sync To Device

Search

All Devices

ID	Name	Type
51	NGT Direct Door-Device-51	NGT Direct Door

Set And Sync Credentials

- **User** - Select a user from the user picklist whose credentials are to be set.
- **Credential** - Select a user credential from this drop down list which is to be set for the selected user. the options are -
  - PIN
  - Cards
  - FP Template (Finger print and Duress)
  - FP Template
  - Palm Template
  - User Photo
  - Face Template

- Depending on the credential selected, one of the following options will appear-
  - PIN Number** - Enter the PIN Number to set the PIN.
  - Card1/Card2** - Enter the Card Serial Number (CSN) or a Comma separated CSN. To know about the format of entering the Card details, refer **Access Card 1** in *"Credentials"* under *Users> User Configuration> Credentials> Access Card 1*.
  - FP Templates** - The number of FP templates enrolled with different sensor devices will be displayed. This will include the finger templates of Duress Finger also.
  - Palm Templates** - The number of Palm templates will be displayed.
  - Enrolled Faces** - The number of face templates will be displayed.

User\* 1583 Shilpa

Credential Face Template

Enrolled Faces 4

**Sync To Device**

Search

☒ Select All

<input checked="" type="checkbox"/>	ID ▲	Name	Type
<input checked="" type="checkbox"/>	3	Vega Door	Vega Controller
<input checked="" type="checkbox"/>	6	MODE Device1	MODE

Set And Sync Credentials

- Sync To Device**- Select the devices where the specified credentials are to be set for the selected user. The options available will depend on the credential selected or the Sync Type.
- Click the **Set and Sync Credentials** button to set the user credential successfully on all the specified devices.

## Multiple Users

The screenshot shows the 'Set And Sync Credentials' window. On the left, there's a sidebar with 'Single User' and 'Multiple Users' tabs. The main content area has a 'Credential' dropdown menu currently set to 'FP Template'. Below it is a 'Select Users' dropdown menu set to 'User Wise'. There are two input fields for 'User', labeled 'ID' and 'Name'. A search bar is located below the input fields. A table displays a list of users with columns 'User ID' and 'Name'. The table contains three rows: '03 Arushi', '1320 SHRUTI SAGAR PATKI', and '1421 Isha Shah'. At the bottom of the form, there is a 'Sync To' dropdown menu set to 'All Allotted Devices' and a 'Set And Sync Credentials' button.

User ID	Name
03	Arushi
1320	SHRUTI SAGAR PATKI
1421	Isha Shah

- **Credential** - This option supports following types of user credentials:
  - FP Template (Finger print and Duress)
  - Palm Template
  - User Photo
  - Face Template
- **Select User** - Specify multiple users using this dropdown list. Choose from the following options -
  - **User Wise** - Select random users from the user picklist.
  - **Group Wise** - Select a group of users from the **Select Group** drop down list.
  - **ALL** - Select all users active on the system.
- **Sync To** - Use this drop down list to specify the devices where the specified credentials are to be set for the selected user. The options available will depend on the credential selected or the Sync Type.
  - **All Allotted Devices** - This option appears for FP Template only. Select this to set credentials on all allotted devices.
  - **All Allotted PVR Devices** - This option appears for Palm Template only. Select this to set credentials on all allotted PVR devices.
  - **All Allotted NGT & Vega Controllers** - This option appears for User Photo only. Select this to set credentials on all allotted NGT and Vega controllers.
  - **All Allotted MODE, Vega and FMX Devices** - This option appears for Face Template only. Select this to set face credential on all MODE, Vega and FMX devices.
- Click the **Set** button to set the user credential successfully on all the specified devices for the selected multiple users.

# Delete Credentials

The **Delete Credential** option provides a simple method of Deleting user credentials from devices. To access this functionality, Select the **Users** module. Select **Credential Management > Delete Credentials**.

The **Delete Credentials** page appears on your screen as follows:

The screenshot shows the 'Delete Credentials' interface. On the left, there is a sidebar with 'Single User' (selected) and 'Multiple Users'. The main area contains a 'User' field with '1' and 'Sheetal'. Below it, a 'Credential' dropdown menu is open, showing options: 'Face Template', 'PIN', 'Cards', 'FP Template' (highlighted), 'Palm Template', 'User Photo', and 'Face Template'. There is also an 'Enrolled Faces' field and a 'Delete From' field.

## Single User

The screenshot shows the 'Delete Credentials' interface for a single user. The 'User' field is filled with 'ID' and 'Name'. Below it, a 'Credential' dropdown menu is open, showing options: 'FP Template', 'All' (highlighted), 'Suprema Proprietary', 'Suprema ISO', 'Lumidigm ISO', and 'Lumidigm Proprietary'. There is also an 'FP Template Type' field and a 'Delete From' field. A 'Delete' button is visible at the bottom.

- **User** - Select a user from the user picklist whose credentials are to be deleted.
- **Credential** - Select a user credential from this drop down list which is to be deleted for the selected user.  
The options are -
  - PIN
  - Cards
  - FP Template (Finger print and Duress)
  - Palm Template
  - User Photo
  - Face Template

- **FP Template Type-** If Credential is selected as FP Template; then you can select the Type of FP Template which is to be deleted. The options of template are Suprema Proprietary, Suprema ISO, Lumidigm ISO, Lumidigm Proprietary and All. This will include the finger templates of Duress Finger also.

The screenshot shows the 'Delete Credentials' interface for a single user. The sidebar on the left has 'Single User' selected. The main form contains the following fields:

- User \***: 1687, Aditi Gupta
- Credential**: FP Template
- FP Template Type**: Suprema Proprietary
- FP Templates (Suprema Proprietary)**: 1
- FP Templates (Suprema ISO)**: 0
- FP Templates (Lumidigm ISO)**: 0
- Delete From**: Entire System

A 'Delete' button is located at the bottom of the form.

- **Enrolled Faces-** If Credential is selected as Face Template; then the number of enrolled face templates for the selected user will be displayed.
- **Delete From-** Use this drop down list to specify the devices from where the specified credentials are to be deleted for the selected user.
- Click the **Delete** button to delete the user credential successfully on all the specified devices.

## Multiple Users

The screenshot shows the 'Delete Credentials' interface for multiple users. The sidebar on the left has 'Multiple Users' selected. The main form contains the following fields:

- Credential**: FP Template
- FP Template Type**: All
- Select Users**: All
- Delete Credentials For**: Active Users
- Delete From**: All Allotted Devices

A 'Delete' button is located at the bottom of the form.

- **Credential** - This option supports the deleting of following user credentials -
  - PIN
  - Cards
  - FP Template (Finger print and Duress)
  - Palm Template
  - User Photo
  - Face Template
- **FP Template Type-** If Credential is selected as FP Template; then you can select the Type of FP Template which is to be deleted. The options of template are Suprema Proprietary, Suprema ISO, Lumidigm ISO, Lumidigm Proprietary and All. This will include the finger templates of Duress Finger also.

- **Select User** - Specify multiple users using this dropdown list. Choose from the following options -
  - **User Wise** - Select random users from the user picklist.
  - **Group Wise**- Select a group of users from the **Select Group** drop down list.
  - **ALL** - Select all users active on the system.
- **Delete From** - Use this drop down list to specify the devices from where the specified credentials are to be deleted for the selected user. The options available will depend on the credential selected.
- Click the **Delete** button to delete the user credential successfully on all the specified devices for the selected multiple users.



# Sync from Device

This feature enables the COSEC system to synchronize user credentials between the COSEC database and the devices as well as to other compatible devices. This is useful in case of discrepancies or loss of credential data which might occur in case of system errors or data handling issues.

This functionality enables:

- the system to sync the selected credential from the selected Device
- these credentials fetched from the selected devices will also be synchronized with other compatible devices connected with the server.



**Sync From Device** is applicable for devices with FR Mode as **Local**.

For Panel200, **Sync From Device** is applicable for Face Sync in Panel Door mode as **Via Panel**.

To ensure smooth functioning of this feature, make sure the Server and the devices are upgraded to the same and latest version. Face Images as Credential is supported from Software Version V20R06 and later.

Make sure the **Enable Face Recognition** check box is selected for the user whose Face Images are to be synced.

- Click **Users module > Credentials Management > Sync From Device**.

The screenshot shows the 'Sync From Device' interface with the 'Single User' tab selected. On the left, there are two tabs: 'Single User' and 'Multiple Users'. The main area is titled 'Sync From Device'. It contains two rows of input fields. The first row is for 'Device', with 'ID' and 'Name' fields, and a 'Credential' dropdown menu set to 'Cards'. The second row is for 'User', with 'ID' and 'Name' fields. A 'Sync' button is located at the bottom right of the form.

The Sync From Device page consists of two tabs — “Single User” and “Multiple Users”.

## Single User

This tab enables you to sync the credentials of a single user from the device.

This screenshot shows the 'Sync From Device' interface with the 'Single User' tab selected. The 'Device' field is filled with '3' and 'ARGO Direct Door'. The 'Credential' dropdown is set to 'Cards'. The 'User' field is filled with '1' and 'SALIM ANSARI'. The 'Sync' button is visible at the bottom.

Configure the following parameters:

- **Device:** Click the **Device** picklist. The **Picklist For Panel Doors and Direct Doors** appears.

MID	Name	Type	Status
1	PVR Device_Direct Door	PVR Door	Enable
1	PVR Panel Door	Panel200 Door	Enable
1	ARGO Panel Door	Panel200 Door	Enable
2	ARGO FACE_Direct Door	ARGO FACE	Enable
3	ARGO Direct Door	ARGO	Enable
4	VEGA Direct Door	Vega Controller	Enable

- Select the desired device.
- **Credential:** Select the relevant user credential from the drop-down list according to the selected device. The following credentials are supported:
  - Cards
  - FP Templates (Finger Print and Duress)
  - Palm Templates
  - Face Images

## Sync From Device

- **User:** Click the **Users** picklist. The **Picklist For All Users** pop-up appears.

User ID	Name
1	SALIM ANSARI
10	RAJENDRA GOSWAMI
1001	ANIKTUMAR SOHALIYA
1002	MEGHA H SHUKLA
1003	UMESH M TALANPURI
1004	DARSHAK B PATEL
1007	DHAVAL I PATEL
1008	MAYANK K KORAT
1009	DIPTI K RATHWA
1010	RAHUL S SHAH

- Select the desired user whose credentials are to be synchronized.
- Click **Sync**. The credentials of the selected user will sync to the COSEC database from the selected device and then the same credentials will be synchronized to the other compatible devices.



*If **Sync From Device** is done for **FP Templates** including **Duress Detection** templates from the Duress supported devices (V4, VEGA, ARGO, PATH V2 and ARC DC200 Direct Doors and V4, VEGA, ARGO, PATH V2 and ARC DC200 Panel Doors) to devices that do not support Duress, then the synced templates will be overwritten as normal templates.*

*And, if the **FP Templates** are synced from devices that do not support Duress, then all the templates will be synced as normal templates only, to all the devices.*

## Multiple Users

This tab enables you to sync the credentials of multiple users from the device.

The screenshot shows the 'Sync From Device' window. On the left, there's a sidebar with 'Single User' and 'Multiple Users' (selected). The main area has a title 'Sync From Device'. It contains several input fields: 'Device' with a value of '3' and a dropdown showing 'ARGO Direct Door'; 'Credential' with a dropdown showing 'Cards'; 'Select Users' with a dropdown showing 'User Wise'; and 'User' with two input fields, 'ID' and 'Name'. A 'Sync' button is located at the bottom right of the main area.

Configure the following parameters:

- **Device:** Click the **Device** picklist. The **Picklist For Panel Doors and Direct Doors** appears.

The screenshot shows a dialog box titled 'Picklist For Panel Doors and Direct Doors'. It has a search bar at the top. Below it is a table with the following data:

MID	Name	Type	Status
1	PVR Device_Direct Door	PVR Door	Enable
1	PVR Panel Door	Panel200 Door	Enable
1	ARGO Panel Door	Panel200 Door	Enable
2	ARGO FACE_Direct Door	ARGO FACE	Enable
3	ARGO Direct Door	ARGO	Enable
4	VEGA Direct Door	Vega Controller	Enable

At the bottom of the dialog is a 'Cancel' button.

- Select the desired device.
- **Credential:** Select the relevant user credential from the drop-down list according to the selected device. The following credentials are supported:
  - Cards
  - FP Templates (Finger print and Duress)
  - Palm Templates
  - Face Images

## Sync From Device

- **Select Users:** Select the desired option — **User Wise**, **Group Wise**, or **All**.
- If you select **User Wise**, click the **User** picklist. The **Picklist for All Users** pop-up appears.

Picklist For All Users

Total Selected: 0 Records

Search  Show Selected

<input type="checkbox"/>	User ID ▲	Name
<input type="checkbox"/>	1	SALIM ANSARI
<input type="checkbox"/>	10	RAJENDRA GOSWAMI
<input type="checkbox"/>	1001	ANKITKUMAR SOHLIYA
<input type="checkbox"/>	1002	MEGHA H SHUKLA
<input type="checkbox"/>	1003	UMESH M TALANPURI
<input type="checkbox"/>	1004	DARSHAK B PATEL
<input type="checkbox"/>	1007	DHAVAL I PATEL
<input type="checkbox"/>	1008	MAYANK K KORAT
<input type="checkbox"/>	1009	DIPTI K RATHWA
<input type="checkbox"/>	1010	RAHUL S SHAH

1 - 10 of 1986 records

OK Cancel

- Select the desired check boxes of the desired users. Click **OK**.
- The selected users appear in the grid.

Search


User ID ▲	Name	
1	SALIM ANSARI	
10	RAJENDRA GOSWAMI	
1001	ANKITKUMAR SOHLIYA	
1002	MEGHA H SHUKLA	

Apply

- You can also delete the desired user. To do so, click **Delete** of the respective user.
- If you select **Group Wise** option,

- Select the desired enterprise group—Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1/2/3.
- For each enterprise group — Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1/2/3, click the corresponding picklist to select the desired option/s.
- The selected groups appear in the grid.

Search <input type="text"/>			
ID	Name	Group ▲	
1	MATRIX COMSEC PVT. LTD.	Organization	
2	SAMARTH	Organization	
3	AVDHOOT	Organization	
4	ELSENGARD	Organization	

- You can also delete particular group. To do so, click **Delete**  of the respective group.
- If you select **All**, then all the users will be selected.
- Click **Sync**. The credentials of the selected users will sync to the COSEC database from the selected device and then the same credentials will be synchronized to the other compatible devices.



*If **Sync From Device** is done for **FP Templates** including **Duress Detection** templates from the Duress supported devices (V4, VEGA, ARGO, PATH V2 and ARC DC200 Direct Doors and V4, VEGA, ARGO, PATH V2 and ARC DC200 Panel Doors) to devices that do not support Duress, then the synced templates will be overwritten as normal templates.*

*And, if the **FP Templates** are synced from devices that do not support Duress, then all the templates will be synced as normal templates only, to all the devices.*

# Reporting In-Charge

A large number of organizations are structured in a way that employees are grouped functionally and each group of employees is assigned to report everyday to a designated officer for efficient management purposes. This *Reporting In-Charge*, also known as Officer In-Charge or Reporting Manager, is responsible for overseeing and managing the reporting group assigned under him/her. COSEC allows the system administrator to assign employees to such reporting groups and also to define reporting in-charges from amongst active COSEC users.

Once defined, this in-charge can perform certain authorizations and sanctioning to all users who are in the same reporting group. A Reporting In-Charge can manage multiple *Reporting Groups* but a user can belong to only one reporting group as a member. There is a provision to add upto five Reporting In-Charges for a Reporting Group along with its Approval Policy.

## Reporting Group

To configure the Reporting Group parameters,

Click **Users > Reporting In-Charge > Reporting Group**.

The **Reporting Group** page appears.

Click **New**, to create a new Reporting Group. You can create upto 9999 Reporting Groups.

- **Reporting Group:** Enter a Name for the Reporting Group. The ID will be displayed after you save the Reporting Group.
- **Approval Policy:** Click the picklist to select the desired Approval Policy or enter the ID/Name of the Approval Policy manually.



*If no Approval Policy is selected then, Reporting Group will work as per Any One Authorization Mode.*

*Reporting Group will work on AnyOne Authorization Mode irrespective of policy selected if selected in-charge from Approval Policy is not configured on this page.*

- **In-Charge Configuration:** You can assign upto five in-charges for a single Reporting Group.



Selecting at least one Group In-Charge is mandatory.

Make sure the desired Reporting In-Charge/s (RIC) are configured as Users. For details, refer to [“Configuring Users”](#).

- **Group In-Charge 1 to Group In-Charge 5:** To assign each group in-charge, click the picklist to select the desired group in-charge or enter the ID/Name of the group in-charge manually.

The applications will be sent for approval to the Reporting Group In-Charge/s as per the Authorization Mode selected. The sequence in which it will be sent will depend on the configuration done in **Group In-Charge 1 to Group In-Charge 5**.

Click **Save**, to save the new Reporting Group.

The new Reporting Group will appear in the right pane of the page.



If the application is Pending and any Reporting In-Charge is deleted/deactivated from the system, then the application will still remain Pending with all the remaining Reporting In-Charge/s.

If the application is Approved/Rejected and any Reporting In-Charge is deleted/deactivated from the system, then there will be no change in the application as the final verdict has already been given.

If set of Reporting In-Charge configured in Reporting Group Page and Approval Policy page matches exactly with each other, then the application will be processed based on Approval Policy.

If set of Reporting In-Charge configured in Reporting Group Page has more In-Charge than set of Reporting In-Charge configured in Approval Policy Page then system will check if set of Reporting In-Charge configured in Approval Policy page is same as configured in Reporting Group page.

- If yes, then application will be processed based on Approval Policy selected for both pending and new application.
- If no, then all new applications process will get updated to Any One Authorization Mode (and the application will be sent to RIC configured in respective Reporting Group).

If number of Reporting In-Charge configured in Reporting Group page is less than number of Reporting In-Charge configured in Approval Policy. If yes, then application flow for all applications will get updated to Any One Authorization Mode (and application will be sent to Reporting In-Charge configured in respective Reporting Group).

If set of Reporting In-Charge configured in Reporting Group page and set of Reporting In-Charge configured in Approval Policy page for exception application does not match exactly with each other then application flow for exceptions application will get updated to Any One Authorization Mode (application will be sent to Reporting In-Charge configured in respective Reporting Group).

# Approval Policy

Approval Policy enables to create different Approval Policies and to select the applications for which the Policy will be applicable.

To configure the Approval Policy parameters,

Click **Users > Reporting In-Charge > Approval Policy**.

The Approval Policy page appears.


ID	Name
1	AnyOne
2	All Sequential
3	All Final-1
4	All Final-2

By default there are four policies created — AnyOne, All Sequential, All Final-1, All Final-2.



*If you are upgrading the system and you have existing users, then the Approval Policies (default as well as custom created) will remain the same. That is, the default policies will be — AnyOne, 1then2, Both Final-1 and Both Final-2.*

*For the default policies — All Sequential, All Final-1, All Final-2 — Short Leave/Official In-Out and Daily Attendance are listed in exception with Authorization Mode as Any One.*

You can select the default policies and Edit the same by clicking **Edit**  or you can add a new policy.

To add a new policy,

Click **New**  . You can create upto 999 Approval Policies.

- **Approval Policy:** Enter a Name for the Approval Policy. The ID will be displayed after you save the Approval Policy.
- **Authorization Mode:** Select the Authorization Mode from the drop-down list — Any One, All, All Sequential



- **Any One:** If you select this option, then the authorization is done by any In-Charge among the selected associated Reporting In-Charge/s. The application will be sent to all the selected Reporting In-Charges and any In-Charge can provide the verdict. The In-Charge who gives the verdict first will be considered as the final verdict and the application status changes to the respective state as per the provided verdict. The verdict details will be displayed in the respective approval page. If you select this option, you also need to configure the **Reporting In-Charge**.
- **Reporting In-Charge:** Select the Reporting In-Charge/s from the drop-down list. Click **Check All** if you wish to select all the Reporting In-Charges. The application will be sent to the selected Reporting In-Charge/s.
- **All:** If you select All, the application will be sent to all the Reporting In-Charges for authorization and the verdict of the Final In-Charge will be considered as the final verdict. The application status changes to the respective state as per the provided verdict. The verdict details will be displayed in the respective approval page. If you select this option, you also need to configure the **Reporting In-Charge** and the **Final In-Charge**.
- **Reporting In-Charge:** Select the Reporting In-Charge/s from the drop-down list. Click **Check All** if you wish to select all the Reporting In-Charges. The application will be sent to the selected Reporting In-Charge/s.
- **Final In-Charge:** Select the Final In-Charge from the selected associated Reporting In-Charges. After the Final In-Charge provides the verdict, the application status changes to the respective state as per the provided verdict. The verdict details will be displayed in the respective approval page.
- **All Sequential:** If you select All Sequential, the application will be sent to all the Reporting In-Charges for authorization in the defined sequence. The application will only be sent from first Reporting In-Charge to the second Reporting In-Charge after the verdict of the first Reporting In-Charge is received and so on.

There is a provision to Auto Forward the application to the next Reporting In-Charge also. In this case, if the verdict is not provided by a Reporting In-Charge within the defined days, then the application will automatically be forwarded to the next Reporting In-Charge.

If you select this option, you also need to configure the **Reporting In-Charge** as well as **Auto Forward** parameters.

- **Reporting In-Charge:** Select the Reporting In-Charges from the drop-down list. Click **Check All** if you wish to select all the Reporting In-Charges. The application will be sent to all the selected Reporting In-Charges in a sequential manner.
- **Auto Forward:** To enable Auto Forward, configure the following parameters.

Reporting In-Charge	Auto Forward	Auto Forward After (Days)	Action
In-Charge 1	<input type="checkbox"/>		Approve <span>▼</span>
In-Charge 2	<input type="checkbox"/>		Approve <span>▼</span>
In-Charge 3	<input type="checkbox"/>		Approve <span>▼</span>
In-Charge 4	<input type="checkbox"/>		Approve <span>▼</span>
In-Charge 5	<input type="checkbox"/>		Approve <span>▼</span>

- **Reporting In-Charge:** It displays the name of the Reporting In-Charge in a sequential manner.
- **Auto Forward:** Select the check box to enable the Auto Forward for the Reporting In-Charge.

- **Auto Forward After (Days):** Specify the duration in days after which the application should be sent to the next Reporting In-Charge if the verdict is not provided by this Reporting In-Charge.
- **Action:** Configure the Action from the drop-down list — Approve or Reject to be provided for the application.

After the last Reporting In-Charge has provided the verdict, the application status changes to the respective state as per the last Reporting In-Charge's verdict. The verdict details will be displayed in the respective approval page.



*An application will be forwarded automatically after the specified days with the logic; [Application Date + Auto Forward configured days + 1]. For example: The application date=10 and configured Auto Forward days=1 then, the application will be forwarded automatically on date [10 + 1 + 1 = 12] =12.*

*For Reporting In-Charge 2, the date on which an application is received will be considered as the application date.*

*If the Reporting In-Charge 1, has Approved/Rejected an application manually before the specified Auto Forward days then, the application date for Reporting In-Charge 2 will be the date on which an application is approved or rejected.*

*If any Reporting In-Charge has rejected the application and the previous Final Reporting In-Charge is deactivated/deleted from the system and later the Reporting In-Charge who has rejected the application changes his/her verdict then the final application verdict will be of System Administrator.*

## Exceptions

Click **Add +** if you wish to add any applications in **Exceptions** list i.e. the applications for which Authorization Mode is to be set other than the default mode.

- **Application(s):** Select the desired Application(s) from the drop-down list to be added in Exceptions.
- **Customize Based On:** Select the field from the drop-down list to display the basis on which application needs to be customized.
- **Range:** Enter the From and To (Hours/ Days) on the basis of which the application will be selected.



The parameters **Customize Based On** and **Range** are visible depending upon the application which you select.

- **Authorization Mode:** Select the desired Authorization Mode from the drop-down list— Any One, All, All Sequential. Refer to the details mentioned above in Authorization Mode.

Click **Add** to add the application to the **Exceptions** table.

Click **Cancel** if you wish to remove all the configurations.

The **Exceptions** table displays the following parameters:

Exceptions						
<div>Search <input type="text"/></div>						
<div><div></div></div>						
Application(s) ▲	Range	Authorization Mode	Reporting In-Charge	Final In-Charge		
Unpaid Leave - UP UnpaidLeave	1.0 - 3.0 Days	All Sequential	In-Charge 1, In-Charge 3, In-Charge 5	In-Charge 5	<div></div>	<div></div>
Unpaid Leave - UP UnpaidLeave	5.0 - 6.0 Days	All Sequential	In-Charge 2, In-Charge 3, In-Charge 4, In-Charge 5	In-Charge 5	<div></div>	<div></div>
Unpaid Leave - UP UnpaidLeave	>= 6.0 Days	All Sequential	In-Charge 1, In-Charge 2, In-Charge 3, In-Charge 4, In-Charge 5	In-Charge 5	<div></div>	<div></div>

- **Application(s):** It displays the Application(s) added in **Exceptions**.
- **Range:** It displays the From and To (Days/Hours) on the basis of which the application will be selected.
- **Authorization Mode:** It displays the selected pattern of approval for any application— Any One, All, All Sequential.
- **Reporting In-Charge:** It displays the selected Reporting In-Charge/s from whom approval needs to be taken.
- **Final In-Charge:** It displays the selected Final In-Charge when authorization mode is selected as **All** or **All Sequential**.
- **Delete:** Click **Delete**, if you wish to delete the particular application from the **Exceptions** table.

Exceptions

Search

Application(s) ▲	Range	Authorization Mode	Reporting In-Charge	Final In-Charge		
Unpaid Leave - UP UnpaidLeave	1.0 - 3.0 Days	All Sequential	In-Charge 1, In-Charge 3, In-Charge 5	In-Charge 5	<div></div>	<div></div>
Unpaid Leave - UP UnpaidLeave	5.0 - 6.0 Days	All Sequential	In-Charge 2, In-Charge 3, In-Charge 4, In-Charge 5	In-Charge 5	<div></div>	<div></div>
Unpaid Leave - UP UnpaidLeave	>= 6.0 Days	All Sequential	In-Charge 1, In-Charge 2, In-Charge 3, In-Charge 4, In-Charge 5	In-Charge 5	<div></div>	<div></div>

Application(s)

Select

Customized Based On

Duration

Range

1 Days - 3 Days

Authorization Mode

All Sequential

Reporting In-Charge \*

Select

Reporting In-Charge	Auto Forward	Auto Forward After (Days)	Action
In-Charge 1	<input checked="" type="checkbox"/>	1	Approve
In-Charge 2	<input type="checkbox"/>		Approve
In-Charge 3	<input checked="" type="checkbox"/>	5	Approve
In-Charge 4	<input type="checkbox"/>		Approve
In-Charge 5	<input checked="" type="checkbox"/>	7	Approve

Update

Cancel

Select any of the application from the **Exceptions** table and click **Update** if you wish to edit the application.

The application will be updated in the **Exceptions** table.

## Error List

If there are any issues while configuring the applications (that is overlaps) in the **Exceptions**, then an Error List will be generated.

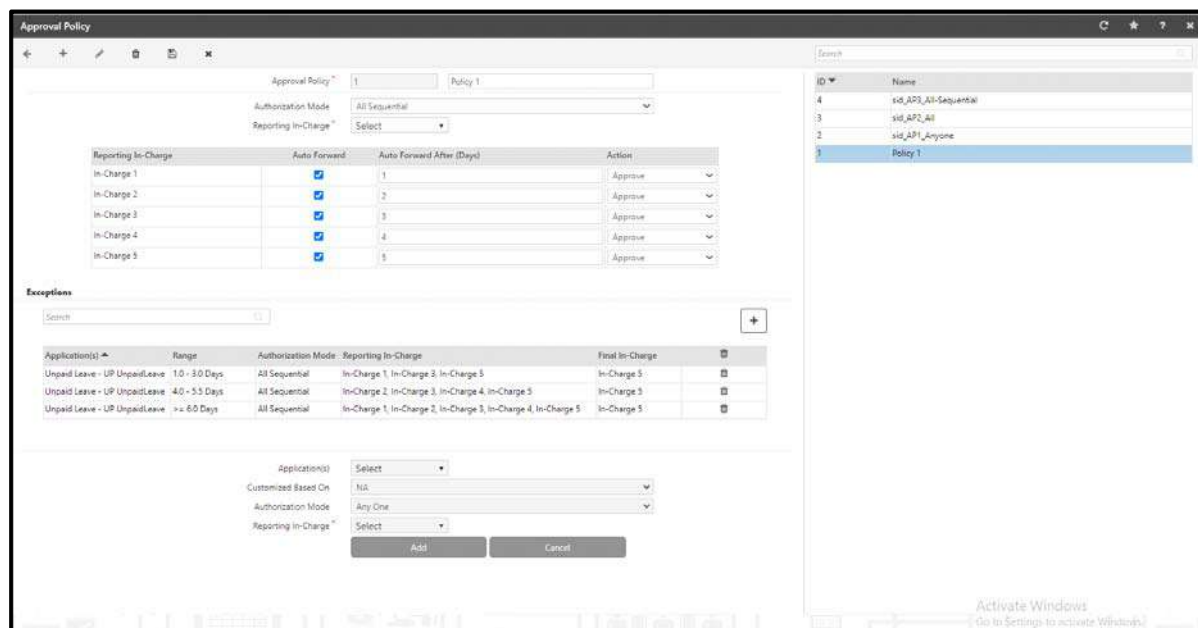
Click **Error List** collapsible panel. It displays the following parameters.



Application(s)	Status	Description
Paid Leave - PL Paid Leave	Failed to configure	Customize based on range overlap with existing Paid Leave - PL Paid Leave

- **Application(s):** It displays the Application type.
- **Status:** It displays the status of the application as failed to configure.
- **Description:** It displays the reason for failure of the application configuration.

Click **Save**, to save the Approval Policy. The new Approval Policy will appear in the right pane of the page.



Approval Policy

Approval Policy: 1 Policy 1

Authorization Mode: All Sequential

Reporting In-Charge: Select

Reporting In-Charge	Auto Forward	Auto Forward After (Days)	Action
In-Charge 1	<input checked="" type="checkbox"/>	1	Approve
In-Charge 2	<input checked="" type="checkbox"/>	2	Approve
In-Charge 3	<input checked="" type="checkbox"/>	3	Approve
In-Charge 4	<input checked="" type="checkbox"/>	4	Approve
In-Charge 5	<input checked="" type="checkbox"/>	5	Approve

Exceptions

Application(s)	Range	Authorization Mode	Reporting In-Charge	First In-Charge
Unpaid Leave - UP UnpaidLeave	1.0 - 3.0 Days	All Sequential	In-Charge 1, In-Charge 3, In-Charge 5	In-Charge 5
Unpaid Leave - UP UnpaidLeave	4.0 - 5.5 Days	All Sequential	In-Charge 2, In-Charge 3, In-Charge 4, In-Charge 5	In-Charge 5
Unpaid Leave - UP UnpaidLeave	>= 6.0 Days	All Sequential	In-Charge 1, In-Charge 2, In-Charge 3, In-Charge 4, In-Charge 5	In-Charge 5

Application(s): Select

Customized Based On: No

Authorization Mode: Any One

Reporting In-Charge: Select

Add Cancel

After creation of the Approval Policy, it can be assigned to the Reporting Group from **Reporting In-Charge >Reporting Group**. For more details, refer ["Reporting Group"](#).

# In-Charge Permissions

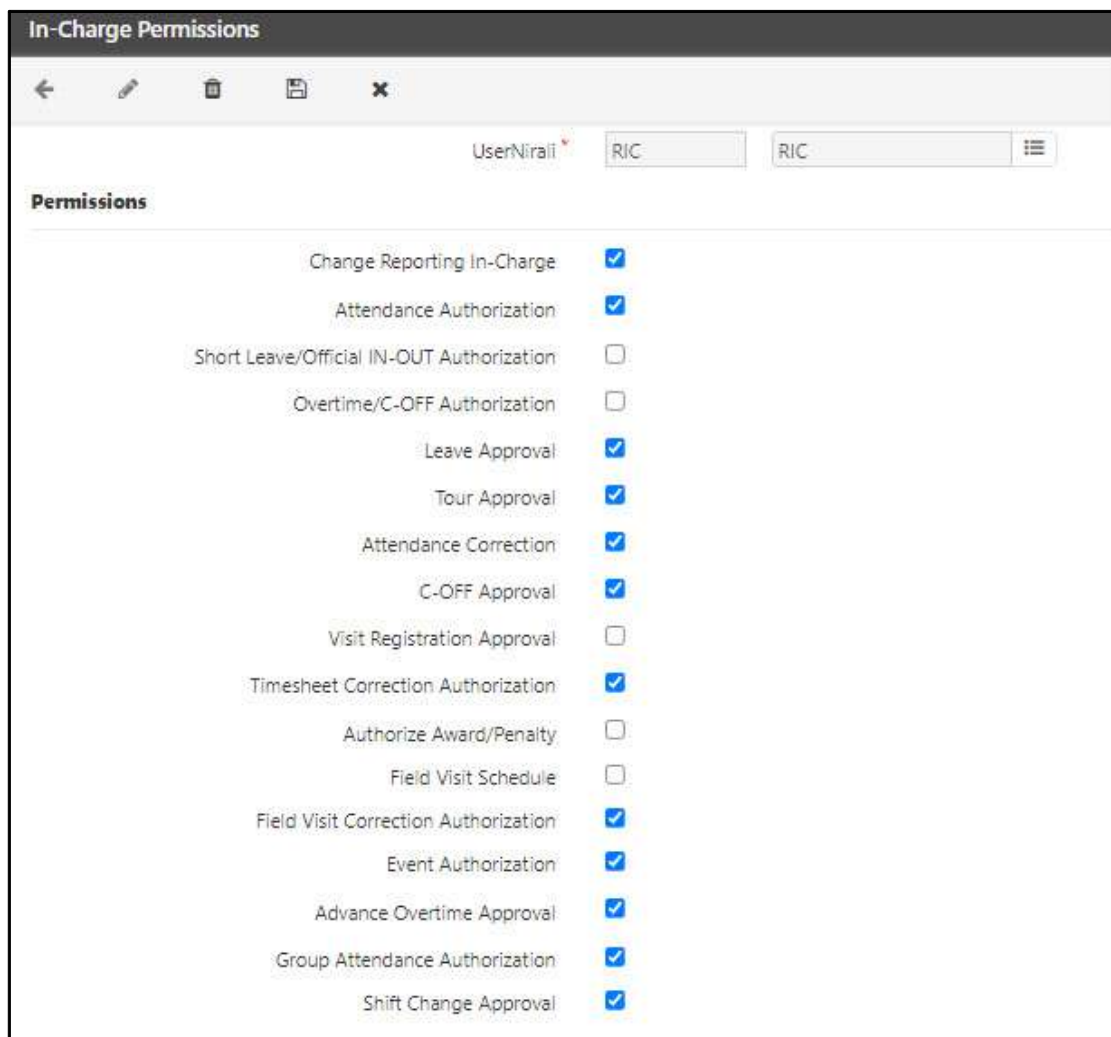
This functionality facilitates the administrator to assign specific permissions to a particular Reporting In-charge defined on the system.

To assign In-Charge Permissions, Select the **Users module > Reporting In-Charge > In-Charge Permissions**.

The **In-Charge Permissions** page appears as shown below.

In-Charge Permissions	
Change Reporting In-Charge	<input type="checkbox"/>
Attendance Authorization	<input type="checkbox"/>
Short Leave/Official IN-OUT Authorization	<input type="checkbox"/>
Overtime/C-OFF Authorization	<input type="checkbox"/>
Leave Approval	<input type="checkbox"/>
Tour Approval	<input type="checkbox"/>
Attendance Correction	<input type="checkbox"/>
C-OFF Approval	<input type="checkbox"/>
Visit Registration Approval	<input type="checkbox"/>
Timesheet Correction Authorization	<input type="checkbox"/>
Authorize Award/Penalty	<input type="checkbox"/>
Field Visit Schedule	<input type="checkbox"/>
Field Visit Correction Authorization	<input type="checkbox"/>
Event Authorization	<input type="checkbox"/>
Advance Overtime Approval	<input type="checkbox"/>
Group Attendance Authorization	<input type="checkbox"/>
Shift Change Approval	<input type="checkbox"/>

- Select a Reporting In-Charge from the list on the right.



Permissions	Enabled
Change Reporting In-Charge	<input checked="" type="checkbox"/>
Attendance Authorization	<input checked="" type="checkbox"/>
Short Leave/Official IN-OUT Authorization	<input type="checkbox"/>
Overtime/C-OFF Authorization	<input type="checkbox"/>
Leave Approval	<input checked="" type="checkbox"/>
Tour Approval	<input checked="" type="checkbox"/>
Attendance Correction	<input checked="" type="checkbox"/>
C-OFF Approval	<input checked="" type="checkbox"/>
Visit Registration Approval	<input type="checkbox"/>
Timesheet Correction Authorization	<input checked="" type="checkbox"/>
Authorize Award/Penalty	<input type="checkbox"/>
Field Visit Schedule	<input type="checkbox"/>
Field Visit Correction Authorization	<input checked="" type="checkbox"/>
Event Authorization	<input checked="" type="checkbox"/>
Advance Overtime Approval	<input checked="" type="checkbox"/>
Group Attendance Authorization	<input checked="" type="checkbox"/>
Shift Change Approval	<input checked="" type="checkbox"/>

- Under **Permissions**, select the desired check boxes for the relevant permissions which are to be enabled for the selected Reporting In-Charge. This will permit the Reporting In-Charge to authorize the applications.
- Click **Save** button to save the permissions for the Reporting In-Charge.

# Import Users

The COSEC application has an inbuilt utility for enabling users to import data from *Excel* files with predefined format. This would thus save the end user a lot of time and effort in having to make individual data entries at the application level.



Make sure you have **View** and **Edit** rights for the Import Users page to import the users.


The parameter **Birth Date** will be mandatory in the Import sheet if set as mandatory in the [“Minimum Age Requirement for Users”](#) in [“User Policy”](#).

To import user data from a file, select the **Users module > Utilities > Import Users**

The **Import Data** page appears as shown.

Configure the following parameters:

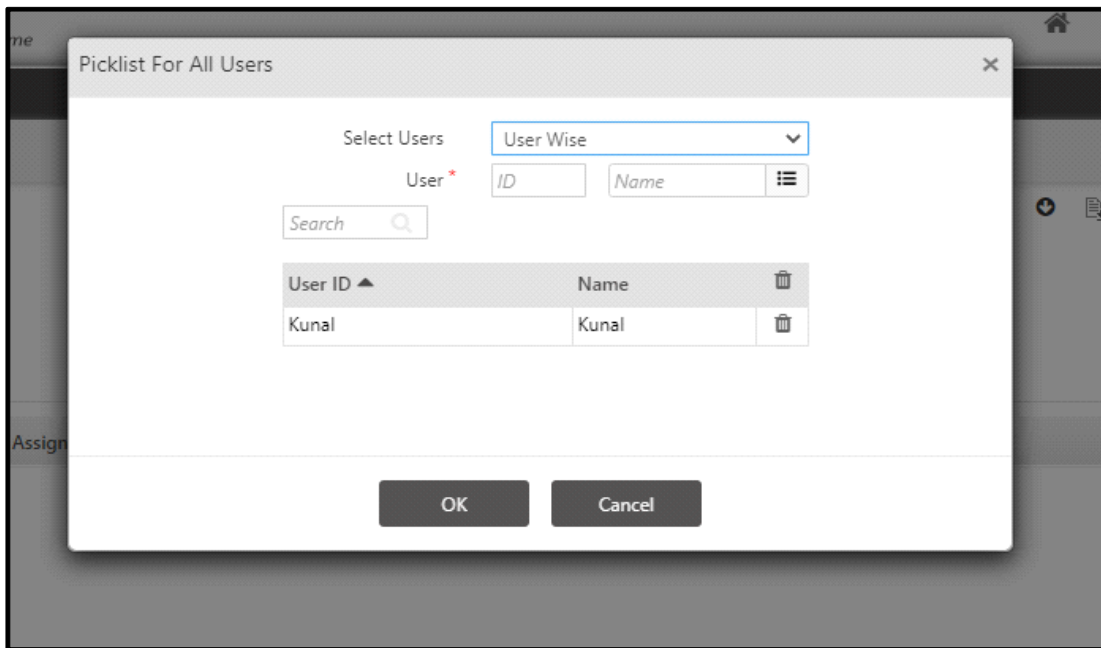
- **Import Data For** - Select the option from the drop-down list for which the data is to be imported.

You can download sample import file by clicking on **Download Sample Import file**  button. The import sheet displays the fields required for importing specific data.

The mandatory fields list is given in **Document guidelines** section of the Import sheet.

	BK	BL	BM	BN	BO	BP	BQ	BR	BS	BT	BU	BV	BW	BX	BY
1	WorkProfileID	RosterPolicyID	HourExceptionID	LeaveGroup	WeekOffGroupID	Field1	Field2	Field3	Field4	Field5	Field6	Field7	Field8	Field9	Field10
2	1	452		22	6										
3	2	565		33	5										
4	3	899		44	4										
5	4	555		55	2										
6	5	454		66	1										

To download detailed sheet, click on **Download Detailed Data Sheet**  button. On clicking this button, a pop-up appears:

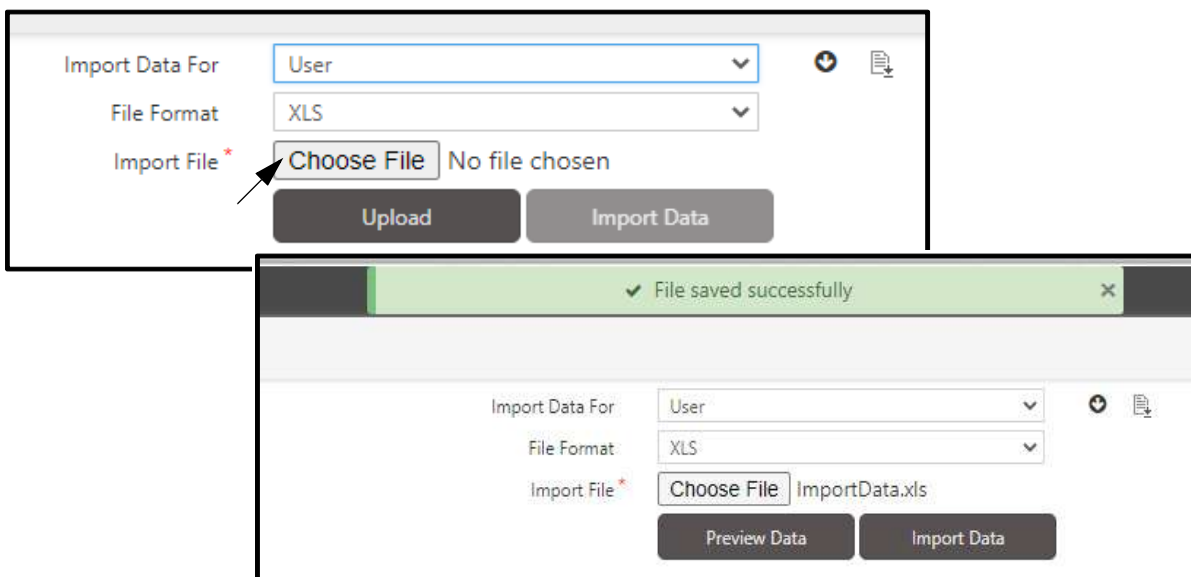


**Select Users:** Select the desired option — User Wise, Group Wise or All. If you select User Wise or Group Wise the select the desired users/groups from the picklist.

Click **OK** button to download the Data Sheet or click on **Cancel** button to abort the process.

The Detailed Data Sheet will be as per the selected option.

- **File Format** - Select the file format of the specific file from the drop-down list. The options available are XLS or CSV.
- **Import File** - Browse the path of the file from which the data is to be imported.



Click on **Upload** to save the file.

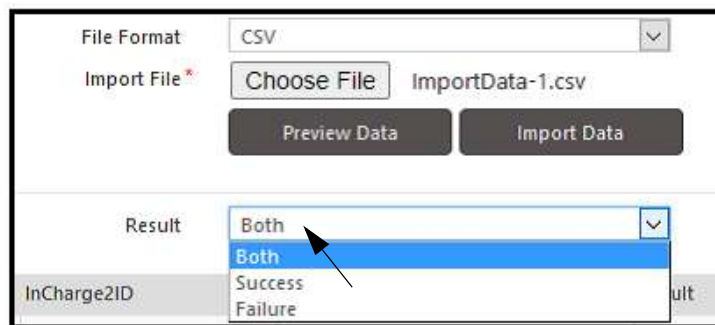


Click on **Preview Data** button to view the data in the respective worksheets to confirm that the data is in order prior to giving the import command.

Now click on **Import Data** to start importing the uploaded data. The result of import is shown as Success or Failure along with result description.

Select the device controllers to be assigned to the imported users by checking the boxes against the relevant controllers and click on **Import**. The system will import all the relevant valid entries from the sheet and will display the status in the bottom grid.

You can also filter import result records on the basis of their Success, Failure or Both using the **Result** drop-down options.

The screenshot shows a web interface for importing data. At the top, there is a 'File Format' dropdown set to 'CSV'. Below it, an 'Import File' section contains a 'Choose File' button and the filename 'ImportData-1.csv'. Two buttons, 'Preview Data' and 'Import Data', are positioned below the filename. Further down, a 'Result' dropdown menu is open, showing three options: 'Both' (highlighted in blue), 'Success', and 'Failure'. An arrow points to the 'Both' option. At the bottom left, the text 'InCharge2ID' is visible, and at the bottom right, a partial view of a table with a 'Result' column is shown.

Once the data is imported successfully, data will be added or updated in User Profile in COSEC Web.



*Administrator needs to ensure that the ASP.NET user has full rights on the folder containing the Excel or .csv file for the import data operation.*

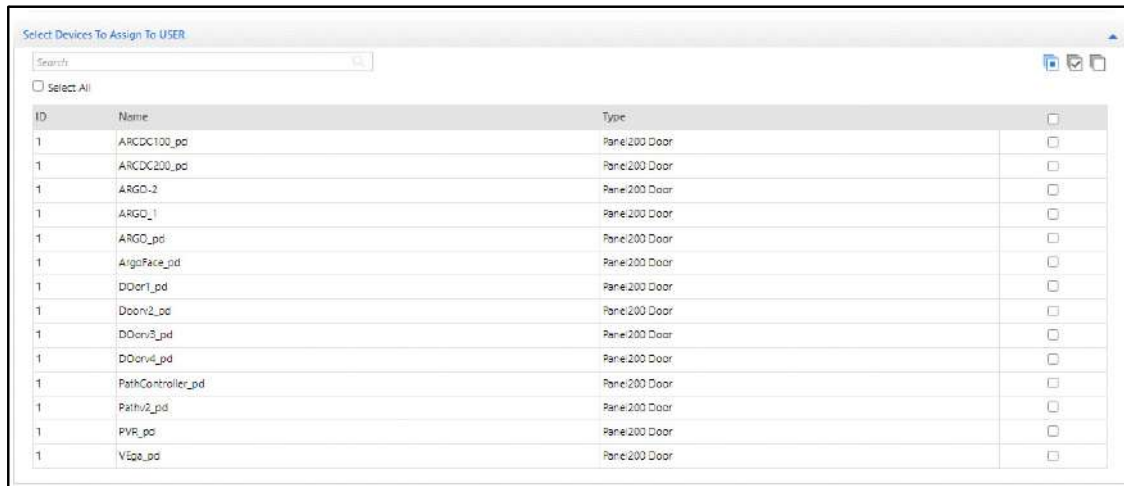
*When new user is added or existing user's Enterprise group is changed. Then if user is assigned to the Enterprise group with which Job costing parameters are associated, then the configured job costing parameters will be assigned to the User.*

*When a new User/ Worker is created via Import Data for User and Worker then the user and worker configuration will be set according to the configuration set in Association Groups assigned to the user and worker.*

### Select Devices to Assign to USER

Click the **Select Devices to Assign to USER** collapsible panel.

You can assign particular devices or all the devices at once.



To assign particular devices, select the check boxes of the desired devices.

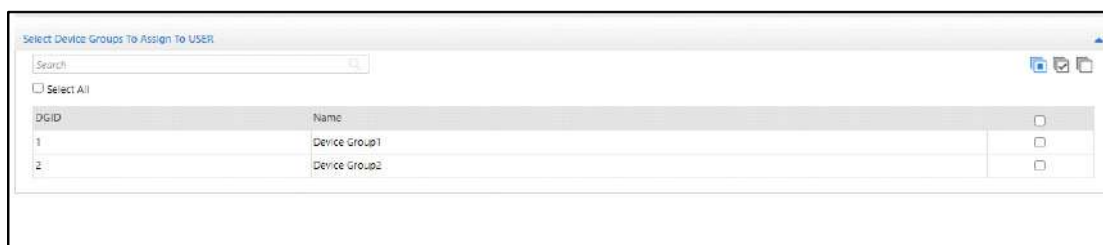
**OR**

To assign all the devices, select the **Select All** check box.

### Select Device Groups to Assign to USER

Click the **Select Device Groups to Assign to USER** collapsible panel.

You can assign particular device groups or all the device groups at once.



To assign particular device groups, select the check boxes of the desired device groups.

**OR**

To assign all the device groups, select the **Select All** check box.

Click **Upload**. The Devices/Device Groups will be assigned to the users.

# Invite User

---

The Employee On Boarding Portal enables you to collect all the required details of the on boarding employees prior to their physically joining the organization.

To collect the required information, you need to:

- pre-determine all the details that you need to collect from the new on boarding employee. Refer to [“Invite User”](#).
- create a link that will be sent to the new on boarding employee for the collection of the details. For details refer to [“Generating the Invite Link”](#).
- set the alerts, refer to [“Configuring Alert Messages”](#).
  - To configure an alert message, click **Admin Module >System Configuration > Alert Message Configuration**. In Alert Filter make sure that you select *Users* from the drop-down list and in Event select *Invite User* from the drop down list.
  - To generate an OTP alert, click **Admin Module >System Configuration > Alert Message Configuration**. In Alert Filter make sure that you select *System* from the drop-down list and in Event select *OTP Generated* from the drop down list.
  - To configure an alert message for **User Onboarding- On Submit**, click **Admin Module >System Configuration > Alert Message Configuration**. In Alert Filter make sure that you select *Users* from the drop-down list and in Event select *User Onboarding- On Submit* from the drop down list. The alert message can also be configured from **Users Module> Utilities >Alert Assignment**, refer [“Assigning Alerts To Users”](#).
  - To configure an alert message for **User Onboarding- Schedule Time**, click **Admin Module >System Configuration > Alert Message Configuration**. In Alert Filter make sure that you select *Users* from the drop-down list and in Event select *User Onboarding- Schedule Time* from the drop down list. The alert message can also be configured from **Users Module> Utilities >Alert Assignment**, refer [“Assigning Alerts To Users”](#).



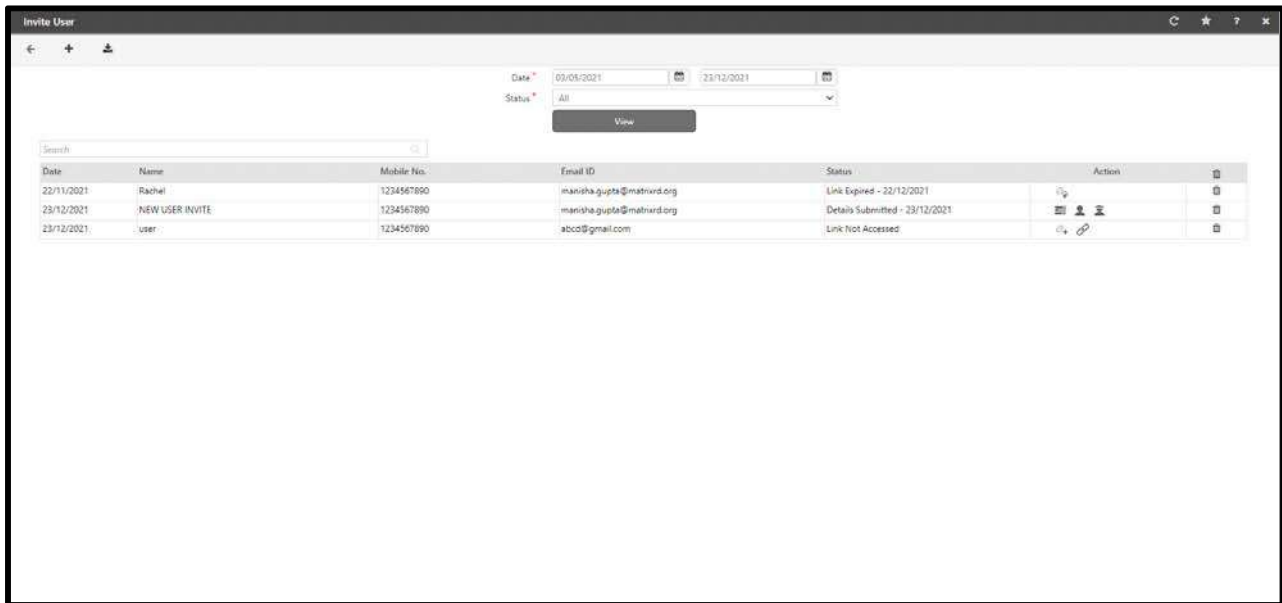
*For the Invite Link to be accessible from the external network, make sure you have configured the COSEC Web URL (external) while installing the COSEC software.*

*Make sure you have configured COSEC Web URL (external) in System Configuration > General Settings in the Admin Web Portal.*

## Generating the Invite Link


- Click **Invite User**.

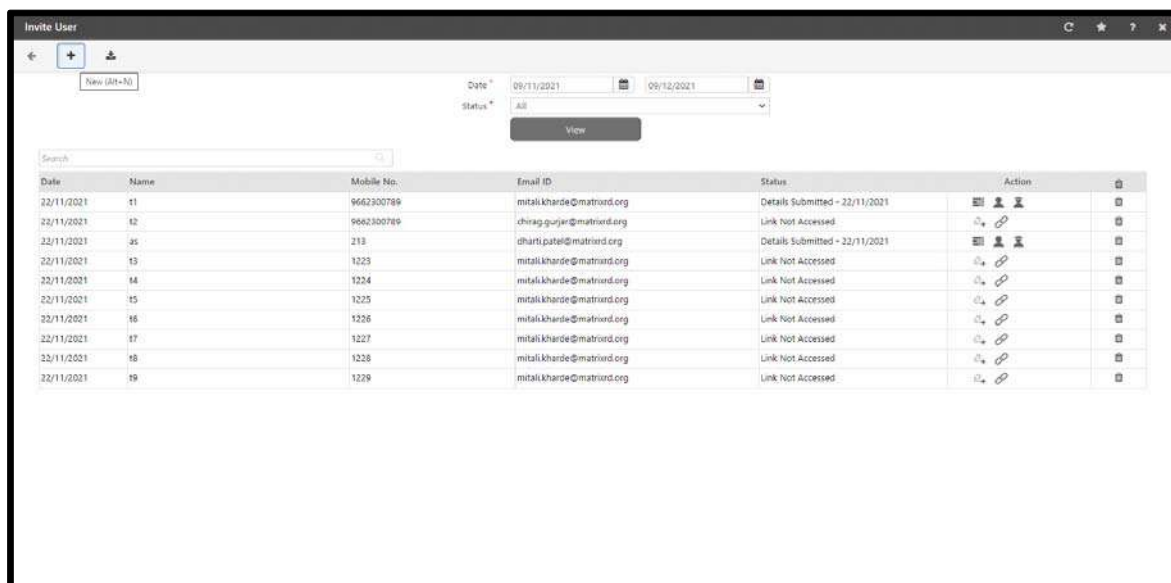
The **Invite User** page appears.



- You can enter the data manually or you can import a file.

#### Entering the data manually,

- To create a new invite link, click **New** .



- The **Invite User** pop-up appears.

- Click **Add** 

- Enter the details - **Name**, **Mobile Number** and **Email ID**.

Click **OK** to save or **Cancel** to abort the changes.

Click **Send Link**. The link will be created and sent to the new on boarding employee.

**To import the file,**

- Click **Import** .

The screenshot shows a window titled "Invite User" with a search bar and filters for Date (22/09/2021 to 22/10/2021) and Status (All). Below is a table with columns: Date, Name, Mobile No., Email ID, Status, and Actions.


Date	Name	Mobile No.	Email ID	Status	Actions
19/10/2021	abcd	1234567890	abcd@gmail.com	Link Not Accessed	
19/10/2021	xxxx	9876543210	abcd@gmail.com	Link Not Accessed	
20/10/2021	SB	2325211254	smita.saria@matrixindia.org	Link Not Accessed	
21/10/2021	New jinnar	1234567890	manisha.gupta@matrixindia.org	Link Not Accessed	

- The **Import Invite User** pop-up appears.

The screenshot shows the "Import Invite User" pop-up window. It has a "File Format" dropdown set to "XLS". Below it is an "Import File" section with a "Choose File" button and a note "No file chosen". There are "Upload", "Preview Data", "Send Link", and "Cancel" buttons. A note at the bottom states: "Note : Please ensure UTF8 encoding for Multi-Language data import file".

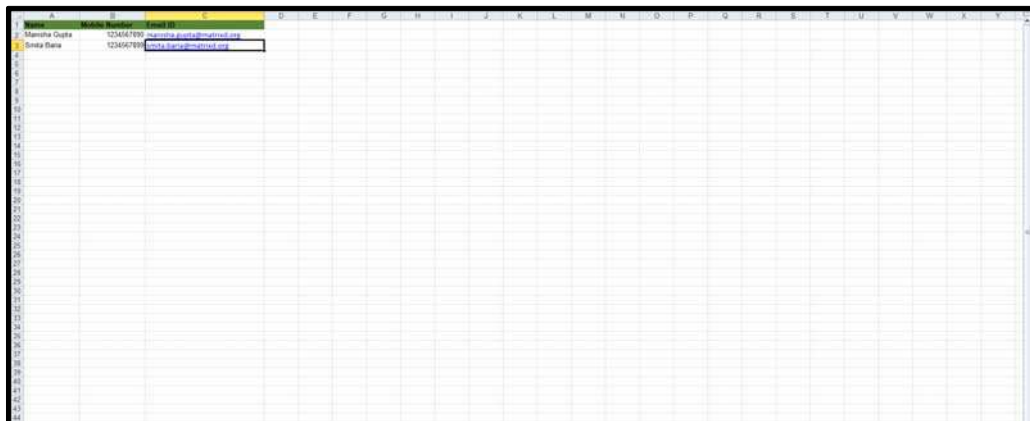
- Select the desired **File Format** as - **XLS**, **CSV** or **XLSX**.

This screenshot is similar to the previous one, but the "File Format" dropdown menu is open, showing the options "XLS", "CSV", and "XLSX". The "XLS" option is currently selected.

- Click **Download Sample Import File**  . A sample file will be downloaded with the name, **Import Data**.



- Open the file.
- Click the **Invite User Sheet**.
- Enter the **Name**, **Mobile No** and **Email ID** of the new on boarding employee.
- Save the details.



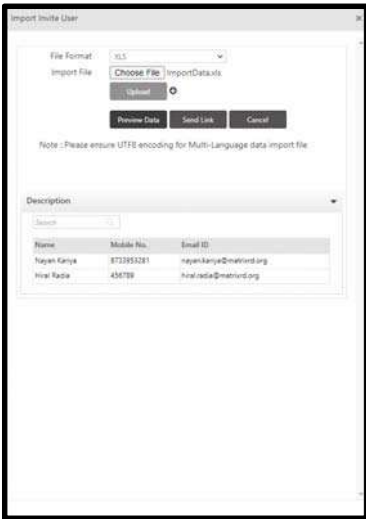
- Now, click **Choose File** and select the **Import Data** file from the location on the PC.
- The selected file name appears as shown below. Click **Upload**.



- The confirmation message appears.

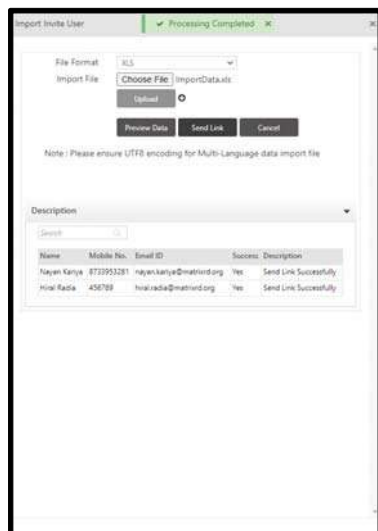


- Click **Preview Data**. The details are displayed under **Description**.

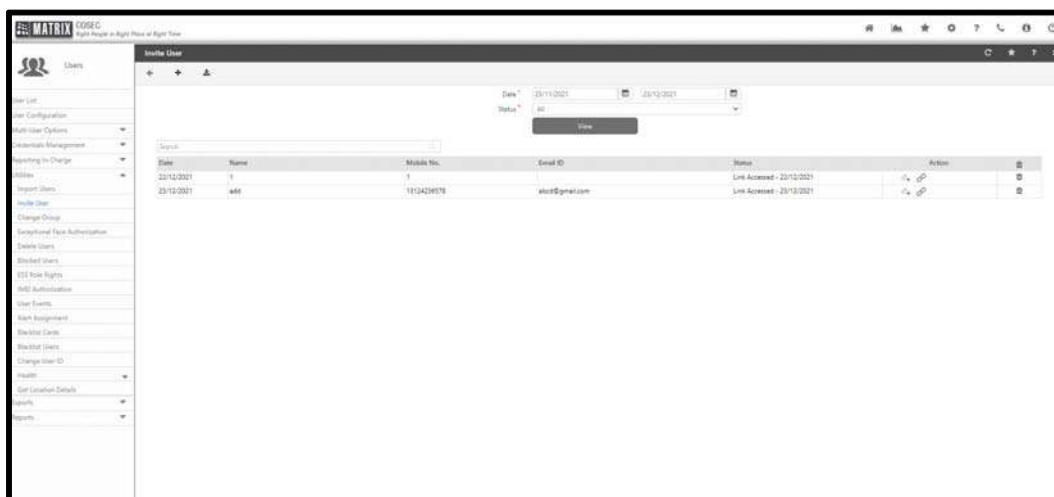




- Click **Send Link** to send the on boarding employee invite link to the **Mobile No.** and **Email ID**.
- The confirmation message appears.



- After the link is sent, the **status** of the links will update in the grid below.



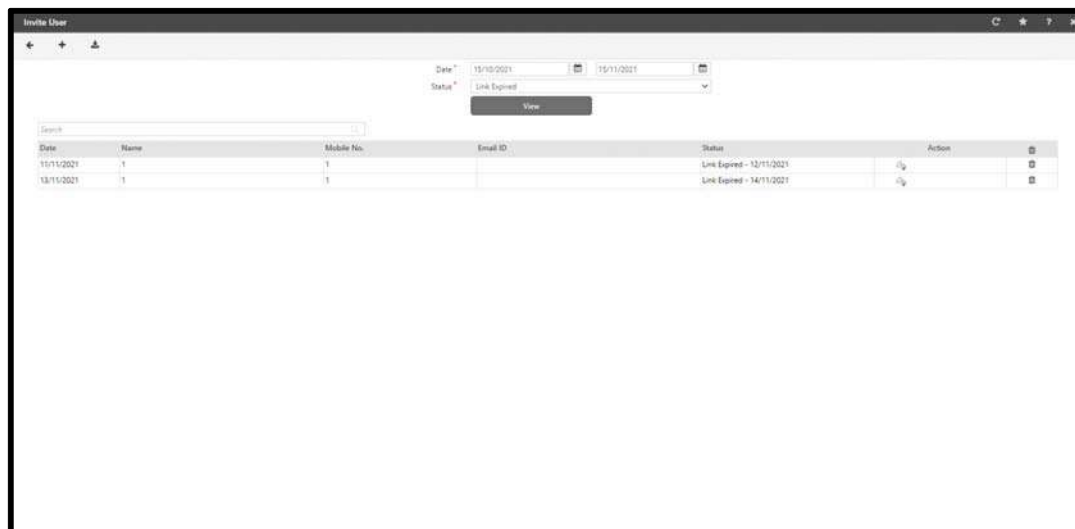
## Filtering the records as per Status

You can filter the records by setting the following parameters as per your requirement:

**Date:** Select the start and end date.

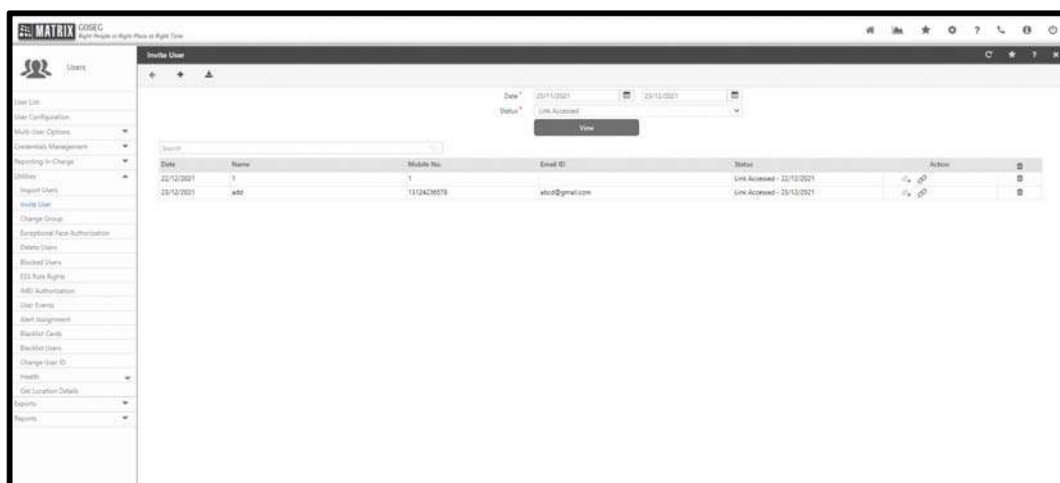
**Status:** Select the desired status from the drop down list — All, Link Not Accessed, Link Expired, Link Accessed, Details Submitted.

If you select **Link Expired** and click **View**.



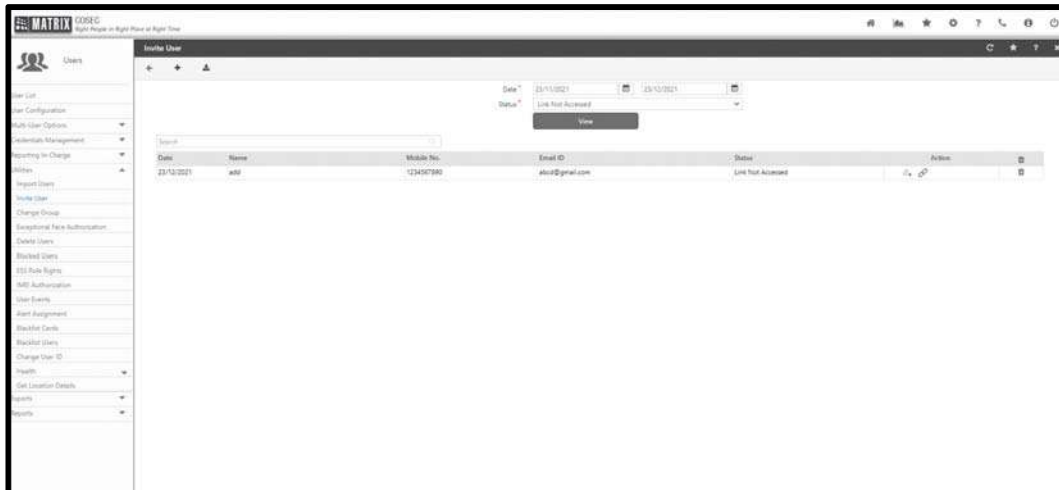
- The records whose links have expired will be displayed.
- If you wish to regenerate the link, click **Regenerate** .



If you select **Link Accessed** and click **View**.



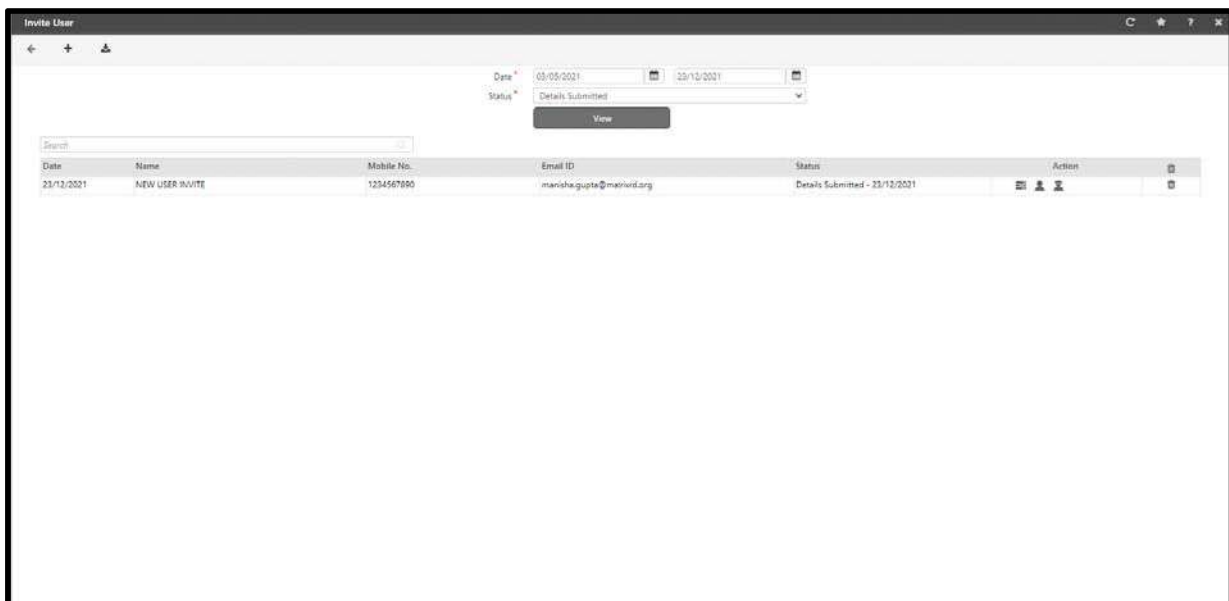
- The records of accessed links will be displayed.
- If you wish to resend the link, click **Resend** or if you wish to copy the link, click **Copy** .




If you select **Link Not Accessed** and click on **View**



- The records whose links have not been accessed will be displayed.
- If you wish to resend the link, click **Resend**  or if you wish to copy the link, click **Copy** .

If you select **Details Submitted** and click **View**.



- The records whose documents have been submitted will be displayed.
- If you wish to view the submitted details, click **Details** .
- If you wish to add the on boarding employee as a new user, click **Add User** .
- OR**
- if you wish to add the on boarding employee as a worker, click **Add Worker** .

If you select **All** and click **View**.

Date	Name	Mobile No.	Email ID	Status	Action
23-12-2021	NEER USER A07TE	1234567890	manish.gupta@matrixind.org	Details Submitted - 23-12-2021	[Icons]
23-12-2021	user	1234567890	abcd@gmail.com	Details Submitted - 23-12-2021	[Icons]
23-12-2021	Abd User	1234567890	mnk@matrix.com	Details Submitted - 23-12-2021	[Icons]
23-12-2021	ab5	1234567890	abcd@gmail.com	Link Not Accessed	[Icons]

- All the records will be displayed.

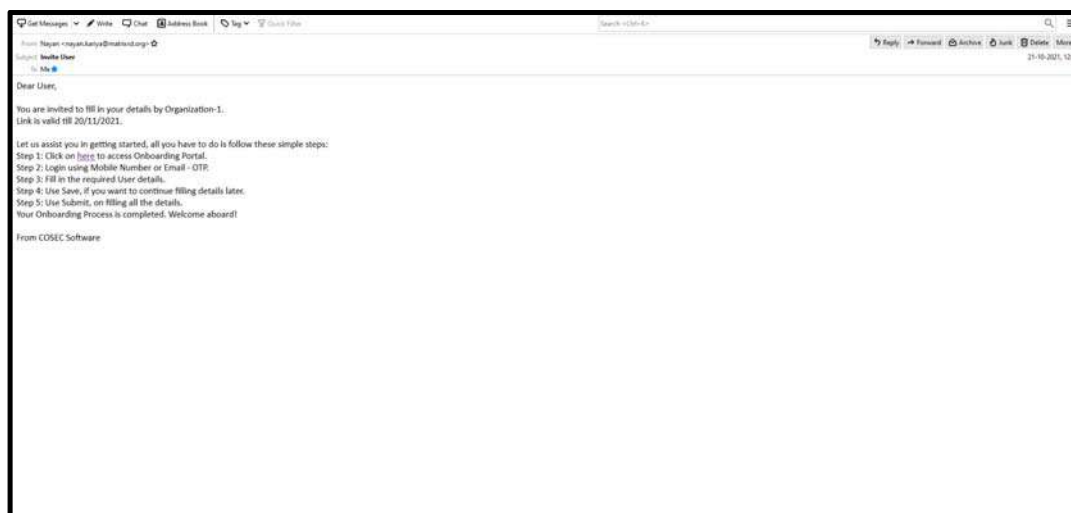
## Accessing the Link

### New Employee

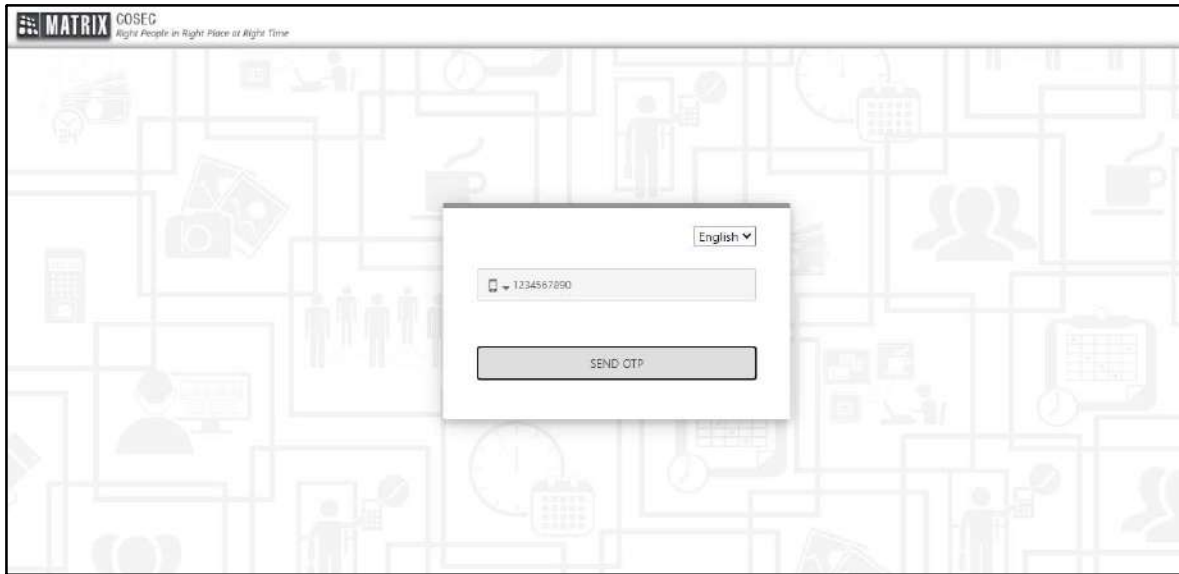
The new on boarding employee will receive an invitation link on the Mobile Number/ Email ID.

- Click the link received on the Mobile/Email.

Sample for Email is given below:



- The new on boarding employee is directed to the following page.



You can select the desired language in which you wish to view the login page. To do so,

- Select the desired language from the dropdown list. The default language is English.



The language set from **Global Language For Login** will be applicable to the login page. For details, refer to **Global Language For Login** in [“Basic Policy”](#). If you wish to view the pages in another language post login, click **Account Settings > Set Language> Preferred Language**. For details, refer to [“Account Setting”](#).

- Select the option - **Mobile** or **Email** on which the OTP is to be sent.
- Click **Send OTP**.
- The following page appears.



- Enter the received **OTP**.
- Click **LOGIN**.



- The new employee on boarding details page appears.
- The new employees must enter the **Basic**, **General**, **Personal** and **Contact** details.

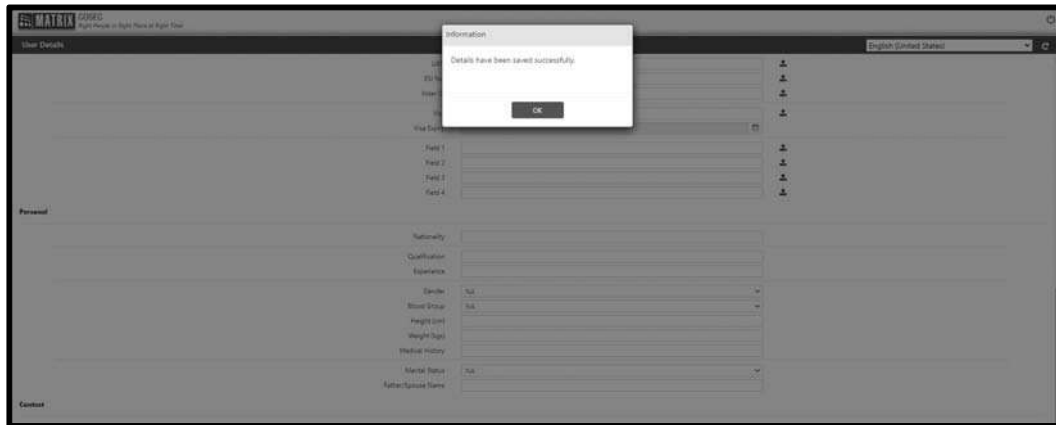
**Face Image:** You can **Upload** the image directly from the local PC or you can **Capture** the image first and then click **Upload**.

At most four images can be Uploaded/ Captured.



*To capture the image, make sure the camera is connected.*

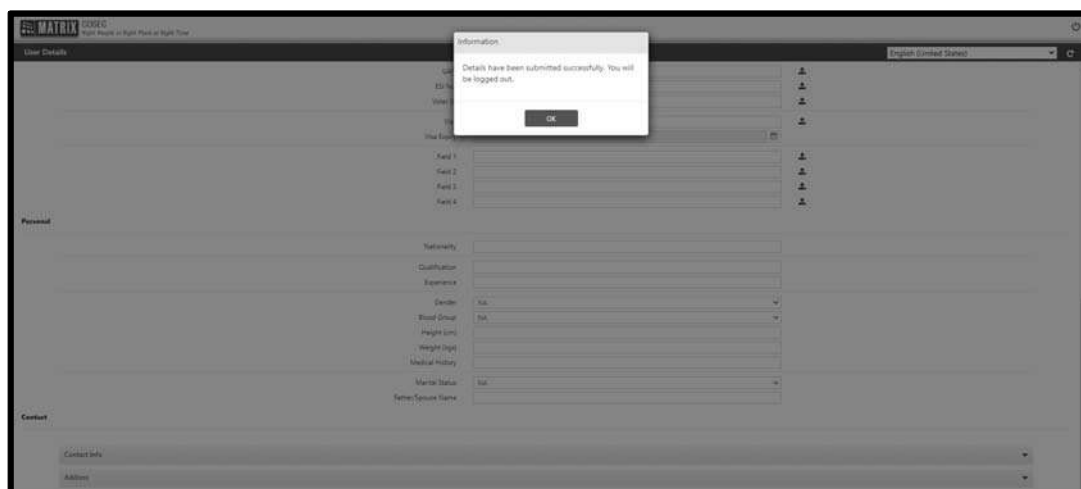
- Click **Save** to save all the details.
- The **Information** pop-up appears. Click **OK**.



- The filled details are displayed.

 A screenshot of the Matrix COSEC User Details form with all fields filled. The General section includes: Date of Birth, Joining Date, Vehicle Registration No., Driving License, Driving License Expiry, Passport No., Passport Expiry, NIN, Aadhaar No., PAN No., UAN, ESI No., Voter ID, and Visa Expiry. The Personal section includes: Nationality, Qualification, Experience, Gender, Blood Group, Height (cm), Weight (kg), Medical History, Marital Status, and Partner/Spouse Name. The Contact section includes: Contact Info and Address.

- Click **Submit**.
- **Information** pop-up appears. Click **OK**.



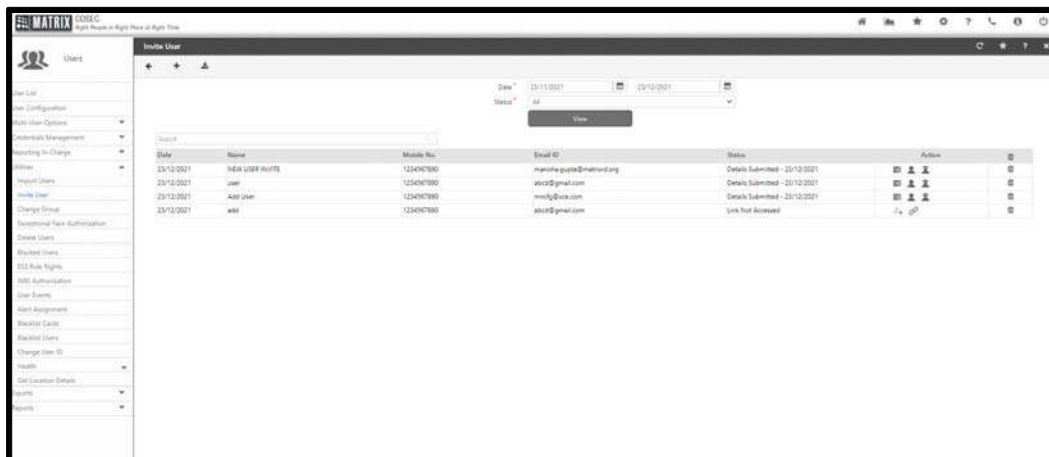
- The new on boarding employee is logged out.

- Confirmation message appears.



## Admin

To view **Status** of links, click **Users > Utilities > Invite Users**.



You can filter the records by settings the following parameters as per your requirement:

**Date:** Select the start and end date to specify the duration.

**Status:** Select the desired status from the drop down list. Refer [“Filtering the records as per Status”](#).



# Changing Group

The Users Module provides a functionality whereby the user has the option to change the groups like Organization, Branch, Department, Section, Category, Grade, Designation, Custom Groups and Reporting Group to which an employee is currently linked. This change can be applied for a user-definable time period. The system also maintains the group change records for each user. User group changes can be assigned both for a single user or multiple users at a time.



*The Group of any user can be changed **99999** times.*

## Single User

To change group for a single user, Select the **Users module > Utilities > Change Group**.

The **Change Group** page will open as follows:

**User ID:** Select a user from the user selection picklist, for whom the group change should apply.

Select the **Additional Details** section to view the group details for the selected user as shown below.

**Change Group:** Select the group from the options of Enterprise groups and Reporting Group to be changed for the selected user.

**Date:** Select the start and end date to specify the duration for which the group change is to be done.

**New Group:** Select the new group from the picklist to be assigned to the user.

**Remark:** You can add a Remark for the change to be done.

Click **Apply** to apply the changes for the selected user.

The changes can be viewed by clicking **User Group Change Records** as shown below.

The screenshot shows a web interface for managing user group changes. At the top, there is a form with the following fields: 'User ID' (1687), 'User Name' (Aditi Gupta), 'Change Group' (Company), 'Date' (03/10/2017 to 31/10/2017), 'New Group' (1, Matrix), and 'Remark' (Organization change for October). Below the form are 'Apply' and 'Clear' buttons. Underneath is a section titled 'User Group Change Records' with a search bar and a table.

User ID	Group Type	From	To	New Group
1687	Company	01/01/2009	31/12/2099	Organization2
1687	Company	09/05/2017	31/12/2099	Organization2
1687	Company	03/10/2017	31/10/2017	Matrix
1687	ReportingGroup	28/03/2017	31/12/2099	ri1



*When existing user's Enterprise group is changed. Then if user is assigned to the Enterprise group with which **Job costing** parameters are associated, then the configured job costing parameters will be assigned to the user.*

## Multiple Users

To change group for multiple users, Select the **Users Module > Utilities > Change Group > Multi User**

The **Multi User** page will appear as follows:

The screenshot shows the 'Change Group' form with the 'Multi User' tab selected. The form contains the following fields:

- Group Type:** ReportingGroup (dropdown)
- Date:** 04/07/2017 (start) to 12/31/2099 (end) (date range picker)
- New Group:** 3 (picklist)
- Remark:** (text area)
- Select Users:** User Wise (dropdown)
- User:** ID and Name (searchable list)
- Apply:** (button)

**Group Type:** Select a group type from the dropdown list for which the change is to be done.

**Date:** Select the start and end date to specify the duration for which the group change is to be done.

**New Group:** Select the new group from the picklist to be assigned to the user.

**Remark:** You can add a Remark for the change to be done.

The screenshot shows the 'Change Group' form with the 'Multi User' tab selected. The 'Select Users' section is expanded, showing a list of users:

User ID	Name	
2	Chirag	
3	Isha	
4	Sweta	

The 'Apply' button is visible at the bottom of the form.

**Select Users:** Select the users by filtering the option of User Wise, Group Wise or All.

Click the **Apply** button to apply the changes.

# Unidentified Face Authorization

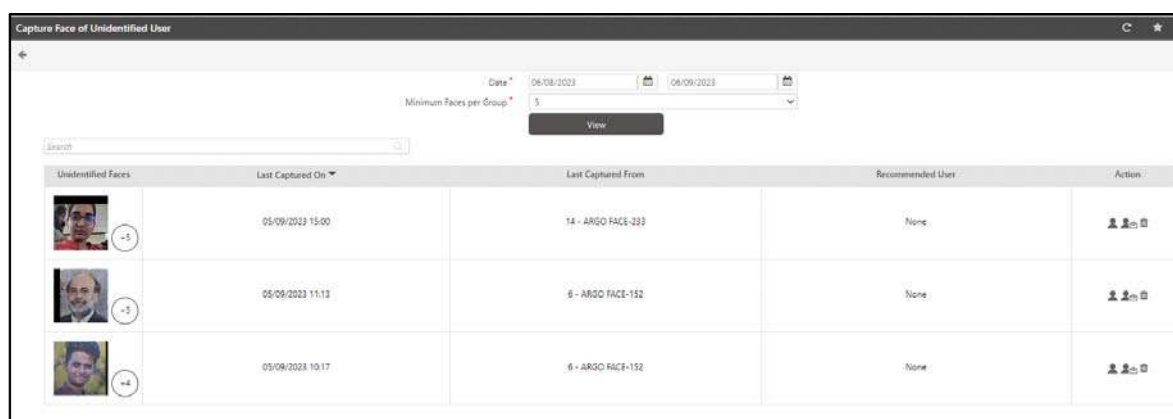
During face recognition, if a user is not identified by his/her face credential, the system will consider this face as an Unidentified Face. These unidentified faces are stored in the database.

The system may store a single face or multiple faces of the same user (known as cluster).

The System Admin can view the details and accordingly perform action— enrolling these unidentified faces against an existing/new user/visitor or can delete them.

To view unidentified faces, click **Users > Utilities> Unidentified Face Authorization**.

The **Capture Face of Unidentified User** page appears.



## Setting the Filters

- **Date:** Select the desired date range to display the captured unidentified faces during that duration.
- **Minimum Faces per Group:** There can be multiple images of a single unidentified user stored in a cluster. There can be multiple clusters of different unidentified users.

Select the desired value in **Minimum Faces per Group**. As per the number set here, the system will filter records of clusters equal to and greater than this number.

- Click **View**. The records will appear as per the set filters.

## Filtered Records

The grid displays the unidentified faces of unidentified users with the following details:

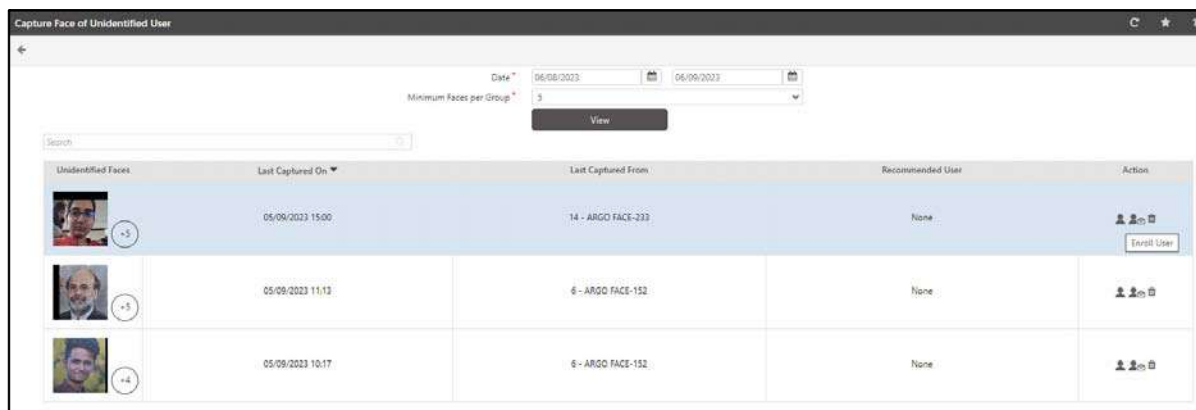
- **Unidentified Faces:** It displays the latest captured image of the user in the cluster along with the total count of captured unidentified faces.
- **Last Captured On:** Displays the date and time of the last captured image.
- **Last Captured From:** Displays the Device ID and the Device Name from which the last image has been captured.

- **Recommended User:** Displays the best match found User ID and User Name from the database for the unidentified user.  
If there is no match found for the unidentified user image in the database, then it displays **None**.
- **Action:** The System Admin can perform the following actions:
  - **Enroll User/Visitor:** Unidentified faces in a cluster can be enrolled against an existing or new user/visitor. Refer “[Enrolling Users](#)” and “[Enrolling Visitor](#)” under “[Enrolling the Unidentified Face](#)”.
  - **Remove:** Unidentified faces from the cluster can be removed or deleted. Refer “[Deleting the Unidentified Face](#)”.

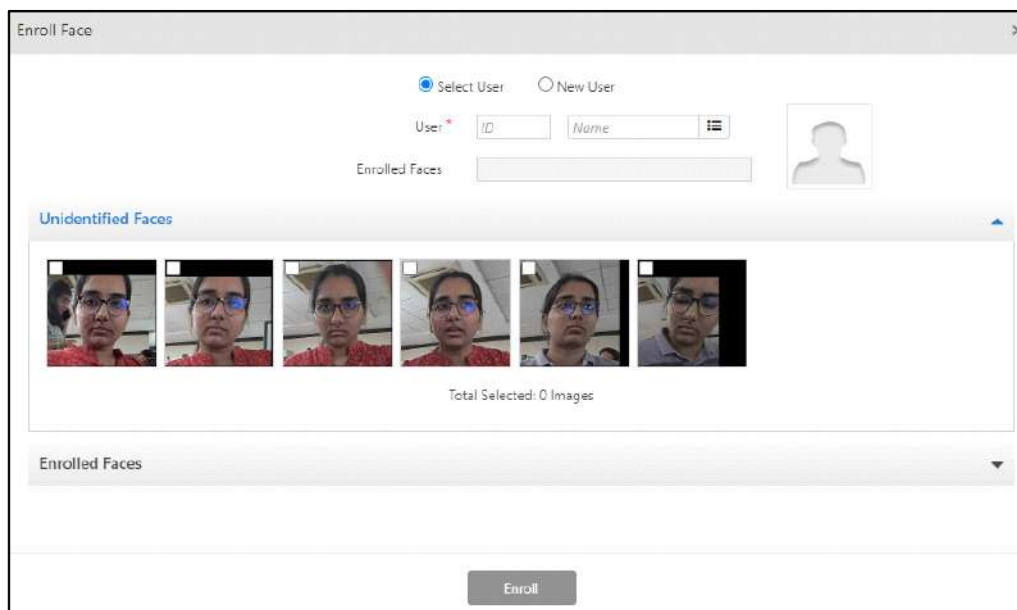
## Enrolling the Unidentified Face

### Enrolling Users

- Click **Enroll User**  to enroll a User.



- The **Enroll Face** pop-up appears.



- If you want to enroll the images against an existing user, select **Select User**.

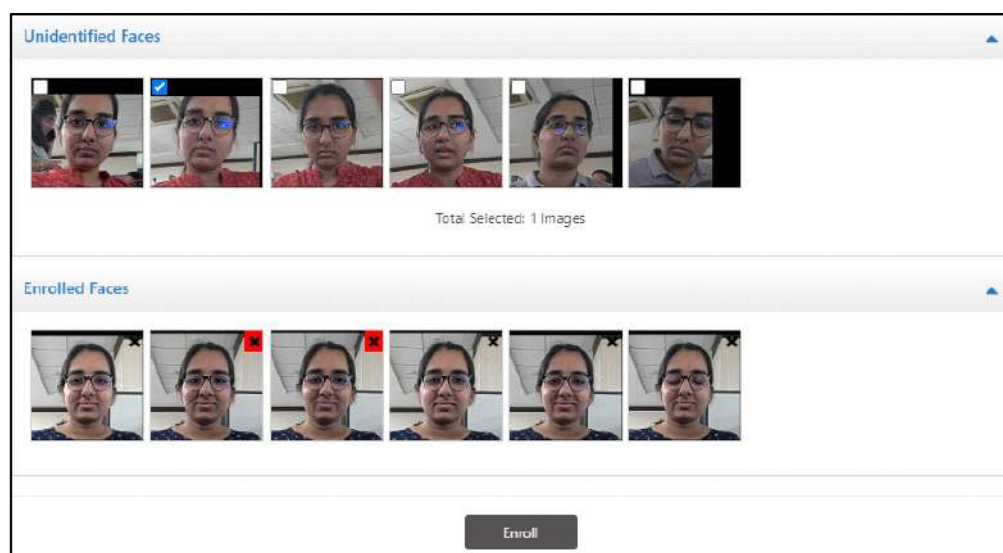
- **User:** Select the desired user from the pick list.
- **Enrolled Faces:** It displays the number of already enrolled faces against the user in the database.
- **Unidentified Faces:** Click the **Unidentified Faces** collapsible panel. It displays all the captured unidentified faces against this user. Select the check boxes of the desired unidentified face images that you wish to add to the list of enrolled face of the user.

The number of unidentified face images selected will be displayed as the **Total Selected** images.



*Make sure the number of faces you consider for enrollment is lesser than or equal to the defined value in **Maximum No. of Faces** in Admin >System configuration> Global Policy >User.*

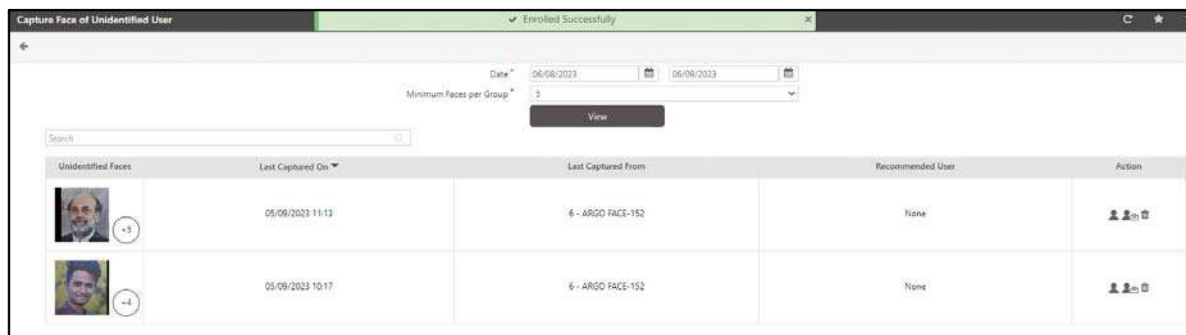
- **Enrolled Faces:** Click the **Enrolled Faces** collapsible panel. It displays the enrolled images of the user currently in the database.



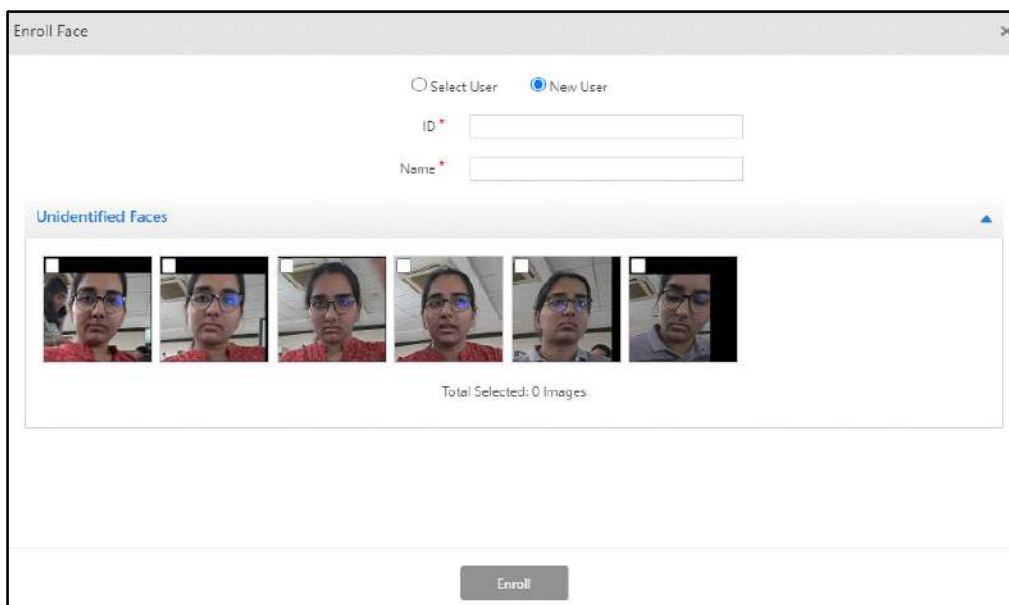
You can either enroll the Unidentified Faces directly or replace the Enrolled Faces with Unidentified Faces.

- To enroll the Unidentified Faces, click **Enroll**. The selected Unidentified Faces will now be added to the Enrolled Faces.
- To replace an existing Enrolled Face,
  - Click on the desired image under **Enrolled Faces**. The red cross icon appears on the top right corner of the image.
  - Select the check box of the desired image under **Unidentified Faces** that you wish to add.
  - Click **Enroll**.

The image with the cross icon in Enrolled Faces will be replaced with the desired Unidentified Face image.



- If you want to enroll the images against a new user, select **New User**.



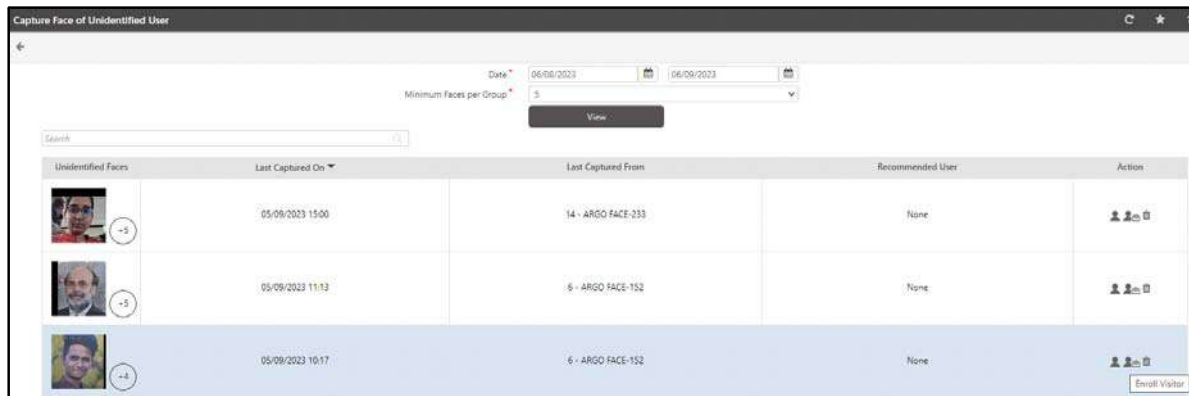
- **ID:** Enter the ID of the new user.
- **Name:** Enter the name of the new user.
- **Unidentified Faces:** Click the **Unidentified Faces** collapsible panel. It displays all the captured unidentified faces against this user. Select the check boxes of the desired unidentified face images that you wish to add to the list of enrolled face of the user.

The number of unidentified face images selected will be displayed as the **Total Selected** images.

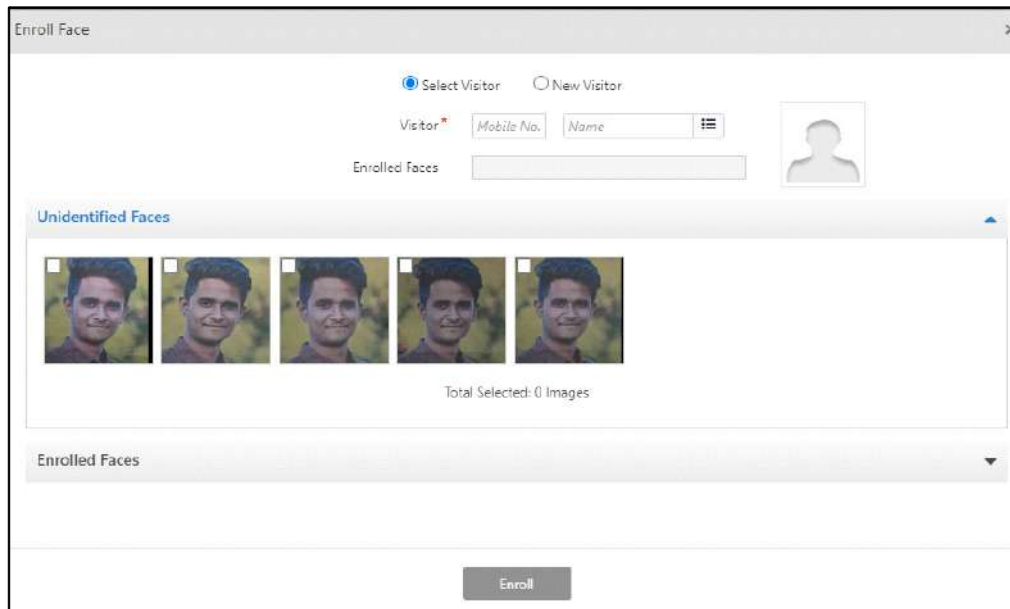
- Click **Enroll**. The selected Unidentified Faces will now be considered as Enrolled Faces.

## Enrolling Visitor

- Click **Enroll Visitor**  to enroll a Visitor.



- The **Enroll Face** pop-up appears.



- If you want to enroll the images against an existing visitor, select **Select Visitor**.
  - Visitor:** Select the desired visitor from the pick list.
  - Enrolled Faces:** It displays the number of already enrolled faces against the visitor.
  - Unidentified Faces:** Click the **Unidentified Faces** collapsible panel. It displays all the captured unidentified faces against this visitor. Select the check boxes of the desired unidentified face images that you wish to add to the list of enrolled face of the visitor.

The number of unidentified face images selected will be displayed as the **Total Selected** images.

- Enrolled Faces:** Click the **Enrolled Faces** collapsible panel. It displays the enrolled images of the visitor currently in the database.

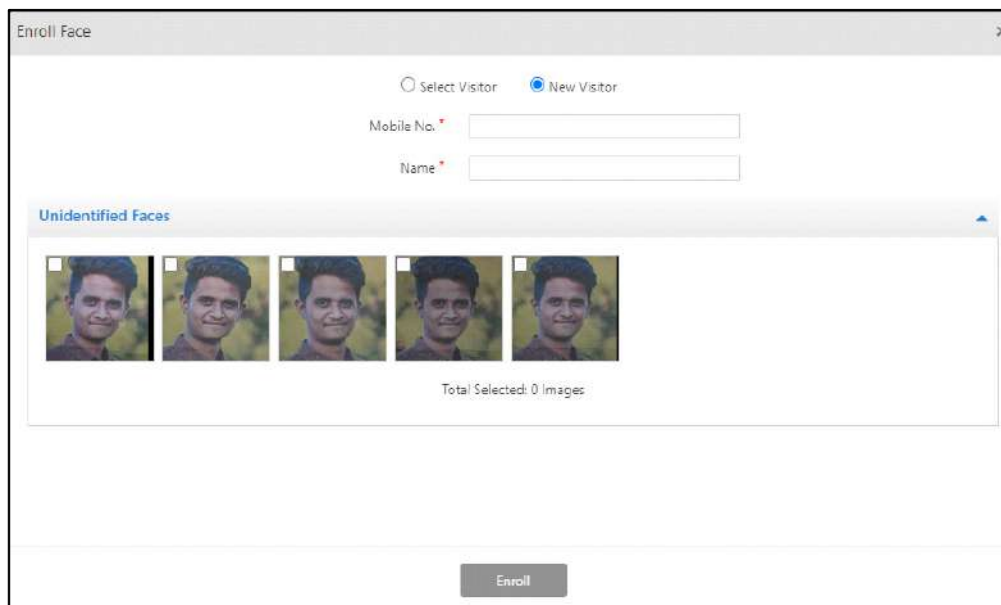


You can either enroll the Unidentified Faces directly or replace the Enrolled Faces with Unidentified Faces.

- To enroll the Unidentified Faces, click **Enroll**. The selected Unidentified Faces will now be added to the Enrolled Faces.
- To replace an existing Enrolled Face,
  - Click on the desired image under **Enrolled Faces**. The red cross icon appears on the top right corner of the image.
  - Select the check box of the desired image under **Unidentified Faces** that you wish to add.
  - Click **Enroll**.

The image with the cross icon in Enrolled Faces will be replaced with the desired Unidentified Face image.

- If you want to enroll the images against a new Visitor, select **New Visitor**.



- **Mobile No:** Enter the mobile number of the new visitor.
- **Name:** Enter the name of the new visitor.
- **Unidentified Faces:** Click the **Unidentified Faces** collapsible panel. It displays all the captured unidentified faces against this visitor. Select the check boxes of the desired unidentified face images that you wish to add to the list of enrolled face of the visitor.

The number of unidentified face images selected will be displayed as the **Total Selected** images.

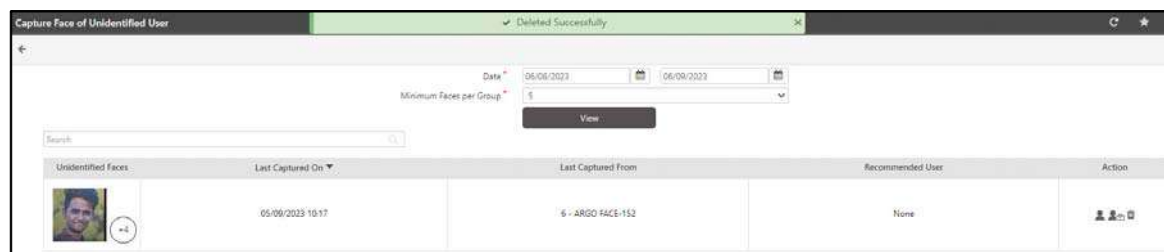
- Click **Enroll**. The selected Unidentified Faces will now be considered as Enrolled Faces.

## Deleting the Unidentified Face

- Click **Delete**  to remove an unidentified face.



- The unidentified face will be successfully deleted from the database.



# Deleting Users

This option enables the administrator to delete single or multiple users from the COSEC database.



*This is an irreversible process. Proceed with caution.*

To delete users from the system, Select the **Users Module > Utilities > Delete Users**.

The **Delete Users** page appears as follows:

The user needs to re-enter the logged in user credentials to access this critical functionality as shown.

The administrator can now select the user or the group of users to be deleted from the COSEC database using the **User Filter** drop down list as shown.

The **User Filter** section allows you the following options for multiple user selection:

- **User Wise:** Enables administrator to randomly select users by clicking the **Select Users** button.
- **Group Wise:** Enables the administrator to select all users belonging to a particular group.
- **All:** Enables administrator to select all active users in the database.

To apply all the changes made, click the **Apply** button.

The system will successfully delete all the selected users from the COSEC database.

# Blocked Users

Users whose credentials have been temporarily blocked due to inactivity for prolonged periods are referred to as *Blocked Users*. This could happen in the event of the Absentee rule being applied to the user or unauthorized access attempts exceeding the defined limit.

Blocking a user only deactivates the credential and does not result in the deletion of user information from the database.



*This functionality is available only with the **Access Control** add on module.*



*The Alert Service must be running to generate the Block User event.*

To access this functionality, Select the **Users module > Utilities > Blocked Users**.

The **Blocked Users** page appears as shown:

ID	Name	Panel/Direct Door	Block DateTime	Reason for Block	Remark	Restore
1	Shinjini	PVR Door-Device-1	08/11/2017 23:59:27	Absentee Rule		
2	Nikita	PVR Door-Device-1	09/11/2017 00:00:00	Absentee Rule		

Suppose Absentee rule is configured for user Shinjini for 15 days. And she is absent for 15 days; when she punches on 16th day (roll-over of date) then she will be denied access with reason: “User is Blocked”. And she will be listed in the Blocked user list as shown above.

- Click the **Blocked User** section to view details of blocked users such as name of the user, name of the door, block date and time, reason for blocking etc. along with the option to restore selected users from their “blocked” status.
- The administrator can re-activate any of the users in the blocked list by clicking on the **Restore** option against the selected user in the list.
- There is a provision for adding **remarks** which can be viewed later for reporting and analysis as well as deciding the future course of action.

Blocked User						
Blocked User (2)						
Search						
ID	Name	Panel/Direct Door	Block DateTime	Reason for Block	Remark	Restore
1	Shinjini	PVR Door-Device-1	08/11/2017 23:59:27	Absentee Rule	User is restored	
2	Nikita	PVR Door-Device-1	09/11/2017 00:00:00	Absentee Rule		
Restored User (0)						

The restored user will be shown in **Restored User** list as shown below.

Blocked User						
Blocked User (1)						
Restored User (1)						
Search						
ID	Name	Panel/Direct Door	Application Restore DateTime	Controller Restore DateTime	Remark	
1	Shinjini	PVR Door-Device-1	09/11/2017 16:04:36		User is restored	

- The reason for the de-activation of the user credential is displayed in the **Reason for Block** column. The possible reasons for deactivation are:

#### 1. Absentee rule being applied to user

2<sup>nd</sup>, 3<sup>rd</sup>, 4<sup>th</sup> March: Absent



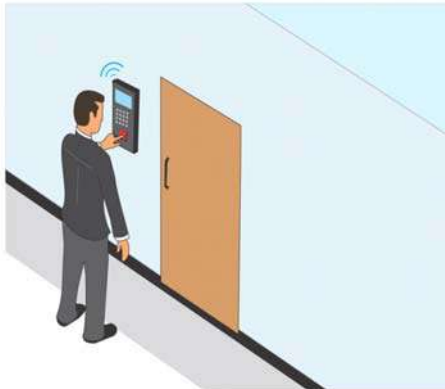
2<sup>nd</sup>, 3<sup>rd</sup>, 4<sup>th</sup>, 5<sup>th</sup> March: Absent



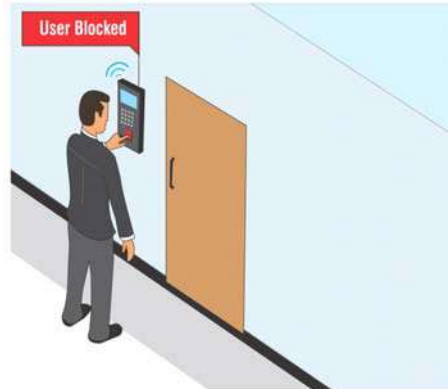
Maximum Absenteeism Count Allowed = 3

2. The Use Count Control rule has been violated.

Time - 11:01  
Attempt - 1



Time - 11:01  
Attempt - 4



Maximum Attempts Allowed Per Minute = 3

3. Failed Access attempts.

1<sup>st</sup> Attempt



6<sup>th</sup> Attempt



Maximum Attempts Allowed at an Unauthorized Zone = 5



For other conditional violations that may lead to blocking of a user, go to **Device Configuration (Panel200) > Features > Set 1 > Block Users**. Also, [See "Enabling Access Control Features" on page 21.](#)

# ESS Role Rights

The ESS Role Rights is used to restrict user(s) access for some options in ESS login. (Like viewing other User's basic details, attendance correction applications etc.). The administrator can create up to 99 role rights configurations, which will specify the pages to be enabled for ESS users and can choose which rights configuration should be applicable to a user.

To configure the rights for ESS pages, select the **Users module > Utilities > ESS Role Rights**.

The **ESS Role Rights** page appears as shown below.

The screenshot shows the 'ESS Role Rights' page. At the top, there is a search bar and a table with two columns: 'ID' and 'Name'. The table contains one row with '1' in the ID column and 'Default Rights' in the Name column. Below the table, there is a 'Configuration' section with a search bar and a table with two columns: 'Menu' and 'Parent Menu'. The table contains five rows: 'Account Details' (Parent Menu: Cafeteria), 'Attendance Correction' (Parent Menu: Time Attendance), 'Attendance Details' (Parent Menu: Time Attendance), 'Attendance Summary' (Parent Menu: Time Attendance), and 'C-OFF Application' (Parent Menu: Leave Management). Each row has an 'Enable' checkbox. The 'Attendance Correction', 'Attendance Details', and 'Attendance Summary' rows have their checkboxes checked. Below the table, there is a 'User Filter' section.

Click on **New** button to create the new role rights.

**ESS Role Rights:** Enter the name of the Rights. For Eg: attendance correction rights can be given to specific users. Cafeteria access rights can be given to some users.

**Default:** Enable the checkbox to make the particular ESS role rights as default.

## Configuration

Enable/Disable the check-box for the options mentioned in the configuration list to assign/deny the role rights to the respective user.

Eg1: For Attendance Correction rights, Attendance Correction, Attendance Details and Attendance Summary are enabled as shown below. The users assigned to Attendance Correction Rights can access these features.

The screenshot shows the 'ESS Role Rights' page. At the top, there is a search bar and a table with two columns: 'ID' and 'Name'. The table contains one row with '1' in the ID column and 'Attendance Correction Rights' in the Name column. Below the table, there is a 'Configuration' section with a search bar and a table with three columns: 'Menu', 'Parent Menu', and 'Enable'. The table contains five rows: 'Account Details' (Parent Menu: Cafeteria), 'Attendance Correction' (Parent Menu: Time Attendance), 'Attendance Details' (Parent Menu: Time Attendance), 'Attendance Summary' (Parent Menu: Time Attendance), and 'C-OFF Application' (Parent Menu: Leave Management). Each row has an 'Enable' checkbox. The 'Attendance Correction', 'Attendance Details', and 'Attendance Summary' rows have their checkboxes checked. Below the table, there is a 'User Filter' section.





The User Basic Details page in the collapsible Configuration panel provides the option of **Advanced Rights Configuration** from where you can hide or show the Attendance Status and Last Punch related details of the user from the ESS > Basic > User Basic Details.

ESS Role Rights

ESS Role Rights \* ID Attendance Correction Rights

Default ☐

Configuration

Search

Menu	Parent Menu	Enable	Configure
Short Leave/Official In-Out	Time Attendance	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Timesheet Correction Application	Job Costing	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Tour Application	Leave Management	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Transaction Correction	Cafeteria	<input checked="" type="checkbox"/>	<input type="checkbox"/>
User Basic Details	Basic	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

21 - 25 of 26 records

« < 1 ... 4 5 6 > »

User Filter

Advanced Role Rights - User Basic Details

Show Attendance Status ☒

Show Last Punch Details ☒

Save

## User Filter

Select the User filter section. Select the users from the pick-list eg. Aditi. The users will be listed in the grid.

User Filter

User Filter Organization

Organization ID Name

User ID Name

Search

ID	Name	
07	Aditi	<input checked="" type="checkbox"/>
1	Shalini	<input type="checkbox"/>
101	Khushbu	<input type="checkbox"/>
1567	Sheetal	<input type="checkbox"/>
1678	Supriya	<input type="checkbox"/>

1 - 5 of 9 records

« < 1 2 > »

Click on **Save** button to add the role rights. The **Rights ID** will be automatically generated.

ESS Role Rights

✓ Saved Successfully

ESS Role Rights \* 2 Attendance Correction Rights

Default ☐

Configuration

Search

Menu	Parent Menu	Enable
Account Details	Cafeteria	<input type="checkbox"/>
Attendance Correction	Time Attendance	<input checked="" type="checkbox"/>
Attendance Details	Time Attendance	<input checked="" type="checkbox"/>
Attendance Summary	Time Attendance	<input checked="" type="checkbox"/>
C-OFF Application	Leave Management	<input type="checkbox"/>

1 - 5 of 26 records

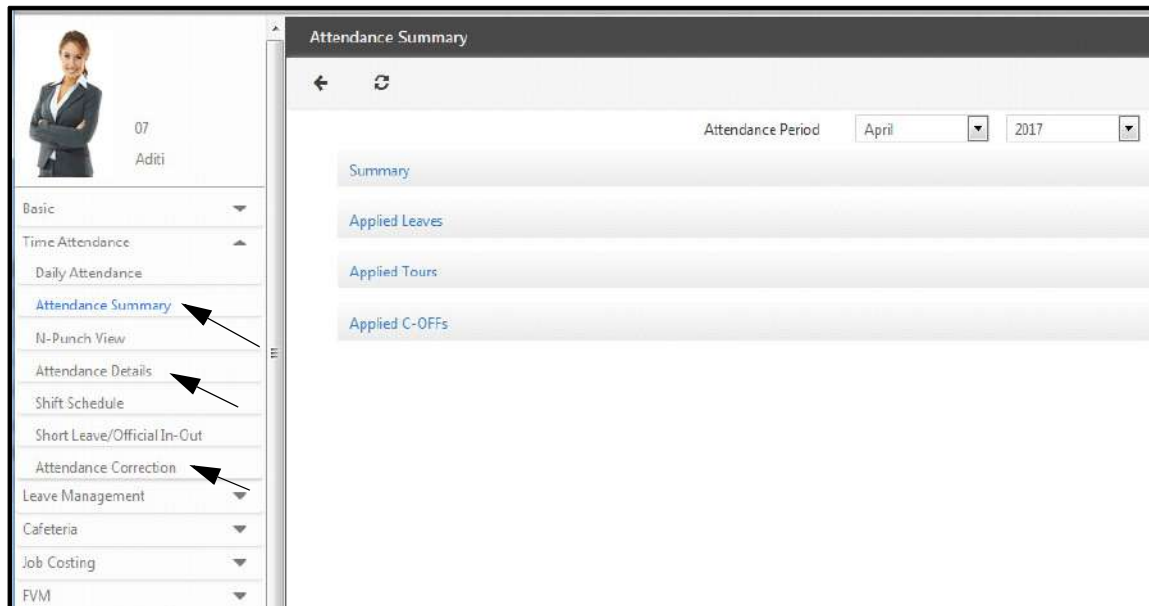
« < 1 2 3 ... 6 > »

User Filter

Search

ID	Name
1	Default Rights
2	Attendance Correction Rights

Hence the user Aditi when logs into her ESS account will have rights for Attendance Correction, Attendance Details and Attendance Summary as shown below.



In the same way, other role rights can be assigned/denied to the required users from the configuration panel of ESS Role rights tab.

# IMEI Authorization

ESS Mobile Apps can be used on mobile devices. To ensure that a user can install and use the app from a single authenticated device, the device IMEI number is stored in the Database. An ESS user can apply for an IMEI number authorization request, and a System Account user can authorize or reject these requests.

You can view all the pending request at one go as well as you can authorize/reject the IMEI request of ESS mobile users.

Select the **Users module > Utilities > IMEI Authorization**.

The **IMEI Authorization** page appears as shown.

You can either:

- view all the pending applications for IMEI Authorization
- set the filters — Date, Filter Users — to view the desired applications

## All Pending Applications

To view only Pending Applications,

- **Show All Pending Applications:** Select this option to enable the pending application filter.
- Click the **Pending** collapsible panel. All the applications in pending state appear.

To approve the application, select the **Authorized** check box of the desired entry.

To reject the application, select the **Reject** check box of the desired entry.

To know more, refer to [“Pending Applications”](#).



*The population on this page depends on the server's database. It might take time to load all pending applications.*

## Applications according to Set Filters

To Set the Filters,

- **Date:** Select this option to enable the date filter. Specify the start and end dates by clicking the respective date selection buttons. This defines the period for which IMEI Applications approval status is to be viewed.
- **Filter Users:** You can filter records according to the desired Enterprise Group, All or for an Individual.

Select **All**, to view authorization status of the applications of all the active users on the system.

Select **Individual**, to view authorization status of the applications of a single user. Click the picklist to select the desired User ID/Name.

Select the desired Enterprise Group — Organization, Branch, Department, Section, Category, Grade, Designation, Custom Group1/2/3 and then click the picklist to select the desired group's ID/Name, to view authorization status of these applications.

Click **View**. The Pending, Authorized and Rejected collapsible panels appear.

## Pending Applications

- Click the **Pending** collapsible panel. All the applications in pending state appear.



Request Date	User ID	Name	IMEI Number	Approve	Reject
01/09/2022	MVR5	MVR5	39de45fd-f9c0-49cb-bb44-f26315635dab	<input type="checkbox"/>	<input type="checkbox"/>

- To approve the application, select the **Approve** check box of the desired entry. This application will then appear under the **Authorized** collapsible panel.
- To reject the application, select the **Reject** check box of the desired entry. This application will then appear under the **Rejected** collapsible panel.

## Authorized Applications

Click the **Authorized** collapsible panel. All the authorized applications with their details are displayed.



Request Date	User ID	Name	IMEI Number	Authorization Date
31/08/2022	MVR1	MVR1	40abac71-7f63-4b67-b60e-d432c14c5937	31/09/2022
31/08/2022	MVR2	MVR2	a8d5bb0a-6731-4889-a327-24983b1caa88	31/08/2022
31/09/2022	MVR3	MVR3	39de45fd-f9c0-49cb-bb44-f26315635dab	31/09/2022
31/08/2022	MVR4	MVR4	40abac71-7f63-4b67-b60e-d432c14c5937	31/08/2022

## Rejected Applications

Click the **Rejected** collapsible panel. All the rejected applications with their details are displayed.



Request Date	User ID	Name	IMEI Number	Rejection Date
01/09/2022	MV1	MV1	39de45fd-f9c0-49cb-bb44-f26315635dab	01/09/2022

# User Events

This functionality enables the COSEC system administrator to view the attendance events, access events as well as visitor events (if any) for one or more selected users. Details of entry and exit punches, allowed/denied status of access as well as the source details of a punch (*Device, App, ESS* etc.) can be viewed.

To view the User Events, Select the **Users module > Utilities > User Events**.

The **User Events** page appears as shown below.

The screenshot shows the 'User Events' interface. At the top, there are date pickers for 'Date' set to '21/03/2017'. Below this is a 'Filter By' dropdown menu set to 'Individual'. Underneath, there are input fields for 'User' with 'ID' and 'Name' labels, and a 'View' button. At the bottom, there are three expandable sections: 'Attendance Events (0)', 'Access Control Events (0)', and 'Visitor Events (0)'.

Specify the **date** range for which events are to be viewed.

Select the **user** based on Filter options of *Individual, Device or Department*.

Click the **View** button to get the specified records. Select the **Attendance Events** section to view the attendance events of employees.

The screenshot shows the 'User Events' interface with the 'Attendance Events (7)' section expanded. It displays a table of attendance events for user '2' (Anmol) on 31/07/2019. The table has columns for User ID, User Name, Date-Time, I/O, Access, Source, Status, Location, View Image, and Details. The events are as follows:

User ID	User Name	Date-Time	I/O	Access	Source	Status	Location	View Image	Details
2	Anmol	31/07/2019 16:11:50	Entry	Allowed	App	Unauthorized			
2	Anmol	31/07/2019 16:05:08	Entry	Allowed	ESS	Unauthorized			
2	Anmol	31/07/2019 12:52:06	Entry	Allowed	ESS	Authorized			
2	Anmol	31/07/2019 12:49:43	Entry	Denied	Device	NA			
2	Anmol	31/07/2019 12:48:53	Entry	Denied	Device	NA			

Below the table, it says '1 - 5 of 7 records' and has pagination controls showing '1' and '2'.

The Attendance Events shows the Date and time when the event is generated along with the I/O, Access, Source, Status and Location. It also displays Image and Details of the punch.

The Status of event, i.e. whether it is Authorized or Unauthorized is displayed under Status.

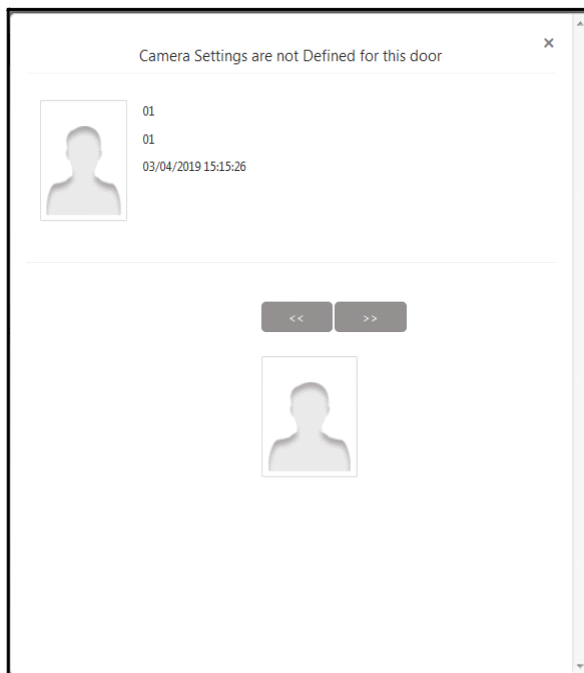
- If the status is Unauthorized, it will display a link which on clicking will be redirected to **Events Authorization** Page as per login user's rights.
- If the status is shown as NA, then Authorized status will be Null and the access will be shown as **Denied**.

Click the  button to view source location details for an entry or exit event.



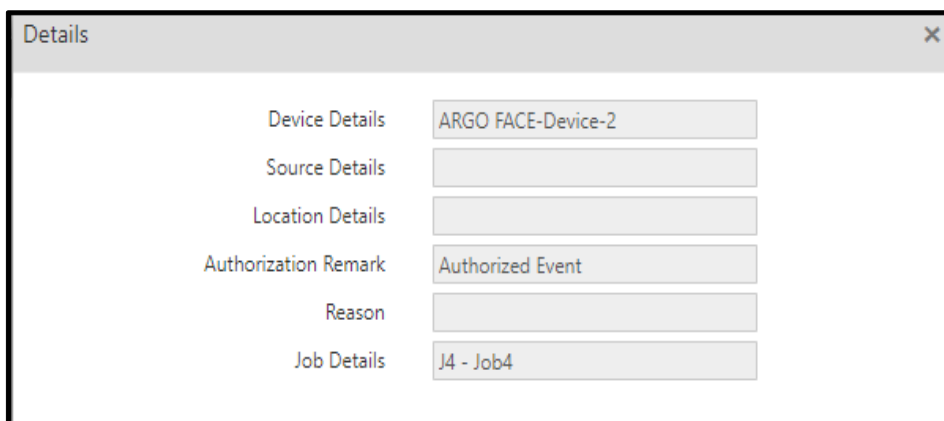
*If Map is not loaded; check the network connection of your PC or check the value of Google API Key from Admin Module > System Configuration > Global Policy > Basic tab.*

Clicking on View Image icon will display the captured image of user as shown below. If no image is captured, then on clicking icon nothing will be displayed.



*If the event is generated by API then there will not be any image popup window on clicking View Image icon.*

On clicking  icon, **Details** regarding user event will be displayed.



# Assigning Alerts To Users

The **Alert Assignment** function enables you to assign multiple alerts for a particular active user in the COSEC system. To know more about Alert messages, refer to [“Configuring Alert Messages”](#).

For example, this functionality can be used to enable a user to receive SMS/Email/WhatsApp/App Notifications whenever the events — leave application approved, missing punches, changes in shifts etc — are generated.

To assign alerts to users, click **Users module > Utilities > Alert Assignment**.

The **Alert Assignment** page appears.

The screenshot shows the 'Alert Assignment' interface. On the left, a form displays details for 'User1': ID, Name, Type (T&A), and Reporting In-Charge (No). Below this is a search bar and a table of alerts. The table has columns for 'Assigned' (checkbox), 'Alert', 'SMS' (checkbox), 'Email' (checkbox), 'App Notification' (checkbox), and 'WhatsApp' (checkbox). The alerts listed are: 1. Monthly Attendance, 2. Leave Approval, 3. Leave Rejection, 4. User Events, and 5. Missing In Punch - Users. On the right, a sidebar shows a list of users: User1 and User2, with User1 selected. At the bottom, there is a pagination bar showing '1 - 5 of 40 records' and a 'Receive Alerts on' dropdown.

To assign the alerts to users,

- Select the desired user from the right grid, for example: User1.
- The user details are displayed on the left. The details displayed are User ID, Name, Type and Reporting In-charge.

If the selected user is a Reporting In-charge of any group, then Yes will be displayed else it displays No.

- A grid with all the alerts and their respective message sending modes is also displayed.

In this grid, for the respective alert, select the check box under Assigned, to assign this alert to the user

For this alert, select the check boxes of the desired mode/s — SMS, Email, WhatsApp— via which you wish to send this alert.

**Alert Assignment**

ID \* User1

Name \* User1

Type T&A

Reporting In-Charge No

Search

Assigned	ID	Alert	SMS	Email	App Notification	WhatsApp
<input checked="" type="checkbox"/>	1	Monthly Attendance	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	2	Leave Approval	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	3	Leave Rejection	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	4	User Events	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	6	Missing In Punch - Users	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

1 - 5 of 40 records

« < 1 2 3 ... 8 > »



*The ESS rights must be allocated to the user to access the COSEC APTA mobile application and receive the alert.*

- For example, the User1 will get:
  - SMS alerts for Monthly Attendance, User Events, Leave Application as well as Missing In Punch - Users event
  - Email alerts for Monthly Attendance, User Events, Missing In Punch - Users events.
  - PUSH Notifications on COSEC APTA Application on the smartphone for Approval/Rejection of the applied leave.
  - WhatsApp alerts for Leave Rejection and User Events.

## Receive Alerts on

Click the **Receive Alerts on** collapsible panel.

**Receive Alerts on**

Personal Cell ☒

Personal Email ☒

Official Cell ☒

Official Email ☒

Select the check boxes of the desired contact options — Personal Cell, Personal Email, Official Cell, Official Email— which you wish to consider for sending the alerts.



*Make sure the contact details are configured for the selected user. For details, refer to [“Configuring Users”](#).*

Click **Save** to assign the selected alerts to this user.



# Blacklist Cards

In COSEC, various credentials such as finger print templates, palm templates as well as access cards can be associated with a user. Each user can be assigned two access cards. In case a user's access card is stolen or lost, the blacklisting feature enables the administrator to add this card to a Watchlist and track its usage.

To blacklist a card, Select the **Users module > Utilities > Blacklist Cards**.

The page will open as shown below.

Blacklist Cards

Select Card\* Card Number

Add To Blacklist

Blacklisted Cards (0)

Search

Card Number	User ID	Blacklist Date-Time
No Data		

Blacklisted Card Events

Click the Select Card picklist. The **Picklist For Card List** pop-up appears.

Picklist For Card List

Total Selected: 0 Records

Search Show Selected

☐ Select All

<input type="checkbox"/>	Card Number ▲	User ID
<input type="checkbox"/>	1002847	64
<input type="checkbox"/>	1002848	1783
<input type="checkbox"/>	1002851	326
<input type="checkbox"/>	1002853	1220
<input type="checkbox"/>	1002856	46
<input type="checkbox"/>	1002858	76
<input type="checkbox"/>	1002861	1416
<input type="checkbox"/>	1002863	1605
<input type="checkbox"/>	1002864	48
<input type="checkbox"/>	1002865	512

1 - 10 of 356 records

<< < 1 2 3 ... 36 > >>

OK Cancel

You can either select multiple cards or can select all the cards at once.

To select particular cards, select the check boxes of the desired cards.

Picklist For Card List

Total Selected: 2 Records

Search  Show Selected

☐ Select All

<input type="checkbox"/>	Card Number ▲	User ID
<input checked="" type="checkbox"/>	1002847	64
<input checked="" type="checkbox"/>	1002848	1783
<input type="checkbox"/>	1002851	326
<input type="checkbox"/>	1002853	1220
<input type="checkbox"/>	1002856	46
<input type="checkbox"/>	1002858	76
<input type="checkbox"/>	1002861	1416
<input type="checkbox"/>	1002863	1605
<input type="checkbox"/>	1002864	48
<input type="checkbox"/>	1002865	512

1 - 10 of 356 records

1 2 3 ... 36

OK Cancel

OR

To select all the cards, select the **Select All** check box. The cards on all the pages will be selected.

Picklist For Card List

Total Selected: 356 Records

Search  Show Selected

☒ Select All

<input checked="" type="checkbox"/>	Card Number ▲	User ID
<input checked="" type="checkbox"/>	1002847	64
<input checked="" type="checkbox"/>	1002848	1783
<input checked="" type="checkbox"/>	1002851	326
<input checked="" type="checkbox"/>	1002853	1220
<input checked="" type="checkbox"/>	1002856	46
<input checked="" type="checkbox"/>	1002858	76
<input checked="" type="checkbox"/>	1002861	1416
<input checked="" type="checkbox"/>	1002863	1605
<input checked="" type="checkbox"/>	1002864	48
<input checked="" type="checkbox"/>	1002865	512

1 - 10 of 356 records

1 2 3 ... 36

OK Cancel

Click **OK**.

The selected cards appear in the grid.


Blacklist Cards

Select Card \*

Search

Card Number ▲	User ID	
56785686	user1	

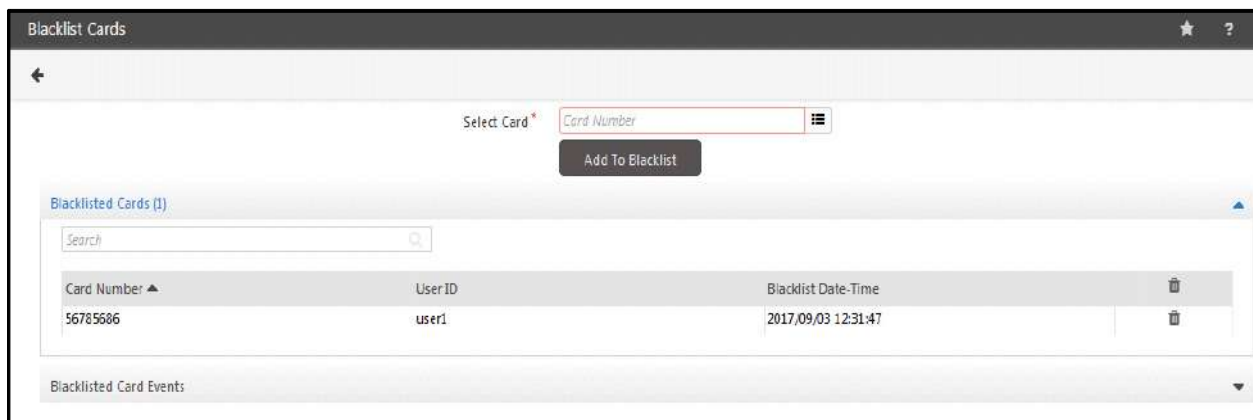
Add To Blacklist

You can also delete the desired cards. To do so, click the **Delete**  icon of the respective card.

Click **Add to Blacklist**.

If you enter a Comma separated CSN, then the system will first encode (convert) the value of this CSN and then add it to the blacklist. To know more about the Comma separated CSN, refer Access Card 1 under *“Credentials”* in Users> User Configuration> Credential.

The blacklisted cards appear under the **Blacklisted Cards** collapsible panel.




Blacklist Cards

Select Card \*

Add To Blacklist

Blacklisted Cards (1)

Search

Card Number ▲	User ID	Blacklist Date-Time	
56785686	user1	2017/09/03 12:31:47	

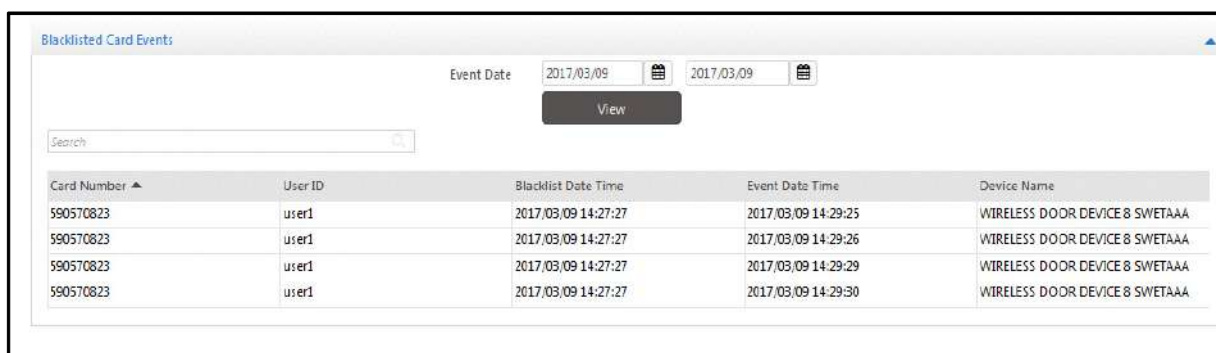
Blacklisted Card Events

Once blacklisted, access cards can be tracked based on card events. To view card events for a selected period, click the **Blacklisted Card Events** section.

**Event date:** Select the From and To date to view the events of cards.

If some user is trying to access the device using blacklisted card, then the event will be displayed in blacklisted card events.

Click the **View** button to view the blacklisted card events for the selected date range as shown below.



Blacklisted Card Events

Event Date 2017/03/09 2017/03/09

View

Search

Card Number ▲	User ID	Blacklist Date Time	Event Date Time	Device Name
590570823	user1	2017/03/09 14:27:27	2017/03/09 14:29:25	WIRELESS DOOR DEVICE 8 SWETAAA
590570823	user1	2017/03/09 14:27:27	2017/03/09 14:29:26	WIRELESS DOOR DEVICE 8 SWETAAA
590570823	user1	2017/03/09 14:27:27	2017/03/09 14:29:29	WIRELESS DOOR DEVICE 8 SWETAAA
590570823	user1	2017/03/09 14:27:27	2017/03/09 14:29:30	WIRELESS DOOR DEVICE 8 SWETAAA

# Blacklisting Users

This page allows blacklisting users, thereby limiting their rights, access, etc., until the user is restored. You can also restore a blacklisted user from the same page. Along with this, you can also view the list of users who have been blacklisted/ restored.

To blacklist a user, Select **Users module > Utilities> Blacklist Users**

The screenshot shows the 'Blacklist Users' interface. At the top, there's a 'Select Users' dropdown set to 'User Wise'. Below it, there are input fields for 'User' (with sub-fields for ID and Name) and 'Reason' (with a '50 Char' limit). An 'Add To Blacklist' button is present. Below the form, there's a section for 'Blacklisted Users (0)' with a search bar and a table. The table has columns: User ID, Name, Blacklist Date-Time, Reason For Blacklisting, and Restore. It currently shows 'No Data'. At the bottom, there's a section for 'Restored Users (1)'.

**User:** You can select the user by filtering the user as **User Wise**, **Group Wise** or **All**. According to the filter selected You can

- select the user randomly from the picklist,
- select the enterprise group and select particular groups or

**Reason:** You can specify the reason behind blacklisting a user.


This screenshot shows the 'Blacklist Users' interface with a user selected. The 'User' field shows ID '1578' and Name 'Supriya'. The 'Reason' field contains the text 'user has mishandled data'. The 'Add To Blacklist' button is visible at the bottom.

Then click on **Add to Blacklist** button. A warning appears.

The screenshot shows a 'Warning' dialog box with the text: 'Would you like to revoke devices (as per device-wise rights)?'. There are two buttons: 'Yes' and 'No'.

If you select **Yes**, then user will become inactive and user's data will be removed from the devices.  
If you select **No**, then user will become inactive but user data will still be there on assigned devices.

The user will get listed in Blacklisted Users section as shown below.

Blacklisted Users (1)				
Search				
User ID	Name	Blacklist Date-Time	Reason For Blacklisting	Restore
1678	Supriya	04/25/2017 12:00:27	user has mishandled data	
Restored Users (1)				

The blacklisted user will be made inactive in the system. The user profile displays the user being Inactive and blacklisted as shown below.

1678  
Supriya  
Inactive (Blacklisted)

Profile

Devices

Credentials

Group

Basic

General

Personal

ID \*

1678

Name \*

Supriya

Active

☐

Optional

Short Name


Supriya

Reference ID

1678

Integration Reference

20 chars

To restore the blacklisted user, click on **Restore**  button to remove the user from the blacklist. The user will be restored to the normal state and shown in the Restored section.

Blacklisted Users (1)				
Search				
User ID	Name	Blacklist Date-Time	Reason For Blacklisting	Restore
1678	Supriya	04/25/2017 12:00:27	user has mishandled data	
Restored Users (1)				

Blacklisted Users (0)				
Restored Users (2)				
Search				
User ID	Name	Restore Date-Time	Reason For Blacklisting	
1678	Supriya	04/25/2017 12:32:51	user has mishandled data	
AP	Aakash	03/29/2017 11:55:25	Caught stealing company property	



The restored user remains inactive. You have to enable the checkbox to make him active user.

# Changing User ID

Certain firms have the practice of assigning temporary User IDs to new employees for a certain period of time before they can be given a permanent ID. COSEC provides the option for HR administrators to assign a temporary User ID to new users. These users can later be migrated to a new COSEC User ID for permanent use. The *Change User ID feature* ensures that none of the existing user data is erased on assigning a new ID.

To change User ID for a user, select the **Users module > Utilities > Change User ID**.

The page will open as shown below.

Change User ID

←

Authorize Process

Username \*

Password \*

Select User

User \*

New User ID \*

Process

Enter the administrator's login credentials to authorize the process.

Select the **user** for whom User ID is to be changed

Enter the **new User ID** to replace the existing User ID.

Click the **Process** button to change User ID.

Change User ID

←

Authorize Process

Username \*

Password \*

Select User

User \*

New User ID \*

Process

# Health

---

The Health tab enables you to view and modify the Health Declaration of users, view the Health Records of users and also Import Health Declaration.

Make sure:

- the **Enable** check box for **Temperature Configuration** and **Symptom Configuration** under [“Temperature and Symptoms Configuration”](#) in [“User Policy”](#) under [“Defining Global Policies”](#) is enabled.
- you assign the **Health Records** and **Self Declaration** page rights to the users under [“ESS Role Rights”](#), to ensure these users can declare their Health Parameters from their ESS login and the same can be viewed/modified from this page.



*If you disable only Temperature Configuration, then you will only be able to view the Symptom details of the users from Health Declaration as well as users will be able to declare only their Symptom status via ESS login and vice versa is applicable.*

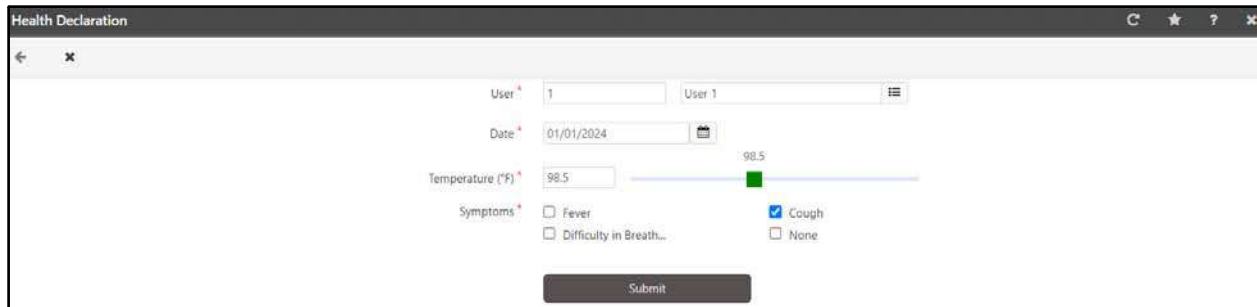
Health tab includes the following:

- [“Health Declaration”](#)
- [“Health Records”](#)
- [“Import Health Declaration”](#)

# Health Declaration

You can view and modify the health parameters of the users declared from their ESS login. To view/modify:

- Click **Users module > Utilities > Health > Health Declaration** and the following screen appears.



- **User:** Click the picklist and select the desired user whose Health Declaration you wish to view.
- **Date:** Select the date from the calendar to view the Health Declaration of the selected user on that date.
- **Temperature (°F):** The Temperature declared by the user appears. Enter the temperature manually or set the temperature using the slider to change it, if required. Drag the slider towards the left to decrease the temperature or drag the slider to the right to increase the temperature.
- **Symptoms:** The check boxes for the symptoms as declared by the user appear as selected. Select or clear the desired check boxes to change the declared symptoms, if required.
- Click **Submit** to submit the Health Declaration of the selected user, if modified. The submitted declaration is displayed on the Health Records page.



The symptoms displayed for selection will appear as configured in [“Temperature and Symptoms Configuration”](#) under [“User Policy”](#) in [“Defining Global Policies”](#).

*If the Health Declaration is submitted/modified more than once on same day, then the system will consider only the last declared health parameters and the same will reflect in the Health Record.*



# Health Records

To view the submitted Health Declarations,

- Click **Users module > Utilities > Health > Health Records** and the following screen appears.

The screenshot shows the 'Health Records' interface. At the top, there are filters for 'User' (set to '1') and 'Date' (range from '27/12/2023' to '03/01/2024'). Below these is a 'View' button. A search bar is also present. The table below has columns: Date, Temperature Source, Temperature (°F), Symptoms Source, Symptoms, and Details. The table is currently empty, displaying 'No Data'.

- User:** Click the picklist and select the desired user whose Health Records you wish to view.
- Date:** Select the From and To date from the calendar to view the Health Records of the selected user.
- Click **View**. A list of all the Health Declarations submitted by the user and modified by the admin during the selected date range appear in a list.

This screenshot shows the 'Health Records' screen with data. The filters remain the same. The table now contains three entries:

Date	Temperature Source	Temperature (°F)	Symptoms Source	Symptoms	Details
01/01/2024	ESS	98.2	ESS	None	[Details Icon]
02/01/2024	SA	98.9	SA	None	[Details Icon]
03/01/2024	ESS	98.4	ESS	None	[Details Icon]

The following details appear — Date, Temperature Source, Temperature (°F), Symptoms Source, Symptoms and Details.

- Click **Details** [Details Icon] corresponding to the desired date to view additional details. The following pop-up appears.

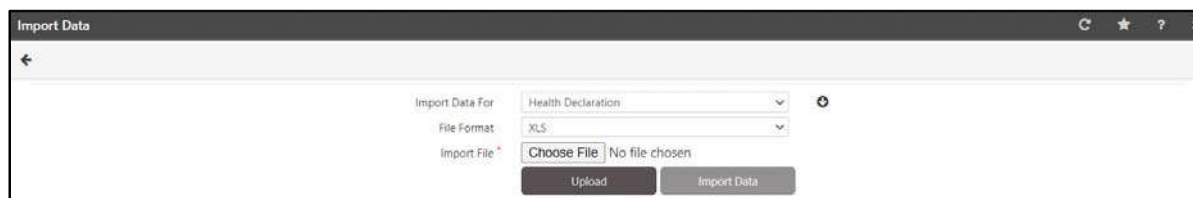
The 'View Health Records' pop-up shows detailed information for a specific record. It includes filters for 'User' (set to '2') and 'Date' (set to '01/01/2024'). The table below shows the details for the record on 02/01/2024 at 16:59:

Date-Time	Temperature Source	Temperature (°F)	Symptoms Source	Symptoms
02/01/2024 16:59	SA	100	SA	Cough


# Import Health Declaration

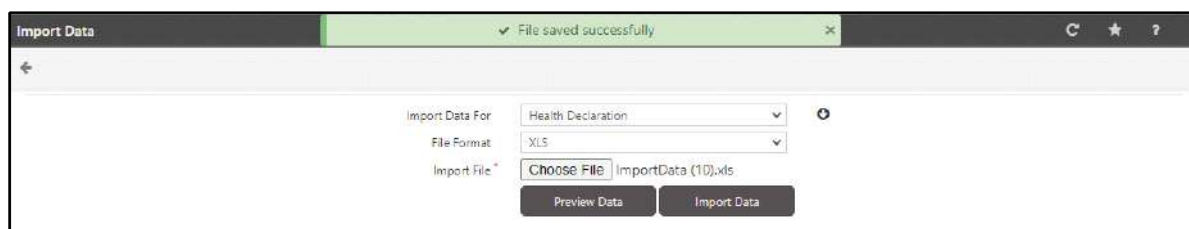
If you wish to import health records of multiple users at one go, you can use the Import option. To import Health Declaration parameters,

- Click **Users module > Utilities > Health > Import Health Declaration** and the following screen appears.

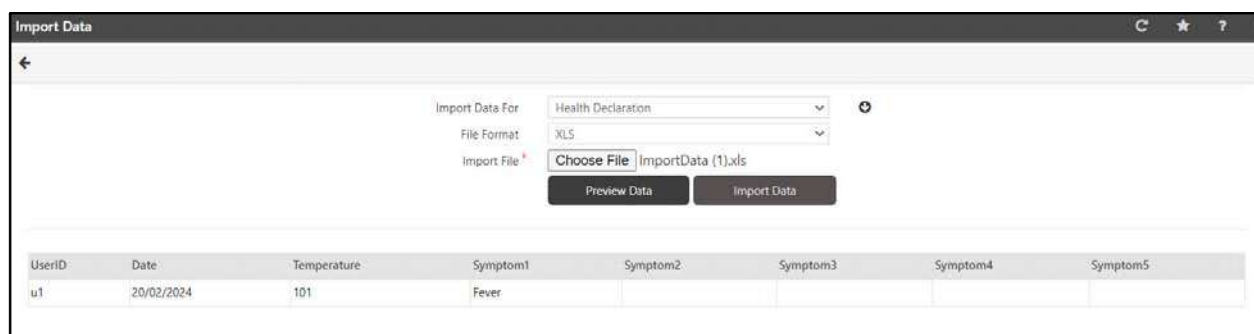


Configure the following parameters:

- Import Data For:** To download sample import file, click **Download Sample Import file** . The downloaded import sheet displays the details required for importing data. Enter the details to be imported in the **Health Declaration** sheet in this sample file and save the file at the desired location.
- File Format:** Select the desired option from the drop-down list options — XLS or CSV.
- Import File:** Browse the saved file path from where you wish to import the file. Click **Choose File**. It displays all folders which are in the drive. Select the desired file from the folder.
- Click **Upload** to upload the data. The file will be saved and you can preview the data.



- Click **Preview Data** to preview the data before importing. The data in the uploaded file is displayed as follows.



UserID	Date	Temperature	Symptom1	Symptom2	Symptom3	Symptom4	Symptom5
u1	20/02/2024	101	Fever				



*Administrator needs to ensure that the user has full rights on the folder containing the Excel or CSV file for the import data operation.*

- Click **Import Data** to import the Health Declaration data. The result of import is shown as Success or Failure along with Result Description.

You can also filter the result records.

- Result:** Select the desired option from the drop-down list — Both, Success or Failure— to view the import result.

UserID	Date	Temperature	Symptom1	Symptom2	Symptom3	Symptom4	Symptom5	Result	Result Description
u1	20/02/2024	101	Fever					Success	User Health Declaration Data Added
u2	20/02/2024	101	Fever					Failure	Enter valid value for UserID
u3								Failure	Enter valid value for UserID
u4								Failure	Enter valid value for UserID
u5								Failure	Enter valid value for UserID
u6								Failure	Enter valid value for UserID
u7								Failure	Enter valid value for UserID
u8								Failure	Enter valid value for UserID
u9								Failure	Enter valid value for UserID
u10								Failure	Enter valid value for UserID

Once the data is imported successfully, data will be added or updated for the specific user in:

- “[Health Declaration](#)”
- “[Health Records](#)”
- Self Declaration and Health Records page in ESS Login.

# Get Location Details

---



To access this page, make sure you enable **Get Location Details** checkbox from *Admin > System Configuration > Global Policy > Basic Policy*.

Admin is unable to understand the exact location of his users/ workers with the help of GPS latitude and longitude coordinates. S/He needs to enter these coordinates on Maps to search the location details manually which is quite time consuming and even tedious to check location details for multiple events.

To overcome this issue, COSEC is providing **Get Location Details** page.

In this page, the system performs **Reverse Geo Coding** process using Google Maps (Internet required).

**Reverse Geo Coding:** It is process of converting a latitude and longitude coordinates into corresponding street address or human readable address.

To perform this process, following things are required:

- Longitude and Latitude Coordinates
- Google API Key

## Longitude and Latitude Coordinates:

There are 2 types of Longitude and Latitude Coordinates — GPS Latitude-Longitude and GSM Latitude-Longitude.

- For events having GPS latitude-longitude, GPS latitude-longitude will be consider for processing.
- For events having GSM latitude-longitude, GSM latitude-longitude will be consider for processing.
- For events having both GPS and GSM latitude-longitude, GPS latitude-longitude will be consider for processing.
- For events having GPS latitude or GPS longitude and GSM latitude-longitude, GPS latitude/longitude will be consider for processing.

## Google API Key

Enable the **Get Location Details** checkbox from *Admin > System Configuration > Global Policy > Basic Policy*.

Then enter the **Google API Key**.

This page then displays the converted location to the Admin.

To access this functionality, select *Users > Utilities > Get Location Details* and the following page appears:

Configure the following parameters:

- **Date:** Select a desired date range to define the period for which location details are to be processed.



*To avoid long processing time, it is recommended to select the date range as per the events available with your system.*

- **Process:** Select a desired option — Pending Events or All Events.

**Pending Events:** Select this option to consider the pending events available with the system which do not have the location address against the coordinates during get location process.

**All Events:** Select this option to consider all the events available with the system during get location process. When you run the get location process for all events, the events which are already processed, will also be reprocessed.

### User Selection

- **Select Users:** Select a desired option — User-wise, Group-wise or All for whom the location is to be processed.

If you select the User-wise, select the desired User from the picklist.

If you select the Group-wise, select the desired Group from the picklist.

Click **Process** to start processing location details for selected users.

Once processed, the details will be displayed in the **Result** table.

The **Result** table displays details like — User ID & Name, Event Date & Time, Coordinates, Location, Status (Success or Failure) and Status Description.

## Result Table:

Get Location Details

Process Completed

Date

19/04/2021

19/05/2021

Process

☐ Pending Events

☒ All Events

User Selection

Select Users

User Wise

User

ID

Name

Search

User ID	Name
1	Richa
2807	Santosh Ramani

Process

Result

Search

User	Event Date & Time	Coordinates	Location	Status	Status Description
2807-Santosh Ramani	18/05/2021 18:02	+22.2562 , +73.1834	Eva Mall Rd Ghanashyam Nager Society	Success	
2807-Santosh Ramani	18/05/2021 18:15	+22.2562 , +73.1834		Failure	Server not reachable
2807-Santosh Ramani	18/05/2021 18:25	+22.2562 , +73.1834		Failure	Server not reachable

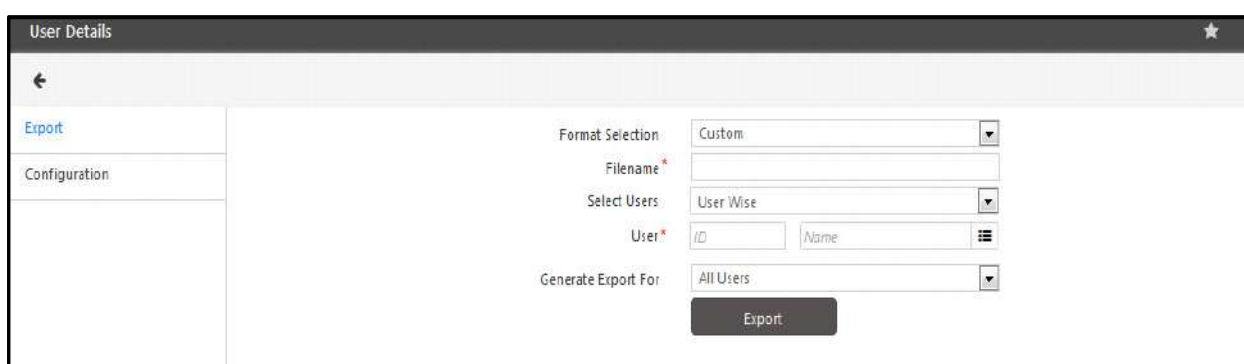
# User Details Export

This functionality enables the administrator to export user profile data such as the user's personal information, contact information, official information etc. in the Excel format. The administrator can either use a system-defined format or customize the export format by selecting the required user fields.

To access this functionality, Select the **Users module > Exports > User Details**

## Export

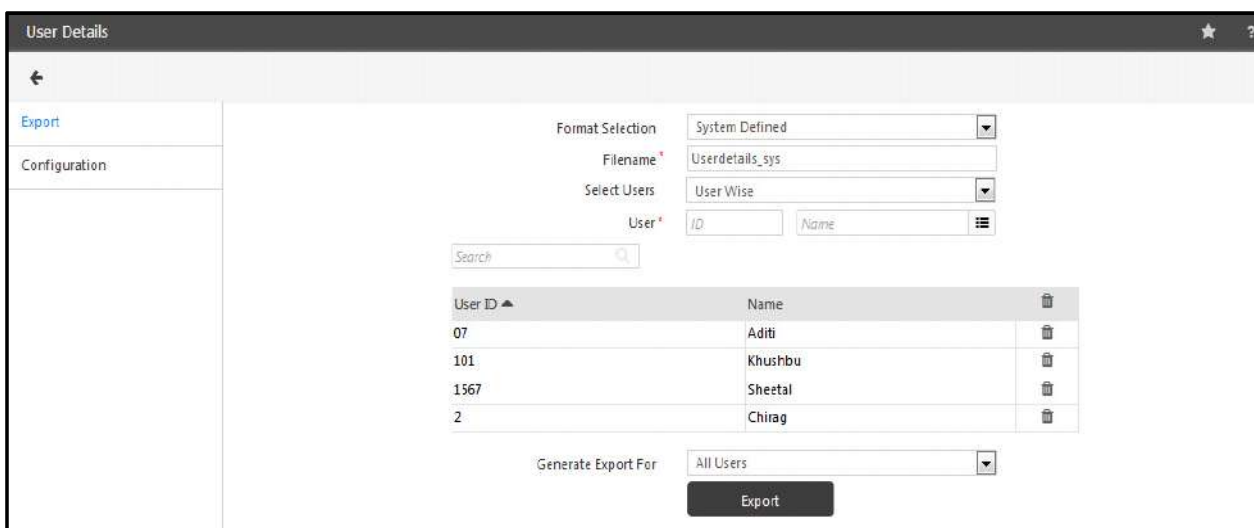
The **User Details** page opens as follows:



The screenshot shows the 'User Details' page with the 'Export' tab selected. The 'Format Selection' dropdown is set to 'Custom'. The 'Filename' field is empty. The 'Select Users' dropdown is set to 'User Wise'. The 'User' field shows 'ID' and 'Name' as selected fields. The 'Generate Export For' dropdown is set to 'All Users'. An 'Export' button is visible at the bottom.

**Format Selection:** In the Export tab, Select the format as **Custom** or **System Defined**. To configure the custom export template, [See "Configuration" on page 688](#).

## System Defined Format



The screenshot shows the 'User Details' page with the 'Export' tab selected. The 'Format Selection' dropdown is set to 'System Defined'. The 'Filename' field is set to 'Userdetails\_sys'. The 'Select Users' dropdown is set to 'User Wise'. The 'User' field shows 'ID' and 'Name' as selected fields. A search bar is visible above a table of users. The table has columns for 'User ID' and 'Name'. The 'Generate Export For' dropdown is set to 'All Users'. An 'Export' button is visible at the bottom.

User ID	Name
07	Aditi
101	Khushbu
1567	Sheetal
2	Chirag

**Filename:** Enter an appropriate Filename for the export file as shown.

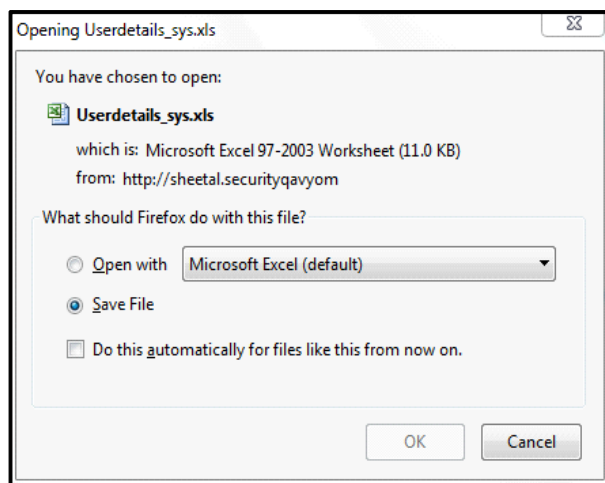
**Select Users:** Select the user based on following filters:

- **User Wise-** To select users randomly using the user picklist.

- **Group Wise** - To select all users associated with a particular enterprise group using the Group Wise dropdown list.
- **ALL** - To select all users in the system.

**Generate Export for:** You can Generate Export For All Users, Active Users or Inactive users.

Click the **Export** button. You can open or save the exported file at a desired location.



The **System defined** exported file for the selected users is shown below. It displays all the details like User ID, User Name, ReferenceID, ShortName, BloodGroup etc.

Userdetails_sys (Compatibility Mode) - Microsoft Excel														
UserID	UserName	ReferenceID	ShortName	Gender	BloodGroup	BirthDate	JoiningDate	LeavingDate	LocAddress1	LocAddress2	LocStreet	LocCity	LocStat	LocCountry
07	Aditi	7	Aditi	Female	AB+	02/09/1993	12/07/2016							
101	Khushbu	101	Khushbu	Female	B+	11/16/1993			D-91, Nandanvan Soc.	Vadsar	GIDC-Makarpura	Varodar	Gujarat	India
1567	Sheetal	1567	Sheetal	Female	A+	11/27/1987	06/17/2013							
2	Chirag	2	Chirag	Male	A+	05/09/1990	04/01/2016							



## Custom Format

**User Details**

Format Selection: Custom

Filename: Userdetails\_custom

Select Users: User Wise

User: ID, Name

Search: [ ]

User ID	Name
07	Aditi
101	Khushbu
1567	Sheetal
2	Chirag

Generate Export For: All Users

Export

The configuration of custom export template is done in Configuration section. See [“Configuration” on page 688](#).

Once the configuration is done, configure the fields in Export section and click on **Export** button.

The custom export file is shown as below. Here the fields will be displayed as per the selection in Configuration section.

User ID	User Name	Birth Date	Joining	Gender	Marital Status	Personal	Personal Mobile	Personal Email	Official Mobile	Official Email
07	Aditi	02/09/1993	12/07/2016	Female		8722212444	9612362302			
101	Khushbu	11/16/1993		Female	Married		9686423523		9787624826	khushbu.g@matrxrd.org
1567	Sheetal	05/12/1987	06/11/2013	Female	Married	9878675678	9682634526	sheetal.raval@gmail.com	8699926301	sheetal.raval@matrxrd.org
2	Chirag	05/09/1990	04/01/2016	Male	UnMarried	9872433367				

## Configuration

The User Details Export can be customized to determine which data appears in the exported file (applicable only for the **Custom** Format Selection).

To do this, click **Users module > Exports > User Details > Configuration** tab.

Click the **Personal Info** collapsible panel.

The screenshot shows the 'User Details' configuration interface. On the left, there is a sidebar with 'Export' and 'Configuration' tabs. The 'Configuration' tab is active. The main area is titled 'Personal Info' and contains a 'Select Fields To Export' section. This section has a search bar, a 'Select All' checkbox, and a table of fields. The 'User ID' field is selected, while 'User Name', 'Reference ID', 'Birth Date', and 'Joining Date' are not. Below the table, it says '1 - 5 of 23 records'. At the bottom, there are expandable sections for 'Contact Info' and 'Official Info', and a 'Save' button.

Fields	
User ID	<input checked="" type="checkbox"/>
User Name	<input type="checkbox"/>
Reference ID	<input type="checkbox"/>
Birth Date	<input type="checkbox"/>
Joining Date	<input type="checkbox"/>

You can select desired fields or can select all the fields at once.

Select the check boxes of the desired fields to be included in the new custom export template.

This screenshot is similar to the previous one, but in the 'Select Fields To Export' table, the 'User Name' and 'Reference ID' fields are now selected (checked), while 'User ID', 'Birth Date', and 'Joining Date' are not. The rest of the interface remains the same.

Fields	
User ID	<input type="checkbox"/>
User Name	<input checked="" type="checkbox"/>
Reference ID	<input checked="" type="checkbox"/>
Birth Date	<input type="checkbox"/>
Joining Date	<input type="checkbox"/>

OR

Select the **Select All** check box to select all the fields on all the pages at once and to include them in the new custom export template.

The screenshot shows a web application window titled "User Details". On the left is a sidebar with "Export" and "Configuration" tabs. The main area displays the "Personal Info" section, which is expanded to show a "Select Fields To Export" table. The table has a search bar, a "Select All" checkbox (checked), and a list of fields with checkboxes. The fields listed are Fields, User ID, User Name, Reference ID, Birth Date, and Joining Date. All checkboxes are checked. Below the table is a pagination control showing "1 - 5 of 23 records" and a set of navigation buttons. At the bottom of the main area are two collapsed sections: "Contact Info" and "Official Info". A "Save" button is located at the bottom center of the window.

Fields	
User ID	<input checked="" type="checkbox"/>
User Name	<input checked="" type="checkbox"/>
Reference ID	<input checked="" type="checkbox"/>
Birth Date	<input checked="" type="checkbox"/>
Joining Date	<input checked="" type="checkbox"/>

Similarly, click the **Contact Info** and **Official Info** collapsible panels and follow the same steps as mentioned in **Personal Info**.

All the selected fields will be included in the new custom export template.

Click **Save** to save the configuration. Now click the **Export** tab to export the user details in excel file.

# User Reports

---

These reports can be obtained using the **Reports** section under the **Users** module. The Reports can be categorized as follows:

“Device-wise Reports”

“User Info”

“Others”

“User Events”

## Device-wise Reports

### Panel Wise Users

This report displays the Panel wise details of the selected users for along with the panel doors on which users are assigned in the system.



The screenshot shows a web application window titled "Panel-Wise Users". Inside, there is a "User Selection" section. It includes a "Select Users" dropdown menu currently set to "User Wise". Below this, there are input fields for "User ID" and "User Name". At the bottom of the selection area, there is a "Generate Report For" dropdown menu set to "All Users". A "Generate Report" button is located at the bottom center of the window.

Configure the following parameters:

#### User Selection

**Select User:** Select the desired option — **User Wise**, **Group Wise**, or **All**.

If you select **User Wise**, click the **User** picklist. The **Picklist for All Users** pop-up appears.

Picklist For All Users

Total Selected: 0 Records

Search  Show Selected

<input type="checkbox"/>	User ID ▲	Name
<input type="checkbox"/>	1	SALIM ANSARI
<input type="checkbox"/>	10	RAJENDRA GOSWAMI
<input type="checkbox"/>	1001	ANKITKUMAR SOHLIYA
<input type="checkbox"/>	1002	MEGHA H SHUKLA
<input type="checkbox"/>	1003	UMESH M TALANPURI
<input type="checkbox"/>	1004	DARSHAK B PATEL
<input type="checkbox"/>	1007	DHAVAL I PATEL
<input type="checkbox"/>	1008	MAYANK K KORAT
<input type="checkbox"/>	1009	DIPTI K RATHWA
<input type="checkbox"/>	1010	RAHUL S SHAH

1 - 10 of 1986 records

1 2 3 ... 199 > >>

OK Cancel

Select the desired check boxes of the desired profiles. Click **OK**.

The selected profiles appear in the grid.

Search

User ID ▲	Name	
1	SALIM ANSARI	
10	RAJENDRA GOSWAMI	
1001	ANKITKUMAR SOHLIYA	
1002	MEGHA H SHUKLA	

Apply






You can also delete the desired profile. To do so, click **Delete** of the respective profile.


If you select **Group Wise** option,

Select the desired enterprise group—Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1/2/3.

For each enterprise group — Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1/2/3, click the corresponding picklist to select the desired option/s.

The selected groups appear in the grid.

Search <input type="text"/>			
ID	Name	Group ▲	
1	MATRIX COMSEC PVT. LTD.	Organization	
2	SAMARTH	Organization	
3	AVDHOOT	Organization	
4	ELSENGARD	Organization	
<div>Apply</div>			








You can also delete particular group. To do so, click **Delete**  of the respective group.

If you select **All**, then all the profiles will be selected.

**Generate Report For:** Select the desired option— **All Users**, **Active Users** or **Inactive Users**.

Click **Generate Report**.

## Sample Report

Panel-Wise Users							
<div>Back</div> <div> <div>1 of 2</div> <div>   100%     </div> </div>							
<div>  <div>MATRIX COMSEC PVT. LTD.</div> <div>Panel-Wise Users</div> <div>Page 1 of 2</div> </div>							
Run By:	System Admin	Date: 06/21/2023 23:00					
User ID	Name	Index	VIP	Access Route	Home Zone	Access Group	Functional Group
Panel-Panel1200							
ARGO_PANEL-Panel1200 Door							
1	SALIM ANSARI	1	No		Zone-1	High Group-1	Staff
1000	MAYANK K KORAT	2	No		Zone-1	High Group-1	Staff
DoorV3-Panel1200 Door							
1	SALIM ANSARI	1	No		Zone-1	High Group-1	Staff
DOORV4_PANEL-Panel1200 Door							
1	SALIM ANSARI	1	No		Zone-1	High Group-1	Staff
PATEV2_PANEL-Panel1200 Door							
1	SALIM ANSARI	1	No		Zone-1	High Group-1	Staff
VEGA_PANEL-Panel1200 Door							
1	SALIM ANSARI	1	No		Zone-1	High Group-1	Staff
dummy-Panel1200 Door							
1	SALIM ANSARI	1	No		Zone-1	High Group-1	Staff
PD_ARGO-Panel1200 Door							
1	SALIM ANSARI	1	No		Zone-1	High Group-1	Staff
1000	MAYANK K KORAT	2	No		Zone-1	High Group-1	Staff

## Door-Wise Users

This report displays the Door wise details of the users assigned to selected direct doors.

Door-Wise Users	
<div>User Selection</div> <div> <div>Select Users</div> <div> <div>User Wise</div> <div>User*</div> <div>ID</div> <div>Name</div> </div> </div> <div> <div>Generate Report For</div> <div>All Users</div> </div> <div>Generate Report</div>	

Configure the following parameters:

## User Selection

**Select User:** Select the desired option — **User Wise**, **Group Wise**, or **All**.

If you select **User Wise**, click the **User** picklist. The **Picklist for All Users** pop-up appears.

Picklist For All Users

Total Selected: 0 Records

Search

Show Selected

<input type="checkbox"/>	User ID	Name
<input type="checkbox"/>	1	SALIM ANSARI
<input type="checkbox"/>	10	RAJENDRA GOSWAMI
<input type="checkbox"/>	1001	ANKITKUMAR SOHLIYA
<input type="checkbox"/>	1002	MEGHA H SHUKLA
<input type="checkbox"/>	1003	UMESH M TALANPURI
<input type="checkbox"/>	1004	DARSHAK B PATEL
<input type="checkbox"/>	1007	DHAVAL I PATEL
<input type="checkbox"/>	1008	MAYANK K KORAT
<input type="checkbox"/>	1009	DIPTI K RATHWA
<input type="checkbox"/>	1010	RAHUL S SHAH

1 - 10 of 1986 records

1 2 3 ... 199 20 21

OK Cancel

Select the desired check boxes of the desired profiles. Click **OK**.

The selected profiles appear in the grid.

Search

User ID	Name	
1	SALIM ANSARI	
10	RAJENDRA GOSWAMI	
1001	ANKITKUMAR SOHLIYA	
1002	MEGHA H SHUKLA	

Apply






You can also delete the desired profile. To do so, click **Delete** of the respective profile.


If you select **Group Wise** option,

Select the desired enterprise group—Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1/2/3.

For each enterprise group — Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1/2/3, click the corresponding picklist to select the desired option/s.

The selected groups appear in the grid.

Search <input type="text"/>			
ID	Name	Group ▲	
1	MATRIX COMSEC PVT. LTD.	Organization	
2	SAMARTH	Organization	
3	AVDHOOT	Organization	
4	ELSENGARD	Organization	
<div>Apply</div>			

You can also delete particular group. To do so, click **Delete**  of the respective group.

If you select **All**, then all the profiles will be selected.

**Generate Report For:** Select the desired option— **All Users**, **Active Users** or **Inactive Users**.

Click **Generate Report**.

Sample Report

Door-Wise Users						
Run by: System Admin						
Sr No	User ID	Name	Status	Department	Designation	Date: 05/17/2023 21:25
RnD2 3rd Floor PVR						
1	1	SALIM ANSARI	Active	MANUFACTURING	Designation 1	
RnD2 4th Floor PVR						
1	1	SALIM ANSARI	Active	MANUFACTURING	Designation 1	
RnD2 GF TRIPOD LEFT IN FOPW						
1	1	SALIM ANSARI	Active	MANUFACTURING	Designation 1	
RnD2 GF TRIPOD LEFT OUT						
1	1	SALIM ANSARI	Active	MANUFACTURING	Designation 1	
RnD2 GF TRIPOD RIGHT IN						
1	1	SALIM ANSARI	Active	MANUFACTURING	Designation 1	
RnD2 GF TRIPOD RIGHT OUT FOPW						
1	1	SALIM ANSARI	Active	MANUFACTURING	Designation 1	

## User-Wise Controllers

This report displays the User wise details of the assigned door controllers.

User Selection	
Select Users:	User Wise
User *	ID Name
Generate Report For:	All Users
Generate Report	

Configure the following parameters:

### User Selection

**Select User:** Select the desired option — **User Wise**, **Group Wise**, or **All**.



If you select **User Wise**, click the **User** picklist. The **Picklist for All Users** pop-up appears.

Picklist For All Users

Total Selected: 0 Records

Search  Show Selected

<input type="checkbox"/>	User ID ▲	Name
<input type="checkbox"/>	1	SALIM ANSARI
<input type="checkbox"/>	10	RAJENDRA GOSWAMI
<input type="checkbox"/>	1001	ANKITKUMAR SOHLIYA
<input type="checkbox"/>	1002	MEGHA H SHUKLA
<input type="checkbox"/>	1003	UMESH M TALANPURI
<input type="checkbox"/>	1004	DARSHAK B PATEL
<input type="checkbox"/>	1007	DHAVAL I PATEL
<input type="checkbox"/>	1008	MAYANK K KORAT
<input type="checkbox"/>	1009	DIPTI K RATHWA
<input type="checkbox"/>	1010	RAHUL S SHAH

1 - 10 of 1986 records

1 2 3 ... 199 > >>

OK Cancel

Select the desired check boxes of the desired profiles. Click **OK**.

The selected profiles appear in the grid.

Search

User ID ▲	Name	
1	SALIM ANSARI	
10	RAJENDRA GOSWAMI	
1001	ANKITKUMAR SOHLIYA	
1002	MEGHA H SHUKLA	

Apply

You can also delete the desired profile. To do so, click **Delete** of the respective profile.

If you select **Group Wise** option,

Select the desired enterprise group—Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1/2/3.

For each enterprise group — Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1/2/3, click the corresponding picklist to select the desired option/s.

The selected groups appear in the grid.

Search <input type="text"/>			
ID	Name	Group	
1	MATRIX COMSEC PVT. LTD.	Organization	
2	SAMARTH	Organization	
3	AVDHOT	Organization	
4	ELSENGARD	Organization	
<div>Apply</div>			

You can also delete particular group. To do so, click **Delete** of the respective group.

If you select **All**, then all the profiles will be selected.

**Generate Report For:** Select the desired option— **All Users**, **Active User** or **Inactive Users**.

Click **Generate Report**.

Sample Report

User-Wise Controllers					
<div>Back</div>					
<div>1 of 1</div>					
<div>MATRIX COMSEC PVT. LTD. User-Wise Controllers</div>					
Run by: System Admin		Date: 05/17/2023		22:08	
Sr No	Panel/Door Name	Index	Status		
1	Panel200-Device-15	1	Active		

## Blocked Users

This report displays the details of the blocked users for the selected devices.

Device Selection	
Select Devices	Device-Wise
Devices *	ID <input type="text"/> Name <input type="text"/>
Generate Report For	All Users
<div>Generate Report</div>	

Configure the following parameters:

### Device Selection

**Select Devices:** Select the desired option— **All** or **Device-Wise**.

If you select **Device-Wise**, click the **Device** picklist. The **Picklist For Devices** pop-up appears.

Picklist For Devices

Total Selected: 0 Records

Search  Show Selected

<input type="checkbox"/>	ID ▲	Name
<input type="checkbox"/>	0 13	Panel
<input type="checkbox"/>	12 63	HO GUARD TOUR FOP
<input type="checkbox"/>	12 66	RnD1 GUARD TOUR FOP
<input type="checkbox"/>	12 69	FACTORY ACCOUNT
<input type="checkbox"/>	12 70	FACTORY SECURITY GUARD -1
<input type="checkbox"/>	12 71	FACTORY SECURITY GUARD -2
<input type="checkbox"/>	12 72	FACTORY STORE
<input type="checkbox"/>	15 77	RnD1 2nd Floor FB FMX IN
<input type="checkbox"/>	15 78	RnD1 2nd Floor FB FMX OUT
<input type="checkbox"/>	15 87	Factory QC FMX

1 - 10 of 71 records

OK Cancel

Select the desired check boxes of the desired devices. Click **OK**.

The selected devices appear in the grid.

Select Devices: Device-Wise

Devices \* ID Name

Search

ID	Name	Group ▲	
0 13	Panel	Devices	
12 63	HO GUARD TOUR FOP	Devices	
12 66	RnD1 GUARD TOUR FOP	Devices	
12 69	FACTORY ACCOUNT	Devices	

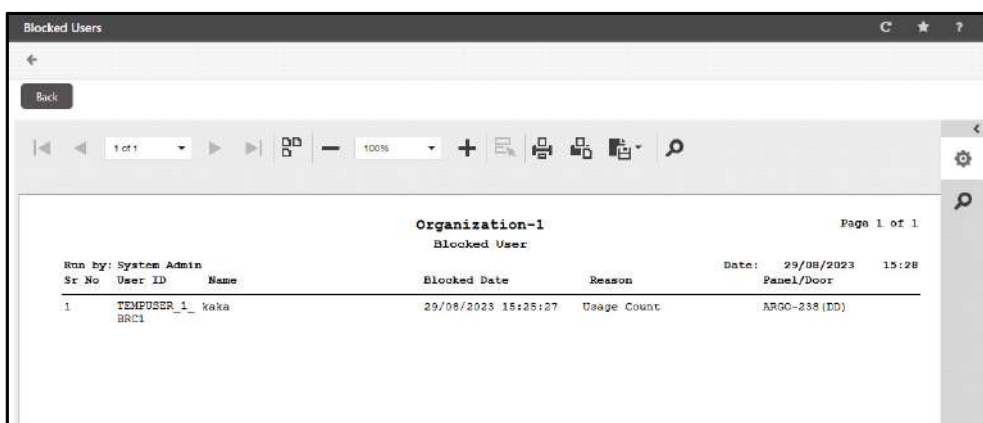
You can also delete the desired devices. To do so, click **Delete** of the respective devices.

If you select **All**, then all the devices will be selected.

**Generate Report For:** Select the desired option— **All Users**, **Active Users** or **Inactive Users**.

Click **Generate Report**

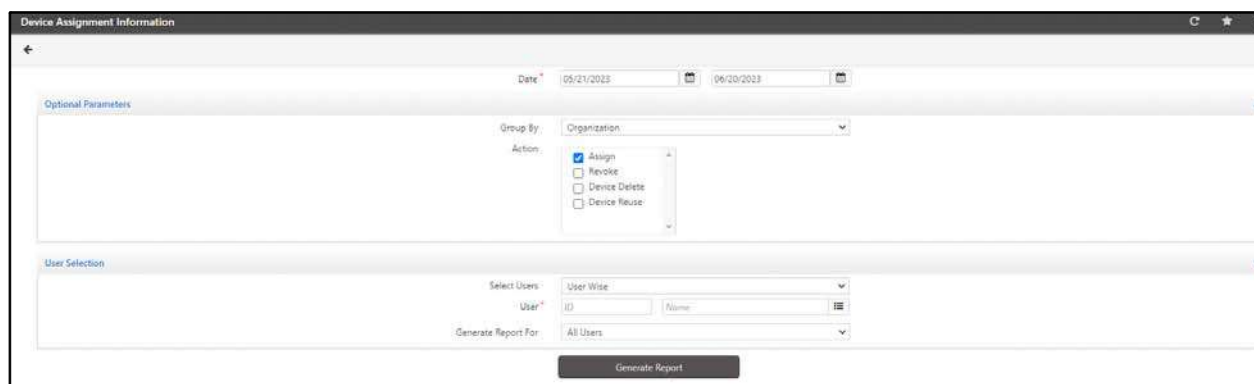
## Sample Report



Organization-1						
Blocked User:						
Run by: System Admin				Date: 29/08/2023 15:28		
Sr No	User ID	Name	Blocked Date	Reason	Panel/Door	
1	TEMPUSER_1_	kaka	29/08/2023 15:25:27	Usage Count	ARGO-258 (TD)	

## Device Assignment Information

This report displays the details of the devices assigned, revoked, deleted or reused for the selected users.



Date: 05/21/2023 To: 06/20/2023

Optional Parameters

Group By: Organization

Action: ☒ Assign ☐ Revoke ☐ Device Delete ☐ Device Reuse

User Selection

Select Users: User Wise

User: ID Name

Generate Report For: All Users

Generate Report

Configure the following parameters:

**Date:** Select the **To** and **From** date for which the report is to be generated.

### Optional Parameters

**Group By:** Select the desired enterprise group from the drop-down list — Organization, Branch, Department, Section, Category, Grade, Designation, Custom Group1/2/3.

**Action:** Select the desired option— **Assign**, **Revoke**, **Device Delete** or **Device Reuse**.

### User Selection

**Select User:** Select the desired option — **User Wise**, **Group Wise**, or **All**.

If you select **User Wise**, click the **User** picklist. The **Picklist for All Users** pop-up appears.

Picklist For All Users

Total Selected: 0 Records

Search  Show Selected

<input type="checkbox"/>	User ID ▲	Name
<input type="checkbox"/>	1	SALIM ANSARI
<input type="checkbox"/>	10	RAJENDRA GOSWAMI
<input type="checkbox"/>	1001	ANKITKUMAR SOHLIYA
<input type="checkbox"/>	1002	MEGHA H SHUKLA
<input type="checkbox"/>	1003	UMESH M TALANPURI
<input type="checkbox"/>	1004	DARSHAK B PATEL
<input type="checkbox"/>	1007	DHAVAL I PATEL
<input type="checkbox"/>	1008	MAYANK K KORAT
<input type="checkbox"/>	1009	DIPTI K RATHWA
<input type="checkbox"/>	1010	RAHUL S SHAH

1 - 10 of 1986 records

OK Cancel

Select the desired check boxes of the desired profiles. Click **OK**.

The selected profiles appear in the grid.

Search

User ID ▲	Name	
1	SALIM ANSARI	
10	RAJENDRA GOSWAMI	
1001	ANKITKUMAR SOHLIYA	
1002	MEGHA H SHUKLA	

Apply






You can also delete the desired profile. To do so, click **Delete** of the respective profile.


If you select **Group Wise** option,

Select the desired enterprise group—Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1/2/3.

For each enterprise group — Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1/2/3, click the corresponding picklist to select the desired option/s.

The selected groups appear in the grid.

Search <input type="text"/>			
ID	Name	Group ▲	
1	MATRIX COMSEC PVT. LTD.	Organization	
2	SAMARTH	Organization	
3	AVDHOT	Organization	
4	ELSENGARD	Organization	
<div>Apply</div>			







You can also delete particular group. To do so, click **Delete**  of the respective group.

If you select **All**, then all the profiles will be selected.

**Generate Report For:** Select the desired option— **All Users**, **Active Users** or **Inactive Users**.

Click **Generate Report**.

Sample Report

Device Assignment Information										
Back										
<div> <div>1 of 34</div> <div>       </div> </div>										
<div> <div>MATRIX COMSEC PVT. LTD.</div> <div>Device Assignment Information Report From 01/01/2000 To 06/21/2023</div> <div>Page 1 of 34</div> </div>										
<div> <div>Run by: System Admin</div> <div>Date: 06/21/2023 23:02</div> </div>										
User ID	User Name	Device ID	Device Name	Device Type	Action	Date	Source	System User ID	System User Name	
MATRIX COMSEC PVT. LTD.										
1	SALIM AHMADI	8	Panel	Panel1200	Assign	05/01/2023 14:17:35	Web	SA	System Admin	
1	SALIM AHMADI	50	RaD1 3rd Floor VEGA	Vega Controller	Assign	06/09/2018 16:51:11	Web	SA	System Admin	
1	SALIM AHMADI	50	RaD1 3rd Floor VEGA	Vega Controller	Revoke	06/09/2018 16:00:56	Web	SA	System Admin	
1	SALIM AHMADI	70	FACTORY SECURITY GROUND -1	Door VS	Assign	12/10/2019 14:48:32	Web	SA	System Admin	
1	SALIM AHMADI	94	RaD1 CF TRIPOD RIGHT IN	PVR Door	Assign	04/30/2018 15:59:32	Web	SA	System Admin	
1	SALIM AHMADI	96	RaD1 SP TRIPOD RIGHT OUT	PVR Door	Assign	04/30/2018 16:11:35	Web	SA	System Admin	
1	SALIM AHMADI	96	RaD1 Canteen2 FMS	Door FMS	Assign	06/04/2018 11:43:13	Web	SA	System Admin	
1	SALIM AHMADI	97	RaD1 4th Floor FB VEGA OUT	Vega Controller	Assign	06/09/2018 13:12:33	Web	SA	System Admin	
1	SALIM AHMADI	98	RaD1 5th Floor FB VEGA IN	Vega Controller	Assign	06/09/2018 13:11:07	Web	SA	System Admin	
1	SALIM AHMADI	99	Blazin Innovetris	Door FMS	Assign	07/28/2018 19:11:26	Web	SA	System Admin	

## User Info

## Access Profile

This report displays the credentials and access control details for the selected users.

Configure the following parameters:

### Optional Parameters

**Group By:** Select the desired enterprise group from the drop-down list — Organization, Branch, Department, Section, Category, Grade, Designation, Custom Group1/2/3.

**Organization Name in Header As Per:** Select the desired option — **User Selection** or **Customized Selection**.

If you select **Customized Selection**, click **Customize Report Header**.

You can select the desired option from the drop-down list or can also add header according to your choice.

### User Selection

**Select User:** Select the desired option — **User Wise**, **Group Wise**, or **All**.


If you select **User Wise**, click the **User** picklist. The **Picklist for All Users** pop-up appears.

User ID	Name
1	SALIM ANSARI
10	RAJENDRA GOSWAMI
1001	ANKITKUMAR SOHLIYA
1002	MEGHA H SHUKLA
1003	UMESH M TALANPURI
1004	DARSHAK B PATEL
1007	DHAVAL I PATEL
1008	MAYANK K KORAT
1009	DIPTI K RATHWA
1010	RAHUL S SHAH

Select the desired check boxes of the desired profiles. Click **OK**.

The selected profiles appear in the grid.

Search		
User ID ▲	Name	
1	SALIM ANSARI	
10	RAJENDRA GOSWAMI	
1001	ANIKTUMAR SOHLIYA	
1002	MEGHA H SHUKLA	
Apply		

You can also delete the desired profiles. To do so, click **Delete**  of the respective user.


If you select **Group Wise** option,

Select the desired enterprise group—Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1/2/3.

For each enterprise group — Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1/2/3, click the corresponding picklist to select the desired option/s.

The selected groups appear in the grid.

Search			
ID	Name	Group ▲	
1	MATRIX COMSEC PVT. LTD.	Organization	
2	SAMARTH	Organization	
3	AVDHOOT	Organization	
4	ELSENGARD	Organization	
Apply			

You can also delete particular group. To do so, click **Delete**  of the respective group.

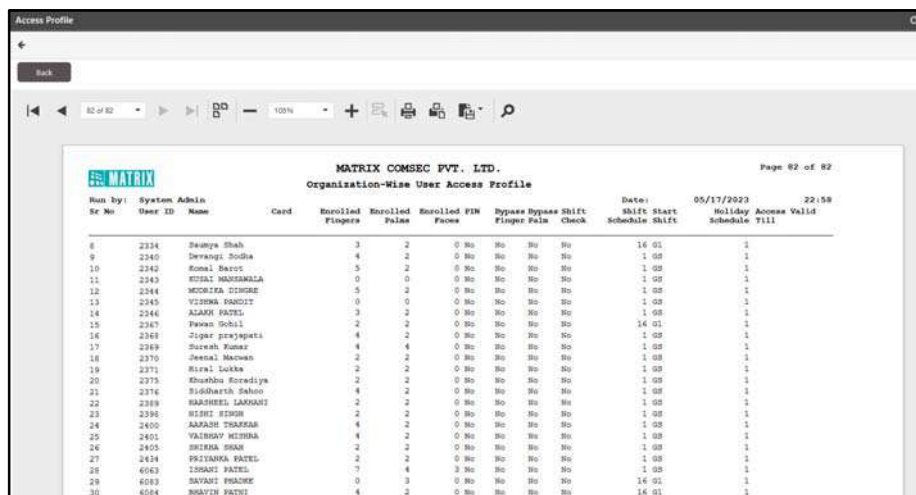
If you select **All**, then all the profiles will be selected.

**Generate Report For:** Select the desired option— **All Users**, **Active Users** or **Inactive Users**.

Click **Generate Report**.



## Sample Report



Access Profile

Back

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100%

MATRIX COMSEC PVT. LTD.

Organization-Wise User Access Profile

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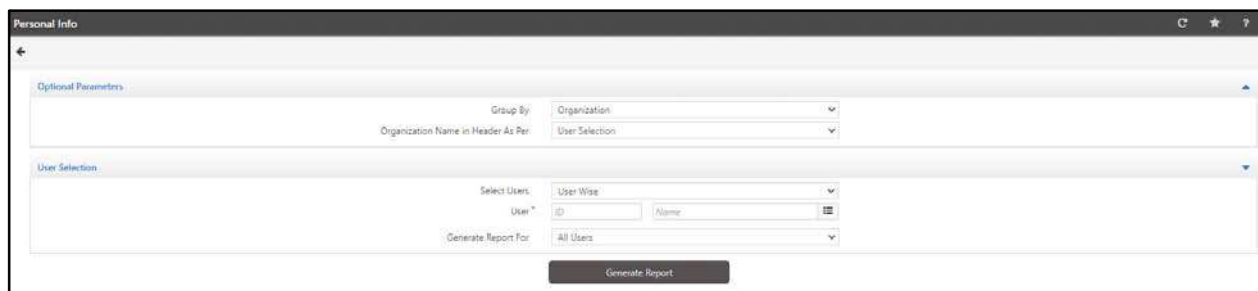
Run by: System Admin

Date: 05/17/2023 22:58

Sr No	User ID	Name	Card	Enrolled Fingers	Enrolled Palm	Enrolled PIN	Bypass Fingerprint	Bypass Palm	Shift Check	Shift Schedule	Shift Start	Holiday Access Valid	Access Valid Till
8	2324	Swamy Shah		3	2	0	No	No	No		14 01	1	
9	2340	Devangi Sodha		4	2	0	No	No	No		1 08	1	
10	2342	Ronal Baret		5	2	0	No	No	No		1 08	1	
11	2343	RUSAL NARAYANA		0	0	0	No	No	No		1 08	1	
12	2344	MEENKA SINGH		5	2	0	No	No	No		1 08	1	
13	2345	VISHVA SINGH		0	0	0	No	No	No		1 08	1	
14	2346	ALAKA PATEL		3	2	0	No	No	No		1 08	1	
15	2347	Pawan Gehil		2	2	0	No	No	No		14 01	1	
16	2348	Zigar prajapati		4	2	0	No	No	No		1 08	1	
17	2349	Suresh Kumar		4	4	0	No	No	No		1 08	1	
18	2370	Jasna Macwan		2	2	0	No	No	No		1 08	1	
19	2371	Rishi Lakka		2	2	0	No	No	No		1 08	1	
20	2375	Kushbu Kordiya		2	2	0	No	No	No		1 08	1	
21	2376	Riddharth Sahni		4	2	0	No	No	No		1 08	1	
22	2389	RAKHEEL LAMANI		2	2	0	No	No	No		1 08	1	
23	2394	RISHI SINGH		2	2	0	No	No	No		1 08	1	
24	2400	ANAND THAKUR		4	2	0	No	No	No		1 08	1	
25	2401	VAIBHAV MEHRA		4	2	0	No	No	No		1 08	1	
26	2405	DEEPA SHAR		2	2	0	No	No	No		1 08	1	
27	2424	PRITIKA PATEL		2	2	0	No	No	No		1 08	1	
28	6063	TSRANI PATEL		7	4	3	No	No	No		1 08	1	
29	6063	SAVANI PRADHE		0	3	0	No	No	No		14 01	1	
30	6064	SHAFIN PATEL		4	2	0	No	No	No		14 01	1	

## Personal Info

This report displays the details of personal information for the selected users.



Personal Info

Optional Parameters

Group By: Organization

Organization Name in Header As Per: User Selection

User Selection

Select Users: User Wise

User: ID Name

Generate Report For: All Users

Generate Report

Configure the following parameters:

### Optional Parameters

**Group By:** Select the desired enterprise group from the drop-down list — Organization, Branch, Department, Section, Category, Grade, Designation, Custom Group 1/2/3.

**Organization Name in Header As Per:** Select the desired option — **User Selection** or **Customized Selection**.

If you select **Customized Selection**, click **Customize Report Header**.

You can select the desired option from the drop-down list or can also add header according to your choice.

### User Selection

**Select User:** Select the desired option — **User Wise**, **Group Wise**, or **All**.

If you select **User Wise**, click the **User** picklist. The **Picklist for All Users** pop-up appears.

Picklist For All Users

Total Selected: 0 Records

Search  Show Selected

<input type="checkbox"/>	User ID ▲	Name
<input type="checkbox"/>	1	SALIM ANSARI
<input type="checkbox"/>	10	RAJENDRA GOSWAMI
<input type="checkbox"/>	1001	ANKITKUMAR SOHLIYA
<input type="checkbox"/>	1002	MEGHA H SHUKLA
<input type="checkbox"/>	1003	UMESH M TALANPURI
<input type="checkbox"/>	1004	DARSHAK B PATEL
<input type="checkbox"/>	1007	DHAWALI PATEL
<input type="checkbox"/>	1008	MAYANK K KORAT
<input type="checkbox"/>	1009	DIPTI K RATHWA
<input type="checkbox"/>	1010	RAHUL S SHAH

1 - 10 of 1986 records

1 2 3 ... 199

OK Cancel

Select the desired check boxes of the desired profiles. Click **OK**.

The selected profiles appears in the grid.

Search

User ID ▲	Name	
1	SALIM ANSARI	
10	RAJENDRA GOSWAMI	
1001	ANKITKUMAR SOHLIYA	
1002	MEGHA H SHUKLA	

Apply





You can also delete the desired profiles. To do so, click **Delete** of the respective profile.


If you select **Group Wise** option,

Select the desired enterprise group—Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1/2/3.

For each enterprise group — Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1/2/3, click the corresponding picklist to select the desired option/s.

The selected groups appear in the grid.

Search <input type="text"/>			
ID	Name	Group ▲	
1	MATRIX COMSEC PVT. LTD.	Organization	
2	SAMARTH	Organization	
3	AVDHOOT	Organization	
4	ELSENGARD	Organization	
<div>Apply</div>			

You can also delete particular group. To do so, click **Delete**  of the respective group.

If you select **All**, then all the profiles will be selected.

**Generate Report For:** Select the desired option— **All Users**, **Active Users** or **Inactive Users**.

Click **Generate Report**.



*The Sample Report for Personal Info is not displayed due to security reasons.*

## Contact Info

This report displays the details of contact information for the selected users.

Contact Info

Optional Parameters

Group By

Organization

Organization Name in Header As Per

User Selection

User Selection

Select Users

User Wise

User\*

ID

Name

Generate Report For

All Users

Generate Report

Configure the following parameters:

### Optional Parameters

**Group By:** Select the desired enterprise group from the drop-down list — Organization, Branch, Department, Section, Category, Grade, Designation, Custom Group1/2/3.

**Organization Name in Header As Per:** Select the desired option — **User Selection** or **Customized Selection**.

If you select **Customized Selection**, click **Customize Report Header**.

You can select the desired option from the drop-down list or can also add header according to your choice.

### User Selection

**Select User:** Select the desired option — **User Wise**, **Group Wise**, or **All**.

If you select **User Wise**, click the **User** picklist. The **Picklist for All Users** pop-up appears.

Picklist For All Users

Total Selected: 0 Records

Search  Show Selected

<input type="checkbox"/>	User ID ▲	Name
<input type="checkbox"/>	1	SALIM ANSARI
<input type="checkbox"/>	10	RAJENDRA GOSWAMI
<input type="checkbox"/>	1001	ANKITKUMAR SOHLIYA
<input type="checkbox"/>	1002	MEGHA H SHUKLA
<input type="checkbox"/>	1003	UMESH M TALANPURI
<input type="checkbox"/>	1004	DARSHAK B PATEL
<input type="checkbox"/>	1007	DHAWAL I PATEL
<input type="checkbox"/>	1008	MAYANK K KORAT
<input type="checkbox"/>	1009	DIPTI K RATHWA
<input type="checkbox"/>	1010	RAHUL S SHAH

1 - 10 of 1986 records

1 2 3 ... 199 > >>

OK Cancel

Select the desired check boxes of the desired profiles. Click **OK**.

The selected profiles appear in the grid.

Search

User ID ▲	Name	
1	SALIM ANSARI	
10	RAJENDRA GOSWAMI	
1001	ANKITKUMAR SOHLIYA	
1002	MEGHA H SHUKLA	

Apply





You can also delete the desired profile. To do so, click **Delete** of the respective profile.


If you select **Group Wise** option,

Select the desired enterprise group—Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1/2/3.

For each enterprise group — Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1/2/3, click the corresponding picklist to select the desired option/s.

The selected groups appear in the grid.

<input type="text" value="Search"/>			
ID	Name	Group ▲	
1	MATRIX COMSEC PVT. LTD.	Organization	
2	SAMARTH	Organization	
3	AVDHOOT	Organization	
4	ELSENGARD	Organization	
<div>Apply</div>			

You can also delete particular group. To do so, click **Delete**  of the respective group.

If you select **All**, then all the profiles will be selected.

**Generate Report For:** Select the desired option— **All Users**, **Active Users** or **Inactive Users**.

Click **Generate Report**.



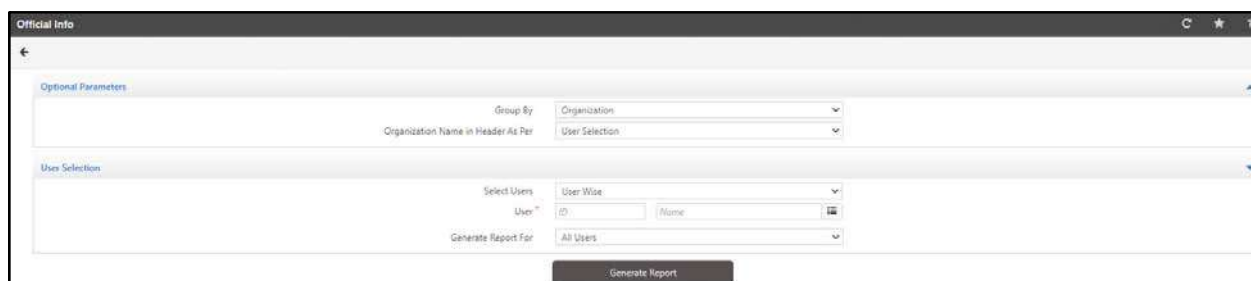
*The Sample Report for Contact Info is not displayed due to security reasons.*

## Official Info

This report displays the details of official information for the selected users.



*The details of Reporting Group, OFF Day1 and OFF Day2 will not be available in Basic License.*



Configure the following parameters:

### Optional Parameters

**Group By:** Select the desired enterprise group from the drop-down list — Organization, Branch, Department, Section, Category, Grade, Designation, Custom Group1/2/3.

**Organization Name in Header As Per:** Select the desired option — **User Selection** or **Customized Selection**.

If you select **Customized Selection**, click **Customize Report Header**.

You can select the desired option from the drop-down list or can also add header according to your choice.

## User Selection

**Select User:** Select the desired option — **User Wise**, **Group Wise**, or **All**.

If you select **User Wise**, click the **User** picklist. The **Picklist for All Users** pop-up appears.

Picklist For All Users

Total Selected: 0 Records

Search  Show Selected

<input type="checkbox"/>	User ID ▲	Name
<input checked="" type="checkbox"/>	1	SALIM ANSARI
<input checked="" type="checkbox"/>	10	RAJENDRA GOSWAMI
<input checked="" type="checkbox"/>	1001	ANKITKUMAR SOHLIYA
<input checked="" type="checkbox"/>	1002	MEGHA H SHUKLA
<input type="checkbox"/>	1003	UMESH M TALANPURI
<input type="checkbox"/>	1004	DARSHAK B PATEL
<input type="checkbox"/>	1007	DHAVAL I PATEL
<input type="checkbox"/>	1008	MAYANK K KORAT
<input type="checkbox"/>	1009	DIPTI K RATHWA
<input type="checkbox"/>	1010	RAHUL S SHAH

1 - 10 of 1986 records

1 2 3 ... 199

OK Cancel

Select the desired check boxes of the desired profiles. Click **OK**.

The selected profiles appear in the grid.

Search

User ID ▲	Name	
1	SALIM ANSARI	
10	RAJENDRA GOSWAMI	
1001	ANKITKUMAR SOHLIYA	
1002	MEGHA H SHUKLA	

Apply






You can also delete the desired profile. To do so, click **Delete** of the respective profile.


If you select **Group Wise** option,

Select the desired enterprise group—Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1/2/3.

For each enterprise group — Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1/2/3, click the corresponding picklist to select the desired option/s.

The selected groups appear in the grid.

Search <input type="text"/>			
ID	Name	Group ▲	
1	MATRIX COMSEC PVT. LTD.	Organization	
2	SAMARTH	Organization	
3	AVDHOT	Organization	
4	ELSENGARD	Organization	
<div>Apply</div>			

You can also delete particular group. To do so, click **Delete**  of the respective group.

If you select **All**, then all the profiles will be selected.

**Generate Report For:** Select the desired option— **All Users**, **Active Users** or **Inactive Users**.

Click **Generate Report**.

Sample Report

Official Info

Back

1 of 1

100%

MATRIX

MATRIX COMSEC PVT. LTD.

Page 1 of 1

Organization-Wise User Official Info

Run By: System Admin

User ID

Date: 06/21/2023 18:51

Sr No

Joining Dt

Name

Reporting Group

DPT

DSG

CTG

Off Day 1

Qualification

Reference

Code

Off Day 2

Experience

MATRIX

1

1

11/01/1992

SALIM ANSARI

Manu

Factor

DSG1

CTG1

Sunday

1

Meheesh P \_ Jayesh F

CG1

CG2

CG3

None

2

10

10/01/1992

RAJENDRA GOSWAMI

Manu

Factor

DSG1

CTG1

Sunday

10

Fareesh Chauhan

CG1

CG2

INA

None

3

1001

05/25/2011

ANKITKUMAR SOHLYA

RNDSW

DSG1

CTG1

Sunday

BEEC

1001

JIGAR BARIA

RNDI

SEC1

GRD1

None

FRESHER

CG1

CG2

INA

4

1002

05/30/2011

MEGHA H SHUKLA

RNDSW

DSG1

CTG1

Sunday

mca

1002

Bitan J. - Santosh P.

RNDI

SEC1

GRD1

None

CG1

CG2

INA

5

1003

05/30/2011

UMESH M TALANPURI

ACTFIN

DSG1

CTG1

Sunday

B. Com.

1003

PRADIPTO S GANESH J

HO

SEC1

GRD1

None

17

CG1

CG2

INA

## Retirement Info

This report displays the details of selected users who are going to retire in the selected time period and specified retirement age.

The screenshot shows a web-based configuration window titled "Retirement Info". It contains several input fields and dropdown menus for setting report parameters. At the top, there are date pickers for "Date" (set to 06/21/2023) and "Retirement Age" (set to 06/21/2023). Below these is a section titled "Optional Parameters" which includes a "Group By" dropdown (set to "Organization") and an "Organization Name in Header As Per" dropdown (set to "User Selection"). Further down is a "User Selection" section with "Select Users" (set to "Group Wise"), "Select Group" (set to "Organization"), and "Organization" (with "ID" and "Name" sub-fields). At the bottom, there is a "Generate Report For" dropdown (set to "All Users") and a "Generate Report" button.

Configure the following parameters:

### Optional Parameters

**Group By:** Select the desired enterprise group from the drop-down list — Organization, Branch, Department, Section, Category, Grade, Designation, Custom Group1/2/3.

**Organization Name in Header As Per:** Select the desired option — **User Selection** or **Customized Selection**.

If you select **Customized Selection**, click **Customize Report Header**.

You can select the desired option from the drop-down list or can also add header according to your choice.

### User Selection

**Select User:** Select the desired option — **User Wise**, **Group Wise**, or **All**.



If you select **User Wise**, click the **User** picklist. The **Picklist for All Users** pop-up appears.

Picklist For All Users

Total Selected: 0 Records

Search  Show Selected

<input type="checkbox"/>	User ID ▲	Name
<input type="checkbox"/>	1	SALIM ANSARI
<input type="checkbox"/>	10	RAJENDRA GOSWAMI
<input type="checkbox"/>	1001	ANKITKUMAR SOHLIYA
<input type="checkbox"/>	1002	MEGHA H SHUKLA
<input type="checkbox"/>	1003	UMESH M TALANPURI
<input type="checkbox"/>	1004	DARSHAK B PATEL
<input type="checkbox"/>	1007	DHAVAL I PATEL
<input type="checkbox"/>	1008	MAYANK K KORAT
<input type="checkbox"/>	1009	DIPTI K RATHWA
<input type="checkbox"/>	1010	RAHUL S SHAH

1 - 10 of 1986 records

1 2 3 ... 199 200

OK Cancel

Select the desired check boxes of the desired profiles. Click **OK**.

The selected profiles appear in the grid.

Search

User ID ▲	Name	
1	SALIM ANSARI	
10	RAJENDRA GOSWAMI	
1001	ANKITKUMAR SOHLIYA	
1002	MEGHA H SHUKLA	

Apply




You can also delete the desired profile. To do so, click **Delete** of the respective profile.


If you select **Group Wise** option,

Select the desired enterprise group—Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1/2/3.

For each enterprise group — Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1/2/3, click the corresponding picklist to select the desired option/s.

The selected groups appear in the grid.

Search <input type="text"/>			
ID	Name	Group ▲	
1	MATRIX COMSEC PVT. LTD.	Organization	
2	SAMARTH	Organization	
3	AVDHOOT	Organization	
4	ELSENGARD	Organization	

You can also delete particular group. To do so, click **Delete**  of the respective group.

If you select **All**, then all the profiles will be selected.

**Generate Report For:** Select the desired option— **All Users**, **Active Users** or **Inactive Users**.

Click **Generate Report**.

Sample Report

Retirement Info									
Back									
1 of 1									
Organization-1 Retirement Info									
Run by:	System Admin			Date:		29/08/2023	15:41		
Sr No	User ID	Name	Designation	Grade	Birth Dt	Join Dt	Retire Dt		
Organization-1	neha	neha	Designation-1	Grade-1	01/01/1962		01/01/2023		

## Enrollment Info

This report displays the enrollment details of the selected credentials for the selected users.

Enrollment Info	
Optional Parameters	
Credentials	<input checked="" type="checkbox"/> Card1 <input type="checkbox"/> Card2 <input type="checkbox"/> RIN <input type="checkbox"/> ID Template <input type="checkbox"/> Suprema <input type="checkbox"/> Proprietary
Not Enrolled Credentials	<input checked="" type="checkbox"/>
Organization Name in Header As Per	User Selection
User Selection	
Select Users	User Wise
User *	<input type="text"/> <input type="text"/>
<input type="button" value="Generate Report"/>	

Configure the following parameters:

### Optional Parameters

**Credential:** Select check boxes of the desired credential option — Card 1/2, PIN, FP Template (Supreme Proprietary), FP Template (Supreme ISO), FP Template (Lumidigm ISO), FP Template (Lumidigm Proprietary), Palm Template, Face Template.

**Not Enrolled Credentials:** Select this check box if you wish to view the visitors whose credentials have not been enrolled.

**Organization Name in Header As Per:** Select the desired option — **User Selection** or **Customized Selection**.

If you select **Customized Selection**, click **Customize Report Header**.

You can select the desired option from the drop-down list or can also add header according to your choice.

## User Selection

**Select User:** Select the desired option — **User Wise**, **Group Wise**, or **All**.

If you select **User Wise**, click the **User** picklist. The **Picklist for All Users** pop-up appears.

Picklist For All Users

Total Selected: 0 Records

Search  Show Selected

<input type="checkbox"/>	User ID ▲	Name
<input type="checkbox"/>	1	SALIM ANSARI
<input type="checkbox"/>	10	RAJENDRA GOSWAMI
<input type="checkbox"/>	1001	ANKITKUMAR SOHLIYA
<input type="checkbox"/>	1002	MEGHA H SHUKLA
<input type="checkbox"/>	1003	UMESH M TALANPURI
<input type="checkbox"/>	1004	DARSHAK B PATEL
<input type="checkbox"/>	1007	DHAVAL I PATEL
<input type="checkbox"/>	1008	MAYANK K KORAT
<input type="checkbox"/>	1009	DIPTI K RATHWA
<input type="checkbox"/>	1010	RAHUL S SHAH

1 - 10 of 1986 records

1 2 3 ... 199 > >>

OK Cancel


Select the desired check boxes of the desired profiles. Click **OK**.

The selected profiles appear in the grid.

Search

User ID ▲	Name	
1	SALIM ANSARI	
10	RAJENDRA GOSWAMI	
1001	ANKITKUMAR SOHLIYA	
1002	MEGHA H SHUKLA	

Apply



You can also delete the desired profile. To do so, click **Delete**  of the respective profile.

If you select **Group Wise** option,


Select the desired enterprise group—Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1/2/3.

For each enterprise group — Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1/2/3, click the corresponding picklist to select the desired option/s.

The selected groups appear in the grid.

ID	Name	Group 	
1	MATRIX COMSEC PVT. LTD.	Organization	
2	SAMARTH	Organization	
3	AVDHOOT	Organization	
4	ELSENGARD	Organization	

**Apply**

You can also delete particular group. To do so, click **Delete**  of the respective group.

If you select **All**, then all the profiles will be selected.

Click **Generate Report**.

Sample Report

Enrollment Info

Back

1 of 1

100%

MATRIX

MATRIX COMSEC PVT. LTD.

Enrollment Info

Date: 06/21/2023 20:39

Page 1 of 1

Run by: System Admin

User ID	Name	Card1	Card2	PIN	Enrolled Fingers				Enrolled Fails	Enrolled Faces	Enrollment Date-Time
					Suprema Proprietary	Suprema ISO	Lumidigm ISO	Lumidigm Proprietary			
1	SALIM AMBAST	Not Enrolled	Not Enrolled	Not Enrolled	5	0	2	0	2	0	03/05/2016 15:20:13
10	RAJENDRA GOSWAMI	Not Enrolled	Not Enrolled	Not Enrolled	2	0	2	0	2	0	
1001	ANKITKUMAR SOBLYIA	Not Enrolled	Not Enrolled	Not Enrolled	2	0	0	0	1	0	
1002	NEERA K SHUKLA	Not Enrolled	Not Enrolled	Not Enrolled	4	0	0	0	6	0	
1003	OMESH M TALAWPURI	Not Enrolled	Not Enrolled	Not Enrolled	4	0	4	0	4	9	
1004	DARSHAK B PATEL	Not Enrolled	Not Enrolled	Not Enrolled	2	0	0	0	2	0	
1007	CHAYAL I PATEL	Not Enrolled	Not Enrolled	Not Enrolled	2	0	0	0	1	0	
1008	MAHANK K KURAT	Not Enrolled	Not Enrolled	Not Enrolled	2	0	6	0	4	30	
1009	DIPTI K RAJISNA	Not Enrolled	Not Enrolled	Not Enrolled	2	0	1	0	6	9	
1010	RANUL S SHAR	Not Enrolled	Not Enrolled	Not Enrolled	2	0	0	0	2	0	

## Change Group

This report displays the details of the selected users whose reporting groups have been changed within the selected date range.

The screenshot shows the 'Change Group' report interface. At the top, there's a header bar with a back arrow, a search icon, and a star icon. Below the header, there's a 'Date' section with two date pickers set to '06/21/2023'. Underneath, there's a 'User Selection' section with a 'Select Users' dropdown menu set to 'User Wise'. Below this, there's a 'User' section with two input fields: 'ID' and 'Name'. At the bottom, there's a 'Generate Report For' dropdown menu set to 'All Users' and a 'Generate Report' button.

Configure the following parameters:

**Date:** Select the **To** and **From** date for which the report is to be generated.

### User Selection

**Select User:** Select the desired option — **User Wise**, **Group Wise**, or **All**.

If you select **User Wise**, click the **User** picklist. The **Picklist for All Users** pop-up appears.

The screenshot shows the 'Picklist For All Users' pop-up window. At the top, there's a green header bar with the text 'Total Selected: 0 Records'. Below the header, there's a search bar with the placeholder text 'Search' and a 'Show Selected' button. Underneath, there's a table with two columns: 'User ID' and 'Name'. The table contains 10 rows of data, each with a checkbox in the 'User ID' column. The data is as follows:

User ID	Name
<input type="checkbox"/> 1	SALIM ANSARI
<input type="checkbox"/> 10	RAJENDRA GOSWAMI
<input type="checkbox"/> 1001	ANKITKUMAR SOHLIYA
<input type="checkbox"/> 1002	MEGHA H SHUKLA
<input type="checkbox"/> 1003	UMESH M TALANPURI
<input type="checkbox"/> 1004	DARSHAK B PATEL
<input type="checkbox"/> 1007	DHAVAL I PATEL
<input type="checkbox"/> 1008	MAYANK K KORAT
<input type="checkbox"/> 1009	DIPTI K RATHWA
<input type="checkbox"/> 1010	RAHUL S SHAH


Below the table, there's a pagination bar showing '1 - 10 of 1986 records' and a set of navigation buttons: '<', '<', '1', '2', '3', '...', '199', '>', '>'.

At the bottom, there are two buttons: 'OK' and 'Cancel'.

Select the desired check boxes of the desired profiles. Click **OK**.

The selected profiles appear in the grid.

Search		
User ID ▲	Name	
1	SALIM ANSARI	
10	RAJENDRA GOSWAMI	
1001	ANKITKUMAR SOHLIYA	
1002	MEGHA H SHUKLA	
Apply		

You can also delete the desired profile. To do so, click **Delete**  of the respective profile.


If you select **Group Wise** option,

Select the desired enterprise group—Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1/2/3.

For each enterprise group — Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1/2/3, click the corresponding picklist to select the desired option/s.

The selected groups appear in the grid.

Search			
ID	Name	Group ▲	
1	MATRIX COMSEC PVT. LTD.	Organization	
2	SAMARTH	Organization	
3	AVDHOOT	Organization	
4	ELSENGARD	Organization	
Apply			

You can also delete particular group. To do so, click **Delete**  of the respective group.

If you select **All**, then all the profiles will be selected.

**Generate Report For:** Select the desired option— **All Users, Active Users or Inactive Users**.

Click **Generate Report**.

## Sample Report

Sr No	Group Type	Change From	Change Till	New Group
1	Organization	01/01/2009	12/31/2099	MATRIX COMSEC PVT. LTD.
2	Reporting Group	01/01/2012	01/31/2099	Mahesh P _ Jayesh P
3	Reporting Group	01/01/2012	12/31/2099	Mahesh P _ Jayesh P
4	Reporting Group	05/01/2014	12/31/2099	KANU LIMBACHIA
5	Reporting Group	05/01/2014	12/31/2099	Jayesh Patel
6	Organization	01/01/2020	12/31/2099	AVDHOT
7	Organization	01/01/2020	12/31/2099	MATRIX COMSEC PVT. LTD.
8	Reporting Group	01/01/2020	12/31/2099	Mahesh P _ Jayesh P
10	Organization	01/01/2012	01/31/2099	Parash Chauhan
1	Reporting Group	01/01/2012	12/31/2099	Mahesh P _ Jayesh P
2	Reporting Group	05/30/2014	12/31/2099	Parash Chauhan
3	Reporting Group	05/30/2014	12/31/2099	Anil Modi
4	Reporting Group	09/01/2014	12/31/2099	Parash Chauhan

## Biometric Enrollment Report

This report displays the details of the biometric credentials enrolled for the selected users.

Configure the following parameters:

### Optional Parameters

**Finger Template Format Type Consideration:** Select the check boxes for the desired options — **Suprema Proprietary**, **Suprema ISO** or **Lumidigm Proprietary**.

**Enrollment Quality:** Select the desired option from the drop-down list and specify the desired percentage of enrollment quality.

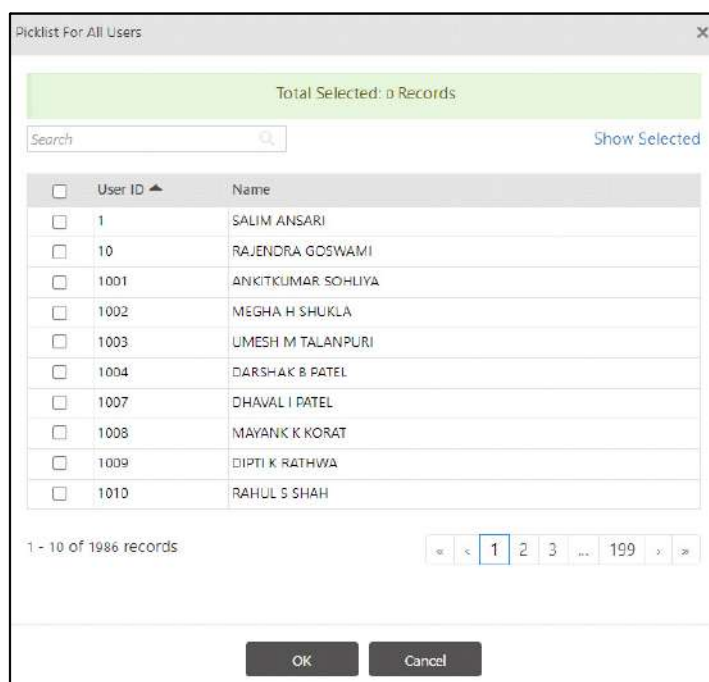


*If the option 'Select' is selected as an Enrollment Quality then the Templates of all quality types will be considered into the report.*

### User Selection

**Select User:** Select the desired option — **User Wise**, **Group Wise**, or **All**.

If you select **User Wise**, click the **User** picklist. The **Picklist for All Users** pop-up appears.



Picklist For All Users

Total Selected: 0 Records

Search  Show Selected

<input type="checkbox"/>	User ID ▲	Name
<input type="checkbox"/>	1	SALIM ANSARI
<input type="checkbox"/>	10	RAJENDRA GOSWAMI
<input type="checkbox"/>	1001	ANKITKUMAR SOHLIYA
<input type="checkbox"/>	1002	MEGHA H SHUKLA
<input type="checkbox"/>	1003	UMESH M TALANPURI
<input type="checkbox"/>	1004	DARSHAK B PATEL
<input type="checkbox"/>	1007	DHAWAL I PATEL
<input type="checkbox"/>	1008	MAYANK K KORAT
<input type="checkbox"/>	1009	DIPTI K RATHWA
<input type="checkbox"/>	1010	RAHUL S SHAH

1 - 10 of 1986 records

OK Cancel

Select the desired check boxes of the desired profiles. Click **OK**.


The selected profiles appear in the grid.



Search

User ID ▲	Name	
1	SALIM ANSARI	
10	RAJENDRA GOSWAMI	
1001	ANKITKUMAR SOHLIYA	
1002	MEGHA H SHUKLA	

Apply

You can also delete the desired profile. To do so, click **Delete**  of the respective profile.



If you select **Group Wise** option,


Select the desired enterprise group—Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1/2/3.

For each enterprise group — Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1/2/3, click the corresponding picklist to select the desired option/s.



The selected groups appear in the grid.

Search <input type="text"/>			
ID	Name	Group ▲	
1	MATRIX COMSEC PVT. LTD.	Organization	
2	SAMARTH	Organization	
3	AVDHOOT	Organization	
4	ELSENGARD	Organization	
<div>Apply</div>			


You can also delete particular group. To do so, click **Delete**  of the respective group.

If you select **All**, then all the profiles will be selected.

**Generate Report For:** Select the desired option— **All Users**, **Active Users** or **Inactive Users**.

Click **Generate Report**.

Sample Report

Biometric Enrollment Report							
<div> <div>Back</div> <div> <div>1 of 1</div> <div>112%</div> <div>+</div> <div>+</div> <div>+</div> <div>+</div> <div>+</div> <div>+</div> </div> </div>							
<div> <div>  </div> <div> <b>MATRIX COMSEC PVT. LTD.</b>  <b>Biometric Enrollment Report</b> </div> <div> <b>Page 1 of 1</b> </div> </div>							
Run by: System Admin		Suprema Proprietary		Suprema ISO		Date: 05/18/2023 18:04	
		Lumidigm Proprietary					
User ID	Name	No of Enrolled Fingers	Quality	No of Enrolled Fingers	Quality	No of Enrolled Fingers	Quality
Swagat	Swagat	1	50	0	0	0	0

## Others

### Former Users

This report displays the details of the former users for the selected date range.

For Month-Year: June 2023	
User Selection	
Select Users:	Group Wise
Select Group:	Organization
Organization:	ID Name
Generate Report For:	All Users
<div>Generate Report</div>	

Configure the following parameters:

**For Month Year:** Select the month and the year for which the report is to be generated.




## User Selection


**Select User:** Select the desired option —**Group Wise, or All.**

If you select **Group Wise** option, select the desired enterprise group from the drop-down list—Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1/2/3.

For each enterprise group — Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1/2/3, click the corresponding picklist to select the desired option/s.

The selected Group appear in the grid.

Search <input type="text"/>			
ID	Name	Group ▲	
1	MATRIX COMSEC PVT. LTD.	Organization	
2	SAMARTH	Organization	
3	AVDHOOT	Organization	
4	ELSENGARD	Organization	
<div>Apply</div>			

You can also delete particular group. To do so, click **Delete**  of the respective group.

If you select **All**, then all the profiles will be selected.

**Generate Report For:** Select the desired option— **All Users, Active Users or Inactive Users.**

Click **Generate Report.**

Sample Report

Former Users									
Back									
1 of 1									
MATRIX COMSEC PVT. LTD.									
Former Users									
Page 1 of 1									
Run By:	System Admin	Date: 05/18/2023 18:15							
User ID	Name	Department	Designation	Joining Date	Confirmation Date	Leaving Date	Reason	Active	InactiveDate-Time
1064	SHAYESH GHREL	RND SOFTWARE ENGINEERING	Designation 1	12/32/2011		02/12/2013		Yes	
1166	AKHITA DARJE	SALES AND MARKETING	Designation 1	12/26/2012		02/16/2013		Yes	
243	PATRIC VILLAL	RND SOFTWARE ENGINEERING	Designation 1	06/15/2009	12/15/2009	02/21/2013		Yes	
289	ADRIEN JOURI	RND SOFTWARE ENGINEERING	Designation 1	03/02/2010		02/28/2013		No	05/15/2018-10:37

## New Joining

This report displays the details of users whose joining date is within the selected date range.

The 'New Joining' window contains the following fields:

- Date:** Two date pickers for 'To' and 'From' dates, both set to 06/21/2023.
- Optional Parameters:**
  - Group By:** A dropdown menu with 'Organization' selected.
  - Organization Name in Header As Per:** A dropdown menu with 'User Selection' selected.
- User Selection:**
  - Select Users:** A dropdown menu with 'User Wise' selected.
  - User:** Two input fields for 'ID' and 'Name'.
  - Generate Report For:** A dropdown menu with 'All Users' selected.
- Generate Report:** A button at the bottom center.

Configure the following parameters:

**Date:** Select the **To** and **From** date for which the report is to be generated.

**Group By:** Select the desired enterprise group from the drop-down list — Organization, Branch, Department, Section, Category, Grade, Designation, Custom Group1/2/3.

**Organization Name in Header As Per:** Select the desired option — **User Selection** or **Customized Selection**.

If you select **Customized Selection**, click **Customize Report Header**.

You can select the desired option from the drop-down list or can also add header according to your choice.

### User Selection

**Select User:** Select the desired option — **User Wise**, **Group Wise**, or **All**.

If you select **User Wise**, click the **User** picklist. The **Picklist for All Users** pop-up appears.

The 'Picklist For All Users' window displays a table of users with the following data:


<input type="checkbox"/>	User ID	Name
<input type="checkbox"/>	1	SALIM ANSARI
<input type="checkbox"/>	10	RAJENDRA GOSWAMI
<input type="checkbox"/>	1001	ANKITKUMAR SOHLIYA
<input type="checkbox"/>	1002	MEGHA H SHUKLA
<input type="checkbox"/>	1003	UMESH M TALANPURI
<input type="checkbox"/>	1004	DARSHAK B PATEL
<input type="checkbox"/>	1007	DHAVAL I PATEL
<input type="checkbox"/>	1008	MAYANK K KORAT
<input type="checkbox"/>	1009	DIPTI K RATHWA
<input type="checkbox"/>	1010	RAHUL S SHAH

At the bottom, there is a pagination bar showing '1 - 10 of 1986 records' and a 'Show Selected' button.

Select the desired check boxes of the desired profiles. Click **OK**.

The selected profiles appear in the grid.

Search		
User ID ▲	Name	
1	SALIM ANSARI	
10	RAJENDRA GOSWAMI	
1001	ANKITKUMAR SOHLIYA	
1002	MEGHA H SHUKLA	
Apply		


You can also delete the desired profile. To do so, click **Delete**  of the respective profile.

If you select **Group Wise** option, select the desired enterprise group from the drop-down list—Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1/2/3.

For each enterprise group — Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1/2/3, click the corresponding picklist to select the desired option/s.

The selected Group appear in the grid.

Search			
ID	Name	Group ▲	
1	MATRIX COMSEC PVT. LTD.	Organization	
2	SAMARTH	Organization	
3	AVDHOOT	Organization	
4	ELSENGARD	Organization	
Apply			

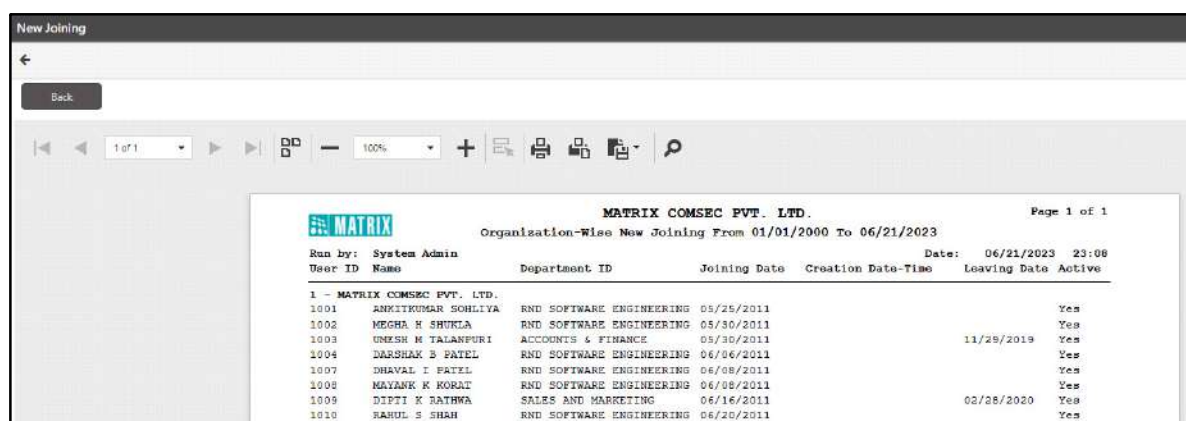
You can also delete particular group. To do so, click **Delete**  of the respective group.

If you select **All**, then all the profiles will be selected.

**Generate Report For:** Select the desired option— **All Users, Active Users or Inactive Users**.

Click **Generate Report**.

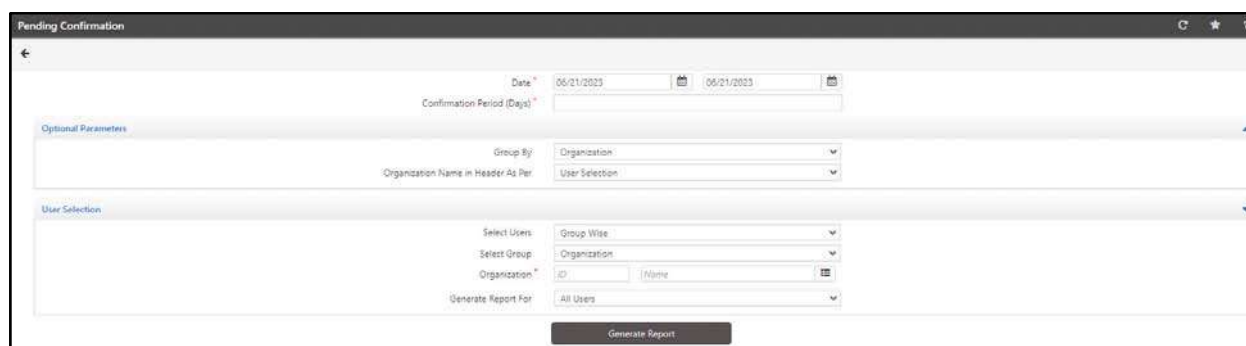
## Sample Report



MATRIX COMSEC PVT. LTD.						
Organization-Wise New Joining From 01/01/2000 To 06/21/2023						
Run by: System Admin				Date: 06/21/2023 23:08		
User ID	Name	Department ID	Joining Date	Creation Date-Time	Leaving Date	Active
1 - MATRIX COMSEC PVT. LTD.						
1001	ANIKTUMAR SOHLIYA	RND SOFTWARE ENGINEERING	05/25/2011			Yes
1002	MECHA M SHUKLA	RND SOFTWARE ENGINEERING	05/30/2011			Yes
1003	UNESH M TALANPURI	ACCOUNTS & FINANCE	05/30/2011		11/29/2019	Yes
1004	DARSHAK B PATEL	RND SOFTWARE ENGINEERING	06/06/2011			Yes
1007	DHAVAL I PATEL	RND SOFTWARE ENGINEERING	06/08/2011			Yes
1008	MAYANK K KORAT	RND SOFTWARE ENGINEERING	06/08/2011			Yes
1009	DIPTI K RATHWA	SALES AND MARKETING	06/16/2011		02/28/2020	Yes
1010	RASHUL S SHAH	RND SOFTWARE ENGINEERING	06/20/2011			Yes

## Pending Confirmation

This report displays the details of the users whose employment confirmation is pending within the selected date range.



Date: 06/21/2023

Confirmation Period (Days):

Optional Parameters

Group By: Organization

Organization Name in Header As Per: User Selection

User Selection

Select Users: Group Wise

Select Group: Organization

Organization: ID Name

Generate Report For: All Users

Generate Report

Configure the following parameters:

**Date:** Select the **To** and **From** date for which the report is to be generated.

**Confirmation Period (Days):**

### Optional Parameter

**Group By:** Select the desired enterprise group from the drop-down list — Organization, Branch, Department, Section, Category, Grade, Designation, Custom Group 1/2/3.

**Organization Name in Header As Per:** Select the desired option — **User Selection** or **Customized Selection**.

If you select **Customized Selection**, click **Customize Report Header**.

You can select the desired option from the drop-down list or can also add header according to your choice.






### User Selection


**Select User:** Select the desired option — **Group Wise**, or **All**.

If you select **Group Wise** option, select the desired enterprise group from the drop-down list—Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1/2/3.

For each enterprise group — Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1/2/3, click the corresponding picklist to select the desired option/s.

The selected Group appear in the grid.

Search <input type="text"/>			
ID	Name	Group ▲	
1	MATRIX COMSEC PVT. LTD.	Organization	
2	SAMARTH	Organization	
3	AVDHOOT	Organization	
4	ELSENGARD	Organization	
Apply			

You can also delete particular group. To do so, click **Delete**  of the respective group.

If you select **All**, then all the profiles will be selected.

**Generate Report For:** Select the desired option— **All Users**, **Active Users** or **Inactive Users**.

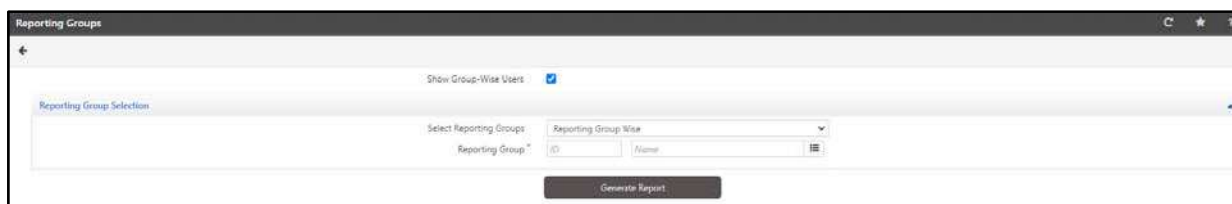
Click **Generate Report**.

Sample Report.

Pending Confirmation							
<div> <div>Back</div> <div> <div>1 of 85</div> <div>100%</div> <div>+</div> <div>+</div> <div>+</div> <div>+</div> <div>+</div> <div>+</div> <div>+</div> <div>+</div> </div> </div>							
<div> <div> <div>MATRIX</div> <div>MATRIX COMSEC PVT. LTD.</div> <div>Pending Confirmation From 01/01/2000 To 06/21/2023</div> <div>Page 1 of 85</div> </div> <div> <div>Run by: System Admin</div> <div>Date: 06/21/2023 23:10</div> </div> </div>							
User ID	Name	Department	Designation	Joining Date	Days Remaining	Confirmation On	
MATRIX COMSEC PVT. LTD.							
1001	ANKITKUMAR SOHLIYA	RND SOFTWARE ENGINEERING	Designation 1	05/25/2011	-	06/04/2011	
1002	MEGHA H SHUKLA	RND SOFTWARE ENGINEERING	Designation 1	05/30/2011	-	06/09/2011	
1003	UMESH M TALANPURI	ACCOUNTS & FINANCE	Designation 1	05/30/2011	-	06/09/2011	
1004	DARSHAK B PATEL	RND SOFTWARE ENGINEERING	Designation 1	06/06/2011	-	06/16/2011	
1007	DHAVAL I PATEL	RND SOFTWARE ENGINEERING	Designation 1	06/08/2011	-	06/18/2011	
1008	MAYANK K KORAT	RND SOFTWARE ENGINEERING	Designation 1	06/08/2011	-	06/18/2011	
1009	DIPTI K RATHWA	SALES AND MARKETING	Designation 1	06/16/2011	-	06/26/2011	
1010	RAHUL S SHAH	RND SOFTWARE ENGINEERING	Designation 1	06/20/2011	-	06/30/2011	
1011	PARIKA S PANDEY	SALES AND MARKETING	Designation 1	06/20/2011	-	06/30/2011	
1012	PARIKSHIT DAS	RND SOFTWARE ENGINEERING	Designation 1	06/23/2011	-	07/01/2011	
1015	SUMEDHA A GAWARIKAR	RND SOFTWARE ENGINEERING	Designation 1	06/27/2011	-	07/07/2011	

## Reporting Groups

This report displays the details of the selected Reporting Groups.



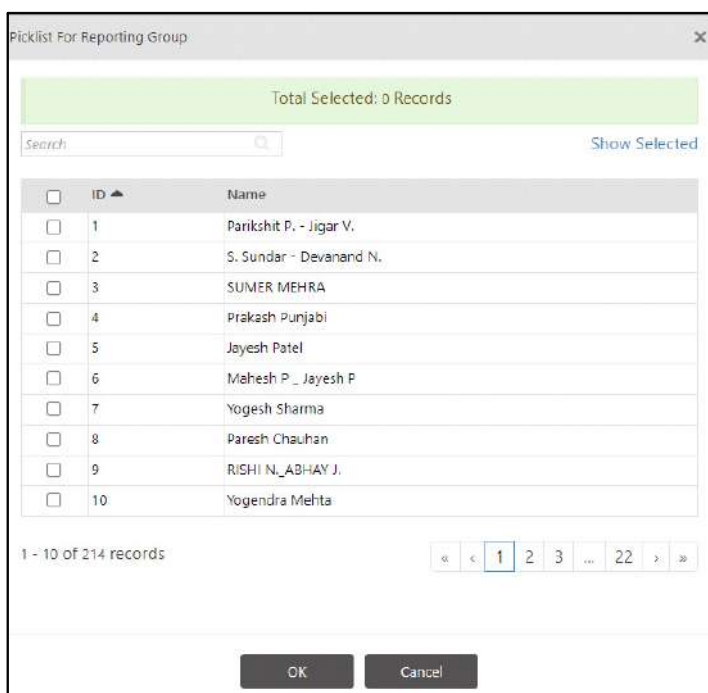
Configure the following parameters:

**Show Group-Wise Users:** Select the check box if the report should display group wise user details.

### Reporting Group Selection

**Select Reporting Groups:** Select the desired option— **All** or **Reporting Group Wise**.

If you select **Reporting Group Wise**, click the **Reporting Group** picklist. The **Picklist For Reporting Group** pop-up appears.




ID	Name
1	Parikshit P. - Jigar V.
2	S. Sundar - Devanand N.
3	SUMER MEHRA
4	Prakash Punjabi
5	Jayesh Patel
6	Mahesh P. - Jayesh P
7	Yogesh Sharma
8	Pareesh Chauhan
9	RISHI N. ABHAY J.
10	Yogendra Mehta

Select the desired check boxes of the desired groups. Click **OK**.

The selected Reporting Group appears in the grid.

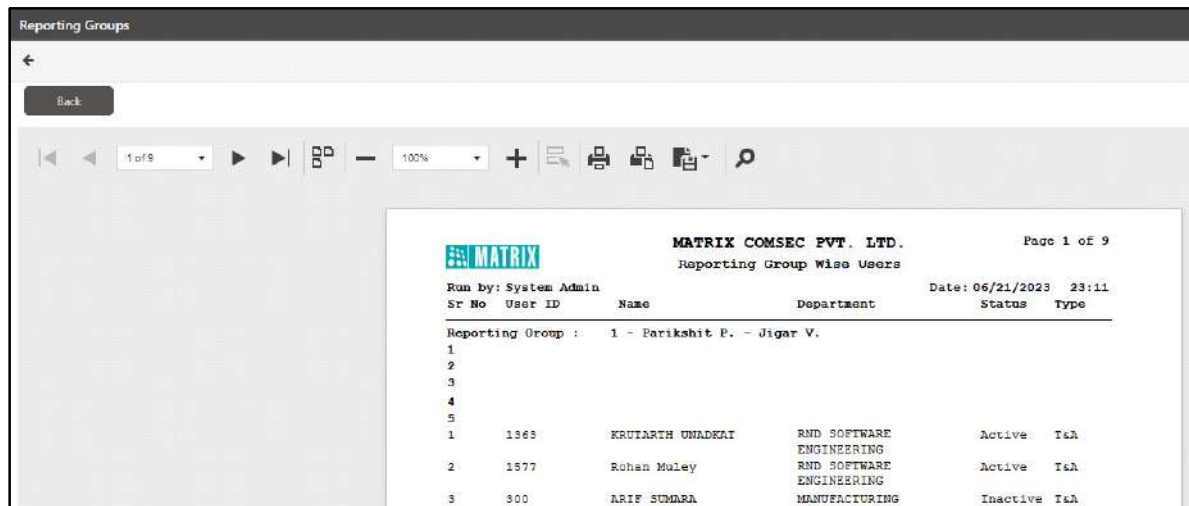
<div>Search</div>			
ID	Name	Group	
1	Parikshit P. - Jigar V.	Reporting Group	
2	S. Sundar - Devanand N.	Reporting Group	
3	SUMER MEHRA	Reporting Group	

You can also delete the desired Reporting Group. To do so, click **Delete**  of the respective Reporting Group.

If you select **All**, then all the Reporting Groups will be selected.

Click **Generate Report**.

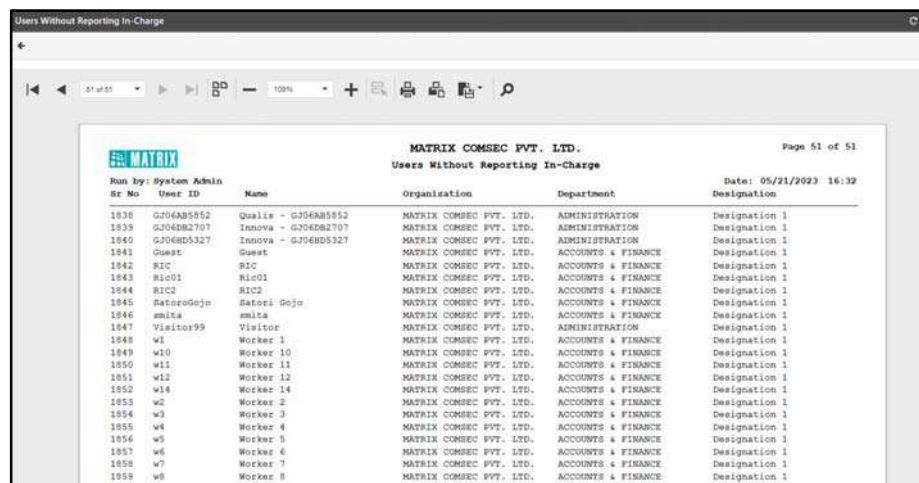
Sample Report



MATRIX COMSEC PVT. LTD.					
Reporting Group Wise Users					
Run by: System Admin			Date: 06/21/2023 23:11		
Sr No	User ID	Name	Department	Status	Type
Reporting Group : 1 - Parikshit P. - Jigar V.					
1					
2					
3					
4					
5					
1	1368	KRUTIARTH UNADKAT	RND SOFTWARE ENGINEERING	Active	I&A
2	1577	Rohan Muley	RND SOFTWARE ENGINEERING	Active	I&A
3	300	ARIF SUMARA	MANUFACTURING	Inactive	I&A

## Users Without Reporting-In Charge

This report displays the details of the users who have not been assigned any Reporting-In Charge.

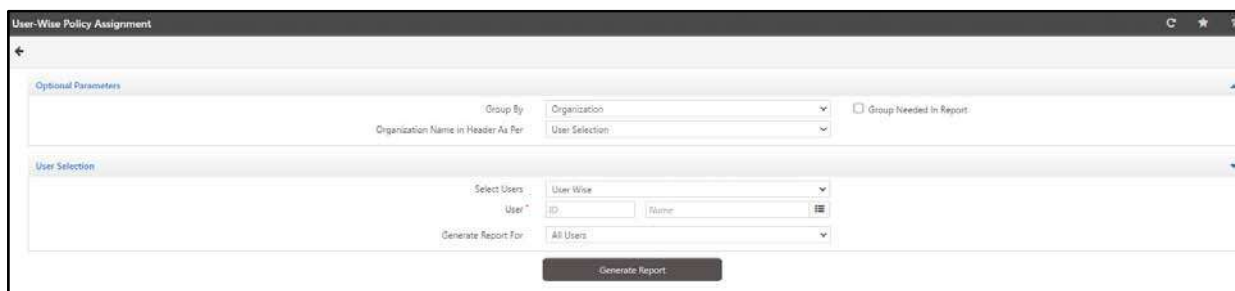


MATRIX COMSEC PVT. LTD.					
Users Without Reporting In-Charge					
Run by: System Admin			Date: 05/21/2023 16:32		
Sr No	User ID	Name	Organization	Department	Designation
1838	GJ06AB5552	Qualia - GJ06AB5552	MATRIX COMSEC PVT. LTD.	ADMINISTRATION	Designation 1
1839	GJ06BD2707	Innova - GJ06BD2707	MATRIX COMSEC PVT. LTD.	ADMINISTRATION	Designation 1
1840	GJ06BD5327	Innova - GJ06BD5327	MATRIX COMSEC PVT. LTD.	ADMINISTRATION	Designation 1
1841	Guest	Guest	MATRIX COMSEC PVT. LTD.	ACCOUNTS & FINANCE	Designation 1
1842	RIC	RIC	MATRIX COMSEC PVT. LTD.	ACCOUNTS & FINANCE	Designation 1
1843	RIC01	RIC01	MATRIX COMSEC PVT. LTD.	ACCOUNTS & FINANCE	Designation 1
1844	RIC2	RIC2	MATRIX COMSEC PVT. LTD.	ACCOUNTS & FINANCE	Designation 1
1845	SatoroGojo	Satori Gojo	MATRIX COMSEC PVT. LTD.	ACCOUNTS & FINANCE	Designation 1
1846	mlita	mlita	MATRIX COMSEC PVT. LTD.	ACCOUNTS & FINANCE	Designation 1
1847	Visitor99	Visitor	MATRIX COMSEC PVT. LTD.	ADMINISTRATION	Designation 1
1848	w1	Worker 1	MATRIX COMSEC PVT. LTD.	ACCOUNTS & FINANCE	Designation 1
1849	w10	Worker 10	MATRIX COMSEC PVT. LTD.	ACCOUNTS & FINANCE	Designation 1
1850	w11	Worker 11	MATRIX COMSEC PVT. LTD.	ACCOUNTS & FINANCE	Designation 1
1851	w12	Worker 12	MATRIX COMSEC PVT. LTD.	ACCOUNTS & FINANCE	Designation 1
1852	w14	Worker 14	MATRIX COMSEC PVT. LTD.	ACCOUNTS & FINANCE	Designation 1
1853	w2	Worker 2	MATRIX COMSEC PVT. LTD.	ACCOUNTS & FINANCE	Designation 1
1854	w3	Worker 3	MATRIX COMSEC PVT. LTD.	ACCOUNTS & FINANCE	Designation 1
1855	w4	Worker 4	MATRIX COMSEC PVT. LTD.	ACCOUNTS & FINANCE	Designation 1
1856	w5	Worker 5	MATRIX COMSEC PVT. LTD.	ACCOUNTS & FINANCE	Designation 1
1857	w6	Worker 6	MATRIX COMSEC PVT. LTD.	ACCOUNTS & FINANCE	Designation 1
1858	w7	Worker 7	MATRIX COMSEC PVT. LTD.	ACCOUNTS & FINANCE	Designation 1
1859	w8	Worker 8	MATRIX COMSEC PVT. LTD.	ACCOUNTS & FINANCE	Designation 1



## User-Wise Policy Assignment

This report displays the details of the policies assigned to the selected users.



The screenshot shows a web application window titled "User-Wise Policy Assignment". It contains two main sections: "Optional Parameters" and "User Selection".

**Optional Parameters:**

- Group By:** A dropdown menu with "Organization" selected.
- Organization Name in Header As Per:** A dropdown menu with "User Selection" selected.
- Group Needed in Report:** An unchecked checkbox.

**User Selection:**

- Select Users:** A dropdown menu with "User Wise" selected.
- User \*:** Two input fields labeled "ID" and "Name".
- Generate Report For:** A dropdown menu with "All Users" selected.

A "Generate Report" button is located at the bottom center of the form.

Configure the following parameters:

### Optional Parameters

**Group By:** Select the desired enterprise group from the drop-down list — Organization, Branch, Department, Section, Category, Grade, Designation, Custom Group1/2/3.

**Group Needed in Report:** Select the check box to display the name of the selected group in the generated report.

**Organization Name in Header As Per:** Select the desired option — **User Selection** or **Customized Selection**.

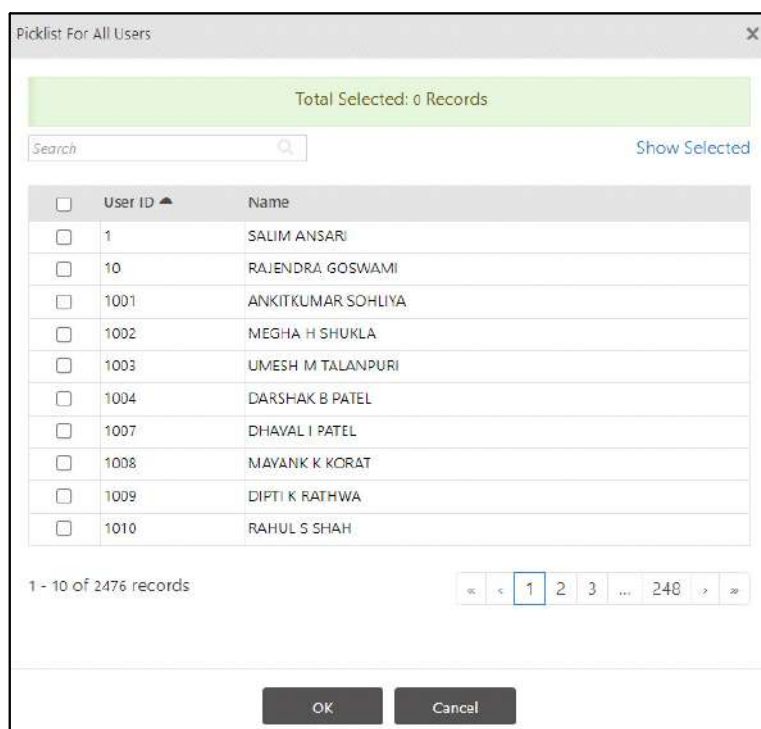
If you select **Customized Selection**, click **Customize Report Header**.

You can select the desired option from the drop-down list or can also add header according to your choice.

### User Selection

**Select User:** Select the desired option — **User Wise**, **Group Wise**, or **All**.

If you select **User Wise**, click the **User** picklist. The **Picklist for All Users** pop-up appears.



Picklist For All Users

Total Selected: 0 Records

Search

Show Selected

<input type="checkbox"/>	User ID	Name
<input type="checkbox"/>	1	SALIM ANSARI
<input type="checkbox"/>	10	RAJENDRA GOSWAMI
<input type="checkbox"/>	1001	ANKITKUMAR SOHLIYA
<input type="checkbox"/>	1002	MEGHA H SHUKLA
<input type="checkbox"/>	1003	UMESH M TALANPURI
<input type="checkbox"/>	1004	DARSHAK B PATEL
<input type="checkbox"/>	1007	DHAVAL I PATEL
<input type="checkbox"/>	1008	MAYANK K KORAT
<input type="checkbox"/>	1009	DIPTI K RATHWA
<input type="checkbox"/>	1010	RAHUL S SHAH

1 - 10 of 2476 records

1 2 3 ... 248

OK Cancel

Select the desired check boxes of the desired profiles. Click **OK**.

The selected profiles appear in the grid.




Search

User ID	Name	
1	SALIM ANSARI	
10	RAJENDRA GOSWAMI	
1001	ANKITKUMAR SOHLIYA	
1002	MEGHA H SHUKLA	

Generate Report For: All Users

Generate Report

You can also delete the desired profiles. To do so, click **Delete**  of the respective profile.

If you select **Group Wise** option, select the desired enterprise group from the drop-down list—Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1/2/3.

For each enterprise group — Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1/2/3, click the corresponding picklist to select the desired option/s.

The selected Group appear in the grid.

Select Users

Group Wise

Select Group

Organization


Organization \*

ID

Name

Search

ID	Name	Group	
1	MATRIX COMSEC PVT. LTD.	Organization	
2	SAMARTH	Organization	
3	AVDHOT	Organization	
4	ELSENGARD	Organization	

You can also delete particular group. To do so, click **Delete**  of the respective group.

If you select **All**, then all the profiles will be selected.

**Generate Report For:** Select the desired option— **All Users**, **Active Users** or **Inactive Users**.

Click **Generate Report**.

Sample Report

User-Wise Policy Assignment

Back

1 of 1

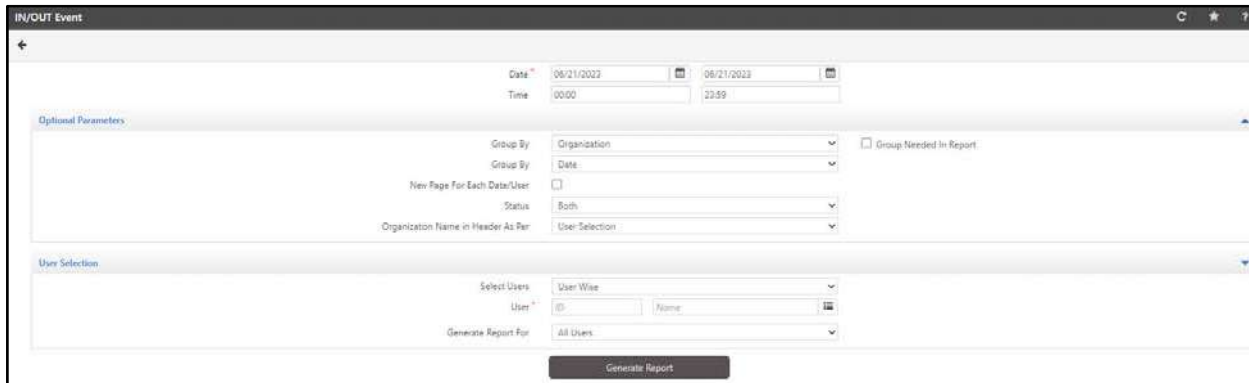
101%

MATRIX COMSEC PVT. LTD.			
User-Wise Policy Assignment			
Run By:	System Admin	Date: 05/21/2023 17:17	
User	: 1	SALIM ANSARI	
Attendance Policy	: 2 - Factory Fixed Shift	Early-OUT Policy	: 3 - Factory Early Out Policy
Absentee Policy	: 1 - MATRIX POLICY	C-OFF Policy	: 1 - COFF Policy-1
Ntwk & OT Policy	: 4 - Factory Overtime	OT/C-OFF Eligibility	: Only Overtime
Late-IN Policy	: 1 - NO RnD Late-In Policy		
User	: 10	HAJDERA GOSWAMI	
Attendance Policy	: 2 - Factory Fixed Shift	Early-OUT Policy	: 3 - Factory Early Out Policy
Absentee Policy	: 1 - MATRIX POLICY	C-OFF Policy	: 1 - COFF Policy-1
Ntwk & OT Policy	: 1 - No Overtime	OT/C-OFF Eligibility	: None
Late-IN Policy	: 1 - NO RnD Late-In Policy		
User	: 1001	ANILKUMAR SONLITA	
Attendance Policy	: 1 - NO-RnD Fixed Shift	Early-OUT Policy	: 1 - NO RnD Early Out Policy
Absentee Policy	: 1 - MATRIX POLICY	C-OFF Policy	: 1 - COFF Policy-1
Ntwk & OT Policy	: 1 - No Overtime	OT/C-OFF Eligibility	: None
Late-IN Policy	: 1 - NO RnD Late-In Policy		
User	: 1002	MEGHNA H SHUKLA	
Attendance Policy	: 1 - NO-RnD Fixed Shift	Early-OUT Policy	: 1 - NO RnD Early Out Policy
Absentee Policy	: 1 - MATRIX POLICY	C-OFF Policy	: 1 - COFF Policy-1
Ntwk & OT Policy	: 1 - No Overtime	OT/C-OFF Eligibility	: None
Late-IN Policy	: 1 - NO RnD Late-In Policy		

## User Events

### In/Out Event

This report displays the details of the Entry and Exit events for the selected users.

The screenshot shows a web-based configuration window titled "IN/OUT Event". At the top, there are date and time pickers. The date range is set from 06/21/2023 to 06/21/2023, and the time is set from 00:00 to 22:59. Below this is a section titled "Optional Parameters" which contains several dropdown menus: "Group By" (set to Organization), "Group By" (set to Date), "New Page For Each Date/User" (unchecked), "Status" (set to Both), and "Organization Name in Header As Per" (set to User Selection). There is also a checkbox for "Group Needed in Report" which is unchecked. Below the optional parameters is a section titled "User Selection" which includes a "Select Users" dropdown (set to User Wise), a "User" field with a search icon, and a "Generate Report For" dropdown (set to All Users). At the bottom center is a "Generate Report" button.

Configure the following parameters:

**Date:** Select the **To** and **From** date for which the report is to be generated.

**Time:** Select the time duration from which In/Out Event report is to be generated.

#### Optional Parameters

**Group By:** Select the desired enterprise group from the drop-down list — Organization, Branch, Department, Section, Category, Grade, Designation, Custom Group1/2/3.

**Group Needed in Report:** Select the check box to display the name of the selected group in the generated report.

**Group By:** Select the desired option— **Date** or **User**

**New Page For Each Date /User:** Select this check box if you wish the report to start from a new page for every user/date.

**Status:** Select the desired option— **Both**, **Allow** or **Denied**.

**Organization Name in Header As Per:** Select the desired option — **User Selection** or **Customized Selection**.

If you select **Customized Selection**, click **Customize Report Header**.

You can select the desired option from the drop-down list or can also add header according to your choice.

#### User Selection

**Select User:** Select the desired option — **User Wise**, **Group Wise**, or **All**.

If you select **User Wise**, click the **User** picklist. The **Picklist for All Users** pop-up appears.

Picklist For All Users

Total Selected: 0 Records

Search  Show Selected

<input type="checkbox"/>	User ID ▲	Name
<input type="checkbox"/>	1	SALIM ANSARI
<input type="checkbox"/>	10	RAJENDRA GOSWAMI
<input type="checkbox"/>	1001	ANKITKUMAR SOHLIYA
<input type="checkbox"/>	1002	MEGHA H SHUKLA
<input type="checkbox"/>	1003	UMESH M TALANPURI
<input type="checkbox"/>	1004	DARSHAK B PATEL
<input type="checkbox"/>	1007	DHAVAL I PATEL
<input type="checkbox"/>	1008	MAYANK K KORAT
<input type="checkbox"/>	1009	DIPTI K RATHWA
<input type="checkbox"/>	1010	RAHUL S SHAH

1 - 10 of 2476 records

« < 1 2 3 ... 248 > »

OK Cancel

Select the desired check boxes of the desired profiles. Click **OK**.

The selected profiles appear in the grid.

Select Users

User Wise ▼

User\* ID Name

Search

User ID ▲	Name	
1	SALIM ANSARI	
10	RAJENDRA GOSWAMI	
1001	ANKITKUMAR SOHLIYA	
1002	MEGHA H SHUKLA	

You can also delete the desired profile. To do so, click **Delete** of the respective profile.

If you select **Group Wise** option, select the desired enterprise group from the drop-down list—Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1/2/3.

For each enterprise group — Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1/2/3, click the corresponding picklist to select the desired option/s.

The selected Group appear in the grid.

Select Users

Group Wise

Select Group

Organization


Organization \*

ID

Name

Search

ID	Name	Group	
1	MATRIX COMSEC PVT. LTD.	Organization	
2	SAMARTH	Organization	
3	AVDHOOT	Organization	
4	ELSENGARD	Organization	

You can also delete particular group. To do so, click **Delete**  of the respective group.

If you select **All**, then all the profiles will be selected.

**Generate Report:** Select the desired option— **All Users, Active Users or Inactive Users.**

Click **Generate Report.**

Sample Report

Back

1 of 2

100%

+

+

+

+

+

+

Organization-Wise IN/OUT Event From 26/07/2024 00:00 To 26/07/2024 23:59

Date: 26/07/2024 10:37

Page 1 of 2

Run by:	System Admin	Punch Time I/O	Type	Device/Source Detail	Location	Punch Mode	Event	Status	Special Function
User ID	Name								
2736	Ishani Patel	09:26:03	In	10 : ARGO FACE		Face	Denied		
2736	Ishani Patel	09:26:22	In	10 : ARGO FACE		Face	Denied		
2736	Ishani Patel	09:26:41	In	10 : ARGO FACE		Face	Denied		
2736	Ishani Patel	09:26:44	In	10 : ARGO FACE		Face	Denied		
2736	Ishani Patel	09:26:48	In	10 : ARGO FACE		Face	Denied		
2736	Ishani Patel	09:26:51	In	10 : ARGO FACE		Face	Denied		
2736	Ishani Patel	09:26:54	In	10 : ARGO FACE		Face	Denied		
2736	Ishani Patel	09:26:57	In	10 : ARGO FACE		Face	Denied		
2736	Ishani Patel	09:27:06	In	10 : ARGO FACE		Face	Denied		
2736	Ishani Patel	09:28:24	In	10 : ARGO FACE		Face	Denied		
2736	Ishani Patel	09:18:09	In	10 : ARGO FACE		Face	Denied		
2736	Ishani Patel	10:04:47	In	10 : ARGO FACE		Face	Denied		
2736	Ishani Patel	10:05:56	In	10 : ARGO FACE		Face	Denied		
2736	Ishani Patel	10:07:34	In	10 : ARGO FACE		Face	Denied		
2736	Ishani Patel	10:09:16	In	10 : ARGO FACE		Face	Denied		
2736	Ishani Patel	10:09:20	In	10 : ARGO FACE		Face	Denied		
2736	Ishani Patel	10:09:23	In	10 : ARGO FACE		Face	Denied		
2736	Ishani Patel	10:09:27	In	10 : ARGO FACE		Face	Denied		
2736	Ishani Patel	10:09:30	In	10 : ARGO FACE		Face	Denied		
2736	Ishani Patel	10:09:44	In	10 : ARGO FACE		Face	Denied		
2736	Ishani Patel	10:10:19	In	10 : ARGO FACE		Face	Denied		
2736	Ishani Patel	10:10:30	In	10 : ARGO FACE		Face	Denied		
2736	Ishani Patel	10:10:33	In	10 : ARGO FACE		Face	Denied		
2736	Ishani Patel	10:10:47	In	10 : ARGO FACE		Face	Denied		
2736	Ishani Patel	10:10:52	In	10 : ARGO FACE		Face	Denied		
2736	Ishani Patel	10:10:55	In	10 : ARGO FACE		Face	Denied		
2736	Ishani Patel	10:10:59	In	10 : ARGO FACE		Face	Denied		
2736	Ishani Patel	10:11:02	In	10 : ARGO FACE		Face	Denied		
2736	Ishani Patel	10:11:13	In	10 : ARGO FACE		Face	Denied		

## In/Out Summary

This report displays the summary details of all the Entry and Exit events for the selected users.

IN/OUT Summary

Date \*

06/21/2023

User Selection

Select Users

Group Wise

Select Group

Organization

Organization \*

ID

Name

Generate Report For

All Users

Generate Report

Configure the following parameters:

**Date:** Select the **To** and **From** date for which the report is to be generated.

## User Selection


**Select User:** Select the desired option —**Group Wise**, or **All**.

If you select **Group Wise** option, select the desired enterprise group from the drop-down list—Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1/2/3.

For each enterprise group — Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1/2/3, click the corresponding picklist to select the desired option/s.

The selected Group appear in the grid.

ID	Name	Group
1	ACCOUNTS & FINANCE	Department
2	ADMINISTRATION	Department
3	CARPENTER	Department

You can also delete particular Group. To do so, click **Delete**  of the respective Group.

If you select **All**, then all the profiles will be selected.

Click **Generate Report**.

## Sample Report

Sr No	Department	Entered	Exited	Total Inside
1	ACCOUNTS & FINANCE	1	0	1
2	ADMINISTRATION	1	0	1
3	DRIVER	2	0	2
4	ELECTRICIAN	1	0	1
5	HOUSE KEEPING	2	0	2
6	IT	1	0	1
7	MANUFACTURING	77	0	77
8	RND ENGINEERING	3	0	3
9	RND SOFTWARE ENGINEERING	2	0	2
10	SECURITY GUARDS	5	0	5
11	VDS	1	0	1

## Access Denied

This report displays the details of the denied Events along with the credentials for the selected users.

The screenshot shows the 'Access Denied' report configuration interface. It includes a date range selector at the top. The 'Optional Parameters' section contains a dropdown for 'Enterprise Group In Report' (set to 'Organization'), a list of 'Denied Events' with checkboxes for 'Invalid Input' (checked), 'Occupancy Control', '2-Person Rule', 'Time Out', and 'Visitor Escort', a dropdown for 'Organization Name in Header As Per' (set to 'User Selection'), and a list of credential types with checkboxes for 'PIN' (checked), 'Card', 'Card + PIN', 'Finger', 'Finger + PIN', and 'Finger + Card'. The 'User Selection' section includes a dropdown for 'Select Users' (set to 'User Wise'), a table with columns 'ID' and 'Name', and a dropdown for 'Generate Report For' (set to 'All Users'). A 'Generate Report' button is located at the bottom left.

Configure the following parameters:

**Date:** Select the **To** and **From** date for which the report is to be generated.

### Optional Parameters

**Enterprise Group In Report:** Select the desired enterprise group from the drop-down list — Organization, Branch, Department, Section, Category, Grade, Designation, Custom Group1/2/3.

**Denied Events:** Select the check boxes for the desired denied Events and the credentials for which the report is to be generated.

**Card Type:** If you have selected the Credentials as any one of the following — Card, Card + PIN, API + Card, Card + Face, BLE + Card, Finger + Card, Finger + Card + PIN, Palm + Card, Palm + Card + PIN — then you can select the desired **Card Type** — RFID, QR — option.

**Card Selection:** If you have selected the Credentials as any one of the following — Card, Card + PIN, API + Card, Card + Face, BLE + Card, Finger + Card, Finger + Card + PIN, Palm + Card, Palm + Card + PIN, BLE, BLE + PIN, BLE + Finger, BLE + Palm — then you can select the desired **Card Selection** — Access Card 1, Access Card 2 — option.



*The options Card Type and Card Selection are applicable to ARGO, VEGA, ARGO FACE, PATH V2, ARC DC 200 Direct Doors as well as Panel Doors.*

*For other devices the filters Card Type and Card Selection will not be applicable. If any option is selected in these filters then the same will be ignored and the system will display all the events as per the selected Credential option.*



**Organization Name in Header As Per:** Select the desired option — **User Selection** or **Customized Selection**.

If you select **Customized Selection**, click **Customize Report Header**.

You can select the desired option from the drop-down list or can also add header according to your choice.

## User Selection

**Select User:** Select the desired option — **User Wise**, **Door-Wise**, or **All**.

If you select **User Wise**, click the **User** picklist. The **Picklist for All Users** pop-up appears.

Picklist For All Users

Total Selected: 0 Records

Search  Show Selected

<input type="checkbox"/>	User ID ▲	Name
<input type="checkbox"/>	1	SALIM ANSARI
<input type="checkbox"/>	10	RAJENDRA GOSWAMI
<input type="checkbox"/>	1001	ANKITKUMAR SOHLIYA
<input type="checkbox"/>	1002	MEGHA H SHUKLA
<input type="checkbox"/>	1003	UMESH M TALANPURI
<input type="checkbox"/>	1004	DARSHAK B PATEL
<input type="checkbox"/>	1007	DHAVAL I PATEL
<input type="checkbox"/>	1008	MAYANK K KORAT
<input type="checkbox"/>	1009	DIPTI K RATHWA
<input type="checkbox"/>	1010	RAHUL S SHAH

1 - 10 of 2476 records

« < 1 2 3 ... 248 > »

OK Cancel

Select the desired check boxes of the desired profiles. Click **OK**.

The selected profile appears in the grid.

Select Users

User Wise

User \* ID Name

Search

User ID ▲	Name	
1	SALIM ANSARI	
10	RAJENDRA GOSWAMI	
1001	ANKITKUMAR SOHLIYA	
1002	MEGHA H SHUKLA	

1 - 4 of 2476 records

« < 1 2 3 ... 248 > »

OK Cancel

You can also delete the desired profile. To do so, click **Delete** of the respective profile.

If you select **Door-Wise**, click the **Door** picklist. The **Picklist For Door** pop-up appears.

Picklist For Door

Total Selected: 0 Records

Search  Show Selected

<input type="checkbox"/>	ID ▲	Name
<input type="checkbox"/>	1	RnD1 Canteen1 ARGO
<input type="checkbox"/>	2	RnD1 2nd FLR Server Room VEGA
<input type="checkbox"/>	3	RnD1 4th FLR Server Room VEGA
<input type="checkbox"/>	4	RnD1 GF TRIPOD RIGHT IN
<input type="checkbox"/>	5	RnD1 Integra ARGO
<input type="checkbox"/>	6	RnD1 Basement Tripod Entry PVR
<input type="checkbox"/>	7	RnD1 4th Floor FB VEGA OUT
<input type="checkbox"/>	8	RnD1 4th Floor FB VEGA IN
<input type="checkbox"/>	9	RnD1 GF MODE TRIPOD LEFT IN
<input type="checkbox"/>	10	Factory Admin FMX

1 - 10 of 107 records

OK Cancel

Select the desired check boxes of the desired doors. Click **OK**.

The selected doors appear in the grid.

Search

ID	Name	Group ▲	
1	RnD1 Canteen1 ARGO	Door	
2	RnD1 2nd FLR Server Room VEGA	Door	
3	RnD1 4th FLR Server Room VEGA	Door	
4	RnD1 GF TRIPOD RIGHT IN	Door	

Generate Report For: All Users

Generate Report

You can also delete the desired door. To do so, click **Delete** of the respective door.

If you select **All**, then all the profiles will be selected.

**Generate Report For:** Select the desired option — **All Users**, **Active Users** or **Inactive Users**.

Click **Generate Report**.

## Sample Report

Sr No	User ID	Name	Enterprise group	Credential	Time	IN/OUT	Reason
26/07/2024	ABDO						
1	2736	Ishani Patel	Organization-1	Card2	10:28	In	Denied - Blocked User
ABDO FACE							
1	2736	Ishani Patel	Organization-1	Face	09:26	In	Denied - Validity Expired
2	2736	Ishani Patel	Organization-1	Face	09:26	In	Denied - Validity Expired
3	2736	Ishani Patel	Organization-1	Face	09:26	In	Denied - Validity Expired
4	2736	Ishani Patel	Organization-1	Face	09:26	In	Denied - Validity Expired
5	2736	Ishani Patel	Organization-1	Face	09:26	In	Denied - Validity Expired
6	2736	Ishani Patel	Organization-1	Face	09:26	In	Denied - Validity Expired
7	2736	Ishani Patel	Organization-1	Face	09:26	In	Denied - Validity Expired
8	2736	Ishani Patel	Organization-1	Face	09:26	In	Denied - Validity Expired
9	2736	Ishani Patel	Organization-1	Face	09:27	In	Denied - Validity Expired
10	2736	Ishani Patel	Organization-1	Face	09:28	In	Denied - Validity Expired
11	2736	Ishani Patel	Organization-1	Face	09:59	In	Denied - Validity Expired
12	2736	Ishani Patel	Organization-1	Face	10:04	In	Denied - Validity Expired
13	2736	Ishani Patel	Organization-1	Face	10:05	In	Denied - Validity Expired
14	2736	Ishani Patel	Organization-1	Face	10:07	In	Denied - Validity Expired
15	2736	Ishani Patel	Organization-1	Face	10:09	In	Denied - Validity Expired
16	2736	Ishani Patel	Organization-1	Face	10:09	In	Denied - Validity Expired
17	2736	Ishani Patel	Organization-1	Face	10:09	In	Denied - Validity Expired
18	2736	Ishani Patel	Organization-1	Face	10:09	In	Denied - Validity Expired
19	2736	Ishani Patel	Organization-1	Face	10:09	In	Denied - Validity Expired
20	2736	Ishani Patel	Organization-1	Face	10:09	In	Denied - Validity Expired
21	2736	Ishani Patel	Organization-1	Face	10:10	In	Denied - Validity Expired
22	2736	Ishani Patel	Organization-1	Face	10:10	In	Denied - Validity Expired
23	2736	Ishani Patel	Organization-1	Face	10:10	In	Denied - Validity Expired
24	2736	Ishani Patel	Organization-1	Face	10:10	In	Denied - Validity Expired
25	2736	Ishani Patel	Organization-1	Face	10:10	In	Denied - Validity Expired
26	2736	Ishani Patel	Organization-1	Face	10:10	In	Denied - Validity Expired
27	2736	Ishani Patel	Organization-1	Face	10:10	In	Denied - Validity Expired

## Doors Accessed By User

This report displays the details of the selected users who have punched on various devices.

Date: 06/22/2023 to 06/22/2023

User Selection

Select Users: User Wise

User: ID Name

Generate Report For: All Users

Generate Report

Configure the following parameters:

**Date:** Select the **To** and **From** date for which the report is to be generated.

### User Selection

**Select User:** Select the desired option — **User Wise**, **Group Wise**, or **All**.

If you select **User Wise**, click the **User** picklist. The **Picklist for All Users** pop-up appears.

Picklist For All Users

Total Selected: 0 Records

Search  Show Selected

<input type="checkbox"/>	User ID ▲	Name
<input type="checkbox"/>	1	SALIM ANSARI
<input type="checkbox"/>	10	RAJENDRA GOSWAMI
<input type="checkbox"/>	1001	ANKITKUMAR SOHLIYA
<input type="checkbox"/>	1002	MEGHA H SHUKLA
<input type="checkbox"/>	1003	UMESH M TALANPURI
<input type="checkbox"/>	1004	DARSHAK B PATEL
<input type="checkbox"/>	1007	DHAVAL I PATEL
<input type="checkbox"/>	1008	MAYANK K KORAT
<input type="checkbox"/>	1009	DIPTI K RATHWA
<input type="checkbox"/>	1010	RAHUL S SHAH

1 - 10 of 2476 records

« < 1 2 3 ... 248 > »

OK Cancel

Select the desired check boxes of the desired profiles. Click **OK**.

The selected profile appears in the grid.

Select Users

User Wise ▼

User \* ID Name

Search

User ID ▲	Name	
1	SALIM ANSARI	
10	RAJENDRA GOSWAMI	
1001	ANKITKUMAR SOHLIYA	
1002	MEGHA H SHUKLA	

You can also delete the desired profile. To do so, click **Delete** of the respective profile.

If you select **Group Wise** option, select the desired enterprise group from the drop-down list—Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1/2/3.

For each enterprise group — Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1/2/3, click the corresponding picklist to select the desired option/s.

The selected Group appear in the grid.

Select Users

Group Wise

Select Group

Organization


Organization \*

ID

Name

Search

ID	Name	Group	
1	MATRIX COMSEC PVT. LTD.	Organization	
2	SAMARTH	Organization	
3	AVDHOOT	Organization	
4	ELSENGARD	Organization	

You can also delete particular group. To do so, click **Delete**  of the respective group.

If you select **All**, then all the profiles will be selected.

**Generate Report For:** Select the desired option— **All Users, Active Users or Inactive Users.**

Click **Generate Report.**

Sample Report

Doors Accessed by User

Back

1 of 452
100%

MATRIX COMSEC PVT. LTD.						
Doors Accessed By User From 01/01/2000 To 06/22/2023						
Run By: System Admin		Date: 06/22/2023		18:34		
Sr No	User ID	Name	Department	Time	I/O	Type
<b>12/03/2014</b>						
<b>RnD1 3rd Floor VEGA</b>						
1	1001	ANKITKUMAR SOHLIYA	RND SOFTWARE ENGINEERING	09:29	IN	
2	1001	ANKITKUMAR SOHLIYA	RND SOFTWARE ENGINEERING	13:15	IN	
3	1003	UMESH M TALANPURI	ACCOUNTS & FINANCE	13:40	IN	
4	1003	UMESH M TALANPURI	ACCOUNTS & FINANCE	13:40	IN	
<b>12/04/2014</b>						
<b>RnD1 3rd Floor VEGA</b>						
1	1010	RAHUL S SHAH	RND SOFTWARE ENGINEERING	19:43	IN	
<b>12/05/2014</b>						
<b>RnD1 3rd Floor VEGA</b>						
1	1001	ANKITKUMAR SOHLIYA	RND SOFTWARE ENGINEERING	13:00	IN	
2	1003	UMESH M TALANPURI	ACCOUNTS & FINANCE	13:35	IN	
3	1010	RAHUL S SHAH	RND SOFTWARE ENGINEERING	09:33	IN	
4	1010	RAHUL S SHAH	RND SOFTWARE ENGINEERING	17:37	IN	

## Door Usage

This report displays the details of the devices accessed by the selected users for the selected date range.

The screenshot shows a web application window titled "Door Usage". It features a date range selector at the top with "Date" and "06/22/2023" displayed. Below this is a "User Selection" section with a "Select Users" dropdown menu set to "User Wise". There are input fields for "User ID" and "Name", and a "Generate Report For" dropdown menu set to "All Users". A "Generate Report" button is located at the bottom right of the form.

Configure the following parameters:

**Date:** Select the **To** and **From** date for which the report is to be generated.

### User Selection

**Select User:** Select the desired option — **User Wise**, **Group Wise**, or **All**.

If you select **User Wise**, click the **User** picklist. The **Picklist for All Users** pop-up appears.

The screenshot shows a pop-up window titled "Picklist For All Users". It has a green header bar with the text "Total Selected: 0 Records". Below the header is a search bar with the placeholder text "Search" and a "Show Selected" button. The main area contains a table with two columns: "User ID" and "Name". The table lists 10 users, each with a checkbox in the "User ID" column. The users listed are: 1 (SALIM ANSARI), 10 (RAJENDRA GOSWAMI), 1001 (ANKITKUMAR SOHLIYA), 1002 (MEGHA H SHUKLA), 1003 (UMESH M TALANPURI), 1004 (DARSHAK B PATEL), 1007 (DHAVAL I PATEL), 1008 (MAYANK K KORAT), 1009 (DIPTI K RATHWA), and 1010 (RAHUL S SHAH). At the bottom of the table, it says "1 - 10 of 2476 records". Below the table is a pagination control with buttons for "«", "<", "1", "2", "3", "...", "248", ">", and "»". At the bottom of the window are "OK" and "Cancel" buttons.

<input type="checkbox"/>	User ID	Name
<input type="checkbox"/>	1	SALIM ANSARI
<input type="checkbox"/>	10	RAJENDRA GOSWAMI
<input type="checkbox"/>	1001	ANKITKUMAR SOHLIYA
<input type="checkbox"/>	1002	MEGHA H SHUKLA
<input type="checkbox"/>	1003	UMESH M TALANPURI
<input type="checkbox"/>	1004	DARSHAK B PATEL
<input type="checkbox"/>	1007	DHAVAL I PATEL
<input type="checkbox"/>	1008	MAYANK K KORAT
<input type="checkbox"/>	1009	DIPTI K RATHWA
<input type="checkbox"/>	1010	RAHUL S SHAH





Select the desired check boxes of the desired profiles. Click **OK**.


The selected profiles appear in the grid.

Select Users: User Wise

User \* ID Name

Search

User ID ▲	Name	
1	SALIM ANSARI	
10	RAJENDRA GOSWAMI	
1001	ANKITKUMAR SOHLIYA	
1002	MEGHA H SHUKLA	

You can also delete the desired profile. To do so, click **Delete**  of the respective profile.

If you select **Group Wise** option, select the desired enterprise group from the drop-down list—Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1/2/3.

For each enterprise group — Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1/2/3, click the corresponding picklist to select the desired option/s.

The selected Group appear in the grid.


Select Users: Group Wise

Select Group: Organization

Organization \* ID Name

Search

ID	Name	Group ▲	
1	MATRIX COMSEC PVT. LTD.	Organization	
2	SAMARTH	Organization	
3	AVDHOT	Organization	
4	ELSENGARD	Organization	

You can also delete particular group. To do so, click **Delete**  of the respective group.

If you select **All**, then all the profiles will be selected.

**Generate Report For:** Select the desired option— **All Users, Active Users or Inactive Users.**

Click **Generate Report.**

## Sample Report

Sr No	Date	IN Door	IN Time	OUT Door	OUT Time	Duration
1	02/28/2015	Factory Vega Production-2	13:19			
2	09/15/2015	RnD1 3rd Floor VEGA	09:13			
3	01/30/2016	RnD1 GF TRIPOD LEFT OUT	13:36			
4	02/01/2016	RnD1 GF TRIPOD LEFT OUT	12:26	RnD1 GF TRIPOD LEFT OUT	12:34	00:08
5	02/02/2016	RnD1 GF TRIPOD LEFT OUT	11:01	RnD1 GF TRIPOD LEFT OUT	11:02	00:01
6	02/02/2016	RnD1 GF TRIPOD LEFT OUT	11:02	RnD1 GF TRIPOD LEFT OUT	11:02	00:00
7	02/02/2016	RnD1 GF TRIPOD LEFT OUT	11:02	RnD1 GF TRIPOD LEFT OUT	11:04	00:02
8	02/02/2016	RnD1 GF TRIPOD LEFT OUT	11:07	RnD1 GF TRIPOD LEFT OUT	11:10	00:03
9	02/02/2016	RnD1 GF TRIPOD LEFT OUT	11:10	RnD1 GF TRIPOD LEFT OUT	11:13	00:03
10	02/02/2016	RnD1 GF TRIPOD LEFT OUT	11:13			
11	02/16/2016	RnD1 GF TRIPOD LEFT OUT	10:55			
12	02/17/2016	RnD1 GF TRIPOD LEFT OUT	14:15			
13	03/09/2016	Factory Vega Production-2	17:02			
14	06/24/2016	RnD1 BCOM BARRIER OUT	11:57			
15	12/22/2017	Factory QC PMX	12:01			

## Who Is In

This report displays the details of the users who have punched in over the specified time period but not punched out on the selected devices.

Who Is In

Optional Parameters

IN Punch Consideration Period (Hours) : 24

Door Selection

Select Door : Door-Wise

Door : [Search Icon] [Name]

Generate Report

Configure the following parameters:

### Optional Parameters

**IN Punch Consideration Period (Hours):** Specify the number of hours after IN Punch which are to be considered for Who Is In report.

### Door Selection

**Select Door:** Select the desired door—**All** or **Door-Wise**



If you select **Door-Wise**, click the **Door** picklist. The **Picklist For Door** pop-up appears.

Picklist For Door

Total Selected: 0 Records

Search  Show Selected

<input type="checkbox"/>	ID ▲	Name
<input checked="" type="checkbox"/>	1	RnD1 Canteen1 ARGO
<input checked="" type="checkbox"/>	2	RnD1 2nd FLR Server Room VEGA
<input checked="" type="checkbox"/>	3	RnD1 4th FLR Server Room VEGA
<input checked="" type="checkbox"/>	4	RnD1 GF TRIPOD RIGHT IN
<input type="checkbox"/>	5	RnD1 Integra ARGO
<input type="checkbox"/>	6	RnD1 Basement Tripod Entry PVR
<input type="checkbox"/>	7	RnD1 4th Floor FB VEGA OUT
<input type="checkbox"/>	8	RnD1 4th Floor FB VEGA IN
<input type="checkbox"/>	9	RnD1 GF MODE TRIPOD LEFT IN
<input type="checkbox"/>	10	Factory Admin FMX

1 - 10 of 107 records

OK Cancel

Select the desired check boxes of the desired doors. Click **OK**.

The selected doors appear in the grid.

Search

ID	Name	Group ▲	
1	RnD1 Canteen1 ARGO	Door	
2	RnD1 2nd FLR Server Room VEGA	Door	
3	RnD1 4th FLR Server Room VEGA	Door	
4	RnD1 GF TRIPOD RIGHT IN	Door	

Generate Report

You can also delete particular door. To do so, click **Delete** of the respective door.

If you select **All**, then all the profiles will be selected.

Click **Generate Report**.

## Sample Report

MATRIX COMSEC PVT. LTD.				
Who Is In as on 24/07/2023 14:26:51				
Page 1 of 1				
Run by: System Admin				
Sr No	User ID	Name	Door	IN Date-Time
<b>ACCOUNTS &amp; FINANCE</b>				
1	2678A	2678A	ARGO FACE-Device-276	24/07/2023 14:22
<b>RND SOFTWARE ENGINEERING</b>				
1	2676	Rajit Chauhan	ARGO FACE-Device-274	24/07/2023 14:10
2	2736	Ishani Patel	ARGO FACE-Device-274	24/07/2023 11:32

## Out Time

This report displays the details of the Out Time of users for the selected date range.



*The **Out Time** report generated will only display the User's Device punches.*

Date: 06/22/2023 - 06/22/2023

User Selection

Select Users: User Wise

User: ID: Name

Generate Report For: All Users

Generate Report

Configure the following parameters:

**Date:** Select the **To** and **From** date for which the report is to be generated.

### User Selection

**Select User:** Select the desired option — **User Wise**, **Group Wise**, or **All**.

If you select **User Wise**, click the **User** picklist. The **Picklist for All Users** pop-up appears.

Picklist For All Users

Total Selected: 0 Records

Search  Show Selected

<input type="checkbox"/>	User ID ▲	Name
<input type="checkbox"/>	1	SALIM ANSARI
<input type="checkbox"/>	10	RAJENDRA GOSWAMI
<input type="checkbox"/>	1001	ANKITKUMAR SOHLIYA
<input type="checkbox"/>	1002	MEGHA H SHUKLA
<input type="checkbox"/>	1003	UMESH M TALANPURI
<input type="checkbox"/>	1004	DARSHAK B PATEL
<input type="checkbox"/>	1007	DHAVAL I PATEL
<input type="checkbox"/>	1008	MAYANK K KORAT
<input type="checkbox"/>	1009	DIPTI K RATHWA
<input type="checkbox"/>	1010	RAHUL S SHAH

1 - 10 of 2476 records

« < 1 2 3 ... 248 > »

OK Cancel

Select the desired check boxes of the desired profiles. Click **OK**.

The selected profiles appear in the grid.

Select Users

User Wise ▼

User \* ID Name

Search

User ID ▲	Name	
1	SALIM ANSARI	
10	RAJENDRA GOSWAMI	
1001	ANKITKUMAR SOHLIYA	
1002	MEGHA H SHUKLA	

You can also delete the desired profile. To do so, click **Delete** of the respective profile.

If you select **Group Wise** option, select the desired enterprise group from the drop-down list—Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1/2/3.

For each enterprise group — Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1/2/3, click the corresponding picklist to select the desired option/s.

The selected Group appear in the grid.

Select Users

Group Wise

Select Group

Organization


Organization \*

ID

Name

Search

ID	Name	Group	
1	MATRIX COMSEC PVT. LTD.	Organization	
2	SAMARTH	Organization	
3	AVDHOT	Organization	
4	ELSENGARD	Organization	

You can also delete particular group. To do so, click **Delete**  of the respective group.

If you select **All**, then all the profiles will be selected.

**Generate Report For:** Select the desired option— **All Users, Active Users or Inactive Users.**

Click **Generate Report.**

Sample Report

Out Time

Back

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100%

MATRIX COMSEC PVT. LTD.		Page 1 of 23	
Out Time From 01/01/2000 To 06/22/2023		Date: 06/22/2023 22:19	
Sr No	Date	OUT Door	IN Door
1003 - UMESH M TALANPURI			
1	12/31/2016	RnD1 GF TRIPOD LEFT	RnD1 BOOM BARRIER IN 15:57 15:59 00:02
2	01/16/2017	RnD1 GF TRIPOD LEFT	RnD1 BOOM BARRIER IN 18:48 18:49 00:01
3	02/05/2017	RnD1 GF TRIPOD LEFT	RnD1 BOOM BARRIER IN 19:39 19:39 00:00
4	02/17/2017	RnD1 GF TRIPOD LEFT	RnD1 BOOM BARRIER IN 20:04 20:15 00:11
5	05/24/2017	RnD1 GF TRIPOD LEFT	RnD1 3rd Floor VEGA 10:03 10:49 00:46
6	11/21/2018	RnD1 GF TRIPOD LEFT	HO Access VEGA 14:19 16:03 01:44
7	12/13/2018	RnD1 GF TRIPOD LEFT	HO Access VEGA 14:29 16:38 02:09
8	12/18/2018	RnD1 GF TRIPOD LEFT	RnD2 4th Floor FVR 14:17 16:21 02:04
9	12/20/2018	RnD1 GF TRIPOD LEFT	RnD2 3rd Floor FVR 14:17 16:47 02:30
10	01/16/2019	RnD1 GF TRIPOD LEFT	HO Access VEGA 14:18 18:05 03:47

## User Events Interval

This report displays the details of Entry and Exit events of the selected users for the specified time period.

**User Event Interval**

Date: 06/23/2023 Time: 00:00

**Optional Parameters**

Filter Devices: All  
Organization Name in Header As Per: User Selection

**User Selection**

Select Users: User Wise  
User ID: Name:

Generate Report

Configure the following parameters:

**Date:** Select the **To** and from date for which the report is to be generated.

**Time:** Specify the time period for which the Entry and Exit events are to be generated in the report.

### Optional Parameters

**Filter Devices:** Select the desired Option— **All**, **Device Group** or **Randomly**

If you select **Device Group**, click the Device Group picklist. The **Select Device Groups** pop-up appears.

**Select Device Groups**

Total Selected: 0 Records

Search Show Selected

☐ Select All

<input type="checkbox"/>	ID	Name
<input type="checkbox"/>	1	ACTA Devices
<input type="checkbox"/>	2	RnD1VIsitor
<input type="checkbox"/>	3	Device Group 3
<input type="checkbox"/>	4	Device Group 4
<input type="checkbox"/>	5	Device Group 5
<input type="checkbox"/>	6	Device Group 6
<input type="checkbox"/>	7	Device Group 7
<input type="checkbox"/>	8	Device Group 8
<input type="checkbox"/>	9	Device Group 9
<input type="checkbox"/>	10	Device Group 10

1 - 10 of 13 records

OK Cancel

You can either select particular device group or can select all the device groups at once.

To select particular Device Groups, click the check boxes of the desired Device Groups.

The screenshot shows a dialog box titled "Select Device Groups". At the top, a green bar indicates "Total Selected: 3 Records". Below this is a search bar and a "Show Selected" link. A "Select All" checkbox is unchecked. A table lists 10 device groups. The first three are selected with blue checkmarks. The bottom of the dialog shows "1 - 10 of 13 records" and a pagination control with "1" highlighted. "OK" and "Cancel" buttons are at the bottom.

<input type="checkbox"/>	ID ▲	Name
<input checked="" type="checkbox"/>	1	ACTA Devices
<input checked="" type="checkbox"/>	2	RnD1Visitor
<input checked="" type="checkbox"/>	3	Device Group 3
<input type="checkbox"/>	4	Device Group 4
<input type="checkbox"/>	5	Device Group 5
<input type="checkbox"/>	6	Device Group 6
<input type="checkbox"/>	7	Device Group 7
<input type="checkbox"/>	8	Device Group 8
<input type="checkbox"/>	9	Device Group 9
<input type="checkbox"/>	10	Device Group 10

OR

To select all the device, select the **Select All** check box. The Device Groups on all the pages will be selected.


This screenshot shows the same "Select Device Groups" dialog box, but now the "Select All" checkbox is checked. The table shows all 10 device groups selected with blue checkmarks. The green bar at the top now indicates "Total Selected: 13 Records". The pagination control still shows "1 - 10 of 13 records".

<input checked="" type="checkbox"/>	ID ▲	Name
<input checked="" type="checkbox"/>	1	ACTA Devices
<input checked="" type="checkbox"/>	2	RnD1Visitor
<input checked="" type="checkbox"/>	3	Device Group 3
<input checked="" type="checkbox"/>	4	Device Group 4
<input checked="" type="checkbox"/>	5	Device Group 5
<input checked="" type="checkbox"/>	6	Device Group 6
<input checked="" type="checkbox"/>	7	Device Group 7
<input checked="" type="checkbox"/>	8	Device Group 8
<input checked="" type="checkbox"/>	9	Device Group 9
<input checked="" type="checkbox"/>	10	Device Group 10

Click **OK**.

The selected device groups appear in the grid.

Search	
ID	Name
1	ACTA Devices
2	RnD/Visitor
3	Device Group 3
4	Device Group 4
Organization Name in Header As Per <span>User Selection</span>	

You can also delete the desired Device Group. To do so, click **Delete**  of the respective Device Group.

Follow the same steps as Device Group, to selected the Devices if you select **Randomly**.

If you select **All**, then all the devices will be selected.

**Organization Name in Header As Per:** Select the desired option — **User Selection** or **Customized Selection**.

If you select **Customized Selection**, click **Customize Report Header**.

You can select the desired option from the drop-down list or can also add header according to your choice.

## User Selection

**Select User:** Select the desired option — **User Wise**, **Group Wise**, or **All**.

If you select **User Wise**, click the **User** picklist. The **Picklist for All Users** pop-up appears.

Picklist For All Users

Total Selected: 0 Records

Search

Show Selected

<input type="checkbox"/>	User ID	Name
<input type="checkbox"/>	1	SALIM ANSARI
<input type="checkbox"/>	10	RAJENDRA GOSWAMI
<input type="checkbox"/>	1001	ANKIT KUMAR SOHLIYA
<input type="checkbox"/>	1002	MEGHA H SHUKLA
<input type="checkbox"/>	1003	UMESH M TALANPURI
<input type="checkbox"/>	1004	DARSHAK B PATEL
<input type="checkbox"/>	1007	DHAVAL I PATEL
<input type="checkbox"/>	1008	MAYANK K KORAT
<input type="checkbox"/>	1009	DIPTI K RATHWA
<input type="checkbox"/>	1010	RAHUL S SHAH

1 - 10 of 2476 records

«

<

1

2

3

...

248

>

»

OK

Cancel

Select the desired check boxes of the desired profiles. Click **OK**.

The selected profile appears in the grid.

Select Users

User Wise


User \*

ID

Name

Search

User ID ▲	Name	
1	SALIM ANSARI	
10	RAJENDRA GOSWAMI	
1001	ANKITKUMAR SOHLIYA	
1002	MEGHA H SHUKLA	

You can also delete the desired profile. To do so, click **Delete**  of the respective profile.

If you select **Group Wise** option, select the desired enterprise group from the drop-down list—Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1/2/3.

For each enterprise group — Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1/2/3, click the corresponding picklist to select the desired option/s.

The selected Group appear in the grid.

Select Users

Group Wise

Select Group

Organization


Organization \*

ID

Name

Search

ID	Name	Group ▲	
1	MATRIX COMSEC PVT. LTD.	Organization	
2	SAMARTH	Organization	
3	AVDHOOT	Organization	
4	ELSENGARD	Organization	


You can also delete particular group. To do so, click **Delete**  of the respective group.

If you select **All**, then all the profiles will be selected.

Click **Generate Report**.



## Sample Report

User Event Interval						
Back						
1 of 784						
100%						
<div>  <b>MATRIX COMSEC PVT. LTD.</b> <span>Page 1 of 784</span> </div>						
User Events Interval From 01/01/2000 To 06/22/2023						
Run by: System Admin	Device	Site	Date: 06/22/2023	22:37		
Event Date-Time			Entry/Exit	Interval	Late-IN/ Early-OUT	
1 - SALIM ARSARI						
01/01/2000 20:01:37	Production- 2	Factory	Entry	00:00:00		
01/02/2013 08:01:20		Factory	Entry	00:00:00		
01/02/2013 17:01:11		Factory	Entry	00:00:00		
01/03/2013 08:01:42		Factory	Entry	00:00:00		
01/03/2013 08:01:45		Factory	Entry	00:00:00		
01/03/2013 10:01:43		Factory	Entry	00:07:58		
01/03/2013 12:01:04		Factory	Entry	02:17:21		
01/03/2013 12:01:31		Factory	Entry	00:20:27		
01/03/2013 15:01:58		Factory	Entry	00:00:00		
01/03/2013 15:01:02		Factory	Entry	00:09:04		
01/03/2013 17:01:26		Factory	Entry	01:37:24		
01/04/2013 08:01:00		Factory	Entry	00:00:00		
01/04/2013 10:01:00		Factory	Entry	00:00:00		
01/04/2013 10:01:46		Factory	Entry	00:10:46		
01/04/2013 12:01:59		Factory	Entry	01:17:13		
01/04/2013 12:01:50		Factory	Entry	00:13:51		
01/04/2013 17:01:20		Factory	Entry	00:00:00		
01/05/2013 08:01:22		Factory	Entry	00:00:00		
01/05/2013 16:01:27		Factory	Entry	00:00:00		
01/07/2013 08:01:45		Factory	Entry	00:00:00		
01/07/2013 12:01:04		Factory	Entry	00:00:00		
01/07/2013 12:01:06		Factory	Entry	00:15:02		
01/07/2013 17:01:26		Factory	Entry	00:00:00		
01/08/2013 08:01:21		Factory	Entry	00:00:00		
01/08/2013 17:01:09	Production- 2	Factory	Entry	00:00:00		
01/09/2013 08:01:42	Production- 2	Factory	Entry	00:00:00		



The Devices module is available to all users of the COSEC Basic Platform License. You can view, define and configure all the parameters related to COSEC Devices in this module. It is important to configure this module correctly because it precedes the process of user enrollment and formulation of advanced HR policies such as *Time and Attendance* or *Access Control* policies.



VEGA Series

DOOR Series

PATH Series

ARC Series

The various COSEC devices have capacity to support the following number of users:

S. No.	COSEC Device	No. of Users Supported
1	Direct Door V1	500
2	Direct Door V2	2000
3	Direct Door V3	50,000
4	Direct Door V4	50,000
5	NGT Direct Door	10,000
6	Wireless Door	50,000
7	PVR Door	50,000
8	PATH Door	10,000
9	ARC DC100	10,000
10	ARC DC200	50,000
10	ARC IO 800	NA

S. No.	COSEC Device	No. of Users Supported
11	Panel	10,000
12	Panel-Lite	25,000
13	Panel200	25,000
14	Vega Controller	50,000
15	Door FMX	50,000
16	MODE Device	50,000
17	ARGO	50,000
18	ARGO FACE	50,000



*The Direct Door V1, Direct Door V2, PATH Door, ARC DC100, ARC DC200, ARC IO 800, Panel and Panel lite are not supported in COSEC VYOM.*

You can access the COSEC Devices using PIN Number, Biometric Credentials, Smart Cards, Mobile based Access like QR Code Access and Bluetooth based Access. You can also open COSEC Doors using Matrix SARVAM UCS by dialing a number from the keypad. To know more refer to *COSEC Integration* in the SARVAM UCS System Manual.

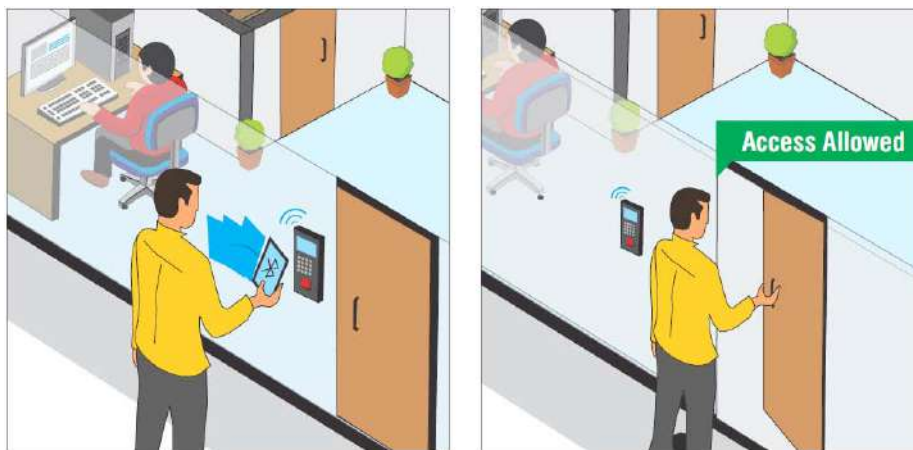
#### **PIN, Biometric Credentials, Card**



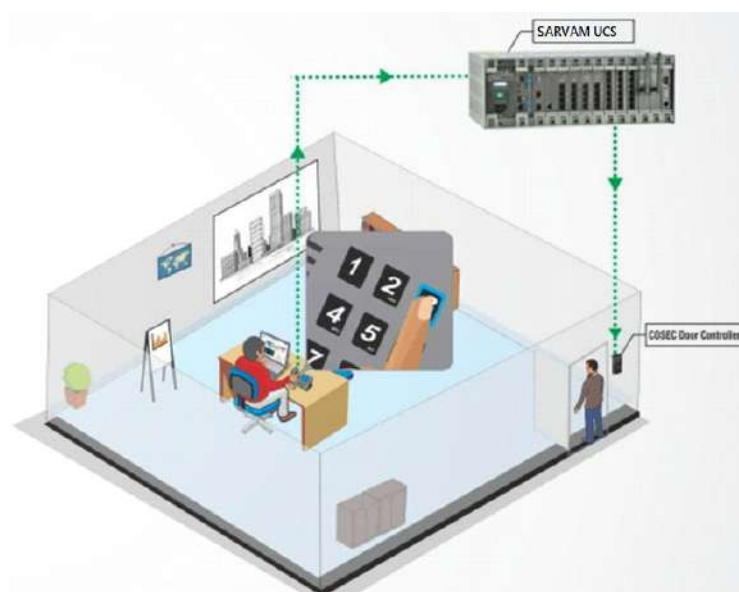
### QR based Access



### Bluetooth based Access



### Access using SARVAM UCS




## Face Recognition

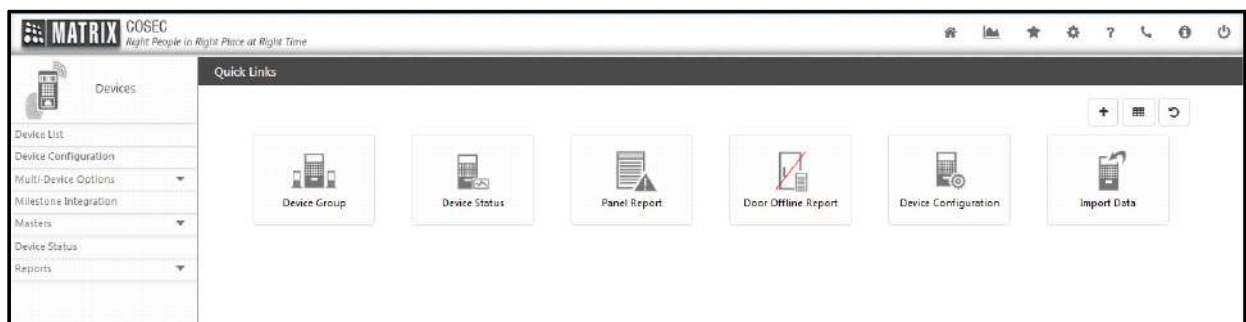
Face Recognition today is the need of the hour and Matrix offers the following devices to choose from as per your requirement:

- The ARGO FACE with built-in facial recognition and liveness detection support for Access Control, Time Attendance & Cafeteria. For details refer to [“ARGO FACE Door”](#).
- The MODE Device is designed for Face Recognition feature which uses in-built camera of the Mobile device for capturing the face. For details, refer to [“MODE Door”](#).
- COSEC Vega, COSEC FMX and COSEC ARGO supports face recognition by using IP camera for capturing the face. For details refer to [“ARGO Door”](#), [“Door FMX”](#) and [“VEGA Door”](#).



To access the **Devices** module,

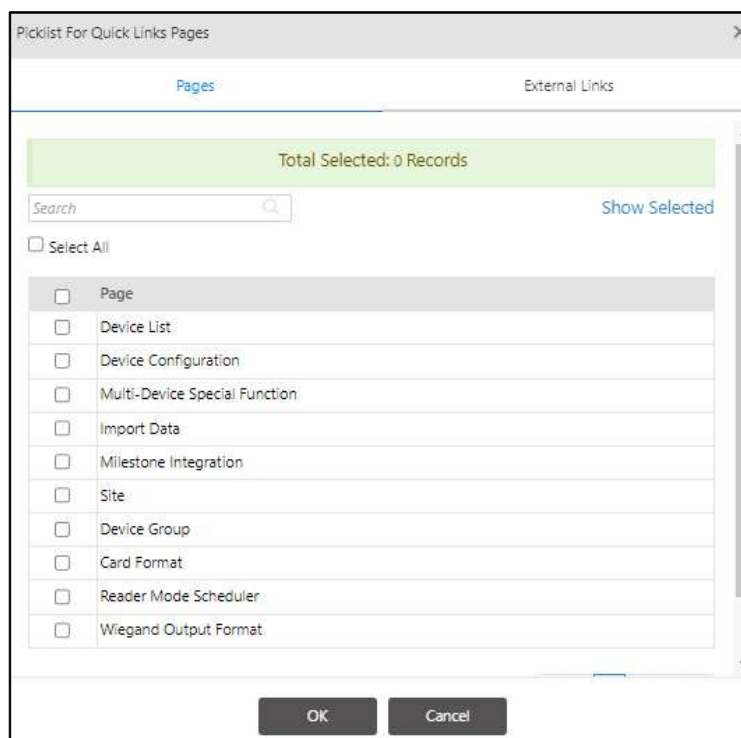
- Click **Devices**  module on the Home page. The **Devices** page appears.



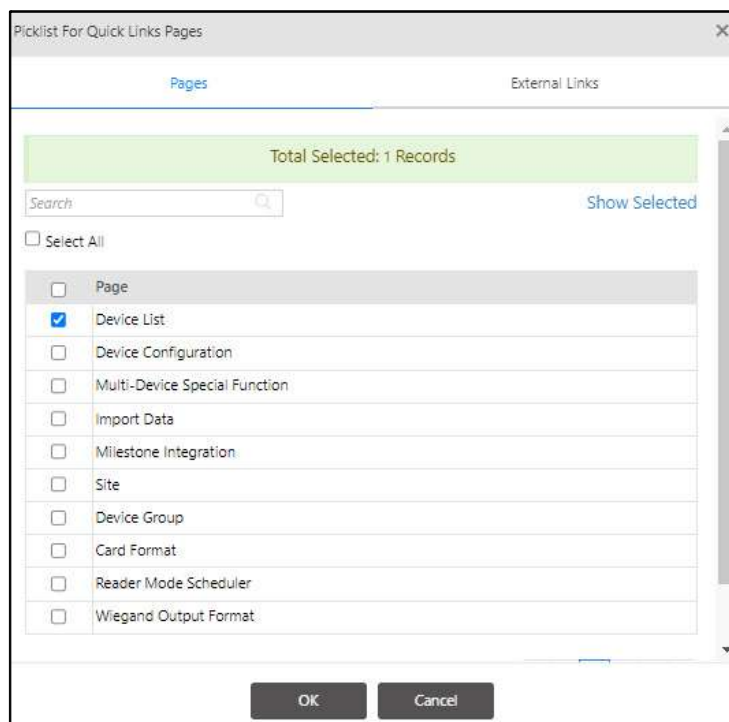
The page displays a menu and **Quick Links** to go to the required page in just one click. Quick Links are shortcuts to reach to a specific page easily. You can configure these options for Quick Links — **Add Quick Link**, **Select Layout** and **Reset to Default**.

### Add Quick Links

- Click **Add**  . The **Picklist for Quick Links Pages** pop-up appears.

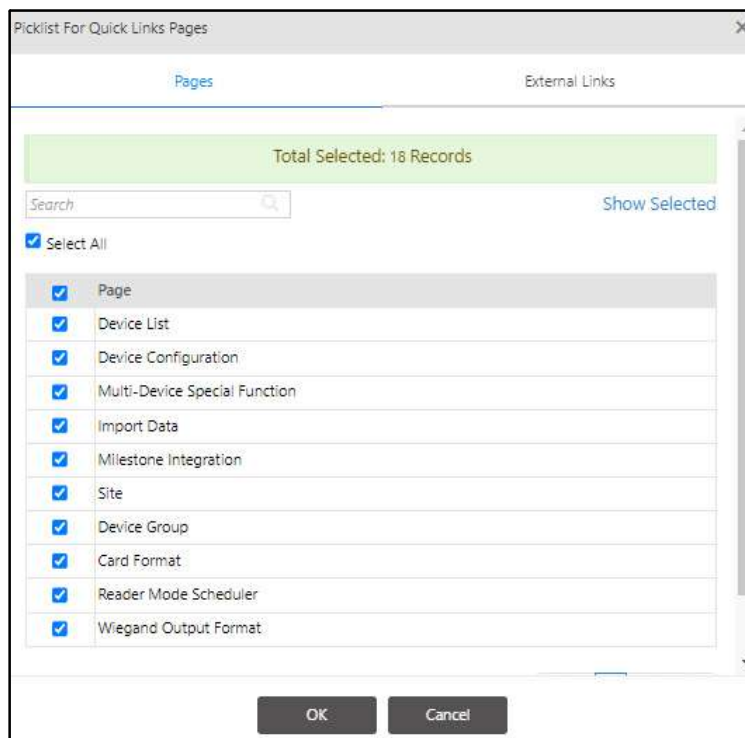


- You can either select particular page or can select all the pages at once. Maximum **20** quick links can be displayed.
- To select particular pages, select the check boxes of the desired pages.




**OR**

- To select all the pages at once, select the **Select All** check box. All the pages will be selected.

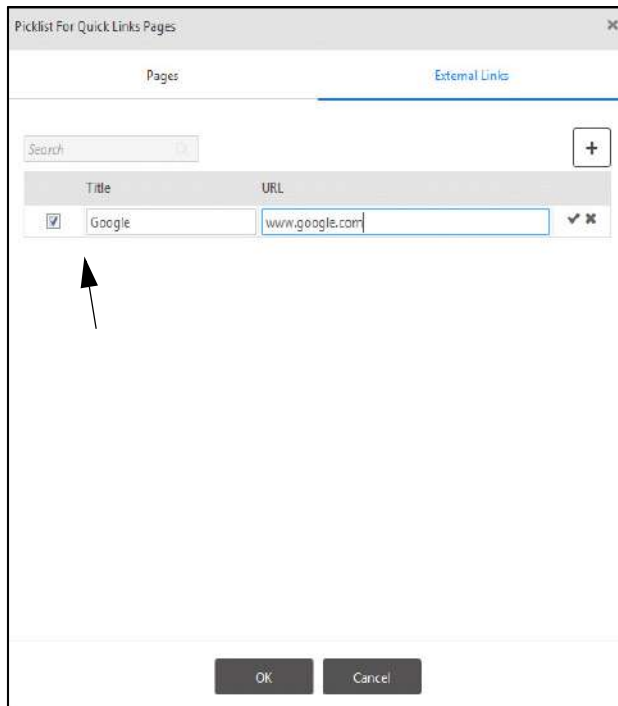




- Click **OK**.
- The Quick Links for selected pages appear on the Quick Link page.

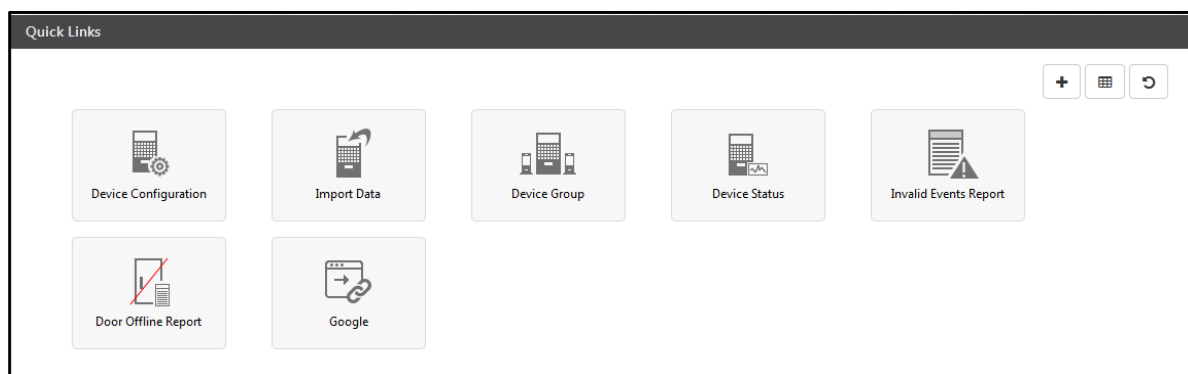
#### Adding External Links,

- Select **External Link** tab and click on  button to add new external link.
- Configure the **Title** and **URL** of the external link under the respective fields. Select the check box to display the Quick Link for the configured link.







- Click **Save**  to save the configuration.
- Once you have saved the configuration, you can edit it. Click **Edit**  to edit the saved configuration.
- Click **OK** to save the configuration of the external link. The Quick Link for the external link appears on the Quick Link page.



## Select Layout

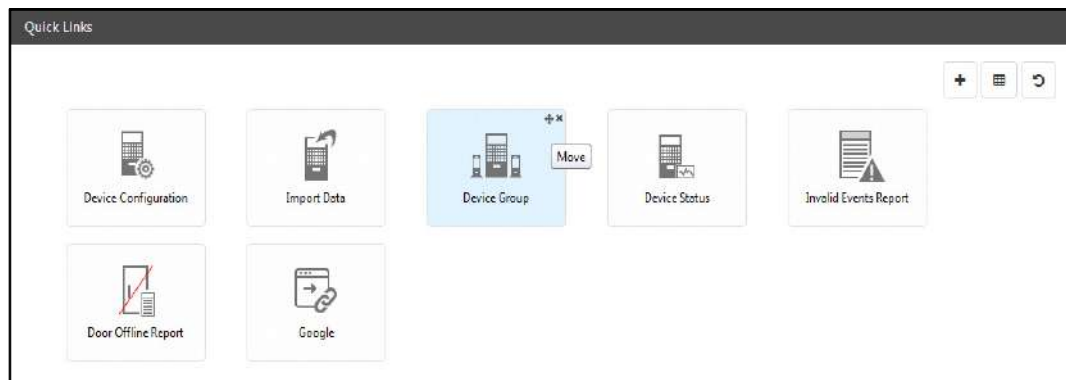
Click **Select Layout**  to select a layout for the quick links. You can select 5x4 or 4x5 layout to manage the quick links.

## Reset To Default

Click **Reset To Default**  to reset the quick links to the default quick links.

## Move the Link

To move the link from one place to another, hover on the link on top right corner and click **Move** as shown below. Then drag the quick link to the desired place. It will be placed at the desired location on the quick links page.



## Delete the Link

To delete a particular link, hover on the link on top right corner and click **Delete** icon as shown below.



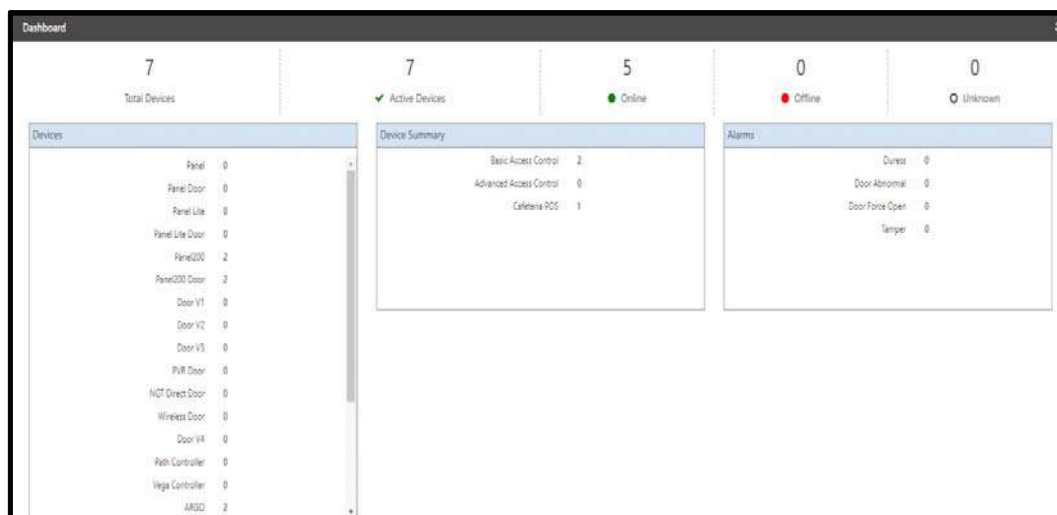
*Quick links are displayed as per rights given to System Account and ESS users.*

## Devices Dashboard

To view the Dashboard,

- Click **Dashboard**  on the **Devices** page.

It displays the following information of the Devices — Device Status, List of Devices, Device Summary and Device Alarms.



## Device Status

- Total Devices: Total number of devices configured in COSEC.
- Active Devices: Total number of devices that are currently active.
- Online Devices: Total number of devices that are currently online with server.
- Offline Devices: Total number of devices that are currently offline with server.
- Unknown Devices: Total number of devices whose status is not known to the server.

## Devices

- This displays the list of various device types configured on the system, along with their individual counts.

## Device Summary

- Basic Access Control: Total number of devices that are configured for Basic Access Control.
- Advanced Access Control: Total number of devices that are configured for Advanced Access Control.
- Cafeteria POS: Total number of devices that are configured for Cafeteria application.

## Alarms

- Duress: Total number of Duress Alarm that are currently unacknowledged.
- Door Abnormal: Total number of currently unacknowledged Door Abnormal events of the doors.
- Door Force Open: Total number of currently unacknowledged Force Open events of the doors.
- Tamper: Total number of currently unacknowledged tampering events of the doors.



To configure an alert message for **Duress** click **Admin Module > System Configuration > Alert Message Configuration**. In Alert Filter, make sure that you select **All/Devices** from the drop-down list and in Event select **Duress** from the drop-down list. For more details, refer "[Configuring Alert Messages](#)".

Maximum 2 fingers can be enrolled as Duress Fingers. To configure the **Maximum No. of Fingers** enrolled click **Admin Module > System Configuration > Global Policy > Maximum No. of Fingers**.

For more information on the above Dashboard options, click the respective information links on the Dashboard.

Clicking **Refresh**  , to update the values on the Dashboard.

The **Devices** Module allows you to add and configure different devices and their corresponding variants. These are as follows:

#### **Direct Doors**

- Door V1
- Door V2
- Door V3
- Door V4
- NGT Direct Door
- Wireless Door
- PVR Door
- Vega Controller
- Door FMX
- Path Controller
- ARC DC100
- ARC DC200
- ARC IO800
- ARGO
- ARGO FACE

#### **Panels**

- Panel
- Panel Lite
- Panel200

#### **Panel Doors**

- Path Panel Door
- PVR Panel Door
- Vega Controller Panel Door
- ARC DC100 Panel Door
- ARC DC200 Panel Door
- ARC IO800 Panel Door
- Door V1/V2/V3/V4 Panel Door
- ARGO Panel Door
- ARGO FACE Panel Door

Although the basic configuration of all devices is a generic process, certain functionalities or configurations may not be available for all devices or all user licenses. For example, Cafeteria configurations are available only for Door V2, Door V3, Door V4, NGT Direct Door, Wireless Door, Door FMX, Vega and ARGO, ARGO FACE devices with a Cafeteria module license. Please refer to the respective device configuration topics for further details.



*For all existing Panel200 devices, it is must for the Admin to update firmware before using PVR as a Panel Door.*

## **Auto Adding New Devices**

It is necessary to add a new device in the COSEC application before proceeding further with configuring it. These devices can be added manually as well as automatically using the **Auto Add New Devices** option.

To add the devices automatically, the administrator must enable the **Auto Add New Devices** check box in Admin Module > System *Configurations* > *Global Policy* > Device. The new devices connected with the COSEC Server

are automatically detected and defined in the COSEC database with a default ID and Name. For details, refer to [“Device”](#) in Global Policy.

For a new device to be auto-detected by the COSEC Server, the administrator must configure the **Server IP Address**, **LAN Settings** and **Port** configurations for the device from the physical Device Menu or Device Web page. For more information, refer to the respective device documents.

You can also auto-add devices that are to be assigned to a particular Device Group by default. Hence, any user and user credentials assigned to the default Device Group can be inherited by the new device automatically without manual intervention.



*If you wish to add a device as a Panel Door, we recommend you to add the same manually in the system if you have enabled **Auto Add New Devices**. This is to prevent the device from being added automatically as a Direct Door when the device comes online.*

*While adding a device make sure the Monitor Service is running.*

*After a new device is added, you must upgrade its firmware, set it to Default factory settings and then Restore the Configurations.*

# Getting Door Online

Devices will be online when their connectivity is established with the Server.

## Server - COSEC CENTRA

Let us consider the following example, to connect COSEC Door V3 with COSEC Server (CENTRA),

- Log into the **Admin Portal** (to do so, enter the following in the web browser: 192.168.101.88/cosecadmin/login. Then, enter the set Username and Password.)
- Click **Monitor Configuration**. The Monitor Configuration page appears.

ID	Monitor Name	Total no. Of Devices
3	MonitorService - 309C23443DA7	67

- If the Monitor Settings have been configured, the details of the Monitor Service appears. Make sure the Monitor Service is running.



*Make sure the Master Service and Admin Portal Service configurations are done and these are running. For details refer to the **Services User Guide**.*

- Click **Service Configuration**, the details of the various services including Monitor Service are displayed.

For details refer to the **Services User Guide**.

- Click **Company Configuration > License and Services**.

The **License and Services** page appears.

- Under **Services**, select the configured Monitor Service. For details refer to the **Admin Mgt Portal User Guide**.
- Now, enter the Default IP Address of COSEC DOOR V3 in the web browser and press the Enter Key.
- Select the **User Name** as **Admin** and enter the set **Password**.
- Click **Settings > LAN Settings**.

The **LAN Settings** page appears.

- The default IP Address appears. You can change the IP Address, if required. Enter the **IP Address** you wish to assign to the door.
- Click **Settings > Basic Profile**.

The **Basic Profile** page appears.

**MATRIX V3 Door - COSEC Door V3 (18)**

Settings

Basic Profile

Connectivity Status: ● via Ethernet

Door Type: Direct Door

Server Connection: COSEC CENTRA

Firmware Version: V01R60.00 (Oct 28 2021 - 01:31:36)

Firmware Upgrade Time: Oct 17 2022 - 11:01:51

System Up-Time: 1 days 6 hrs 33 mins

Submit Cancel

Readers

Readers	Mode	Configured Reader	Detected Reader
Internal - Card	Entry	HID iCLASS-U Reader - Active	HID iCLASS-U Reader
Internal - Finger	Entry	Finger Reader - Active	Finger Reader
External - Card	Exit	None	None
External - Finger	Exit	None	None
External - BLE	Exit	None	None

- In **Server Connection**, select the **COSEC CENTRA** option.
- Click **Manage > Backup and Update**.

The **Backup and Update** page appears.

**MATRIX V3 Door - COSEC Door V3 (18)**

Settings

Manage

Change Password

Backup and Upgrade

Alarm Monitoring and Control

Door Monitoring and Control

Enrollment

Smart Card Key

View

**Backup and Upgrade**

Backup and Upgrade Auto Firmware Upgrade

Upgrade For: Door

Upgrade Firmware: Choose a file 📁 ↑

Restore Configurations: Choose a file 📁 ↺

Backup Events: ↓

The device firmware must be upgraded. To do so, select the file and click **Update**.

- Click **Settings > Server Settings**. The **Server Settings** page appears.



**MATRIX V3 Door - Door V3 51 FOT HID-iClass None (18)**

**Settings**

- Basic Profile
- LAN Settings
- Wi-Fi Settings
- Mobile Broadband Settings
- Server Settings**
- COCC Settings
- Identification Server Settings
- Date-Time Settings
- Cofeteria Settings
- Multi Language Support
- Reader Settings
- Logs
- Manage
- View

**Server Settings - COSEC CENTRA**

This will be used to communicate with Monitor Service

Connectivity Status: ● **Via Ethernet**

Encryption (SSL): ☐

Configuration: ☒ Basic ☐ Custom

URL:

**Web Server**

Encryption (HTTPS): ☐

Interface Selection: ☒ Auto ☐ Manual

Network Interface:

URL:

Directory Name:

**Panel**

Connectivity Status: ● **Disconnected**

Connect to Panel: ☐

Interface Selection: ☒ Auto ☐ Manual

Network Interface:

IP Address:

**Submit Cancel Default**

- In **URL**, enter the COSEC CENTRA IP Address and Port.

Once the connection with the Server is established, the **Connectivity Status** will turn Green.

Now, enter the **COSEC Server IP Address** in the address bar of the web browser and press the Enter Key.

- Click **Device Module > Device Status**.



*Make sure you have enabled the **Auto Add New Devices** check box in Admin Module > System Configurations > Global Policy > Device.*

The **Device Status** page appears.

**Device Status**

Search:

Filter List:  Device Type:  Device Status:  Group By:

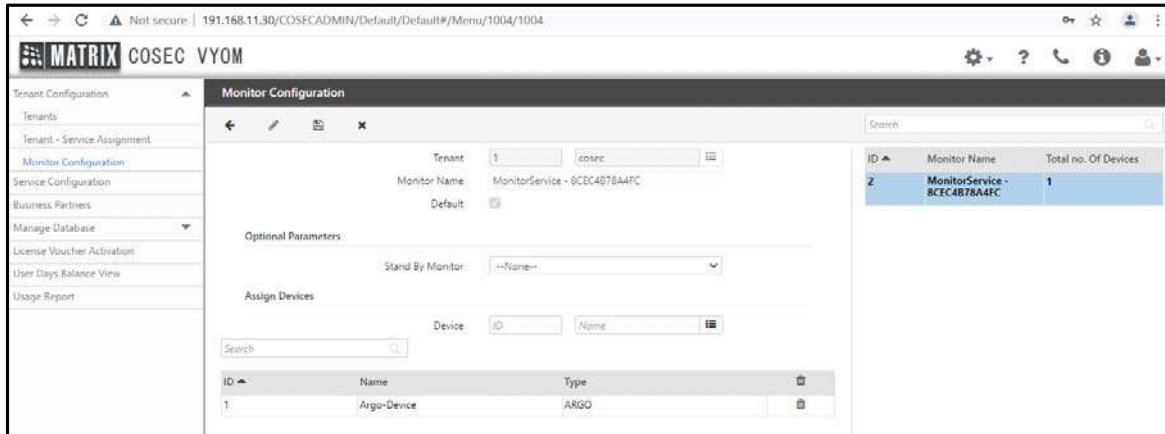
Name	Status	IP	MAC Address	Device Type	Site
Door V3	<span style="color: green;">●</span> Connected	192.168.10.100	00:1B:09:02:66:F3	Door V3	Site-1

- Refresh the Device Status page. The device Status displays Connected and the device will be online.

## Server - COSEC VYOM

Let us consider the following example, to connect COSEC ARGO Door with COSEC Server (VYOM),

- Log into the **Admin Portal** (to do so, enter the following in the web browser: 192.168.101.88/cosecadmin/login. Then, enter the set Username and Password.)
- Click **Monitor Configuration**. The Monitor Configuration page appears.



ID	Monitor Name	Total no. Of Devices
2	MonitorService - BCEC4B78A4FC	1

- If the Monitor Settings have been configured, the details of the Monitor Service appears. Make sure the Monitor Service is running.



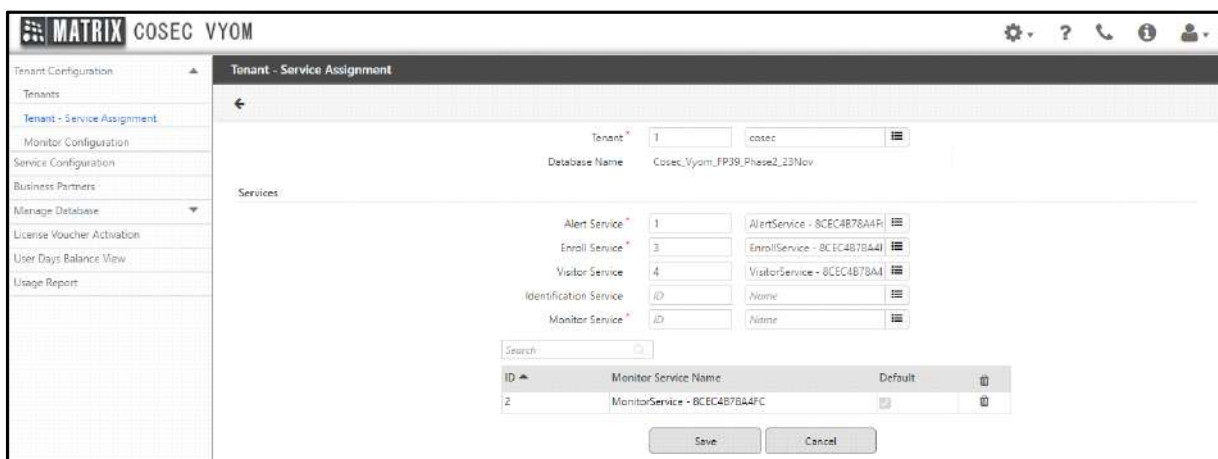
*Make sure the Master Service and Admin Portal Service configurations are done and these are running. For details refer to the **Services User Guide**.*

- Click **Service Configuration**, the details of the various services including Monitor Service are displayed.

For details refer to the **Services User Guide**.

- Click **Tenant Configuration > Tenant - Service Assignment**.

The **Tenant Service Assignment** page appears.



ID	Monitor Service Name	Default
2	MonitorService - BCEC4B78A4FC	

- Under **Services**, select the configured Monitor Service. For details refer to the **Admin Mgt Portal User Guide**.
- Now, enter the Default IP Address of COSEC DOOR V3 in the web browser and press the Enter Key.
- Select the **User Name** as **Admin** and enter the set **Password**.
- Click **Settings > LAN Settings**.

The **LAN Settings** page appears.

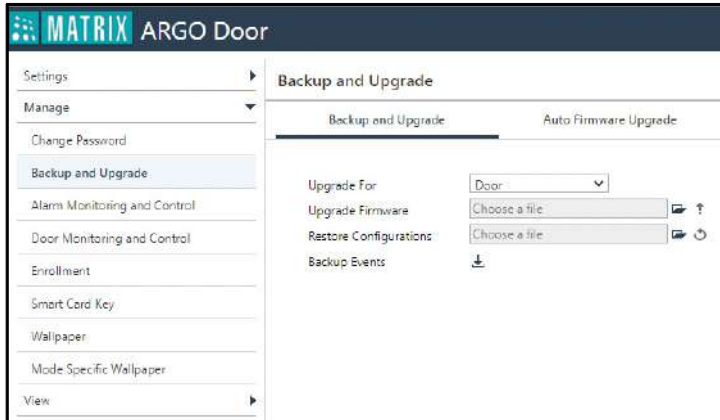
- The default IP Address appears. You can change the IP Address, if required. Enter the **IP Address** you wish to assign to the door.
- Click **Settings > Basic Profile**.

The **Basic Profile** page appears.

Readers	Mode	Configured Reader	Detected Reader
Internal - Card	Entry	EM Prox Reader - Inactive	HID iCLASS-U Reader
Internal - Finger	Entry	Finger Reader - Active	Finger Reader
External - Card	Exit	None	None
External - Finger	Exit	None	None
External - BLE	Exit	None	None

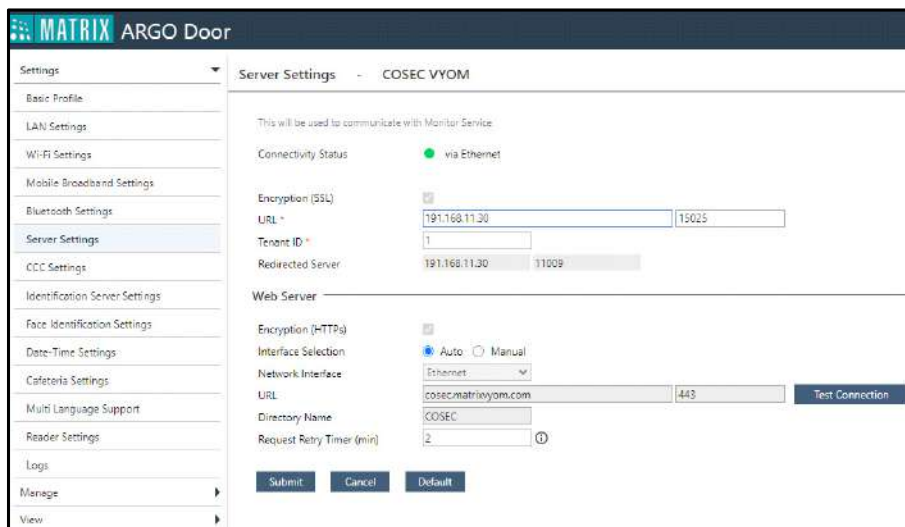
- In **Server Connection**, select the **COSEC VYOM** option.
- Click **Manage > Backup and Update**.

The **Backup and Update** page appears.



The device firmware must be upgraded. To do so, select the file and click **Update**.

- Click **Settings > Server Settings**. The **Server Settings** page appears.



- In **URL**, enter the COSEC VYOM IP Address and Port.
- In **Tenant ID**, enter the ID provided to you.

Once the connection with the Server is established, the **Connectivity Status** will turn Green.

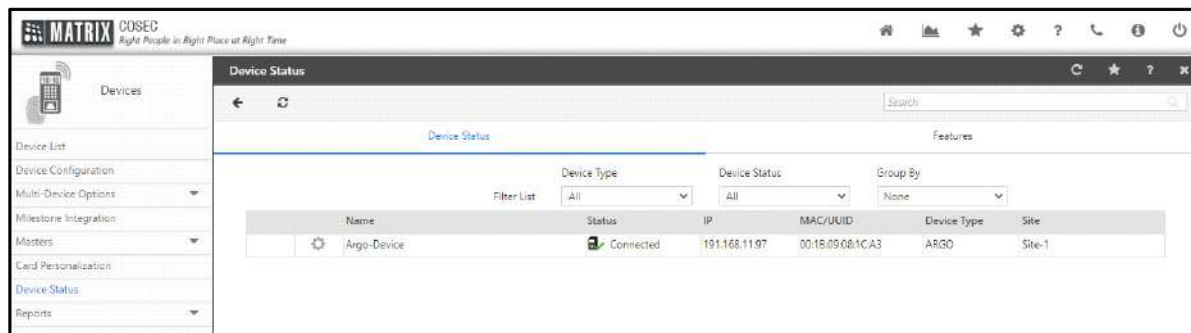
Now, enter the **COSEC Server IP Address** in the address bar of the web browser and press the Enter Key.

- Click **Device Module > Device Status**.



**Make sure you have enabled the *Auto Add New Devices* check box in Admin Module > System Configurations > Global Policy > Device.**

The **Device Status** page appears.



- Refresh the Device Status page. The device Status displays Connected and the device will be online.

# Device List

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The configuration procedure for every COSEC device is unique and depends on the type of device to be configured and the properties or regulations to be assigned to it.

Both Direct Door and Panel Door devices have considerably different configuration procedures as both follow separate approaches for communicating with the Server and other devices. While Direct Doors are independent doors that communicate individually with the COSEC Server.

Doors can also be connected as Panel Doors via Panel200. The Panel200 is a controlling device that can establish a centralized communication between the Server and other Panel Doors.

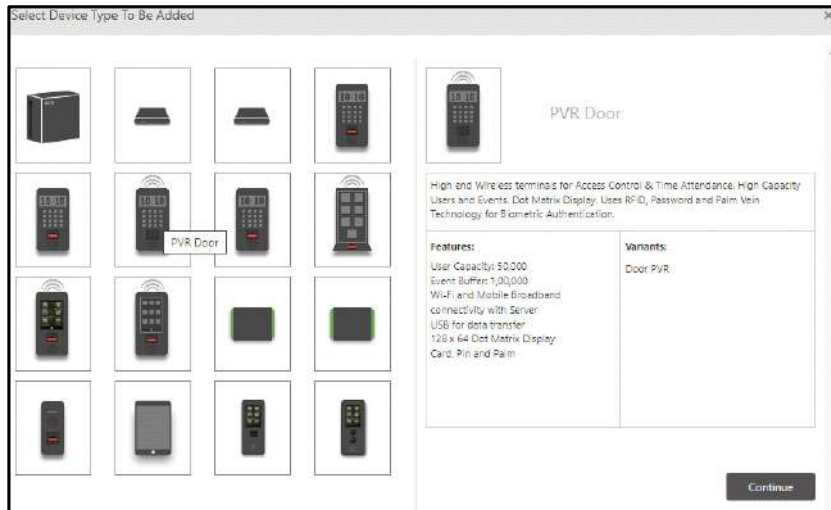
You can configure a COSEC Door as Direct Door or Panel Door.



*Here, Panel refers to Panel/Panel Lite/Panel200.*

## Adding and Configuring Doors

- **For Direct Door:** You can select any door from the options of Door Controller V1/V2/V3/V4, PATH Door, ARC Door, ARC IO800, PVR Door, NGT Door, Wireless Door, Vega Controller, ARGO or ARGO FACE and configure the door directly.
- Click **New**. Then click on the desired device.



- **For Panel Door:** You have to configure Panel200 first. Once Panel200 is configured, you can add the desired door by clicking the Panel Door option.
  - Click **New**, then click **Panel Door**.

- Select the desired **Panel200** from the drop-down list.

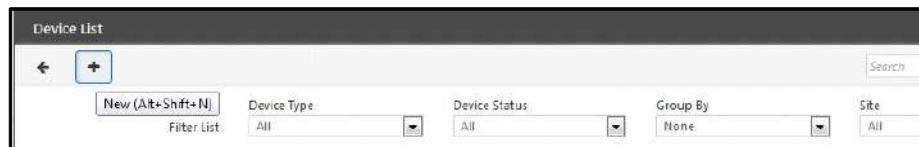


- Select the desired **Door Type** from the drop-down list— Door V1, Door V2, Door V3, Door V4, Path Controller, Vega Controller, PVR Door, ARC DC 100, ARC IO 800, ARC DC 200, ARGO, Path V2, ARGO FACE.

To configure doors,

- Click **Devices module > Device List**.

The **Device List** page appears.



- Click **New**.

The **Select Device Type To Be Added** pop-up appears.



- Click on the desired Door Type.
- Click **Continue** to proceed.

The Device Configuration page appears.

Refer to the respective topic for details.

- “NGT Door”
- “PVR Door”
- “ARC Door”
- “ARC IO-800”
- “PATH Door”
- “Door Controllers”
- “Door FMX”
- “VEGA Door”
- “Wireless Door”
- “ARGO Door”



- “ARGO FACE Door”
- “Panel200”
- “MODE Door”

After configuring the devices, the **Device List** appears.

ID	Name	Device Type	Site	Status	Copy Configuration To
12	ARGO_Device	ARGO	Site-1	Active	
11	ARC DC200_1	ARC DC 200	Site-1	Active	
10	VEGA_12	Vega Controller	Site-1	Active	
9	NGT_Device 1	NGT Direct Door	Site-1	Active	
8	Wireless Door	Wireless Door	Site-1	Active	
7	PVR Door	PVR Door	Site-1	Active	
6	DoorV4_Device	Door V4	Site-1	Active	
5	DoorV3_Device	Door V3	Site-1	Active	
4	DoorV2_Device	Door V2	Site-1	Active	
3	DoorV1_Device	Door V1	Site-1	Active	
2	PATH V2_1	Path V2	Site-1	Active	
2	ARGO FACE_PD	Panel200 Door	Site-1	Active	
1	PathV2_2	Path V2	Site-1	Active	
1	Argo_1Device	Panel200 Door	Site-1	Active	

1 - 14 of 15 records

You can also copy the configurations of a device to other devices from the Device List. For details refer to “[Copy Configurations To](#)”.

You can view the Device list based on the filters — **Device Type**, **Device Status** and **Site**.

You can connect **External Readers** to the door controller and configure it from **Device > Device Configuration > Profile > Readers > External Readers**.

**Device Configuration**

21 PVR\_Ground Fl...  
PVR Door  
0/10000  
Active

**Readers**

Auto Detect Readers ☐

**Internal Readers**

Mode: Entry  
Card Reader Type: None

Search:

Member No	Card Format	Configurable Bits
1	Default Format	0

Palm Reader Type: None  
Enable Scheduling: ☐  
Reader Mode Schedule: ID Name

**External Readers**

Mode: Exit  
External Reader Type: 

- None
- None
- EM Prox Reader
- HID Prox Reader
- MIFare-U Reader
- HID iClass-U Reader
- HID iClass-W Reader
- UHF Reader
- MIFare-W Reader
- PN-W Reader

Exit Switch: ☐

These Readers are used to read and detect cards and finger templates enrolled for the user.

You can use Read Only Card as well as Smart Card.

The External Reader type selection depends on the available card/credentials with you.

### ***Reader Types and supported credentials***

- **EM Prox Reader:** EM Prox Read Only Card
- **HID Prox Reader:** HID i-class Low Frequency Read Only Card.
- **MiFare-U Reader:** Mifare Smart Card.
- **HID iClass-U Reader:** HID i-class Smart Card.
- **HID iClass-W Reader:** HID i-class at Wiegand Interface; Read Only Card.
- **UHF Reader:** UHF Card at Wiegand Interface.
- **Combo Exit Reader:** Finger and any card (Type of Card is automatically detected by the Reader).
- **MiFare-W Reader:** Mifare at Wiegand Interface; Read Only Card.
- **PIN-W Reader:** Pin Reader.
- **CB U Reader:** Reader with BLE support.
- **CB W Reader:** Reader CB at Wiegand Interface.
- **ATOM RD300:** Pin, RFID Card, Mobile Credential over BLE and Fingerprint.
- **ATOM RD200:** RFID Card, Mobile Credential over BLE and Finger.
- **ATOM RD100:** Card and Mobile Credential over BLE.


### **COSEC PATH Readers**


The variants; RDCE, RDCEP, RDCI, RDCM can be used as Combo Exit Readers, that is, you can use finger as well as card as the credential.

- **COSEC PATH Reader:** RDCE - EM Prox Cards  
RDCP - HID- Prox Cards  
RDCI - HID-iClass Cards  
RDCM- Mifare Cards  
RDCE - Finger and EM Prox Cards  
RDCEP - Finger and HID- Prox Cards  
RDCI - Finger and Mifare/EM Prox /HID-iClass Cards  
RDCM - Finger and Mifare Cards
- **COSEC ATOM Readers:** The type of card supported in each COSEC ATOM variants — RD300, RD200 and RD100 is dependent upon their sub-variants as described below.
  - **ATOM RD300**
    - ATOM RD300SFM - Mifare / Desfire / NFC / Combo Cards
    - ATOM RD300SFI - HID i - Class, Mifare / Desfire / NFC / Combo Cards
    - ATOM RD300SFE - Proximity Card

- **ATOM RD200**
  - ATOM RD200SFM - Finger and Mifare / Desfire / NFC / Combo Cards
  - ATOM RD200SFI - Finger and HID i - Class, Mifare / Desfire / NFC / Combo Cards
  - ATOM RD200SFE - Finger and Proximity Card
- **ATOM RD100**
  - ATOM RD100KM - Mifare / Desfire / NFC / Combo Cards
  - ATOM RD100KI - HID i - Class, Mifare / Desfire / NFC / Combo Cards
  - ATOM RD100M - Mifare / Desfire / NFC / Combo Cards
  - ATOM RD100I - HID i - Class, Mifare / Desfire / NFC / Combo Cards
  - ATOM RD100E - Proximity Card
  - ATOM RD100KE - Proximity Card

## Copy Configurations To

After the devices are added, the Device List displays all these devices. If you wish to copy the configurations from a device to multiple devices, you can do so using **Copy Configurations To**  option.

The **Copy Configurations To**  option will be visible only against those device for which rights have been provided. For details, refer to [“Assigning Device Rights”](#) under [“System Accounts”](#).



*Copy Configurations To is applicable to the following devices — Panel 200, Direct Doors - VEGA, ARC DC200, ARC IO800, Path V2, MODE, ARGO, ARGO FACE, Panel Doors - VEGA, ARC DC200, ARC IO800, Path V2, ARGO, ARGO FACE.*

*If certain parameters are configured and Copy Parameters To option is clicked, then:*


- *the value of the applicable parameters already configured will be over-written with the values as configured in the selected device.*
- *the values of other parameters that are configured will remain as they are.*

*If none of the parameters are configured and Copy Parameters To option is clicked, then*

- *all the applicable parameter values will be copied from the selected device.*
- *the values of the other parameters will be their default values.*

*To know more about the applicable parameters that will be copied, refer to [“Copy Parameter Details”](#).*

To do so,

- Click **Copy Configurations To**  of the device whose configurations you wish to copy to other devices.

- The **Applicable Devices** pop-up appears.

The screenshot shows a window titled 'Applicable Devices' with a close button (X) in the top right corner. At the top, a green bar displays 'Total Selected: 0 Records'. Below this is a search bar with the placeholder text 'Search' and a magnifying glass icon, followed by a 'Show Selected' button. Underneath, there is a checkbox labeled 'All Devices'. The main area contains a table with three columns: a checkbox, 'ID', and 'Name'. The table lists three devices: ID 10 (VEGA\_12), ID 13 (Vega\_2), and ID 14 (VEGA\_Device\_12). At the bottom, there are 'OK' and 'Cancel' buttons.

<input type="checkbox"/>	ID	Name
<input type="checkbox"/>	10	VEGA_12
<input type="checkbox"/>	13	Vega_2
<input type="checkbox"/>	14	VEGA_Device_12



The devices that appear in the **Applicable Devices** pop-up will be of the same family and device type. Let us understand this:

- In case of Direct Door, for example if you click the Copy Parameters To corresponding to a Vega device, then the pop-up will display other Vega Direct Doors only. If in the Device List you have direct door devices — ARGO1, ARGO2, Vega1 and Vega2, then this pop-up will display only Vega1 and Vega2.
- In case of Panel Door, for example if you click the Copy Parameters To corresponding to the Vega Panel Door device, then the pop-up will display other Vega Panel Doors connected with the same Panel only. If in the Device List you have two Panels — Panel1 and Panel2 connected. In Panel1 the connected Panel Doors are VegaPD1, VegaPD2, ARGOPD1, ARGOPD2. In Panel2 the Panel Doors connected are Vega PD3 and Vega PD4. Then, if you are click the Copy Parameters To of PanelPD3, then this pop-up will display VegaPD4 only.

You can select the particular devices or you can select all the devices at once.

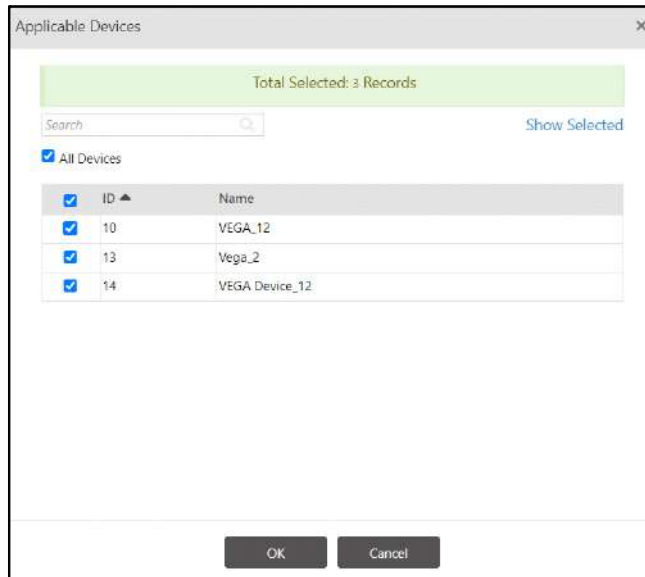
- To select the particular devices, click the check boxes of the desired devices.

This screenshot shows the same 'Applicable Devices' window, but now the checkbox for ID 10 (VEGA\_12) is checked. The green bar at the top now displays 'Total Selected: 1 Records'. The rest of the interface, including the search bar, 'All Devices' checkbox, and 'OK/Cancel' buttons, remains the same.

<input type="checkbox"/>	ID	Name
<input checked="" type="checkbox"/>	10	VEGA_12
<input type="checkbox"/>	13	Vega_2
<input type="checkbox"/>	14	VEGA_Device_12

OR

- To select all the devices, select the **All Devices** check box. All the devices on all the pages are selected.



- Click **OK**.

A Warning pop-up appears. Click **Yes** to copy all the applicable parameters. A processing screen appears.

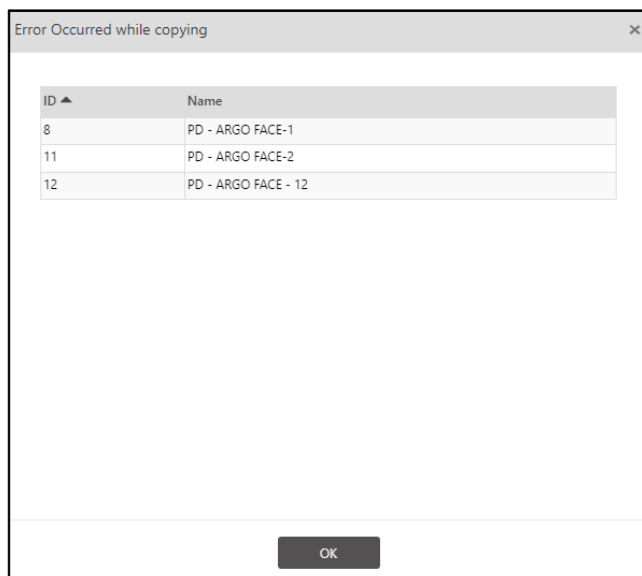


*Only applicable parameters will be copied. For details, refer to [“Copy Parameter Details”](#).*

*If during the processing screen, you click Cancel, then the entire copy process will be aborted.*

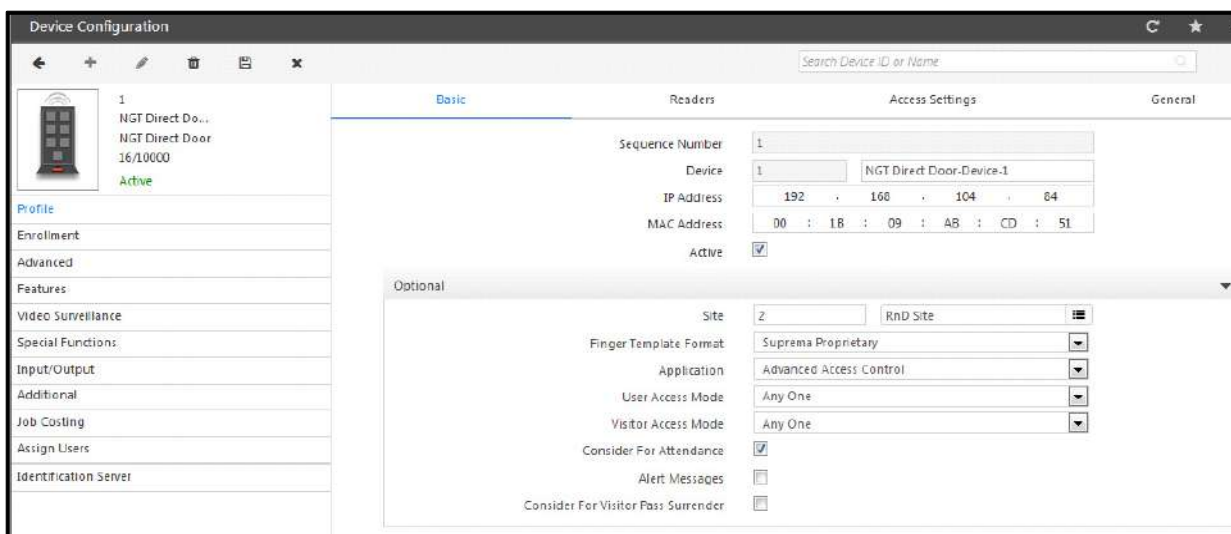
If all applicable parameters are copied successfully to all the devices/selected devices, then the Applicable Configurations are Successfully Copied message will be displayed.

If all applicable parameters are not copied successfully, then the Failed to copy. Please try again message will be displayed as well as the Error occurred while Copying pop-up will appear with the details — Device ID, Device Name — of the devices to which the configurations were not copied.



# NGT Door

The Device Configuration page for NGT Door appears as shown below.



Enter the MAC address of the door. The IP address will be displayed automatically once the device comes Online in Monitor.

To add Devices automatically, go to Admin Module> System Configuration> Global Policy> Device. Enable the “Auto Add New Devices” check-box. Once the device is connected in network, it will come Online in COSEC Monitor.



*The Monitor Service must be running while adding the device to COSEC.*

Once the device is configured, click the **Save** button to save the configuration.

To know more about configuring devices, click on the links for different tabs of Device configuration.

- [“Profile”](#)
- [“Enrollment”](#)
- [“Advanced”](#)
- [“Features”](#)
- [“Video Surveillance”](#)
- [“Special Functions”](#)
- [“Input/Output”](#)
- [“Additional”](#)
- [“Job Costing”](#)

- *“Assign Users”*
- *“Cafeteria”*
- *“Identification Server”*

## Profile

This section enables the user to set up the basic profile for any new device. Setting up a door profile involves defining basic parameters to set up any door controller device.

To do this, On the **Device Configuration** page, select the **Profile** tab. The Profile can be configured in the following sections:

- “Basic”
- “Readers”
- “Access Settings”
- “General”

## Basic

The **Basic** section for “NGT door” is shown below:

The screenshot shows the 'Device Configuration' window with the 'Basic' tab selected. The left sidebar lists various configuration sections: Profile, Enrollment, Advanced, Features, Video Surveillance, Special Functions, Input/Output, Additional, Job Costing, Assign Users, and Identification Server. The main area displays the configuration for 'NGT Direct Door-Device-1'. Fields include Sequence Number (1), Device (1), IP Address (192.168.104.84), and MAC Address (00:18:09:AB:CD:51). There is an 'Active' checkbox which is checked. Below these fields is an 'Optional' section with dropdown menus for Site (Z), RnD Site, Finger Template Format (Suprema Proprietary), Application (Advanced Access Control), User Access Mode (Any One), and Visitor Access Mode (Any One). At the bottom of the optional section are checkboxes for 'Consider For Attendance' (checked), 'Alert Messages', and 'Consider For Visitor Pass Surrender'.

Configure the following options as required:

- **Sequence Number** - This is a system generated sequence number for each new device.
- **Device**- Specify a name that can be assigned to the door. The Door ID is auto-generated by the system.
- **IP Address** - This is the IP address assigned to the door. Once the device connection is established, this field will automatically display the door IP address.
- **MAC Address** - Specify the MAC Address of the door.



*MAC address of door is required while manually adding the door to the COSEC Monitor. Note the MAC address from the device when it is powered on.*

- **Active** - Check the box to activate the device on the network.





To add the Device automatically, go to Admin Module> System Configuration> Global Policy> Device. Enable the **“Auto Add New Devices”** checkbox.

The device will be added automatically but make sure you enable the **Active** checkbox in order to connect the device to the network. Once the device is connected to the network, it will come online in COSEC Monitor.

The **Basic** page also offers an **Optional** tab which provides optional configurations as shown below:

- **Site** - Select the site to which this door is to be assigned from the site pick list window. Site is created from Devices> Masters> Site.
- **Finger Template Format** - Select the format as Suprema Proprietary or Suprema ISO according to which the templates will be enrolled. For globally setting the template format, you can set from Global policy.
- **Application** - Select the application type for which the device is to be used. The options are **Basic Access Control**, **Advanced Access Control** and **Cafeteria**. All devices set to **Cafeteria** will subsequently be available for Cafeteria configuration.



The available license is ACS and Application is set to Basic Access Control. If this ACS voucher exhausts, then while dispatching Basic Configuration of device, application type will be sent as 'Advance Access Control'.

- **User/Visitor Access Mode** - Defines the type and combination of credentials required to identify and validate a user/visitor at the Door Controller. Select the appropriate credential combination from the drop down list.

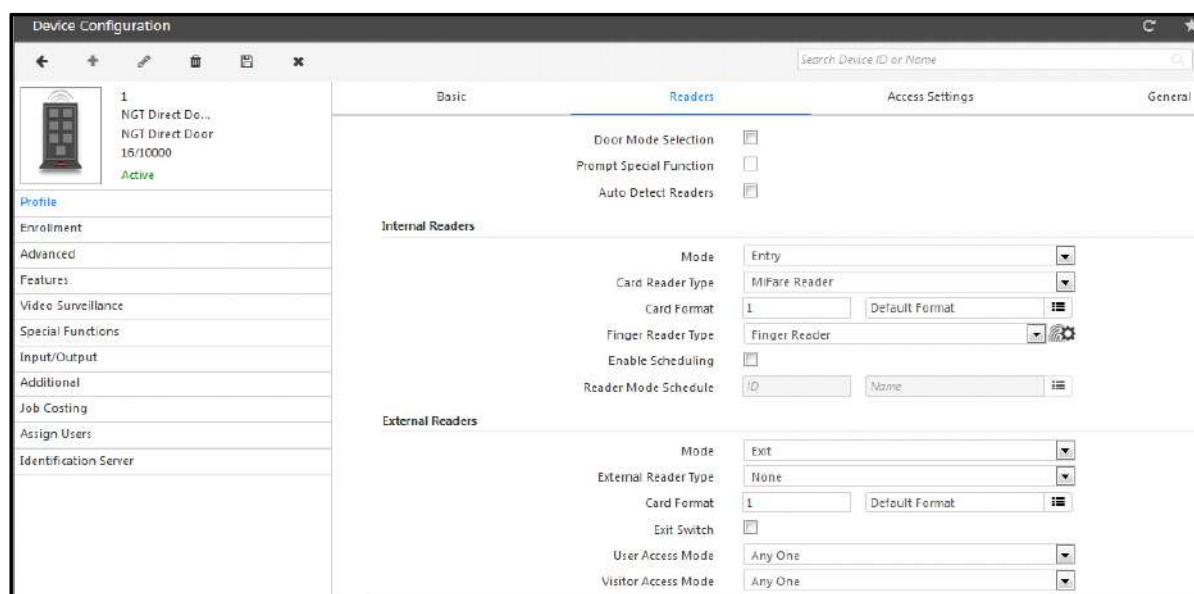
The options available are:

- Any one
  - Card
  - Card + Biometrics
  - Card + Biometrics + PIN
  - Card + PIN
  - Biometrics
  - Biometrics + PIN
  - Biometrics then Card
- **Consider for Attendance** - Select this checkbox if the events sent by this door are to be considered for Time and Attendance data processing. If this option is disabled, then the system would consider all events coming from the door as access control events.

- **Alert Messages** - Select this checkbox to enable the application to send alerts based on events from this door.
- **Consider for Visitor Pass Surrender:** Check the box to consider the selected device for visitor pass surrender. The Visitor can show his credential on this device to surrender the pass.

## Readers

Readers are important hardware components in a biometric door device. They may be internal or external. This section enables the administrator to configure both internal and external readers for a door as shown.



The following parameters are available for configuration:

**Door Mode Selection** - If this option is enabled, then user will be prompted to select punch type as IN or OUT while punching on the device.

Eg: When a door is in Entry mode, your punches will always be in Entry side. But if you want to mark the punch in ext mode then you can select the door mode if “Door Mode Selection” is enabled.

If not selected, user will need to enable Scheduling to set reader mode of door as entry or exit as per user-defined schedules. For information on creating Reader Mode Schedules, **see Devices > Masters > Reader Mode Scheduler**.

**Prompt Special Function-** This will provide selection of special function on device screen and based on the selection of particular type of special function, job codes for JPC user will be prompted. This can be enabled only when “Door Mode Selection” is enabled.


**Auto Detect Readers** - Select this checkbox to enable auto detection of Readers on a door controller connected to the server.

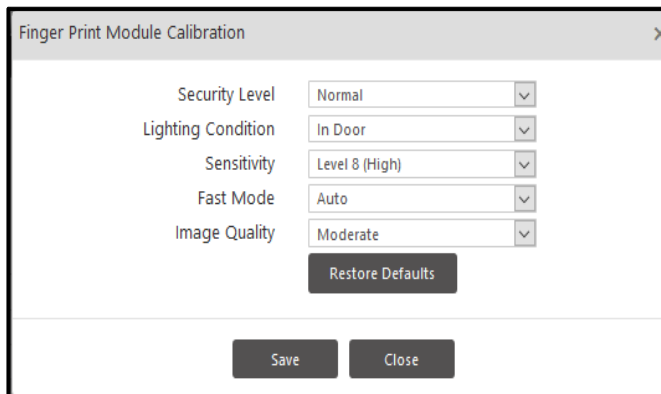
### Internal Readers

This option allows the configuration of the Internal Reader for the selected door.

- **Mode:** Select the Mode as **Entry** or **Exit** from the drop down list.
- **Card Reader Type;** Select the Card Reader Type from the following options:

- EM Prox Reader
  - HID Prox Reader
  - MiFare Reader
  - HID iClass-U Reader
  - HID iClass-W Reader
- **Card Format:** Select a card format to be applicable for internal readers of the device.
    - See Devices> Master> Card Format
  - Select the **Finger Reader Type** as **Finger Reader**.

Click the **FP Reader Configuration**  button to set the **Security Level**, **Lighting Condition**, **Sensitivity**, **Fast Mode**, **Image Quality** and **Restore Defaults** for the selected FP Reader as shown.



### Finger Print Module Calibration

- **Security Level:** Security level specifies FAR (False Acceptance Ratio). Since FAR and FRR (False Rejection Ratio) is in inverse proportion to each other, FRR will increase with higher security levels.

For regular Time-Attendance system “**Normal**” level can be selected. For high security areas requiring complete or maximum matching of template, “**Highly Secure**” level must be selected. For approximate matching of template, “**Secure**” level can be selected.

- **Lighting Condition:** Optical sensors are sensitive to lighting condition. With this parameter, users can tune optical sensors to be adapted for their lighting environment. Select the In Door or Out Door option based on the device location.
- **Sensitivity:** Specifies sensor sensitivity to detect a finger. On high sensitivity, the module will accept the finger input more easily. Level 8 has the highest sensitivity.
- **Fast Mode:** Fast Mode parameter can be used to shorten the matching time with a little degradation of authentication performance. In typical cases, Fast Mode 1 is 2 to 3 times faster than Normal mode while Fast Mode 5 is 6 to 7 times faster than Normal mode. There is also an Auto mode.
- **Image Quality:** When a fingerprint is scanned, the module will check if the quality of the image is adequate for further processing. Image quality parameter specifies the strictness of this quality check. Strongest option might lead to higher number of finger rejections during the enrollment process.



*Good quality of enrollment( around 70-75% quality) is recommended for proper identification of enrolled templates.*

- Click on the **Restore Defaults** button to return the field values for this page to default values if needed.
- Click on the **Save** button.
- **Enable Scheduling:** Select this check box to **Enable Scheduling** to set reader mode of door as entry or exit as per user-defined schedules. For information on creating Reader Mode Schedules, **see Devices > Masters > Reader Mode Scheduler**.

## External Readers

This option allows the configuration of the External Reader for the selected door.

- **Mode:** Select the Mode as **Entry** or **Exit** from the drop down list.
- **External Reader Type:** Select the desired type of External Reader from the drop-down list.



*Using PIN-W Reader; user can change their PIN number through devices.*

- **Card Format** - Select a card format to be applicable for external readers of the device. This is applicable for all direct doors.
- **Exit Switch** - Select this check box to enable the use of **Exit Switch**.
- **User/Visitor Access Mode** - Select the access mode from the options shown below:
  - Any One
  - Card
  - Biometrics
  - Card + Biometrics
  - Biometrics then Card
- **Access Control On Exit Mode** - Select this check box to enable the checking of the following access control policies on door when the external reader is in the 'exit' mode.
  - User enabled
  - User validity
  - Blocked user
  - Time Based Access Check
  - ASC
  - User Access Group

When this parameter is unchecked, all the following access control features will be checked on door (which are applicable and configured).

- User enabled
- Blocked user
- Time Based Access Check
- ASC
- User Access Group
- Deadman
- Door application mode

- Use count
- Mantrap
- Anti-pass back
- Panel Route access
- Smart card based route access
- 2-person
- Access mode
- Occupancy control
- Visitor escort rule

## Access Settings

The **Access Settings** page appears as shown below:

The screenshot shows the 'Access Settings' tab in the 'Device Configuration' window. The left sidebar lists various configuration categories, and the main area displays settings for the selected device (NGT Direct Door 4/10000, Active). The settings include:

- Universal Time Zone:** A dropdown menu showing '(GMT+05:30)Chennai, Kolkata, New Delhi, Mumbai'.
- Time Format:** A dropdown menu showing '24 Hours'.
- Auto Synchronize with NTP:** A checked checkbox.
- Preferred NTP Server:** An empty text input field.
- Working Days:** A grid of checkboxes for Sun, Mon, Tue, Wed, Thu, Fri, Sat, and Holiday, all of which are checked.
- Working Hours(HH:MM):** Two text input fields showing '00:00' and '23:59'.
- Holiday Schedules:** A table with four rows, each containing a 'Holiday Schedule' number (1-4) and a corresponding 'Schedule' name (Schedule 1-4).

- **Universal Time Zone** - Select the geographic time zone in which the DOOR will operate.
- **Time Format** - Specifies the time format to be displayed on Door Controller LCD display. The formats available are:
  - 24 Hours
  - 12 Hours

Select the relevant option from the drop down list as per the site requirements.

### Auto Synchronize with NTP

If Date and time is to be automatically synchronized as per the **Preferred NTP Server** (predefined or user-defined NTP server address) selected by user, then you must enable **Auto Synchronize With NTP** checkbox.

Independent of the mode set from server as Auto or Manual, the user can change the date and time settings from device webpage, which will be reflected on device display.

- When Auto Synchronization with NTP is disabled Preferred NTP Server field will be disabled.
- When Auto Synchronization with NTP is enabled,
  1. You can specify the Preferred NTP server of your choice. In this case device will first try to get Date and Time from that server address.

If it does not get Date and Time in three tries; device will check from pre-defined NTP servers.

If you have entered one of the three pre-defined NTP servers(ntp1.cs.wisc.edu , time.windows.com , time.nist.gov); then device will first check that server first.

If it receives updated Date and Time then Updated Date and Time will be reflected on device web-page and display screen.

2. You can keep the Preferred NTP server as blank. In this case device will check for Date and Time from the first NTP server.
3. If user has manually entered Date and Time from web- page or Device Menu then those values of Date and Time will be reflected on device web-page and display screen.

In the case of the **Manual** option the administrator can manually update the time on the Door with that of the system time as and when required. This can be accomplished from the COSEC Monitor and control application.

- **Working Days** - Specify the days on which the default working hours should be applicable. Check the relevant boxes to specify the active days.
- **Working Hours (HH:MM)** - Define the default working hours in HH:MM format.
- **Holiday Schedule** - This section allows the administrator to assign up to four holiday schedules to the device by using the Holiday Schedule pick list.



*If the same holiday schedule is configured for a user and for the door controller on which the user is assigned, then the user's attendance marking on this device, on any of the scheduled holidays will always be marked as a holiday.*

## General

The **General** page appears as follows. Enter all general details applicable to the device in this section.

The screenshot shows the 'Device Configuration' window with the 'General' tab selected. On the left, a sidebar lists various configuration categories: Profile, Enrollment, Advanced, Features, Video Surveillance, Special Functions, Input/Output, Additional, and Assign Users. The main area displays settings for a device named '7 NGT door' (NGT Direct Door, Q/10000, Active). The 'Mute Buzzer' checkbox is unchecked. Below it, four display messages are configured, each with a checked 'Display Message' checkbox, a 'Schedule' range, and a 'Message' text field. The messages are: 'Good Morning' (00:00 to 11:59), 'Good Afternoon' (12:00 to 15:59), 'Good Evening' (16:00 to 20:59), and 'Good Night' (21:00 to 23:59). A search bar at the top right allows searching by device ID or name.

Display Message	Schedule	Message
<input checked="" type="checkbox"/>	00:00 - 11:59	Good Morning
<input checked="" type="checkbox"/>	12:00 - 15:59	Good Afternoon
<input checked="" type="checkbox"/>	16:00 - 20:59	Good Evening
<input checked="" type="checkbox"/>	21:00 - 23:59	Good Night

- **Mute Buzzer** - User can mute or unmute the door buzzer by checking or clearing the box respectively.
- **Voice Guidance** - Select this check box to enable Voice Guidance feature on door which will guide the user through voice.
- **Enable Display Messages** - This feature allows the user to enable display messages to be displayed on the door device. Upto 4 display messages can be configured for a door.
- **Display Message** - Enable each display message individually by selecting this checkbox.
- **Schedule** - For each message, the user needs to define the time period between which this message is to be displayed.
- **Message** - Enter the message to be displayed in this field. Maximum 21 characters allowed.
- **Multi-Language Support** - Select this check box to enable multi-language support for the selected device.

The **Display From** field shall display the reading order for the selected language.

# Enrollment

The Enrollment page appears as shown below.

- **Enroll from Device** - Select this check-box to enable the enrollment of user from the door controller. When this check-box is enabled, 'Enroll User' special function on that device will get active as shown below.

If 'Enroll User' special function & 'Enroll From Device' check-box both are inactive in device configuration, then on activating 'Enroll User' special function, 'Enroll From Device' check-box will be enabled.

No.	Function Name	Active	JOB Selection	User Group	Card-1
1	Official Work - IN	Yes	Yes	All	
2	Official Work - OUT	Yes	Yes	All	
3	Short Leave - IN	Yes	Yes	All	
4	Short Leave - OUT	Yes	Yes	All	
5	Regular - IN	Yes	Yes	All	
6	Regular - OUT	Yes	Yes	All	
7	Break End	Yes	Yes	All	
8	Break Start	Yes	Yes	All	
9	Overtime - IN	Yes	Yes	All	
10	Overtime - OUT	Yes	Yes	All	
11	Enroll User	Yes	No	All	
12	Enroll Special Card	Yes	No	All	

- **Enrollment Mode** - Select the credential from the drop-down list that can be enrolled using the special function at the door. The options are **ReadOnlyCard**, **SmartCard**, **Biometrics** and **BiometricsThenCard**.
- **Template Per Finger** - This parameter displays the values as configured at the global level. This field is not user editable from this page.
- **Max Number of Fingers** - This parameter displays the values of the maximum number of fingers configured at the global level. This field is not user editable from this page.



- **Number of Fingers/Cards** - Select the number of cards or fingerprints to be enrolled based on the credential option selected in the Enrollment Mode parameter.
- **Enable Self-Enrollment** - Select this check-box to enable the self-enrollment feature on this door

## Advanced

The Advanced tab allows the user to configure some advanced parameters such as access control settings, alarms and device timers.

To access this, After selecting the device, Select the **Advanced** tab from **Device Configuration** page. The advanced settings can be configured from following two sections:

- “Settings”
- “Timers”

## Settings

The **Settings** page appears on your screen as shown below:

The following parameters are available for configuration:

- **Generate Exit Switch Events** - Select this checkbox to enable the door to generate events everytime the exit switch is used.

- **Generate Invalid User Events** - Select this checkbox to enable the door to generate events for invalid user inputs.
- **Generate Sequential IN-OUT Events** - Select this checkbox to generate user punches on device as the sequential IN-OUT events irrespective of whichever mode in which device is functioning.
- **Two Credentials Required**- Select this checkbox to enable the feature of verifying 2 credentials mandatorily for users allowed to By-pass finger/palm.
- **Show Pin**- Select this checkbox to display the characters of PIN when the PIN is entered on device.
- **Allow Exit when Door Lock** - Select this checkbox if users are to be allowed to exit even when the Door relay is in locked condition.
- **Auto Relock** - Select this checkbox to allow the door to relock immediately when the door status changes to close after normal open irrespective of the defined pulse time. However, it is supported only if a door sense is installed and enabled.
- **Auto Relock Timer** - Specify the time in seconds for the Auto Relock operation. Valid Range: 1 to 65535.
- **Alarms** - Select this checkbox to set all door-based alarms as active.
- **Tamper Alarm** - Select this checkbox to activate the Tamper Alarm.
- **Enable Additional Security**- Select this checkbox to enable additional security at the selected Door Controller.
- **Additional Security Code** - Enter a code (ranging from 1 to 65535) in the field provided. Re-enter the code to confirm.



Changing this value can affect the SI function. Click on the **Default Code** button to reset the **Additional Security Code** to the value set in the **Global Additional Security Code** field on the Global System Policy page.

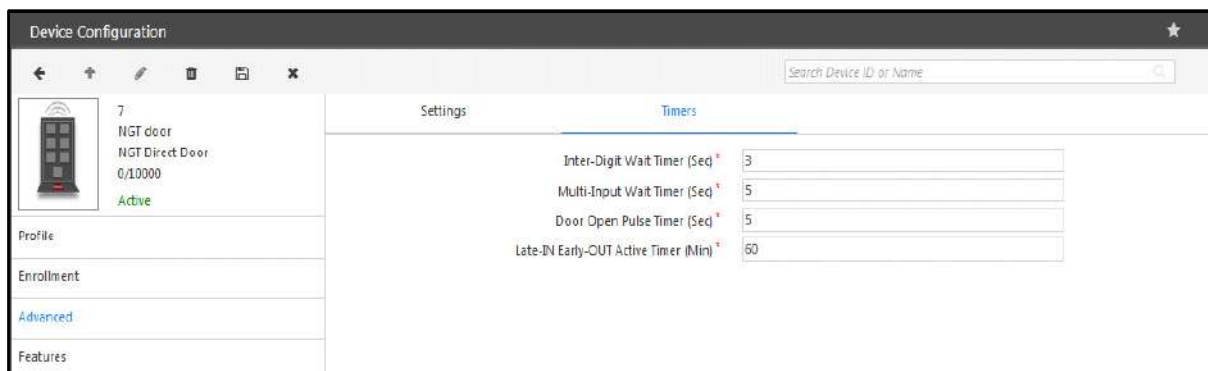
- **Enable Smart Identification** - Select this check box to enable this functionality at the selected Door Controller and select the **Access Level** and the **Access Mode** from the drop down list.
- **Auto Acknowledge Alarm** - Select this check box to enable the auto-acknowledgment of all alarms for this device.
- **Auto Acknowledge Alarm (sec)** - Set the time in seconds for the Auto Acknowledge Timer. The wait timer will start and on expiry of the timer, the alarm buzzer will stop automatically.
- **Facility Code** - Set a value for Facility Code to be set for access modes other than “Card”, if Facility Code is expected in Wiegand Output. This will be applicable to all direct doors.
- **Allow Access Through Mobile**- Check the box to allow the access to device using COSEC ACS App.

Allow Access Through Mobile	<input type="checkbox"/>
Mobile Entry Access Mode	Mobile Only ▼
Mobile Exit Access Mode	Mobile Only ▼

- **Mobile Entry/Exit Access Mode-** Select the entry and exit door access mode from the options of **Mobile Only** and **Mobile then Biometrics**.

## Timers

This section allows the configuration of various types of pre-defined device timers which can trigger off specific responses. In COSEC, timers are often used to control door behaviour and for triggering alarms. The **Timers** page appears on your screen as shown below:



- **Inter-Digit Wait Timer (sec)** - Specify the time period in seconds between two key inputs on the device keypad. On expiry of this timer, the system considers the user input to be complete and is ready for the next input.
- **Multi-Input Wait Timer (sec)** - Specify the time in seconds for which system needs to wait for the second credential input from the user when more than one credential is to be used to grant access.



*We recommend you to set the timer value as greater than or equal to 10 seconds to avoid access denial issues to users. This is applicable when the system reads the credentials (biometric) from the user's Smart Cards.*

- **Door Open Pulse Timer (sec)** - Specify the time in seconds (1 to 65535) for the door to be energized for a valid credential. If the opened door does not return to a closed state before the expiry of this timer, the door will generate a "Door Abnormal" alarm.
- **Late-IN Early-OUT Active Timer (min)** - Specify the time in minutes for which the Late-IN and Early-OUT special functions will remain active after being enabled at the Door Controller.

## Door Access using QR code

The user can access the COSEC device using COSEC APTA installed in the mobile device. If the user has rights for COSEC APTA and the access to the device is allowed for the user, then he can use his mobile device to scan the QR code which constitute the details of the COSEC door.

There is icon for QR code on COSEC APTA application. Clicking that icon will open the camera in your mobile. Now you can show the mobile camera to scan the QR code. The COSEC door will get opened after verifying the security key and access policies of the user.

## Steps to create a QR code

Step 1: Enter details in JSON format

```
{"version":"x","ip": "x.x.x.x","port":"x","pdid":"x","mode":"x"}
```

Valid values:

Field	Field range	Default Value	Remark
version	1-255	1	
ip	0.0.0.0-255.255.255.255	0.0.0.0	
port	0-65535	0	
pdid	0-255	0	If door is in direct door mode then, then PDID will be 0  If door is in panel door mode then, PDID will have values from 1-255
mode	0,1	0	0= for entry mode 1=for exit mode



**Note:**

**Step1a.** If door is in direct door mode enter IP & port of the direct door

b. If door is a panel door, then enter IP & port of the panel door and in the pdid specify the door id which is to be accessed.

**Step 2:** Encrypt the JSON string using key "matrix12" with simple DES/ECB mode.

**Step 3:** Encode the encrypted string using Base 64.

**Step 4:** Use this string to generate QR code through any third party software.

## Features

The Features tab allows the user to enable certain Access Control features for a device



*The Features tab is available only with the Access Control Module license.*

To access this, After selecting the device, Select **Device Configuration> Features**. The access control features for the device can be set from the following two sections:

- "Set1"
- "Set2"

## Set1

This page allows the configuration of three rules - **Absentee Rule**, **Occupancy Control** and **Use Count Control**. The page appears as shown below.

The screenshot shows the 'Device Configuration' window for 'Set1'. The left sidebar lists various configuration categories, with 'Features' currently selected. The main panel displays the configuration for 'Set1' (an NGT door). It includes three rule sections: 'Absentee Rule' with an 'Enable' checkbox checked; 'Occupancy Control' with an 'Enable' checkbox checked, 'Maximum Occupancy Limit' set to 9, 'Minimum Occupancy Limit' set to 1, and 'Zero Occupancy' checked; and 'Use Count Control' with an 'Enable' checkbox checked and 'Use Count Limit (Per minute)' set to 5.

- **Absentee Rule** - Select this check box to **enable** this feature at the door. This rule sets the maximum number of days for non-use of a credential. On expiration of days limit, the user will be automatically blocked.  
For configuring the rule See *Access Control> Absentee Rule*.
- **Occupancy Control** - Select this check box to **enable** the feature at the door and specify maximum number of users to be allowed within the controlled area after which a user exit is required to enable access to another user. Also specify the **Minimum Occupancy Limit** i.e. the minimum number of occupants the designated zone should have, and enable/disable the **Zero Occupancy** option to determine whether the designated zone should be allowed to be empty or not.  
For configuring the rule See *Access Control> Occupancy Control*.
- **Use Count Control** - Select this check box to **enable** the feature at the door and specify the maximum number of uses per minute.  
For configuring the rule See *Access Control> Use Count Control*.

## Set2

This page allows the configuration of three rules - **First-IN User Rule**, **Anti-Pass-Back (APB)** and **2-Person Rule**. The page appears as shown below.

The screenshot shows the 'Device Configuration' window with a sidebar on the left containing a list of devices and a 'Features' section. The main area is titled 'Set2' and contains three rule configurations:

- First-IN User Rule:**
  - Enable: ☒
  - Reset On: ☒ Day Change ☐ Timer Expiry
  - Access Timer (Sec): 3
  - First-IN User Group: 1 (List 1)
- Anti-Pass-Back (APB):**
  - On Entry: ☒
  - On Exit: ☒
  - Forgiveness: ☒
  - Hard/Soft: Soft
- 2-Person Rule:**
  - Enable: ☒
  - Mode: Primary Must
  - Primary Group: Select
  - Secondary Group: None
  - 2nd Person Wait Timer (Sec): 5

- **First-IN User Rule** -Select this check box to enable the feature at the direct door and select the First-In User group which would be valid at the door.  
For configuring the rule See *Access Control> First- In User Rule> Assignment*
- **Anti-Pass Back (APB)** - Select this check box to enable the feature at the direct door.  
For configuring the rule See *Access Control> Anti-Pass Back*
- **2-Person Rule** - Select this check box to enable the feature at the door and set the **wait time** in seconds after which the second person is allowed to punch on the door.  
For configuring the rule See *Access Control> 2- Person Rule*

## Video Surveillance

The Video Surveillance tab allows the user to configure parameters for video surveillance integration with the COSEC device.

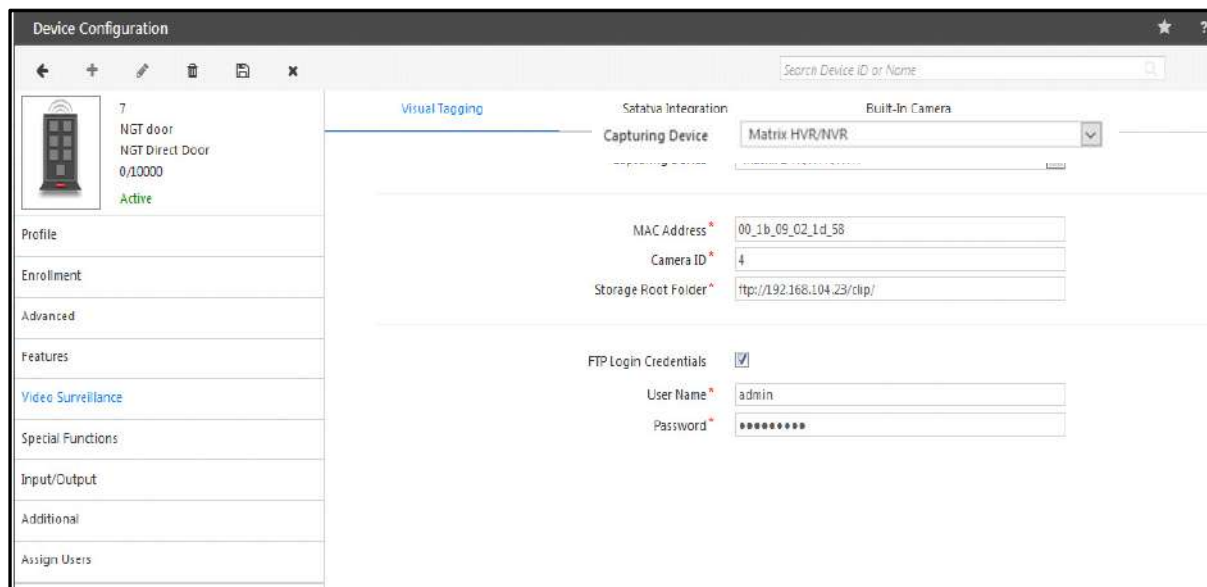
It is available in Basic License.

To access this, Go to **Device Configuration> Video Surveillance**.

- “Visual Tagging”
- “Satatya Integration”
- “Built-In Camera”

## Visual Tagging

The COSEC application can interface with some supported hybrid and network video recording systems and grab images triggered by user events at the Doors. The **Visual Tagging** option enables the administrator to define the video recorder parameters. The **Visual Tagging** page appears as shown below.



The screenshot shows the 'Device Configuration' window with the 'Visual Tagging' tab selected. On the left, a sidebar lists various configuration categories: Profile, Enrollment, Advanced, Features, Video Surveillance (highlighted), Special Functions, Input/Output, Additional, and Assign Users. The main area displays settings for a device named '7' (NGT door, 0/10000, Active). Under the 'Capturing Device' section, 'Matrix HVR/NVR' is selected from a dropdown. Below this, fields for 'MAC Address' (00\_1b\_09\_02\_1d\_58), 'Camera ID' (4), and 'Storage Root Folder' (ftp://192.168.104.23/clip/) are visible. The 'FTP Login Credentials' section has a checked checkbox and fields for 'User Name' (admin) and 'Password' (masked with dots).



To view the user events and related images, go to **Admin > Views/Logs > Event View**. To know more about viewing events, refer to “Event View”.

The following parameters are available for configuration:

- **Capturing Device** - Select the video recording device type from the dropdown menu.

The compatible device types are:

- Matrix HVR/NVR
- Built-In Camera
- Milestone



For more information on integration with **Milestone** devices, refer to “[Milestone Integration](#)”.

- **MAC Address** - In the event of selecting the Matrix HVR/NVR, the administrator needs to specify the MAC address of the video recorder device using “\_” (underscore) as the separator.
- **Camera ID** - Specify the camera number or camera ID for IP cameras. For analog cameras specify the camera number.
- **Storage Root Folder** - Specify the Root folder path or FTP Path where the uploaded images will be saved.
- **FTP Login Credentials** - Check this box to activate FTP login credentials for authentication.
- **Username** - Specify the FTP server username.
- **Password** - Specify the FTP server password.



Some COSEC devices do not support all the network connection options.

## Satatya Integration

This functionality is available for configuration only when the Matrix HVR/NVR device type is selected as the **Capturing Device** (from *Visual Tagging*). It enables the configured COSEC devices to directly send commands to the SATATYA HVR/NVR devices as per the configuration on this page. The Satatya configuration page appears as shown below:

- **Integration type-** Select the integration type from the options of Wired and Network. In wired integration, door is physically connected with Satatya Device. In Network integration, connection can be by ethernet, wireless or broadband depending upon the COSEC device support.
- **Active-** Check the box to activate the connection.
- **Network Connection-** Select the Network connection from the options of Ethernet, Broadband, Wireless.
- **IP Address-** Specify the IP address of HVR/NVR if device is connected with Ethernet.
- **Port Number-** Specify the port number of HVR/NVR.
- **Name-**Specify a user friendly name for the integration function.
- **Active-** Check the Active box to enable the SATATYA integration functionality.
- **Schedule -** Specify a schedule for the function by specifying the start and the end time (*24 Hours format*) as well as checking the boxes against the applicable **days** of the week.
- **Event-** Select a COSEC event from the drop down list for which the resultant action is to be configured.



- **Mode-** Select the event mode from the options of Entry, Exit and Both from the drop down list wherever applicable.
- **Action-** Select the action for the Satatya device from the drop down list. The options available are:
  - Recording - Specify the duration in minutes.
  - Upload Image - This will be uploaded as per the ftp settings.
  - Video Pop-up - Specify the duration in seconds. The video pop up will be generated on the local client of Satatya device on the selected camera.
  - PTZ Preset - Specify the PTZ position number as defined on the SATATYA device.
  - Mail Image - Specify the email-ID.
- **Camera-** Select the relevant camera channels depending on the action selected.

**Example1:** For Access allowed event on COSEC Device, the video pop up of Camera 12 will be shown for 10 seconds.

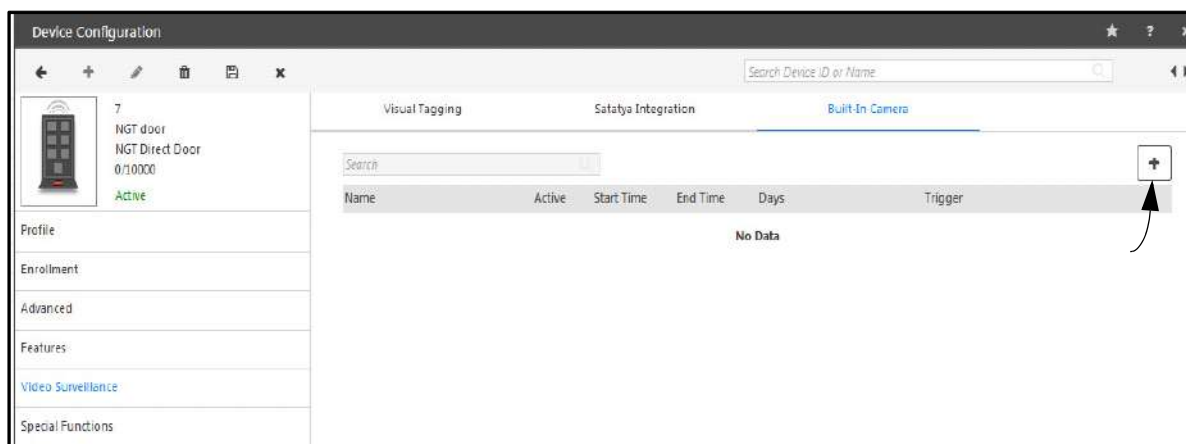
The screenshot shows a configuration window with the following settings:


- Event:** Access Allowed (selected from a dropdown)
- Mode:** Both (selected from a dropdown)
- Action:** Video Pop-Up (selected from a dropdown)
- Duration Sec.:** 10 (entered in a text box)
- Camera:** A grid of checkboxes for cameras 1 through 24. Camera 12 is checked.

- Click the **Add** button to finish the process of linking the event to the action. The user may configure another event-action linkage if required.

## Built-In Camera

This functionality enables configuration and scheduling of image capturing using the in-built camera of an NGT door. The **Built-In Camera** configuration page appears as shown below.

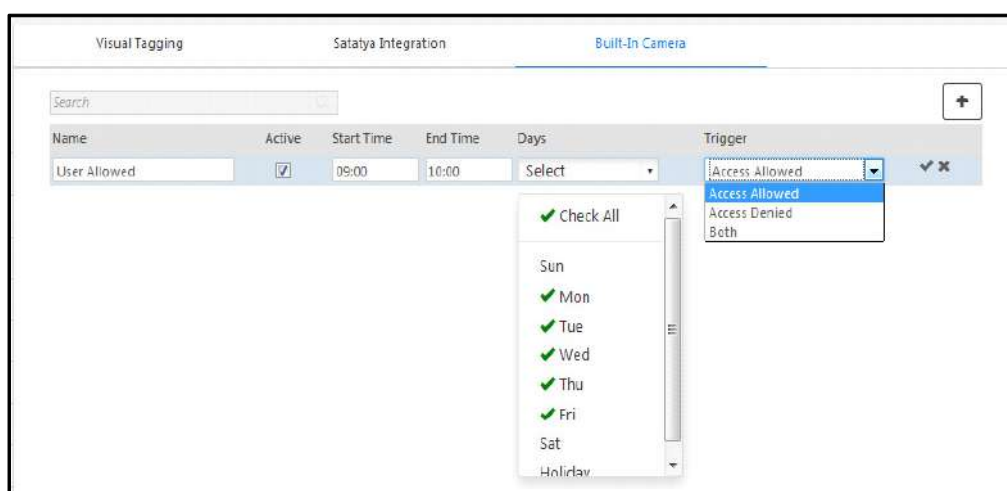


 This functionality is not available in the **Edit**  mode for devices.

The NGT Built-In Camera can be scheduled to capture images during scheduled periods and triggered by specific user events.

To configure a schedule click **Add** button as shown above.

- Specify the function **Name** and select the **Active** check box to enable it on the system.
- Specify a schedule by entering **Start** and **End Time**.
- Select the Applicable **days**.
- Select the user events from the drop down list by which the image capturing should be **triggered**. The options are Access Allowed, Access Denied and Both.



- Click the **OK** and **Save** button to save the schedule for the selected device.


## Special Functions

To configure *Special Functions* for COSEC doors, refer to [“Special Functions”](#).

## Input/Output

The Input/Output (I/O) configuration of a system determines how the output or response of a system is influenced by the input applied on it. In case of the COSEC Access Control System, the I/O configuration should enable the system to monitor and trigger a specific response to any changes in door state or event occurrences at the door device. This change of door state or occurrence of events may be considered as an input while the response or action that is generated by the system on detection of this input, may be defined as the output.



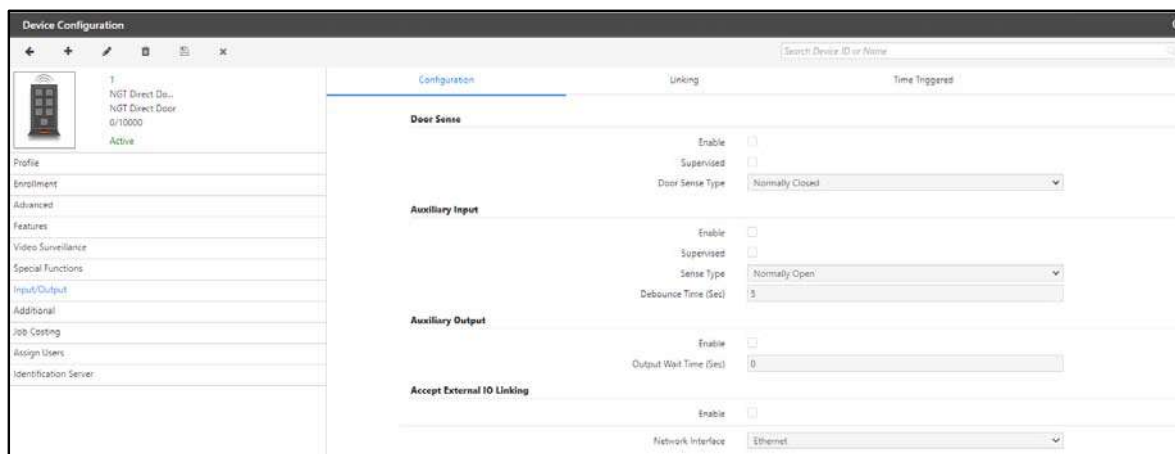
1. This functionality cannot be fully accessed in the Edit  mode for a selected device.
2. This functionality is available only with the Access Control add-on module license.

To access this, After selecting the device, Select **Device Configuration> Input Output**. The Input Output parameters can be set from the following sections:

- “Configuration”
- “Linking”
- “Time Triggered”

## Configuration

The **Configuration** section for a NGT Door appears as shown below.



The following parameters are available for configuration:

- **Door Sense** - The system by default can sense two states of a door - *Normally Open (NO)* and *Normally Closed (NC)* depending on which the output is determined. For example, any deviation of the door from its normal state may lead to the trigger of a *Door Abnormal* alarm.

Select the **Enable** checkbox to enable the system for such two-state monitoring.

Select the **Supervised** checkbox to enable the door for four-state monitoring where the door is also monitored for *door fault* and *door disconnection*. Specify the **Sense Type** as **Normally Closed** or **Normally Open** (Default: Normally Closed).

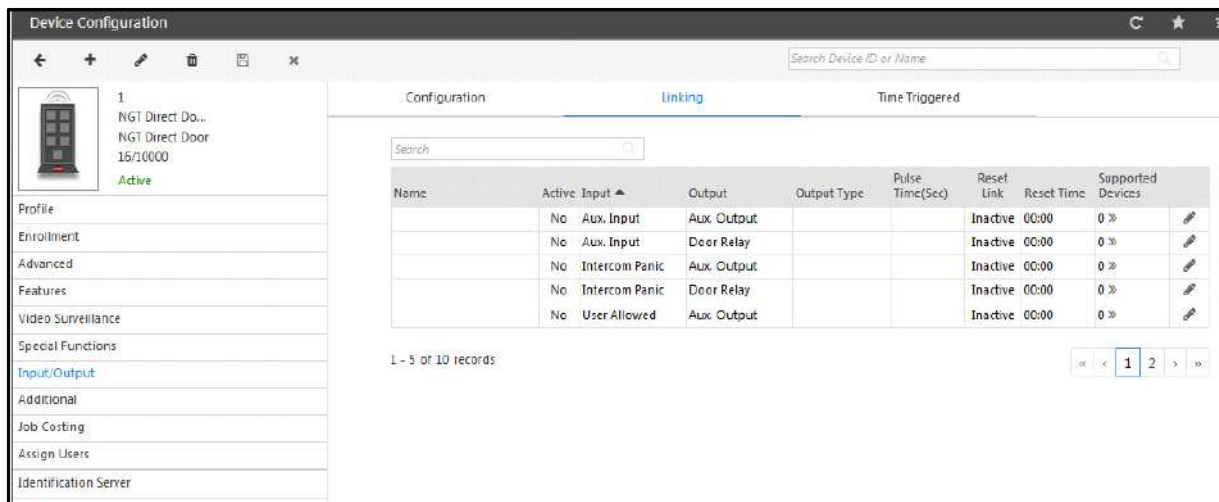
- **Auxiliary Input** - Select the **Enable** checkbox option for Auxiliary Input (e.g. Smoke Detectors) depending on normal or supervised door state monitoring as described above.

**Debounce Time (Sec)** - Specify the Debounce time in seconds. Default value is 3 sec and range should be 0-99 sec. It defines the minimum time for which an input interface must be maintained in a given state before the system reports it. For example, if a Normal door state is changed to Alarm, the state must remain in Alarm for five seconds before an alarm is generated.

- **Auxiliary Output** - Select the **Enable** checkbox to enable Auxiliary Output (e.g. Fire Alarm) for the selected device. To set an additional waiting period before the Aux Output signal is sent, enter an **Output Wait Time (Sec)**.
- **Accept External IO Linking** - Select the Enable checkbox to enable device-to-device IO Linking i.e. input from one Direct Door can trigger output in another Direct Door.
- **Network Interface-** Select the interface option for IO linking with external devices. The options are
  - Ethernet
  - Wireless
  - Mobile Broadband

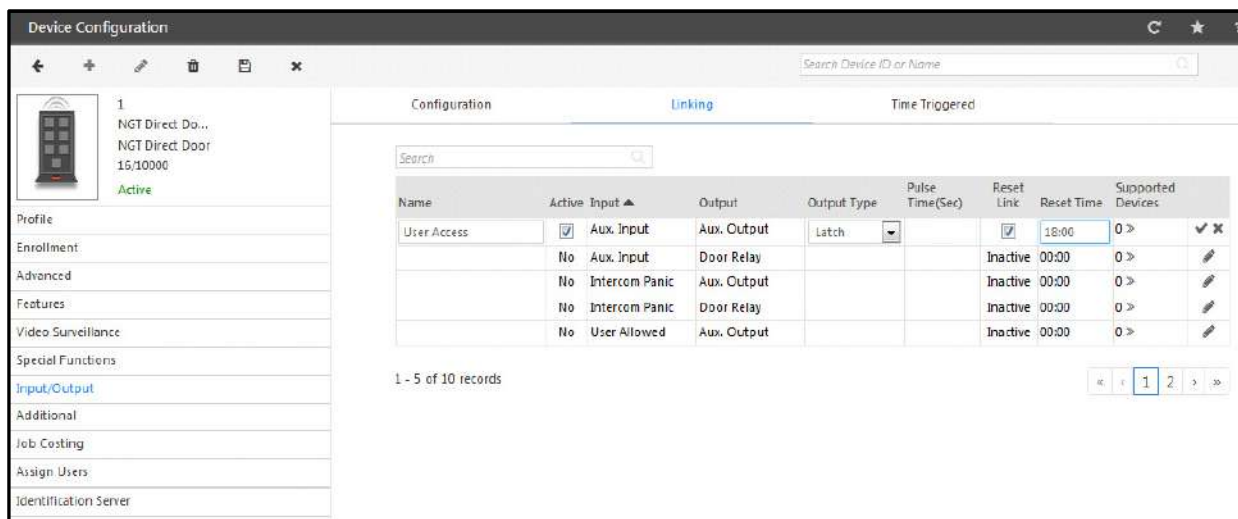
## Linking

The **Linking** section appears as shown below.




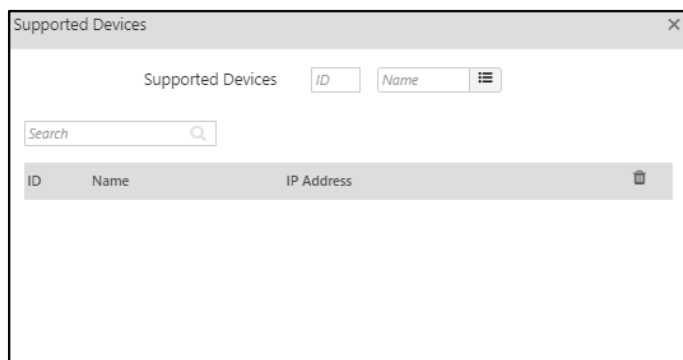
The COSEC application supports the Input/Output Linking feature to activate an output port based on a trigger received from an input port on the same Direct Door. This option enables the administrator to define how an event or events (input port) will trigger an output on the selected door.

Select a Input-Output linking row and click edit button.



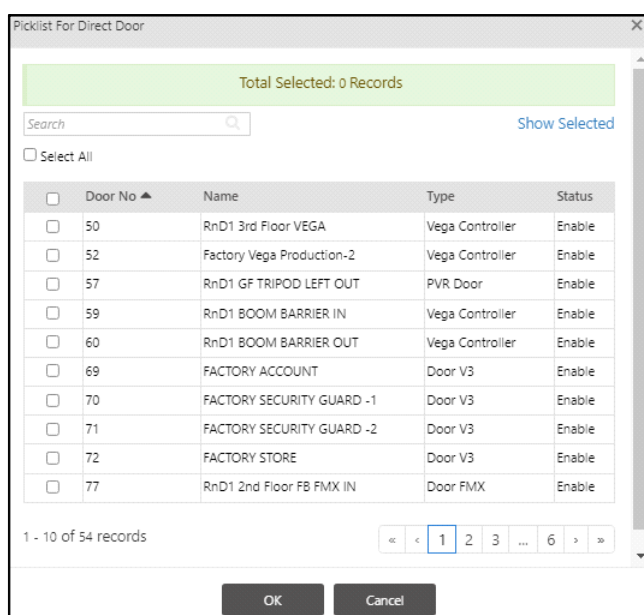
- **Name** - Specify a name for the new I/O linking program to be defined.
- **Output Type** - Specify the appropriate type of output from the following four options available in the drop down list:
  - **Pulse**: With this type of output, the user needs to define the Pulse time in seconds.
  - **Interlock**: With this option, the output follows the input. The relay output is triggered as long as the input is activated after which it returns to normal state.
  - **Latch**: With this option, it is denoted that the relay output will be in an energized condition for infinite period and needs to be reset manually.
  - **Toggle**: With this option, the output group toggles its state whenever an input group is activated.
- **Pulse Duration (sec)** - For a *Pulse* output type, specify the pulse duration in seconds.
- **Active** - Select this check box to activate this linking program.
- **Reset Link**- Select this check box to reset the link automatically after a defined time period.
- **Reset Time**- Enter the time period in hh:mm format at which the link will get reset automatically. Suppose, an IO Link gets activated on 21/04/2017 at 15:00. And Reset Time is set as 18:00. When Device Time is 18:00 then that IO link will get reset.
- **Supported Devices** - All devices supported for external IO Linking will appear in this picklist for selection. Upto 255 external devices can be added by the administrator.

- Click **Supported Devices**  icon. The **Supported Devices** pop-up appears.



The **Supported Devices** pop-up window displays a search bar and a table with columns: ID, Name, and IP Address. The table is currently empty.

- In this pop-up, click the **Supported Devices** picklist. The **Picklist For Direct Door** pop-up appears.



The **Picklist For Direct Door** pop-up window displays a search bar, a "Total Selected: 0 Records" status bar, and a table with columns: Door No, Name, Type, and Status. The table contains 10 records. Below the table is a pagination bar showing "1 - 10 of 54 records" and a "Show Selected" button.

Door No	Name	Type	Status
50	RnD1 3rd Floor VEGA	Vega Controller	Enable
52	Factory Vega Production-2	Vega Controller	Enable
57	RnD1 GF TRIPOD LEFT OUT	PVR Door	Enable
59	RnD1 BOOM BARRIER IN	Vega Controller	Enable
60	RnD1 BOOM BARRIER OUT	Vega Controller	Enable
69	FACTORY ACCOUNT	Door V3	Enable
70	FACTORY SECURITY GUARD -1	Door V3	Enable
71	FACTORY SECURITY GUARD -2	Door V3	Enable
72	FACTORY STORE	Door V3	Enable
77	RnD1 2nd Floor FB FMX IN	Door FMX	Enable

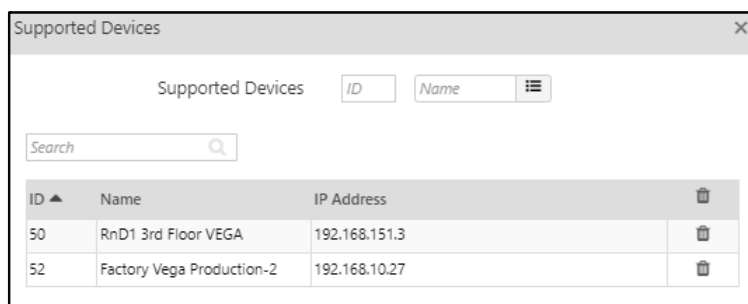
You can either select particular devices or can select all the devices at once.

To select particular devices, click the check boxes of the desired devices.

**OR**


To select all the devices, select the **Select All** check box. The devices on all the pages will be selected,

Click **OK**. You return to the **Supported Devices** pop-up and the selected devices are displayed here.



The **Supported Devices** pop-up window displays the same search bar and table as before, but now the table contains two records, indicating that the selected devices from the picklist have been added.

ID	Name	IP Address
50	RnD1 3rd Floor VEGA	192.168.151.3
52	Factory Vega Production-2	192.168.10.27

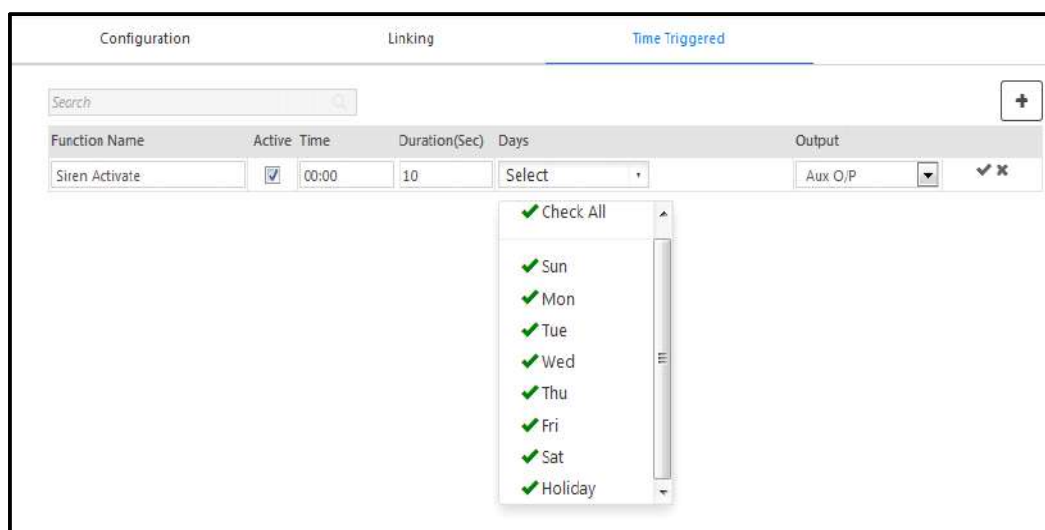
You can also delete the desired devices. To do so, click **Delete**  of the respective device.

Close the pop-up the number of selected devices are displayed under **Supported Devices** in the grid.

- Click **OK** and **Save** the configuration.

## Time Triggered

On the **Input Output** page, select the **Time Triggered** section as shown.



This functionality enables the user to control the activity of an Output without manual intervention. The time triggered functions are used for activating events like door unlock and siren activation that are set as per the start time and for the configured time duration. This functionality is designed to energize outputs for predefined periods at the configured time. The COSEC access control system supports up to 20 Time Triggered functions on a Direct Door.



## Additional

This section lists some additional configurations that can be enabled for door controllers.

To access these configurations, Go to **Device Configuration > Additional**

The Additional parameters can be set from the following sections:

- [“Greetings”](#)
- [“Daylight Saving”](#)

## Greetings

This functionality enables the administrator to define greeting messages triggered by user access events at the NGT DIRECT DOORS. The greeting messages can be in predefined visual as well as audio formats.

The screenshot shows the 'Device Configuration' window for a door. On the left is a sidebar with a list of doors and a menu. The main area is titled 'Greetings' and contains the following fields:

- Greeting Type:** A dropdown menu set to 'Custom Message'.
- Active:** A checkbox that is checked.
- Message Line1:** A text input field containing 'Welcome to Matrix'.
- Message Line2:** A text input field containing 'Have a Good Day'.
- Date:** A date picker showing '08/12/2016'.
- AV Panel:** A collapsible panel containing:
  - Image:** A dropdown menu set to 'Keep Smiling'.
  - Audio:** A dropdown menu set to 'Sunshine Piano'.
- User Selection:** A dropdown menu.
- Buttons:** 'Add' and 'Cancel' buttons.
- Search:** A search input field.
- Table:** A table with columns: Greeting Type, Message 1, Message 2, AV, Active, and a delete icon. It currently shows 'No Data'.

Configure the following options as required:

- Select the **Greeting Type** from the drop down list. The options available are:
  - Custom Message
  - Birthday Message
- Check the **Active** box to activate the greeting message on the selected door.
- Specify the message in alphanumeric format in the space provided against Message Line1 and Message Line2.
  - In the event of defining a *Custom Message*, select the **Date** on which the message is to be displayed by clicking on the date picklist button. In the event of defining a *Birthday Message*, date selection will be disabled.
- Expand the **AV** collapsible panel and select a predefined image and audio file from the respective drop down lists.
- When defining a *Custom Message*, select all users or specific users from the user picklist. This field will be disabled in the event of a *Birthday Message* and all users will be selected by default.
- Click the **Add** button to save the settings on the door.



Greeting Type	Message 1	Message 2	AV	Active
Custom Message	Welcome to Matrix	Have a Good Day	AV	Yes

## Daylight Saving

Many countries observe the convention of adjusting clocks forward and backward. Clocks are set ahead during the spring and back to standard time in the autumn. COSEC doors can be configured to be compatible with this procedure keeping the RTC of the system updated with such changes.

The **Daylight Saving** configuration can be done in 2 ways i.e. Day-Month wise or Date-Month wise.

- Select the **DST Type** as Day-Month wise or Date-Month wise. The **Disable** option when selected, disables the application of DST on the system time.
- On selection of the **Day-Month wise** option, the DST is set by the day of the month on which clock needs to be forwarded and reverted back to normal. Set the month, week number, day of the week, and time for both the **Forward Clock** and **Backward Clock** as shown.

- On selection of the **Date-Month wise** option, the DST is set by date of the month on which clock needs to be forwarded and reverted back to normal. Define the **Time Period** for the date-month wise DST

settings in *24-hours* format, and specify the **Month**, **Date** and **Time** for the **Forward Clock** and the **Backward Clock** as shown.

This DST Setting implies that on 1st sunday of November at 09:00 hours, the clock will be forwarded by 08:00 hours. And on 1st sunday of January at 10:00 hours, the clock will be reversed or backwarded by 08:00 hours.

- Click the **Save** button.

## Job Costing

When user punches on any device, there will be an option to select the Job Code on which the user is working. Job Costing enables the Admin to show or hide Job Code selection on device. It also enables the admin to assign default jobs on device.



Make sure the **Device Based Job Assignment** check box is enabled for the desired Users.

- **Show Job Menu:** Select the desired option— **Show List** or **Allocate Default**.

## Show List

When **Show List** is selected; then multiple jobs can be assigned to the device. The user can select the relevant job code while punching on the device. His/her job hours will be recorded for that job code.

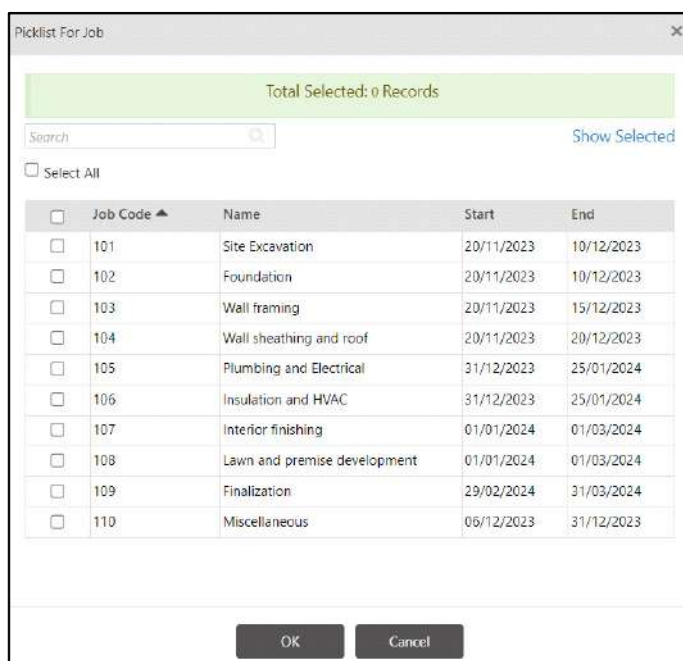
## Assign Jobs

- **Assign Jobs:** You can select Job Group as well as individual Jobs.
- To select **Job Group**, click the Job Group picklist, the **Picklist For Job Group** pop-up appears. Select the desired Job Group.

Click **Save**. The Jobs of the selected Job Group appear in the grid.


You can delete the desired Job. To do so, click **Edit**  and then click **Delete**  of the respective Job.

- To select **Jobs**, click the Jobs picklist. The **Picklist For Job** pop-up appears.



Picklist For Job

Total Selected: 0 Records

Search 

[Show Selected](#)

☐ Select All

<input type="checkbox"/>	Job Code ▲	Name	Start	End
<input type="checkbox"/>	101	Site Excavation	20/11/2023	10/12/2023
<input type="checkbox"/>	102	Foundation	20/11/2023	10/12/2023
<input type="checkbox"/>	103	Wall framing	20/11/2023	15/12/2023
<input type="checkbox"/>	104	Wall sheathing and roof	20/11/2023	20/12/2023
<input type="checkbox"/>	105	Plumbing and Electrical	31/12/2023	25/01/2024
<input type="checkbox"/>	106	Insulation and HVAC	31/12/2023	25/01/2024
<input type="checkbox"/>	107	Interior finishing	01/01/2024	01/03/2024
<input type="checkbox"/>	108	Lawn and premise development	01/01/2024	01/03/2024
<input type="checkbox"/>	109	Finalization	29/02/2024	31/03/2024
<input type="checkbox"/>	110	Miscellaneous	06/12/2023	31/12/2023

OK Cancel


You can either select particular jobs or can select all the jobs at once.

To select particular jobs, select the check boxes of the desired jobs.

**OR**

To select all the jobs, select the **Select All** check box. The jobs on all the pages will be selected.

Click **OK**.

The selected Jobs appear in the grid. You can also delete the desired Job. To do so, click **Delete**  of the respective Job.

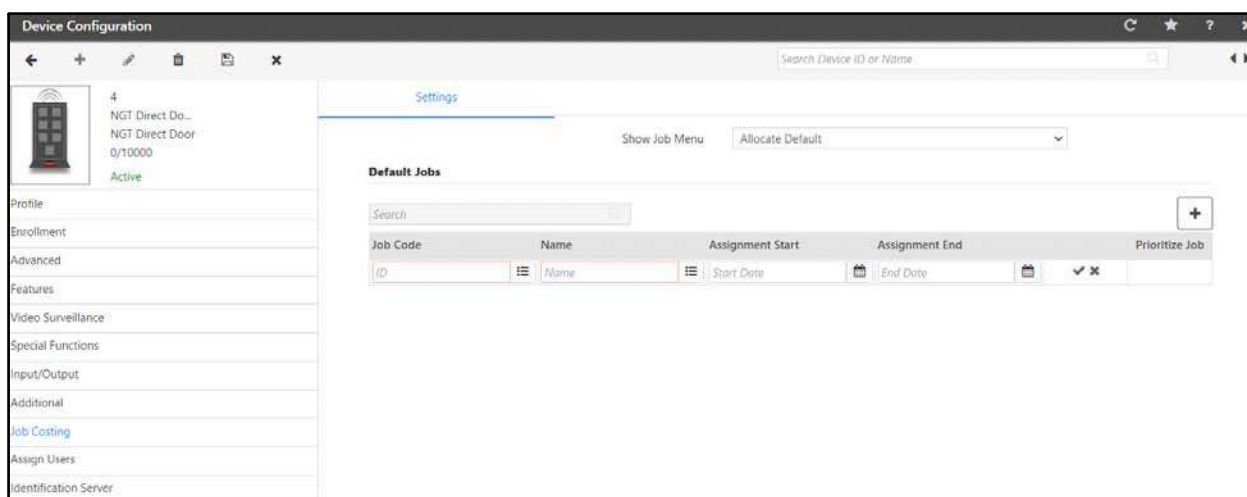
- Click **Save**.

## Allocate Default

When **Allocate Default** is selected; then default jobs for the device can be selected. The Job costing user can directly punch on this door for starting the default job.

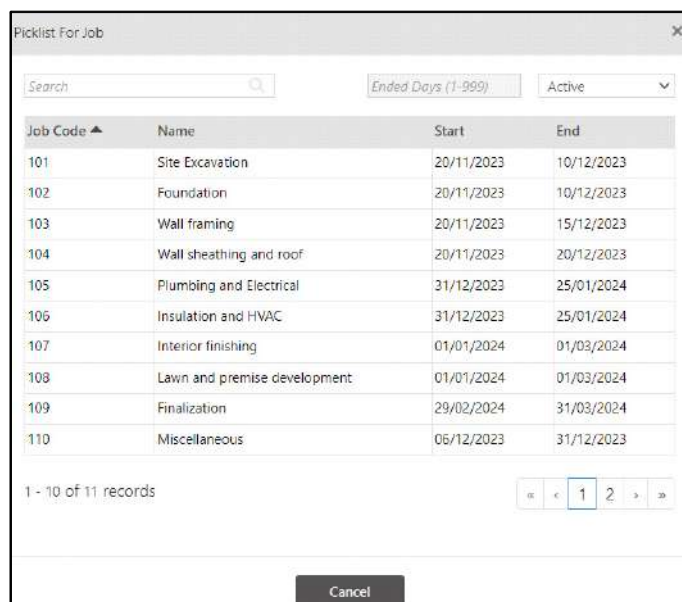
## Default Jobs

Multiple default jobs can be assigned with overlapping Assignment Date Ranges. You can also set the priority of the assigned jobs if required. If you have jobs with overlapping dates and you have set their priority as per your requirement, then the first job will be considered as the default job.



- Click **Add**  . Click the picklist under **Job Code/Name** to select the desired Jobs.

The **Picklist For Job** appears.



By default, all the **Active** jobs are displayed. Click **Active** and select the desired option — **All**, **Active**, **Expired** — to filter the jobs. The jobs appear as per the set filter.

If you select **Expired**, you can set another filter.

Configure the number of days in Ended Days (1-999). The system will display the expired jobs, derived using the following: Current Date minus Number of days configured in Ended Days.

For example:

Ended Days configured = 2

Current Date= April 25, 2024

All the jobs expired between April 23, 2024 to April 25, 2024 (midnight), will be displayed.

Click to select the desired job from the list. You can also search for the desired job using the search bar.

The selected job appears in the grid.

- **Assignment Start and Assignment End:** The selected Jobs Start and End dates are displayed. You can change the Assignment Start and Assignment End dates of the job if required. To do so, click the calendar and select the desired start and end dates.
- Click **Save** to save the configuration.

The **Default Jobs** grid will consist of all the jobs, that is expired, in-progress as well as assigned.



*It is recommended to set job priority only if overlapping dates are assigned to the jobs.*

*If a new job is assigned, by default it will appear at the highest priority. You can change the priority later, if required.*

You can set the priority of the jobs as per your requirement. To do so,

The screenshot shows the 'Device Configuration' window. On the left is a sidebar with a device icon and a list of configuration options: Profile, Enrollment, Advanced, Features, Video Surveillance, Special Functions, Input/Output, Additional, Job Costing, Assign Users, and Identification Server. The main area is titled 'Settings' and contains a 'Show Job Menu' dropdown set to 'Allocate Default'. Below this is the 'Default Jobs' section, which includes a search bar and a table with the following data:

Job Code	Name	Assignment Start	Assignment End	Prioritize Job
111	Premise cleaning	01/10/2023	01/11/2023	Up/Down arrows
108	Lawn and premise development	01/01/2024	01/03/2024	Up/Down arrows
102	Foundation	20/11/2023	10/12/2023	Up/Down arrows
101	Site Excavation	20/11/2023	10/12/2023	Up/Down arrows

- Under **Prioritize Job**, click the **Up** arrow button to move a job upwards in the list. Similarly, click the **Down** arrow button to move a job downwards in the list.

If you have overlapping dates assigned to Jobs, in such scenarios there will be multiple Jobs in which the punches are possible.

To resolve this set the Job with highest priority at the first position, so that when the system searches for the Job as per the date, the punch will be marked in the first Job in which the date is detected.

Let us understand this with the help of an example.

**Example:**

User 1 has been assigned the following jobs:

Job Code	Job Name	Assignment Start	Assignment End	Prioritize Job
J1	Job 1	01/10/2023	10/10/2023	1
J2	Job 2	09/10/2023	15/10/2023	2
J3	Job 3	17/10/2023	25/10/2023	3
J4	Job 4	25/10/2023	31/10/2023	4

Now, User 1 changes the priority of the assigned jobs as follows:

Job Code	Job Name	Assignment Start	Assignment End	Prioritize Job
J2	Job 2	09/10/2023	15/10/2023	1
J1	Job 1	01/10/2023	10/10/2023	2
J4	Job 4	25/10/2023	31/10/2023	3
J3	Job 3	17/10/2023	25/10/2023	4

When User 1 will punch on 09/10/2023, the punch will be marked against Job 2 as it has been set at priority number 1. Similarly, when User 1 will punch on 25/10/2023, the punch will be marked against Job 4 as it is at a higher priority than Job 3.

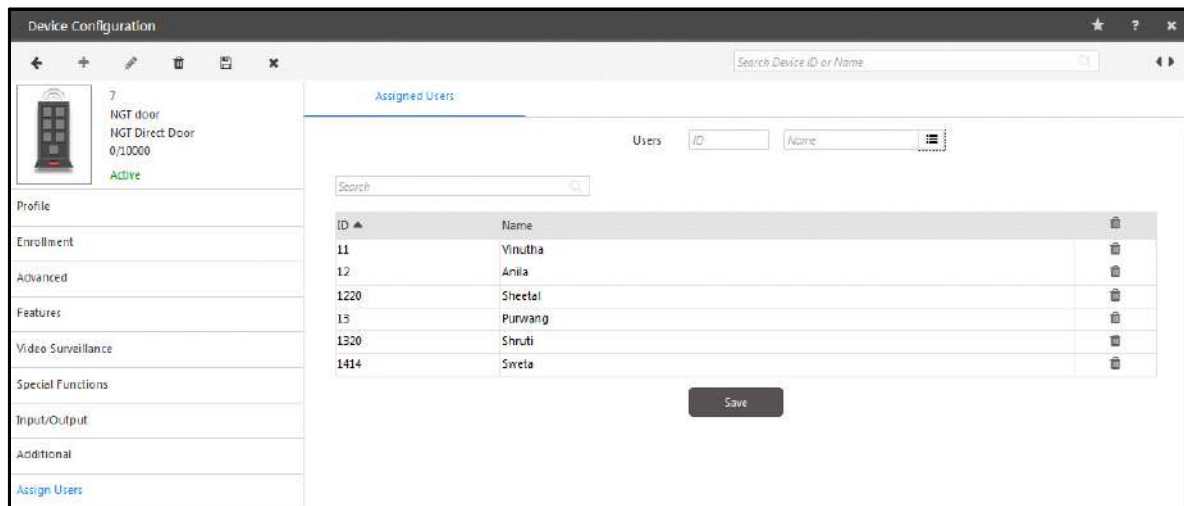


*Make sure that the assigned jobs are prioritized correctly to ensure that the punches are in place.*

## Assign Users

To the configured device, you can select and assign the users.

Click the picklist button and select the users.

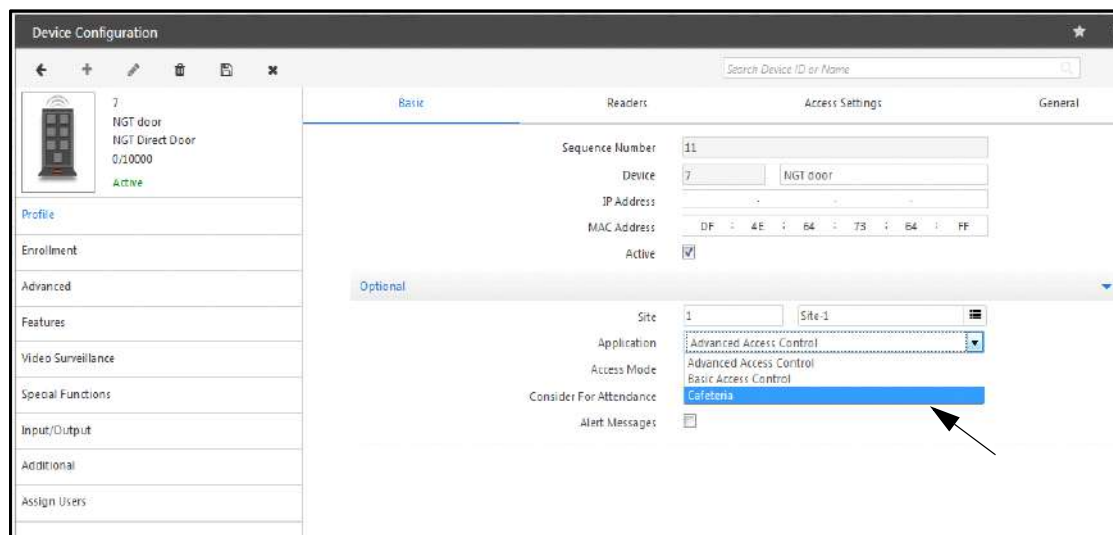


- Click the **Save** button to assign all the added users to the selected door.

## Cafeteria

The COSEC system enables the user to configure devices which will be used by the Cafeteria management module.

To configure a door for Cafeteria application, select **Cafeteria** option in Device Profile> Basic> Application as shown below.



The Cafeteria tab will appear in Device Configuration page.

Select **Device Configuration> Cafeteria> Settings**

## Settings

The Cafeteria configuration for NGT Door is shown as below.

Device Configuration

Device ID: 0/10000  
Device Name: NGT Direct Door  
Active/Inactive

Profile  
Enrollment  
Advanced  
Features  
Video Surveillance  
Special Functions  
Input/Output  
Additional  
Job Costing  
Assign Users  
**Cafeteria**  
Identification Server

Settings Menu

Consecutive Transaction Delay (Sec): 0

**Printer Settings**

Printer: None  
Connection Type: RS232  
Baud Rate: 115200  
Company Name:  
Company Address:  
Punch Line:  
Exclude Price-Cost From Coupon: ☐

- **Consecutive Transaction Delay (Sec):** Enter the time interval between two transactions, wherein any user transaction would be restricted.

## Printer Settings

- **Printer:** Select the printer from the dropdown list based on the site requirements.
- **Connection Type:** Select the printer connection type from the drop down list. The options available are:
  - RS232 (serial)
  - USB
- **Baud Rate:** In the event of a serial printer, select the appropriate baud rate from the drop down list.
- Specify the **Company Name**, **Company Address** and the **Punch Line** as per the site requirements. These details will be printed on the receipt dispensed from the selected printer.
- Select the **Exclude Price-Cost From Coupon** check box if you want to exclude the price from the coupon.

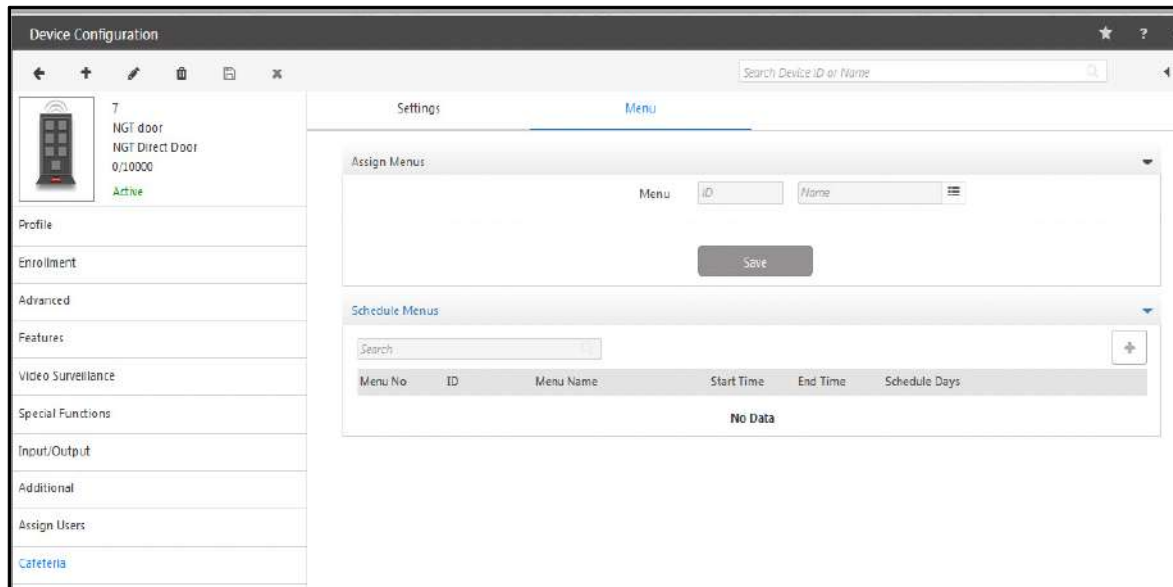
## Menu

COSEC allows the administrator to assign one or more cafeteria menus (Menu 1, Menu 2, Menu 3... upto 99.) to a device. These can be configured by selecting pre-defined menus from the Menu picklist.



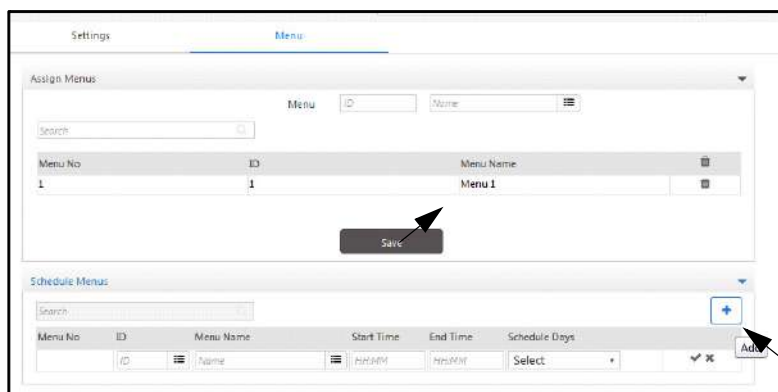
*The Menu is created from Cafeteria module.*





The Menu can be scheduled from Cafeteria module and is displayed in “Schedule Menus” in above screenshot.

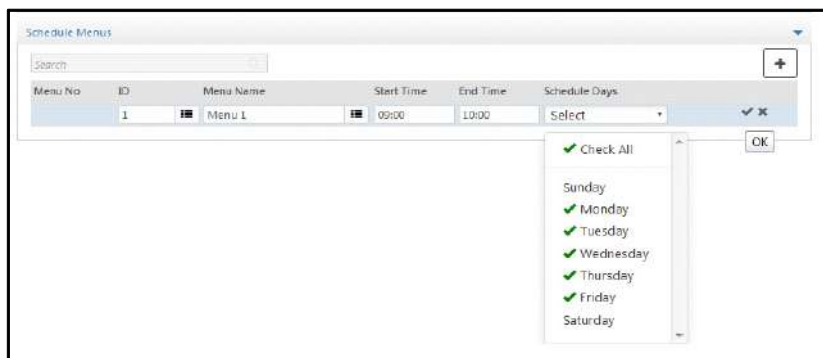
If you have to assign another menu and schedule it on the door then select the Menu from the picklist. The Menu will be shown in the grid as shown below.




Now to schedule the menu click **Add** button as shown above.

Then select the menu to be scheduled from the **ID** picklist. Specify the **Start** and **End time** for which the Menu will be active and is available to users on the selected door. Select the **days** for which this menu will be available i.e. scheduled on the door.

Then click **OK** and **Save** the Menu schedule on the door.



 *Two Menus cannot be scheduled for same timing.*

## Identification Server

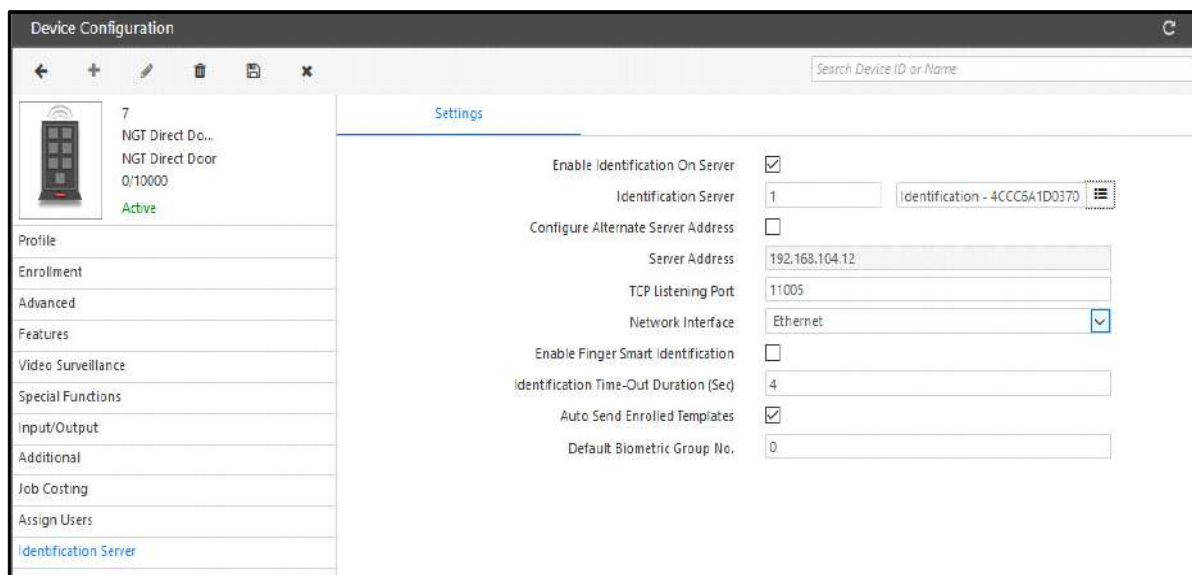
This tab enables the selected device to be assigned to a pre-defined Identification Server.

Device has a limited memory capacity for storage of templates so we need Identification Server which will store the more number of templates and respond to device when asked for identification.

For more information on Identification Servers, See *Admin> System Configuration> Identification Server Configuration*.

To access these configurations,

- On the **Device Configuration** page, select the **Identification Server** tab.



- Enable Identification On Server:** Select the checkbox to enable the identification of palm/finger templates on this device.

- **Identification Server:** Select an Identification Server using the picklist button to which the device is to be assigned. The configuration of server is done from **Admin module > System Configuration > Identification Server Configuration**.
- **Server Address:** It displays the IP Address of the selected Identification Server.

- **Configure Alternate Server Address:** Enable this check-box to configure external IP address of Identification Server.
  - **Server Address:** Enter the external network IP address which will be used for accessing identification server.
- **TCP Listening Port:** Enter the TCP port number. The default port number is 11005.
- **Network Interface:** Select the interface through which the server is to be connected to the device. The options are: Ethernet, Wireless and Mobile Broadband.
- **Enable Finger Smart Identification:** For all other supported doors, select the checkbox to enable fingerprint templates identification through Identification Server.
- **Identification Time-Out Duration (Sec):** Specify the duration in seconds after which the fingerprint template identification will get time out.  
**Example:** If 5 seconds is specified, then the identification server will try to identify the template till 5 seconds and if not found then it will show time-out to the user.
- **Auto Send Enrolled Templates:** Select the checkbox to enable any enrolled templates to be saved both on the COSEC database as well as saved locally on the configured Identification Server. This enables prompt identification of user on enrollment.
- **Default Biometric Group No.:** Specify the default biometric group number to be assigned to the device. It is a number allotted to a device to be assigned to the Identification Server. This enables the Identification Server to match the template against only those devices that belong to the corresponding biometric group. This reduces the false detection as well time to search template.

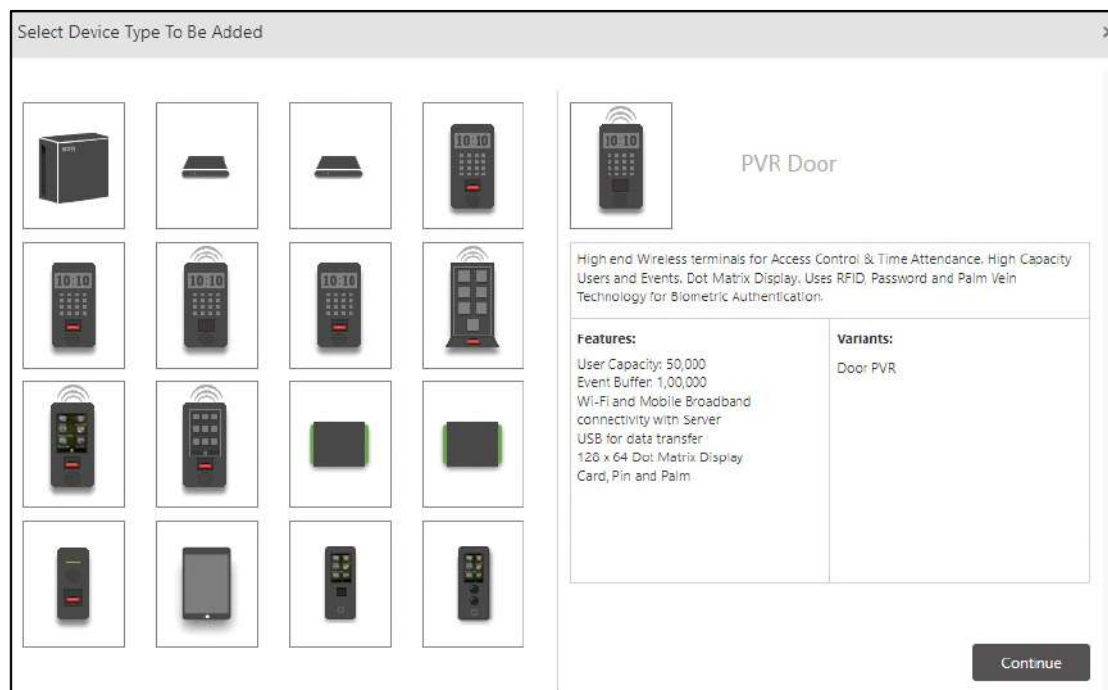
# PVR Door

COSEC PVR Door uses a contactless technology that reads internal vascular pattern of the user palm and gives accurate result to provide utmost security.

PVR Door can be connected as **Direct Door** as well as **Panel Door**.

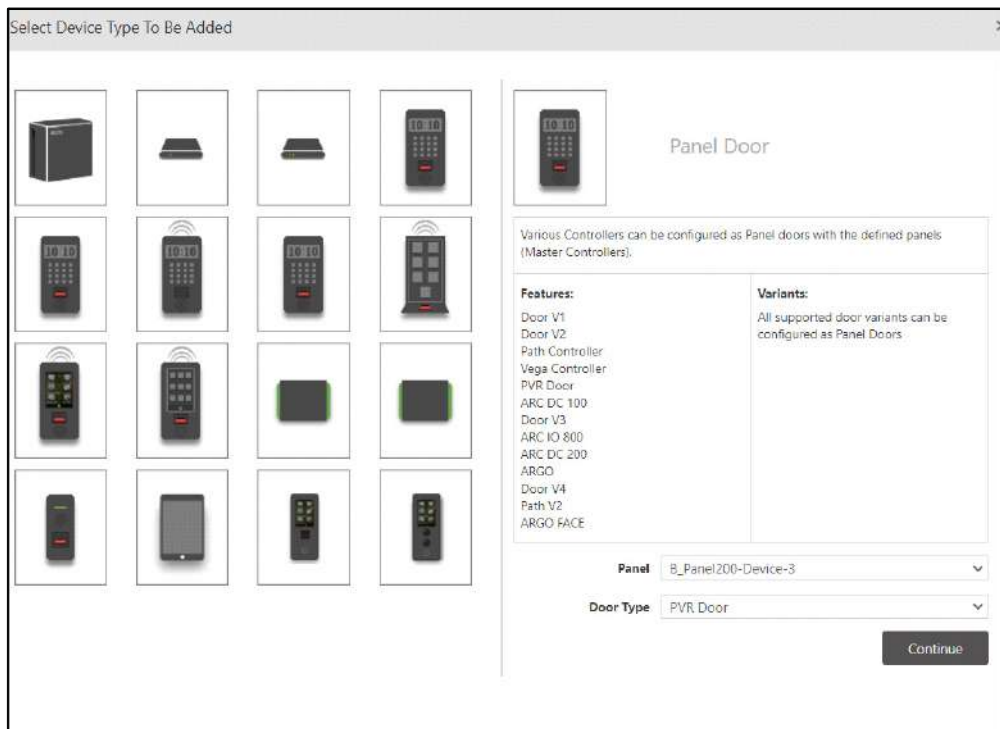


Click the PVR Door device from the Device List to add it as a **Direct Door**.



OR

Click Panel Door to add PVR Door device as a **Panel Door**.

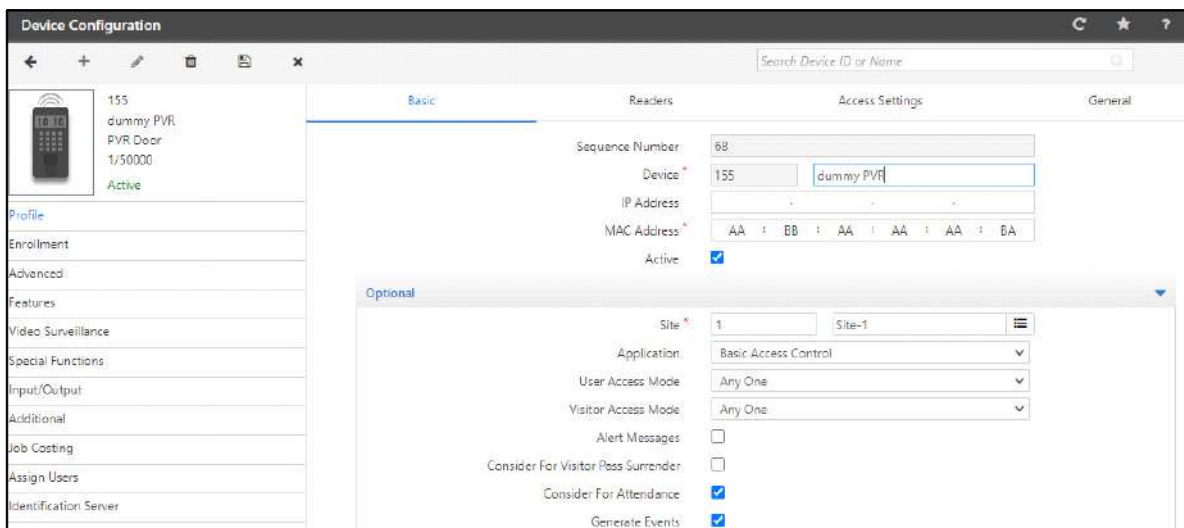


**Panel:** Select the desired Panel from the drop-down list with which you wish to connect the Door.

**Door Type:** Select **PVR Door** from the drop-down list.

Click **Continue**.

The **Device Configuration** page for PVR Door appears.



To add devices automatically, click **Admin Module > System Configuration > Global Policy > Device**. Select the **Auto Add New Devices** check box. Once the device is connected in the network, it comes online in COSEC Monitor.



While adding the device to COSEC Server, make sure the COSEC Monitor Service is running.

To know more about configuring devices, click on the links for different tabs of Device configuration.

- “Profile”
- “Enrollment”
- “Advanced”
- “Features”
- “Video Surveillance”
- “Special Functions”
- “Input/Output”
- “Additional”
- “Job Costing”
- “Assign Users”
- “Identification Server”

## Profile

Setting up a door profile involves configuring basic parameters to set up any door controller device. This section enables the user to set up the basic profile for any new device.

To do this, on the **Device Configuration** page, click the **Profile** tab in the left pane.

The screenshot shows the 'Device Configuration' window with the 'Profile' tab selected in the left sidebar. The main area is divided into 'Basic' and 'Optional' sections. The 'Basic' section includes fields for Sequence Number (68), Device (155), IP Address, MAC Address (AA : BB : AA : AA : AA : BA), and Active (checked). The 'Optional' section includes Site (1), Application (Basic Access Control), User Access Mode (Any One), Visitor Access Mode (Any One), Alert Messages (unchecked), Consider For Visitor Pass Surrender (unchecked), Consider For Attendance (checked), and Generate Events (checked).

Field	Value
Sequence Number	68
Device	155
IP Address	
MAC Address	AA : BB : AA : AA : AA : BA
Active	<input checked="" type="checkbox"/>
Site	1
Application	Basic Access Control
User Access Mode	Any One
Visitor Access Mode	Any One
Alert Messages	<input type="checkbox"/>
Consider For Visitor Pass Surrender	<input type="checkbox"/>
Consider For Attendance	<input checked="" type="checkbox"/>
Generate Events	<input checked="" type="checkbox"/>

To configure the Profile parameters, click the following links:

- [“Basic”](#)
- [“Readers”](#)
- [“Access Settings”](#)
- [“General”](#)

## Basic

Click **Basic** tab. The **Basic** page appears.



*Sequence Number, Device, IP Address, MAC Address and Active are applicable for both Direct Door and Panel Door.*

For PVR as a **Direct Door**.

Configure the following parameters:

- **Sequence Number:** This is a system generated sequence number for each new device.
- **Device:** Specify a name that can be assigned to the door. The Door ID is auto-generated by the system.
- **IP Address:** This is the IP address assigned to the door. Once the device connection is established, this field will automatically display the door IP address.
- **MAC Address:** Specify the MAC Address of the door.



*MAC address of door is required while manually adding the door to the COSEC Monitor. Note the MAC address from the device when it is powered on.*

- **Active:** Select the check box to activate the device in the network.



To add the Device automatically, click **Admin Module > System Configuration > Global Policy > Device**. Select the **Auto Add New Devices** check box.

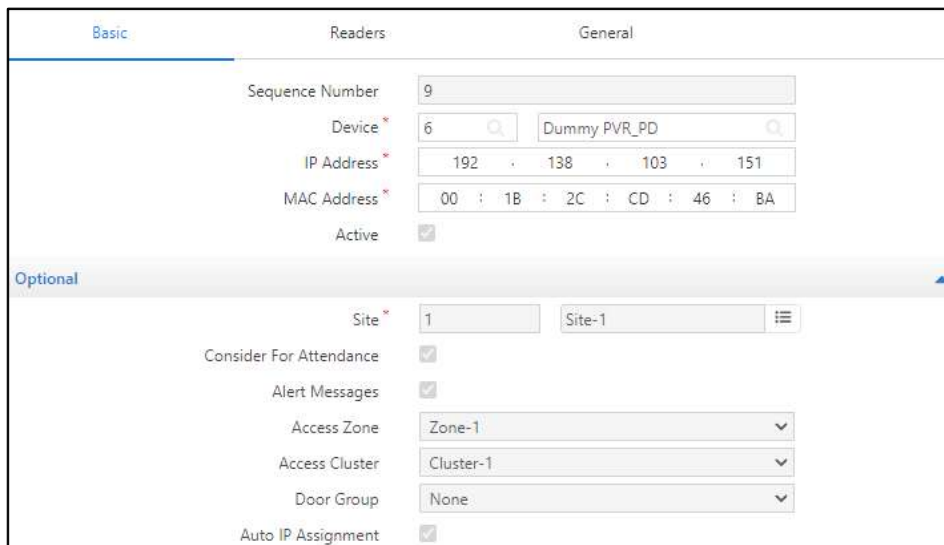
*The device will be added automatically but make sure you enable the **Active** check box in order to connect the device to the network. Once the device is connected to the network, it will come online in COSEC Monitor.*

Click the **Optional** collapsible tab, to configure the following parameters:

- **Site:** Select the site to which this door is to be assigned from the picklist. Site is created from **Devices > Masters > Site**.
- **Application:** Select the type of application for which the device is to be used from the drop-down list options— **Basic Access Control** or **Advanced Access Control**.
- **User/ Visitor Access Mode:** This defines the type and combination of credentials required to identify and validate a user at the Door Controller. Select the appropriate credential combination from the drop-down list.
  - Any one
  - Card
  - Card + PIN
  - Card + Biometrics
  - Card + PIN + Biometrics
  - Biometrics
  - Biometrics + PIN
  - Biometrics + Group
  - Biometrics then Card
  - Card then Biometrics
  - None
- **Alert Messages:** Select this check box to enable the application to send alerts based on events from this door.
- **Consider for Visitor Pass Surrender:** Select this check box to consider the device for visitor pass surrender. The Visitors can show their credentials on this device to surrender their passes.
- **Consider for Attendance:** Select this check box if the events sent by this door are to be considered for Time and Attendance data processing. If this option is disabled, then the system would consider all events coming from the door as Access Control events.
- **Generate Events:** By default, this check box is selected. Click to disable, if the server is not required to receive any events from this device.



For PVR as a **Panel Door**.



Field	Value
Sequence Number	9
Device	6
IP Address	192 . 138 . 103 . 151
MAC Address	00 : 1B : 2C : CD : 46 : BA
Active	<input checked="" type="checkbox"/>

**Optional**

Site	1	Site-1
Consider For Attendance	<input checked="" type="checkbox"/>	
Alert Messages	<input checked="" type="checkbox"/>	
Access Zone	Zone-1	
Access Cluster	Cluster-1	
Door Group	None	
Auto IP Assignment	<input checked="" type="checkbox"/>	

Click the **Optional** collapsible panel, to configure the following parameters:

- **Site:** Select the site to which this door is to be assigned from the picklist. Site is created from **Devices > Masters > Site**.
- **Consider for Attendance:** Select this check box if the events sent by this door are to be considered for Time and Attendance data processing. If this option is disabled, then the system would consider all events coming from the door as Access Control events.
- **Alert Messages:** Select this check box to enable the application to send alerts based on events from this door.
- **Access Zone:** Select the desired Access Zone to be assigned to the door from the drop-down list.
- **Access Cluster:** Select the desired Access Cluster to be assigned to the door from the drop-down list.
- **Door Group:** The Door Group drop-down includes the list of all configured Door Groups on the corresponding Panel. An additional option as 'None' is available and selected by default. Select the desired Door Group to be assigned to the door from the drop-down list.
- **Auto IP Assignment:** Select this check box to assign the IP to the Panel Door from the device webpage.



*Access Zone is configured while configuring Panel200.*

## Readers

Readers are important hardware components in a biometric door device. They may be internal or external. This section enables the user to configure both internal and external readers for a door.

Click the **Readers** tab. The **Readers** page appears.

Member No	Card Format	Configurable Bits
1	Default Format	0

Configure the following parameters:



*Door Mode Selection, Prompt Special Function and Auto Detect Readers are applicable for Direct Door only.*

- **Door Mode Selection:** Select this check box if you wish the user to select the punch type as IN or OUT while punching on the device.

For example, when a door is in Entry mode, your punches will always be in Entry side. But if you want to mark the punch in Exit mode, you can select the door mode if **Door Mode Selection** check box is enabled.

If not selected, the user needs to enable Scheduling to set reader mode of door as entry or exit as per user-defined schedules. For information on creating Reader Mode Schedules, refer **Devices > Masters > Reader Mode Scheduler**.

- **Prompt Special Function-** Select this check box to enable the selection of special functions on device screen, based on the selection of particular type of special function. This can be enabled only when **Door Mode Selection** is enabled. For more details, refer to “Special Functions”.
- **Auto Detect Readers:** Select this check box to enable the auto detection of Readers on a door controller connected to the server.

## Internal Readers

This option allows the configuration of the Internal Reader for the door.

Click **Internal Readers** collapsible panel and configure the following parameters.



*Mode, Card Reader Type and Card Format are applicable for both Direct Door and Panel Door.*

- **Mode:** Select the Mode as **Entry** or **Exit** from the drop-down list.
- **Card Reader Type:** Select the desired Card Reader Type from the drop-down list.
- **Card Format:** Single or multiple card formats can be assigned to the readers of the door. The default card format is assigned to device as shown in the grid. If no other card format is assigned to device, then this default format will be applied.



*The formatting of card is described in Devices> Master> Card Format.*

### Multiple Card Format

- To assign multiple card formats to device click **Add**. Then click the picklist to select the card format and click **OK** to save the format.

- Similarly, you can add maximum 5 card formats. When the card format is saved, the configured bits of that format as configured from **Masters > Card Format** will be displayed here. Multiple Card format configurations will be sent to the door separated by **Format ID** that is 'Member No.' along with all other format related parameters.

Member No	Card Format	Configurable Bits
1	Default Format	0
2	Format 1	64
3	Format 2	32



*Palm Reader Type is applicable for both Direct Door and Panel Door.*

- **Palm Reader:** Select the **Palm Reader Type** as **Palm Vein Reader**.

Click **Palm Reader Configuration**  to set the Palm identification configuration.

The **Palm Reader Configuration** pop-up appears.

Configure the following parameters:

- **Security Level:** Select the desired Security Level to be set for the Palm Reader Configuration from the drop-down list options—Normal, Highest, High, Low, Lowest. You can select **Normal** level for regular Time and Attendance system. You must select **High/Highest** level for high security areas that require complete or maximum matching of template. You can select **Low/Lowest** level for approximate matching of template.
- **Palm Matching Timeout:** Specify the duration in seconds for which the reader will match and identify the Palm template, after which it will show timeout.
- **Palm Template Quality:** Select the desired Palm Template Quality from the drop-down list options—Good, Moderate, Poor. You can select **Good** quality for Access Control system required in high security areas. You can select **Moderate** quality for normal Time and Attendance system.

Click **Restore Defaults**, to return the field values for this page to default values, if required.

Click **Save** to save the changes or **Close**, if you wish to discard the changes.



*Enable Scheduling and Reader Mode Schedule are applicable for Direct Door only.*

- **Enable Scheduling:** Select the check box to enable the automated control of an Internal Reader. This will set the reader mode of door as Entry or Exit as per user-defined schedules.
- **Reader Mode Schedule:** Select the Schedule for the Reader Mode which is to be assigned to this door from the picklist. With this the same reader can be configured to function both in Entry as well as Exit mode based on scheduled timings.

## External Readers

This option allows the configuration of the External Reader for the door.



*Mode, External Reader Type, Card Format and Exit Switch are applicable for both Panel Door and Direct Door.*

Click **External Readers** collapsible panel and configure the following parameters.

The screenshot shows the 'External Readers' configuration window. At the top, there are dropdown menus for 'Mode' (set to 'Exit') and 'External Reader Type' (set to 'EM Prox Reader'). Below these is a search bar. A table lists two card formats: 'Default Format' (Member No 1, Configurable Bits 0) and 'Format 1' (Member No 2, Configurable Bits 64). Each row has edit and delete icons. Below the table, there is a checked 'Exit Switch' checkbox, and dropdown menus for 'User Access Mode' (set to 'Any One') and 'Visitor Access Mode' (set to 'Any One').

- **Mode:** Select the Mode as **Entry** or **Exit** from the drop-down list.
- **External Reader Type:** Select the desired Card Reader Type from the drop-down list.



*If you are using PIN-W Reader; users will be able to change their PIN number from the devices.*



*User Access Mode, Visitor Access Mode and Access Control on Exit Mode is applicable for Direct Door only.*

- **Card Format:** Single or multiple card formats can be assigned to the readers of the door. The default card format is assigned to device as shown in the grid. If no other card format is assigned to device; then this default format will be applied. This is applicable for all Direct Doors and all Panel Doors. For details, refer ["Multiple Card Format"](#).
- **Exit Switch:** Select this check box to enable the use of **Exit Switch**.
- **User/Visitor Access Mode:** Select the desired **Access Mode** from the drop-down list options—Any One, Card, None, BLE.
- **Access Control On Exit Mode:** Select this check box to enable the checking of the following access control policies on door when the External Reader is in the **Exit** mode.
  - User enabled
  - User validity
  - Blocked user

- Time Based Access Check
- ASC
- User Access Group

## Access Settings



*Access Settings are applicable for Direct Door only.*

Click the **Access Settings** tab. The **Access Settings** page appears.

Configure the following parameters:

- **Universal Time Zone:** Select the geographic time zone in which the door will operate from the drop-down list.
- **Time Format:** Select the time format to be displayed on Door Controller LCD display from the drop-down list options —24 Hours or 12 Hours.
- **Auto Synchronize with NTP:** If Date and time is to be automatically synchronized as per the **Preferred NTP Server** (predefined or user-defined NTP server address) selected by user, then you must select the **Auto Synchronize With NTP** check box.

Independent of the mode set from server as Auto or Manual, the user can change the date and time settings from device web page, which will be reflected on device display.

- When **Auto Synchronization with NTP** is disabled, **Preferred NTP Server** field will be disabled.
- When Auto Synchronization with NTP is enabled,
  - You can specify the **Preferred NTP Server** of your choice. In this case, the device will first try to get Date and Time from that server address.

If it does not get Date and Time in three tries, device will check from pre-defined NTP servers.

If you have entered one of the three pre-defined NTP servers(ntp1.cs.wisc.edu, time.windows.com, time.nist.gov), then device will first check that server first.

If it receives updated Date and Time, then that Updated Date and Time will be reflected on device web page and display screen.

- You can keep the Preferred NTP Server as blank. In this case device will check for Date and Time from the first NTP server.



*If user has manually entered Date and Time from device web page or Device Menu, then these values of Date and Time will be reflected on device web page and display screen.*

*In the case of the **Manual** option, the administrator can manually update the time on the Door with that of the system time as and when required. This can be accomplished from the COSEC Monitor.*

- **Working Days:** Specify the days on which the default working hours should be applicable. Select the respective check boxes of the relevant days.
- **Working Hours (HH:MM):** Specify the default working hours in HH:MM format.
- **Holiday Schedule:** Select the desired Holiday Schedule from the picklist. The Administrator can assign upto four Holiday Schedules to the device.



*If the same Holiday Schedule is configured for a user and for the door controller on which the user is assigned, then the user's attendance marking on this device, on any of the scheduled holidays will always be marked as a holiday.*

## General

Click the **General** tab. The **General** page appears.

Basic Readers Access Settings **General**

Mute Buzzer ☐

**Allowed Acknowledgement**

Display Duration (ms) 3000

LED - Buzzer Duration Long

**Denied Acknowledgement**

Display Duration (ms) 3000

LED - Buzzer Duration Long

Enable Display Messages ☐

Custom Birthday Message Happy Birthday

Display Message 1 ☒

Schedule 00:00 11:59

Message Good Morning

Display Message 2 ☒

Schedule 12:00 15:59

Message Good Afternoon

Display Message 3 ☒

Schedule 16:00 20:59

Message Good Evening

Display Message 4 ☒

Schedule 21:00 23:59

Message Good Night

Multi-Language Support ☐

Configure the following parameters:



*Mute Buzzer, Allowed Acknowledgment and Denied Acknowledgment are applicable for both Direct Door and Panel Door.*

- **Mute Buzzer:** Select the check box to enable door buzzer muting.
- **Allowed Acknowledgment**
  - **Display Duration (ms):** Specify the time duration for which the **Acknowledgment Allowed** message should be displayed. Valid Range is 500 to 3000 ms.
  - **LED - Buzzer Duration:** Select the time duration for the LED Buzzer from the drop-down list options—Long, Medium, Short.
- **Denied Acknowledgment**
  - **Display Duration (ms):** Specify the time duration for which the **Acknowledgment Denied** message should be displayed. Valid Range is 500 to 3000 ms.
  - **LED - Buzzer Duration:** Select the time duration for the LED Buzzer from the drop-down list options—Long, Medium, Short.





*Enable Display Messages, Custom Birthday Message, Display Message 1 to 4, Schedule, Message and Multi-Language Support are applicable for Direct Door only.*

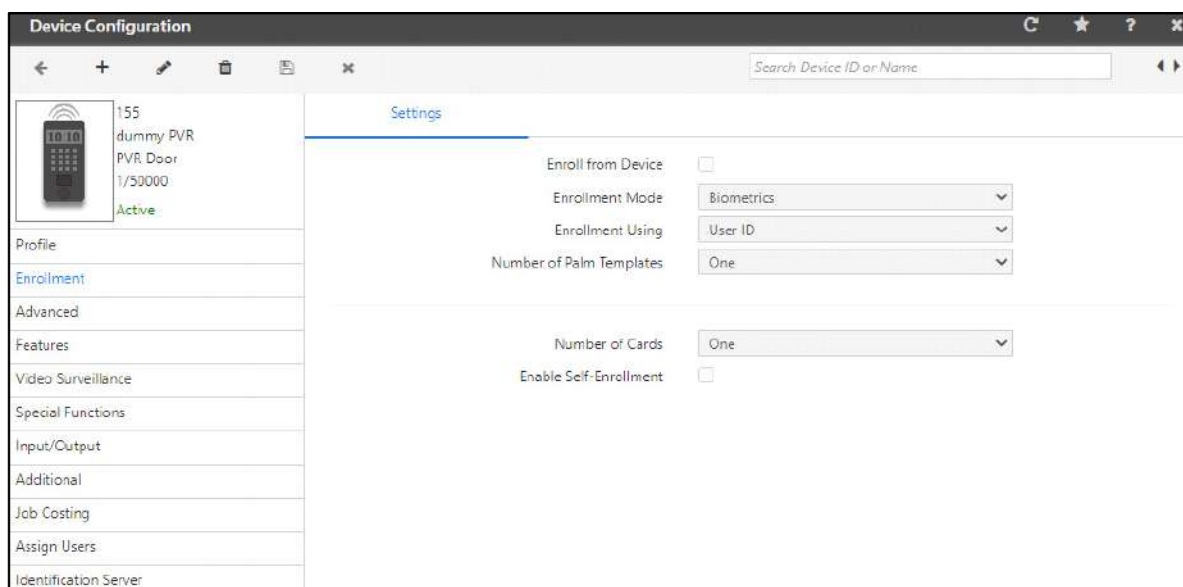
- **Enable Display Messages:** Select this check box, if you wish to customize the messages as well as display them on the device. You can configure and display the Birthday Message and 4 other Messages.
- **Custom Birthday Message:** Enter the birthday message to be displayed on the door to the user, when the user punches on the door on his/her birth date. The valid values are: A-Z a-z 0-9 `~!@#\$%^&\*()\_+~\|/ |;?<>.,\".
- **Display Message 1 to 4:** Select this check box to enable each display message. These check boxes are enabled automatically if you select the **Enable Display Message** check box.
- **Schedule:** Specify the time duration for which the display message should be displayed in HH:MM format.
- **Message:** Enter the message to be displayed. Maximum 21 characters are allowed.
- **Multi-Language Support:** Select this check box to enable multi-language support for the device.

## Enrollment



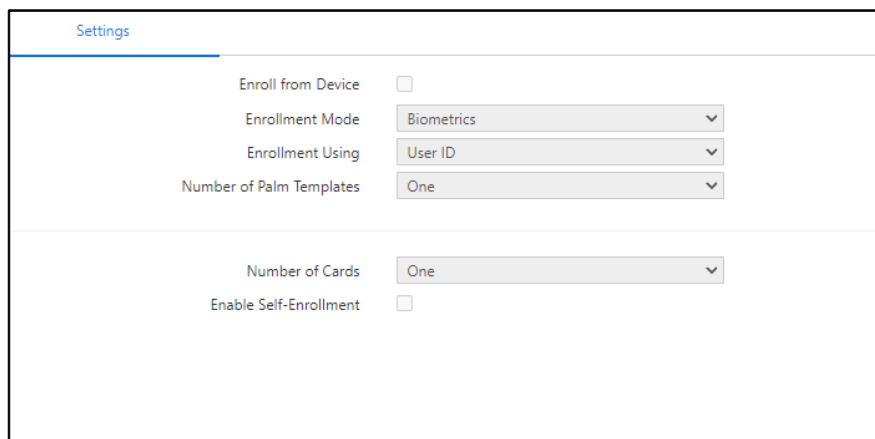
*Enrollment is applicable for Direct Door only.*

On the **Device Configuration** page, click the **Enrollment** tab in the left pane.



## Settings

Click the **Settings** tab. The **Settings** page appears



Settings

Enroll from Device ☐

Enrollment Mode Biometrics ▼

Enrollment Using User ID ▼

Number of Palm Templates One ▼

Number of Cards One ▼

Enable Self-Enrollment ☐

Configure the following parameters:

- **Enroll from Device:** Select this check box to enable the enrollment of user from the door controller. When this check box is enabled, **Enroll User** special function on that device will get activated.



*If **Enroll User** special function & **Enroll From Device** check box both are inactive in device configuration, then on activating **Enroll User** special function, **Enroll From Device** check box will be enabled.*

- **Enrollment Mode:** Select the credential to be enrolled using special function at the door from the drop-down list options —ReadOnlyCard, SmartCard, Biometrics or BiometricsThenCard.
- **Enrollment Using:** Select the desired option to be used for enrollment from the drop-down list options — User ID or Reference No.
- **Number of Palm Templates:** Select the Number of Palm Templates to be enrolled from the drop-down list, if the Enrollment Mode is **Biometrics** or **BiometricsThenCard**.
- **Number of Cards:** Select the Number of Cards to be enrolled from the drop-down list, if the Enrollment Mode is **ReadOnlyCard** or **SmartCard**.
- **Enable Self-Enrollment:** Select this check box to enable the Self-Enrollment feature on the door.

## Advanced

The Advanced tab allows the user to configure some advanced parameters such as Access Control Settings, Alarms, Device Timers as well as Wiegand.

To do this, on the **Device Configuration** page, click the **Advanced** tab in the left pane.

The screenshot shows the 'Device Configuration' window with a sidebar on the left and a main settings area on the right. The sidebar lists various configuration sections: Profile, Enrollment, Advanced (highlighted), Features, Video Surveillance, Special Functions, Input/Output, Additional, Job Costing, Assign Users, and Identification Server. The main area has four tabs: Settings, Alarms, Timers, and Wiegand. The 'Settings' tab is active, displaying a list of configuration options with checkboxes and input fields.

Settings	Alarms	Timers	Wiegand
Generate Exit Switch Events	<input type="checkbox"/>		
Generate Invalid User Events	<input type="checkbox"/>		
Generate Sequential IN-OUT Events	<input type="checkbox"/>		
Two Credentials Required	<input type="checkbox"/>		
Show PIN	<input type="checkbox"/>		
Allow Exit when Door Lock	<input checked="" type="checkbox"/>		
Auto Relock	<input type="checkbox"/>		
Auto Relock Timer (Sec)	3		
Enable Additional Security	<input type="checkbox"/> Disabled		
Enable Smart Identification	<input type="checkbox"/>		
Access Level	8		
Access Mode	Card		
Auto Acknowledge Alarm	<input type="checkbox"/>		
Auto Acknowledge Alarm (Sec)	10		
Facility Code	1		
Allow Access Through Mobile	<input type="checkbox"/>		
Mobile Entry Access Mode	Mobile Only		
Mobile Exit Access Mode	Mobile Only		

To configure the Advanced parameters click the following links:

- [“Settings”](#)
- [“Alarms”](#)
- [“Timers”](#)
- [“Wiegand”](#)

## Settings

The **Settings** tab differs for both Direct Door and Panel Door.

Click **Settings** tab.

For configuring the settings for **PVR** as a **Direct Door**, refer to [“Settings- Direct Door”](#).

For configuring the settings for **PVR** as a **Panel Door**, refer to [“Settings- Panel Door”](#).

## Settings- Direct Door

For PVR as **Direct Door**.

Settings	Alarms	Timers	Wiegand
Generate Exit Switch Events	<input type="checkbox"/>		
Generate Invalid User Events	<input type="checkbox"/>		
Generate Sequential IN-OUT Events	<input type="checkbox"/>		
Two Credentials Required	<input type="checkbox"/>		
Show PIN	<input type="checkbox"/>		
Allow Exit when Door Lock	<input checked="" type="checkbox"/>		
Auto Relock	<input type="checkbox"/>		
Auto Relock Timer (Sec)	<input type="text" value="3"/>		
Enable Additional Security	<input type="checkbox"/> Disabled		
Enable Smart Identification	<input type="checkbox"/>		
Access Level	<input type="text" value="8"/>		
Access Mode	<input type="text" value="Card"/>		
Auto Acknowledge Alarm	<input type="checkbox"/>		
Auto Acknowledge Alarm (Sec)	<input type="text" value="10"/>		
Facility Code	<input type="text" value="1"/>		
Allow Access Through Mobile	<input type="checkbox"/>		
Mobile Entry Access Mode	<input type="text" value="Mobile Only"/>		
Mobile Exit Access Mode	<input type="text" value="Mobile Only"/>		
<b>Temperature Logging</b>			
Enable	<input type="checkbox"/>		
Sensor Type	<input type="text" value="FEVOBOT"/>		
Sensor Interface	<input type="text" value="USB"/>		
Emissivity	<input type="text" value="0.95"/>		
Calibration Parameter	<input type="text" value="+"/> <input type="text" value="0.0"/>		
Approach to Sensor Wait-Timer (Sec)	<input type="text" value="3.0"/>		
Temperature Detection Time Out (Sec)	<input type="text" value="10"/>		
Tolerance between Consecutive Readings	<input type="text" value="0.5"/>		
Consecutive Readings Count within Tolerance	<input type="text" value="5"/>		
Temperature Threshold (°F)	<input type="text" value="99.5"/>		
Minimum Temperature for Access (°F)	<input type="text" value="95.0"/>		
Restriction Type	<input type="text" value="Soft"/>		
Bypass If Sensor Disconnected	<input type="checkbox"/>		

Configure the following parameters:

- **Generate Exit Switch Events:** Select this check box to enable the door to generate events every time the Exit Switch is used.
- **Generate Invalid User Events:** Select this check box to enable the door to generate events for Invalid User inputs.

- **Generate Sequential IN-OUT Events:** Select this check box to enable the door to generate user punches on device as the sequential IN-OUT events irrespective of whichever mode in which the device is functioning.
- **Two Credentials Required:** Select this check box to enable the feature. If both, **ByPass Finger/Palm/face for Attendance** (User Configuration > T&A > Attendance) and **Two Credentials Required** check boxes are enabled, then two credentials will be mandatory for the users and the door will verify both these credentials.
- **Show Pin:** Select this check box to display the characters of PIN when the PIN is entered on device.
- **Allow Exit when Door Lock:** Select this check box to enable the users to Exit even when the Door relay is in locked condition.
- **Auto Re-lock:** Select this check box to enable the door to re-lock immediately when the door status changes to close after normal open, irrespective of the defined pulse time. However, it is supported only if a door sense is installed and enabled.
- **Auto Re-lock Timer:** Specify the time in seconds for the Timer to Re-lock automatically. Valid Range: 1 to 65535.
- **Enable Additional Security:** Select this check box to enable additional security at the Door.
  - **Additional Security Code:** Specify the Additional Security Code ranging from 1 to 65535.
  - **Re-enter Code:** Re- enter the **Additional Security Code** to confirm.



*Changing this value can affect the SI function. Click **Default Code** to reset the **Additional Security Code** to the value set in the **Global Additional Security Code** field on the Global System Policy page.*

- **Enable Smart Identification:** Smart Identification enables the identification of a user using the Smart Card even though the user is not registered on a device. Select this check box to enable Smart Identification at the door and select the **Access Level** and the **Access Mode** from the drop-down list.



*Door PVR must be in an Adaptive mode (System Configuration > Global Policy > Device > Run PVR Door In Adaptive Mode) to allow the Access through **Card + Biometric** and **Card + Biometric + PIN** mode of the Access.*

- **Auto Acknowledge Alarm:** Select this check box to enable the acknowledgment of all alarms for this device automatically.
- **Auto Acknowledge Alarm (sec):** Specify the time in seconds for the Auto Acknowledge Timer. On expiry of the timer, the alarm buzzer will stop automatically.
- **Facility Code:** Specify a value for Facility Code to be set for access modes other than **Card**, if Facility Code is expected in Wiegand Output.
- **Allow Access Through Mobile:** Select this check box to enable the Access to device using COSEC ACS App.
- **Mobile Entry/Exit Access Mode:** Select the **Entry and Exit** door **Access Mode** from the drop-down list options—Mobile Only, Mobile then Biometrics, Mobile then Card.



If User Access Mode is selected as **None** in Zone Configuration and Mobile Access Mode is selected as **Mobile Then Biometrics** then door can be accessed through Mobile and then Biometric credential.

## Temperature Logging

- **Enable:** Select this check box to enable the temperature logging feature on the zone.
- **Sensor Type:** Select the type of thermal sensor integrated in the device from the drop-down list options—**AST, Web-Based** or **FEVOBOT**.
- **Sensor Interface:** Select the interface on which device will communicate with the sensor from the drop-down list.  
For Sensor Type-AST, the Sensor Interface options will be: RS-232 and USB  
For Sensor Type- Web-Based, the Sensor Interface options will be: HTTP/S  
For Sensor Type-FEVOBOT, the Sensor Interface options will be: USB
- **Emissivity:** Specify the Emissivity for Sensor. This parameter is applicable when the Sensor Type is AST. The default value is 0.95.
- **Calibration Parameter:** Specify the Calibration Parameter for the thermal sensor. This parameter is applicable when Sensor Type is AST or Web-Based. On click of **+** the value increases by 0.1 and on click of **–** it decreases by 0.1.
- **Approach to Sensor Wait-Timer:** Specify the time for which the device will wait for user to approach the device before starting Temperature Detection.
- **Temperature Detection Time-Out:** Specify the time till which temperature detection will be done for the user and if valid temperatures are not found till the expiry of timer, then timeout will be declared.
- **Tolerance between Consecutive Readings:** Specify the time within which the consecutive readings are considered to be valid user temperature readings. This parameter is applicable when Sensor Type is AST or Web-Based.
- **Consecutive Readings Count within Tolerance:** Specify the number of readings within the Tolerance time for which the consecutive readings are considered to be valid user temperature readings. This parameter is applicable when Sensor Type is AST or Web-Based. For example: if the count is set as 5, then 5 readings are taken and the reading with the highest temperature is considered.
- **Temperature Threshold:** Specify the Threshold value of the Temperature.
- **Minimum Temperature for Access:** Specify the Minimum Temperature value for Access that should be detected to be considered as valid temperature.
- **Restriction Type:** Specify the Restriction Type from the drop-down list options —**Soft** or **Hard**.
- **Bypass if Sensor Disconnected:** Select this check box to enable bypassing the feature if sensor connectivity is lost or is disconnected.

## Settings- Panel Door

For PVR as a **Panel Door**.

Settings			Alarms	Timers
Auto Relock	<input type="checkbox"/>			
Auto Relock Timer (Sec)	3			
Tail-Gating	<input type="checkbox"/>			
Reset Wait Timer	On Door Lock			
Man Trap Timer - Internal Reader (Sec) *	0			
Man Trap Timer - External Reader (Sec) *	0			
Enable Man Trap Door Interlocking	<input type="checkbox"/>			
Select Doors for Interlocking	ID	Name		

Configure the following parameters:

- **Auto Re-lock:** Select this check box to enable the door to re-lock automatically when the door status changes to close after normal open, irrespective of the defined pulse time. However, it is supported only if a door sense is installed and enabled.
- **Auto Re-lock Timer:** Specify the time in seconds after which the door should re-lock automatically.
- **Tail-Gating:** Tailgating refers to an access violation which occurs when more than one person tries to enter a secured area using a single person's access credentials. If this option is enabled on the Panel Door, the occupancy count of a zone should be increased or decreased considering both the punch as well as the auxiliary input of the Panel Door. Select this check box to enable this feature.
- **Reset Wait Timer:** Select when the Wait Timer should be reset for tailgating from the drop-down list options—On Door Lock or Pulse Wait Timer.
- **Man Trap Timer- Internal Reader (Sec):** Specify the Man Trap Entry Timer within which the user should enter the next sequential door of a man-trap.
- **Man Trap Timer- External Reader (Sec):** Specify the Man Trap Exit Timer within which the user should exit the panel door to enter the next sequential door of a man-trap.
- **Enable Man Trap Door Interlocking:** Select this check box to enable the Door Interlock for the door (say Door1). This means if the Door1 is open, other doors will remain closed.
- **Select Doors for Interlocking:** Select the doors to be assigned for Interlocking from the picklist. You can select particular doors or all the doors at once.

- To do so, click the **Select Doors** for Interlocking picklist. The **Picklist For Panel Door** pop-up appears.


ID	Name
10	ARCDC100_DD_Door
9	ARCDC100_DD_Door
8	ARCDC100_SD_Door
1	ARGO_PANEL
2	DoorV3
7	DoorV3_Door
3	DOORV4_PANEL
6	dummy
4	PATHV2_PANEL
5	VEGA_PANEL

You can either select particular door or can select all the doors at once.

To select particular doors, click the check boxes of the desired doors.

**OR**

To select all the doors, select the **Select All** check box. The doors on all the pages will be selected.

Click **OK**. Hover over the **Info**  icon. It displays the number of selected doors.

For example, if Door 2 and Door 3 are selected for interlocking with Door 1, Door 2 and Door 3 will remain locked when Door 1 is open.



*Door Interlocking feature will not work for Degraded mode.*

*For Example, when a door is in abnormal state and for that door interlocking is enabled, then user access to other doors of the interlocking group is allowed.*

## Alarms

Alarms tab differs for Direct Door and Panel Door.

Click **Alarms** tab. The **Alarms** page appears.



For PVR as **Direct Door**.

Settings	Alarms	Timers	Wiegand
	Tamper	<input type="checkbox"/>	
	Door Abnormal	<input type="checkbox"/>	
	Door Force Open	<input type="checkbox"/>	
	Door Fault	<input type="checkbox"/>	
	Panic	<input type="checkbox"/>	
	Temperature Threshold	<input type="checkbox"/>	

For PVR as a **Panel Door**.

Settings	Alarms	Timers
	Duress	<input type="checkbox"/>
	Tamper	<input type="checkbox"/>
	Door Abnormal	<input type="checkbox"/>
	Door Force Open	<input type="checkbox"/>
	Door Fault	<input type="checkbox"/>
	Panic	<input type="checkbox"/>
	Door Held Open	<input type="checkbox"/>
	Dead Man	<input type="checkbox"/>
	Occupancy Violated	<input type="checkbox"/>
	Tail-Gating	<input type="checkbox"/>
	Man Trap Timer Violation	<input type="checkbox"/>
	Access Denied - Anti-Pass Back	<input type="checkbox"/>
	Access Denied - Access Route Violated	<input type="checkbox"/>
	Access Denied - Other Reasons	<input type="checkbox"/>
	User Unidentified	<input type="checkbox"/>
	Multiple Unauthorized Attempts	<input type="checkbox"/>
	Access Denied - Access Route Timer Violated	<input type="checkbox"/>

- Select the check boxes of the desired alarms you wish to enable.

## Timers

This section allows the configuration of various types of predefined device timers which can trigger off specific responses. In COSEC Server, Timers are often used to control door behavior and for triggering alarms.

The **Timers** tab differs for both Direct Door and Panel Door.

Click **Timers** tab. The **Timers** page appears.

For PVR as **Direct Door**.

Settings	Alarms	Timers	Wiegand
Inter Digit Wait Timer (Sec) *			
<input type="text" value="3"/>			
Multi-Input Wait Timer (Sec) *			
<input type="text" value="5"/>			
Door Open Pulse Timer (Sec) *			
<input type="text" value="5"/>			
Late-IN Early-OUT Active Timer (Min) *			
<input type="text" value="60"/>			
Palm Enrollment Time Out (Sec) *			
<input type="text" value="60"/>			

Configure the following parameters:

- **Inter-Digit Wait Timer (sec):** Specify the time in seconds within which two key inputs on the device keypad must be obtained. On expiry of this timer, the system considers the user input to be complete and is ready for the next input.
- **Multi-Input Wait Timer (sec):** Specify the time in seconds for which system needs to wait for the second credential input from the user when more than one credential is to be used to grant access.



*It is recommended to set the timer value as greater than or equal to 10 seconds to avoid Access Denial issues to users. This is applicable when the system reads the credentials (Biometric) from the user's Smart Cards.*

- **Door Open Pulse Timer (sec):** Specify the time in seconds (1 to 65535) for the door to remain open for a valid credential. If the opened door does not return to a closed state before the expiry of this timer, the door will generate a **Door Abnormal** alarm.
- **Late-IN Early-OUT Active Timer (min):** Specify the time in minutes for which the Late-IN and Early-OUT special functions will remain active after being enabled at the Door.
- **Palm Enrollment Time Out (sec):** Specify the time in seconds for which a Palm Enrollment command will be valid for credential input. Once this timer runs out, a new enrollment command will have to be generated.

For PVR as a **Panel Door**.

Settings	Alarms	Timers
Pulse Time (Sec)		
<input type="text" value="5"/>		

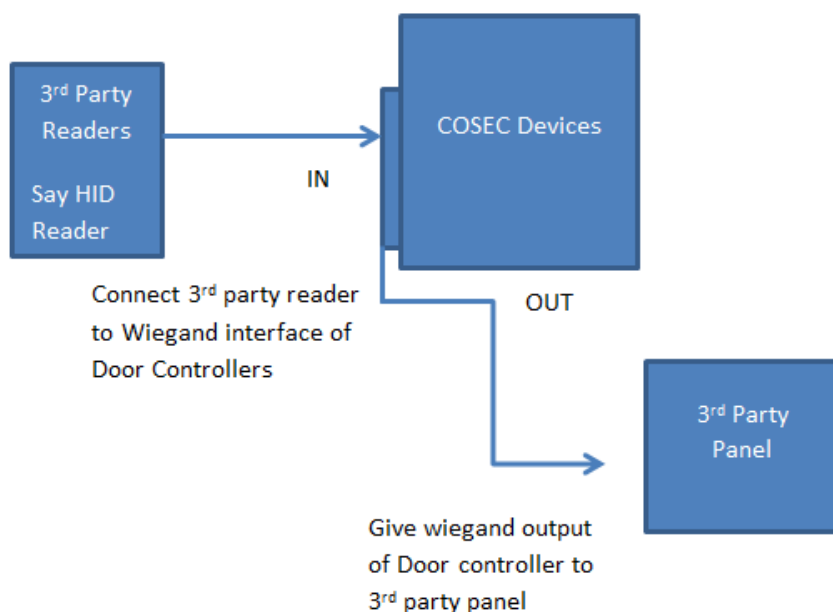
- **Pulse Time (sec):** Specify the time in seconds for the panel door to remain open for a valid credential.

## Wiegand



*Wiegand is applicable for Direct Door only.*

Click the **Wiegand** tab. The **Wiegand** page appears.



- **Wiegand Interface:** The COSEC Device can be connected both as input devices (e.g. to receive data from a Wiegand Reader) or output devices (e.g. to support output to third party panel) via the Wiegand interface as shown above.

So select the interface of PVR Direct Door as **Output Mode** to work as Wiegand Output to Panel or **Reader Input** to take data from third party reader. If Reader Input option is selected, all the output mode parameters will be disabled.

If you select Output Mode then configure the **Output Mode Parameters**.

## Output Mode Parameters

- **Wait For Panel Signal:** Select the check box to enable. If this option is enabled the PVR Door will wait for reply from the connected third party device before triggering any output. You need to configure the **Signal Wait Timer (Sec)**.
- **Signal Wait Timer:** Specify the time for which the PVR Door should wait for reply from the connected third party device before triggering any output.
- **Wait For User Verification:** Select the check box to enable. If this option is enabled, user verification will be requested on the third party device before triggering any output.
- **Wiegand Output Format:** Select the desired format — 26 Bit, 37 Bit, Actual or Custom

The screenshot shows a web interface with tabs for Settings, Alarms, Timers, and Wiegand. The Wiegand tab is active. Under 'Wiegand Interface', 'Output Mode' is selected. The 'Output Mode Parameters' section includes: 'Wait For Panel Signal' (checked), 'Signal Wait Timer (Sec)' (20), 'Wait For User Verification' (checked), 'Wiegand Output Format' (26 Bit), and 'Send From' (MSB Bit).

If you select **Custom**, you can configure details of fields to be sent as output from the Wiegand reader that has been added.

The screenshot shows the 'Wiegand Format' configuration page. It lists various events with corresponding 'ID' and 'Name' picklist fields and a 'Send From' dropdown. The events are: For Allowed Events, Allowed Code, For Identified Events, Identified Code, For Denied With Invalid Biometric Events, Invalid Biometric Code, For Denied With Invalid Card Events, Invalid Card Code, For Denied With Invalid PIN Events, Invalid PIN Code, For Denied With Credential Time-Out Events, and Credential Time-Out Code. The 'Send From' dropdown is set to 'MSB Bit'.

- For each of the listed events, click the picklist to select the desired **Wiegand Output Format**.
- Assign an Access **Code** for each communication (for example Invalid PIN Code). This will depend on the number of output bits configured for Access Code in the selected Wiegand Output Format.
- **Send From:** Select the desired sending order for reader data — MSB or LSB Bit.

## Features



*The Features are available only with the Access Control Module license and are applicable for Direct Door only.*

The Features tab enables the user to enable certain Access Control features for the device.

To do this, on the **Device Configuration** page, click the **Features** tab in the left pane.

The screenshot shows the 'Device Configuration' window with the 'Features' tab selected in the left sidebar. The main area is divided into 'Basic' and 'Optional' sections. The 'Basic' section includes fields for Sequence Number (68), Device (155), IP Address, MAC Address (AA : BB : AA : AA : AA : BA), and an Active checkbox (checked). The 'Optional' section includes Site (1), Application (Basic Access Control), User Access Mode (Any One), Visitor Access Mode (Any One), Alert Messages (unchecked), Consider For Visitor Pass Surrender (unchecked), Consider For Attendance (checked), and Generate Events (checked).

To configure the Features parameters, click the following links:

- [“Set1”](#)
- [“Set2”](#)

## Set1

Click **Set1** tab. The **Set1** page appears.

Set1	Set2
<b>Absentee Rule</b>	
Enable	<input type="checkbox"/>
<b>Occupancy Control</b>	
Enable	<input type="checkbox"/>
Maximum Occupancy Limit	<input type="text" value="9"/>
Minimum Occupancy Limit	<input type="text" value="1"/>
Zero Occupancy	<input checked="" type="checkbox"/>
<b>Use Count Control</b>	
Enable	<input type="checkbox"/>
Use Count Limit (Per Minute)	<input type="text" value="5"/>
<b>Duress Detection</b>	
Duress Detection	<input type="checkbox"/> <input type="text"/>

Configure the following parameters:

### Absentee Rule

- **Enable:** Select this check box to enable the feature on the door. This rule sets the maximum number of days for non-use of a credential. On expiration of days limit, the user will be automatically blocked. For configuring the rule, refer to [“Absentee Rule”](#).

### Occupancy Control

- **Enable:** Select this check box to enable the feature on the door.
- **Maximum Occupancy Limit:** Specify the maximum number of users to be allowed within the controlled area, after which a user exit is required to enable access to another user.
- **Minimum Occupancy Limit:** Specify the minimum number of occupants to be present within the controlled area.
- **Zero Occupancy:** Select the check box to enable the controlled area to be empty. For configuring the rule, refer to [“Occupancy Control”](#).

### Use Count Control

- **Enable:** Select this check box to enable the feature on the door.
- **Use Count Limit (Per Minute):** Specify the maximum number of times a user is allowed to access an area with valid credentials per minute. For configuring the rule, refer to [“Use Count Control”](#).

### Duress Detection

- **Duress Detection:** Select this check box to enable Duress Detection on the door. The default duress detection code is displayed which is used to generate the duress alarm. Specify the desired duress code.

This code informs that a user is forced to open the door under threat. Once this feature is enabled the system waits for the duress code after the User PIN and the right arrow key input before enabling the duress alarm. The keys have to be pressed in the following order: (User Pin Code) → (Right Arrow Key) → (2 digit Duress Code).

## Set2

Click **Set2** tab. The **Set2** page appears.

The screenshot shows the 'Set2' configuration page with three main sections:

- First IN User Rule:**
  - Enable: ☐
  - Reset On: ☒ Day Change ☐ Timer Expiry
  - Access Timer (Sec):
  - First IN User Group:
- Anti-Pass Back (APB):**
  - On Entry: ☐
  - On Exit: ☐
  - Hard/Soft:
  - Forgiveness: ☒
  - Reset After: ☒ Day Change ☐ Timer Expiry
  - Forgiveness Timer (Min):
- 2-Person Rule:**
  - Enable: ☐
  - Mode:
  - Primary Group:
  - Secondary Group:
  - 2nd Person Wait Timer (Sec):

Configure the following parameters:

### First-IN User Rule

- **Enable:** Select this check box to enable the feature on the door.
- **Reset On:** Select when the First-IN User rule should be reset from the options — **Day Change** or **Time Expiry**.

If you select **Time Expiry**, configure the **Access Timer (Sec)**.

- **Access Timer (sec):** Specify the duration for which the rule should be applied. After the expiry of this timer, the rule will be reset for all the users.
- **First-In User Group:** Select the desired group which should be valid at the door from the picklist. For configuring the rule, refer to "[First In User Assignment](#)".

### Anti-Pass Back (APB)

- **On Entry:** Select this check box to enable the system to monitor the entry reader for APB violation.
- **On Exit:** Select this check box to enable the system to monitor the entry as well as the exit readers for APB violations.

- **Hard/Soft:** Select the restriction type from the drop-down list options—Soft or Hard.

**Hard APB:** If you select Hard APB, access will be denied if the exit is not registered first. It does not allow a second entry using the same card without an exit.

**Soft APB:** The access will be granted even if the exit is not registered. It allows a second entry of the same user without an exit; however, an event and a warning are generated that indicates the second entry.

- **Forgiveness:** Select this check box to enable the system to reset the APB status.

If **Forgiveness** is enabled, configure the following parameters.

- **Reset After Day Change:** This will reset the APB status of all the users to NULL at midnight. This enables a user, who left the building in the evening without exit punch, to use his/her card for entry in the next morning.
- **Reset After Timer Expiry:** This will reset the APB status of all the users after the expiry of defined time.

If **Reset After Timer Expiry** is selected, configure the following parameter.

- **Forgiveness Timer (Mins):** Specify the time duration in minutes after which Anti-Pass Back status will get reset and the pass will be in original state.

## 2-Person Rule

- **Enable:** Select this check box to enable the feature on the door.
- **Mode:** Select the Mode from the drop-down list options— Primary Must or Primary & Secondary Must.
- **Primary Group:** Select the desired group from the drop-down list.
- **Secondary Group:** Select the desired group from the drop-down list.
- **2nd Person Wait Timer (sec):** Specify the wait time in seconds after which the second person is allowed to punch on the door. For configuring the rule, refer to ["2 Person Rule Assignment"](#).



## Video Surveillance



*Video Surveillance is applicable for both Direct Door and Panel Door.*

The **Video Surveillance** tab enables the user to configure parameters for video surveillance integration with the COSEC device. It is available in Basic License.

To do this, on the **Device Configuration** page, click the **Video Surveillance** tab in the left pane.

The screenshot shows the 'Device Configuration' window. On the left, a sidebar lists various configuration options: Profile, Enrollment, Advanced, Features, Video Surveillance (highlighted in blue), Special Functions, Input/Output, Additional, Job Costing, Assign Users, and Identification Server. The main area is divided into two tabs: 'Visual Tagging' (active) and 'Satatya Integration'. Under 'Visual Tagging', there are fields for 'Capturing Device' (set to 'Matrix HVR/NVR'), 'MAC Address', 'Camera ID', and 'Storage Root Folder'. There is also a checkbox for 'FTP Login Credentials' which is unchecked. Below this, there are fields for 'User Name' and 'Password'.

To configure the Video Surveillance parameters, click the following links:

- [“Visual Tagging”](#)
- [“Satatya Integration”](#)

## Visual Tagging

The COSEC application can interface with some supported Hybrid and Network Video Recorders and grab images triggered by user events at the Doors. The **Visual Tagging** tab enables the administrator to define the video recorder parameters.

Click the **Visual Tagging** tab. The **Visual Tagging** page appears.



To view the user events and related images, click **Admin > Views/Logs > Event View**. To know more about viewing events, refer to [“Event View”](#).

Configure the following parameters:

- **Capturing Device:** Select the video recording device type from the drop-down list options — Matrix HVR/NVR or Milestone.

For more information on integration with **Milestone** devices, refer to [“Milestone Integration”](#).

If you select Matrix HVR/NVR, then configure the following parameters.

- **MAC Address:** Specify the MAC address of the video recorder device using “\_” (underscore) as the separator.
- **Camera ID:** Specify the Camera number or Camera ID for IP cameras. For analog cameras, specify the camera number.
- **Storage Root Folder:** Specify the Root Folder path or FTP Path where the uploaded images are to be saved.
- **FTP Login Credentials:** Select this check box to activate the FTP login credentials for authentication.
- **User name:** Specify the FTP Server User Name.
- **Password:** Specify the FTP Server Password.

## Satatya Integration

This functionality is available for configuration only when the Matrix HVR/NVR device type is selected as the **Capturing Device** in **Visual Tagging** tab. It enables the configured COSEC devices to directly send commands to the SATATYA HVR/NVR devices as per the configuration on this page.

Click **Satatya Integration** tab. The **Satatya Integration** page appears.

Visual Tagging
Satatya Integration

Integration Type
Network

Active
☐

IP Address \*

Port Number \*
1024-65535

---

Schedule Name

Active
☐

Schedule Range \*
00:00
23:59

Days \*
☒ Sun
☒ Mon
☒ Tue
☒ Wed
☒ Thu
☒ Fri
☒ Sat
☒ Holiday

Event
Access Allowed

Mode
Both

Action
Recording

Duration Min. \*

Camera \*
☐ 1
☐ 2
☐ 3
☐ 4
☐ 5
☐ 6
☐ 7
☐ 8
☐ 9
☐ 10
☐ 11
☐ 12
☐ 13
☐ 14
☐ 15
☐ 16
☐ 17
☐ 18
☐ 19
☐ 20
☐ 21
☐ 22
☐ 23
☐ 24

Add
Cancel

Configure the following parameters:

- **Integration Type:** Select the **Integration Type** from the drop-down list options—Wired or Network.

If you select **Wired Integration**, door will be physically connected with the Satatya Device.

If you select **Network Integration**, connection can be by Ethernet, Wireless or Broadband depending upon the COSEC device support. If you select this option you need to configure the below mentioned parameters.

- **Active:** Select this check box to enable the SATATYA Integration functionality.
- **IP Address:** Specify the IP Address of HVR/NVR.
- **Port Number:** Specify the Port Number of HVR/NVR.
- **Schedule Name:** Specify a user friendly Name for the Integration function.
- **Active:** Select this check box to enable the schedule.
- **Schedule:** Specify the Start Time and End Time of the Schedule in HH:MM format.
- **Days:** Select the check boxes for the desired Days on which you wish to apply the Schedule.
- **Event:** Select a COSEC Event for which the action is to be configured from the drop-down list.
- **Mode:** Select the event Mode from the drop-down list options—Entry, Exit, Both if you select the Event as Access Allowed, Access Denied or Invalid User.

- **Action:** Select the Action for the Satatya device from the drop-down list options—Recording, Image Upload, Video Pop-up, PTZ Preset, Mail Image.

If you select **Recording**, specify the **Duration Min..**

If you select **Upload Image**, Images will be uploaded as per the FTP settings.

If you select **Video Pop-up**, specify the **Duration Sec.** The video pop up will be generated on the local client of Satatya device.

If you select **PTZ Preset**, specify the desired **Position No.**

If you select **Mail Image**, specify the **Email ID.**

- **Camera:** Select the check boxes of the desired camera channels depending on the Action selected.

**Example 1:** For Action as Video Pop up and the camera channel selected is 24, then the pop-up of Camera 24 will be shown for 10 seconds.

**Example 2:** For Access Allowed event on COSEC Device and the camera channel selected are 4,6,8 and 10, then recording of these cameras will be done for 10 seconds.

- Click **Add**. All the Events and Actions configured for them appear in a list.

Visual Tagging
Satatya Integration

Integration Type
Network

Active
☒

IP Address \*
192 . 168 . 111 . 164

Port Number \*
8711

---

Schedule Name

Active
☐

Schedule Range \*
00:00
23:59

Days \*
☒ Sun
☒ Mon
☒ Tue
☒ Wed
☒ Thu
☒ Fri
☒ Sat
☒ Holiday

Event
Access Allowed

Mode
Both

Action
Recording

Duration Min. \*

Camera \*
☐ 1
☐ 2
☐ 3
☐ 4
☐ 5
☐ 6
☐ 7
☐ 8
☐ 9
☐ 10
☐ 11
☐ 12
☐ 13
☐ 14
☐ 15
☐ 16
☐ 17
☐ 18
☐ 19
☐ 20
☐ 21
☐ 22
☐ 23
☐ 24

Add
Cancel

Search

Name	Event	Action	Start Time	End Time	Active	
New Schedule	Access Allowed	Recording	00:00	23:59	Yes	

## Special Functions



*Special Functions is applicable for both Direct Door and Panel Door.*

On the **Device Configuration** page, click the **Special Functions** tab in the left pane.

No.	Function Name	Active	Job Selection	User Group	Card 1	Card 2	Card 3	Card 4	
1	Official Work - IN	Yes	Yes	All					
2	Official Work - OUT	Yes	Yes	All					
3	Short Leave - IN	Yes	Yes	All					
4	Short Leave - OUT	Yes	Yes	All					
5	Regular - IN	Yes	Yes	All					
6	Regular - OUT	Yes	Yes	All					
7	Break End	Yes	Yes	All					
8	Break Start	Yes	Yes	All					
9	Overtime - IN	Yes	Yes	All					
10	Overtime - OUT	Yes	Yes	All					
11	Enroll User	Yes	No	All					
12	Enroll Special Card	Yes	No	All					

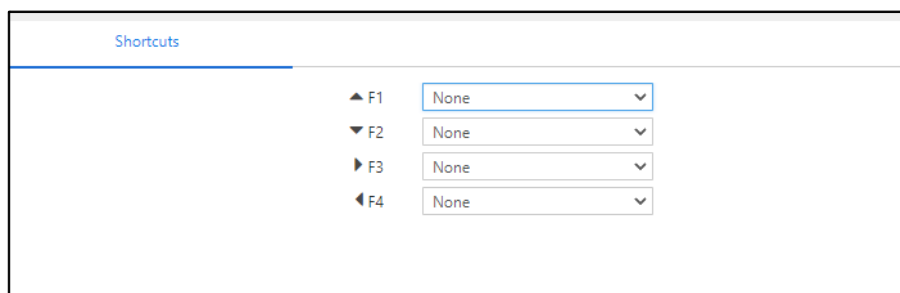
The **Special Functions** page differs for both Direct Door and Panel Door.

For PVR as **Direct Door**.

Configuration		Shortcuts			Schedule				
No.	Function Name	Active	Job Selection	User Group	Card 1	Card 2	Card 3	Card 4	
1	Official Work - IN	Yes	Yes	All					
2	Official Work - OUT	Yes	Yes	All					
3	Short Leave - IN	Yes	Yes	All					
4	Short Leave - OUT	Yes	Yes	All					
5	Regular - IN	Yes	Yes	All					
6	Regular - OUT	Yes	Yes	All					
7	Break End	Yes	Yes	All					
8	Break Start	Yes	Yes	All					
9	Overtime - IN	Yes	Yes	All					
10	Overtime - OUT	Yes	Yes	All					
11	Enroll User	Yes	No	All					
12	Enroll Special Card	Yes	No	All					

To configure Special Functions for PVR as Direct Door, refer to [“Special Functions”](#).

For PVR as a **Panel Door**.



Shortcuts

▲ F1	None
▼ F2	None
► F3	None
◄ F4	None

To configure Special Functions for PVR as Panel Door, refer to [“Special Functions Shortcuts”](#).

## Input/Output



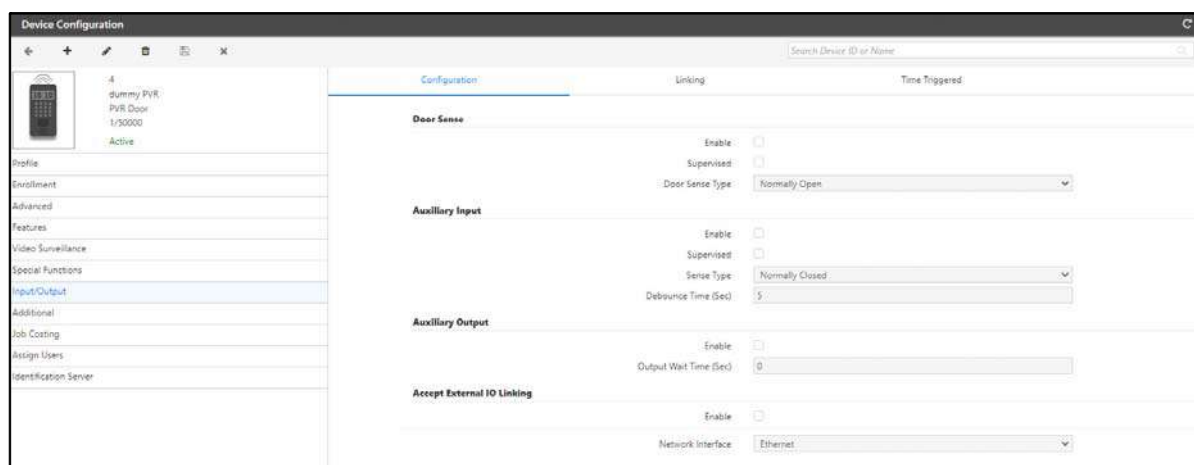
*Input/Output is applicable for both Direct Door and Panel Door.*

*The Configuration Tab is applicable for both Direct Door and Panel Door, whereas Linking and Time Triggered tab is applicable for Direct Door only.*

*This functionality is available only with the Access Control add-on module license.*

The Input/Output (I/O) configuration of a door determines how the output or response of a system is influenced by the input applied on it. In case of the COSEC Access Control System, the I/O configuration should enable the system to monitor and trigger a specific response to any changes in door state or event occurrences at the door device. This change of door state or occurrence of events may be considered as an input while the response or action that is generated by the system on detection of this input, may be defined as the output.

On the **Device Configuration** page, click the **Input/Output** tab in the left pane.



Device Configuration

4 dummy PVR  
PVR Door  
1/30000  
Active

Profile  
Enrollment  
Advanced  
Features  
Video Surveillance  
Special Functions  
**Input/Output**  
Additional  
Job Costing  
Assign Users  
Identification Server

Configuration Linking Time Triggered

**Door Sense**

Enable ☐  
Supervised ☐  
Door Sense Type: Normally Open

**Auxiliary Input**

Enable ☐  
Supervised ☐  
Sense Type: Normally Closed  
Debounce Time (Sec): 5

**Auxiliary Output**

Enable ☐  
Output Wait Time (Sec): 0

**Accept External IO Linking**

Enable ☐  
Network Interface: Ethernet

To configure the Input/Output parameters, click the following links:

- [“Configuration”](#)
- [“Linking”](#)

- “Time Triggered”

## Configuration



*Configuration is applicable for both Direct Door and Panel Door.*

Configuration tab differs for Direct Door and Panel Door.

Click **Configuration** tab. The **Configuration** page appears.

For PVR as **Direct Door**.

Configuration	Linking	Time Triggered
<b>Door Sense</b>		
Enable	<input type="checkbox"/>	
Supervised	<input type="checkbox"/>	
Door Sense Type	Normally Open	
<b>Auxiliary Input</b>		
Enable	<input type="checkbox"/>	
Supervised	<input type="checkbox"/>	
Sense Type	Normally Closed	
Debounce Time (Sec)	5	
<b>Auxiliary Output</b>		
Enable	<input type="checkbox"/>	
Output Wait Time (Sec)	0	
<b>Accept External IO Linking</b>		
Enable	<input type="checkbox"/>	
Network Interface	Ethernet	

Configure the following parameters:

### Door Sense

The system by default can sense two states of a door - Normally Open (NO) and Normally Closed (NC) depending on which the output is determined. For example, any deviation of the door from its normal state may lead to the trigger of a **Door Abnormal** alarm.

- **Enable:** Select the check box to enable the feature.
- **Supervised:** Select the check box to enable the door for four-state monitoring, where the door is also monitored for Door Fault and Door Disconnection.
- **Door Sense Type:** Select the Door Sense Type from the drop-down list options — Normally Open or Normally Closed.

### Auxiliary Input

- **Enable:** Select the check box to enable the feature.

- **Supervised:** Select the check box to enable the door for four-state monitoring, where the door is also monitored for Door Fault and Door Disconnection.
- **Sense Type:** Select the Sense Type from the drop-down list options — Normally Open or Normally Closed.
- **Debounce Time (Sec):** Specify the Debounce Time in seconds. It defines the minimum time for which the door should remain in a given state to enable the system to take action on it. For example, if a Normal door state is changed to Alarm, the state must remain in Alarm for five seconds before an alarm is generated.

### Auxiliary Output

- **Enable:** Select the check box to enable the feature.
- **Output Wait Time (Sec):** Specify the time in seconds that will be set as an additional waiting period before the Aux Output signal is sent.

### Accept External IO Linking

- **Enable:** Select the check box to enable device-to-device IO Linking, i.e. input from one Direct Door can trigger output in another Direct Door.
- **Network Interface:** Select the interface option for IO linking with external devices from the drop-down list options—Ethernet, Wireless or Mobile Broadband.

For PVR as a **Panel Door**.

Configuration			
<b>Door Sense</b>			
Enable	<input type="checkbox"/>		
Supervised	<input type="checkbox"/>		
Door Sense Type	Normally Open ▼		
<b>Auxiliary Input</b>			
Enable	<input type="checkbox"/>		
Supervised	<input type="checkbox"/>		
Sense Type	Normally Closed ▼		
Debounce Time (Sec)	5		
<b>Auxiliary Output</b>			
Enable	<input type="checkbox"/>		
Output Group	1	DC Aux Ports	⋮
<b>Relay Output</b>			
Output Group Number (Door Unlock)	2	Door Unlock	⋮
Output Group Number (Door Lock)	ID	Name	⋮

Configure the following parameters:

### Door Sense

The system by default can sense two states of a door - Normally Open (NO) and Normally Closed (NC) depending on which the output is determined. For example, any deviation of the door from its normal state may lead to the trigger of a **Door Abnormal** alarm.

- **Enable:** Select the check box to enable the feature.



- **Supervised:** Select the check box to enable the door for four-state monitoring, where the door is also monitored for Door Fault and Door Disconnection.
- **Door Sense Type:** Select the Door Sense Type from the drop-down list options — Normally Open or Normally Closed.

#### Auxiliary Input

- **Enable:** Select the check box to enable the feature.
- **Supervised:** Select the check box to enable the door for four-state monitoring, where the door is also monitored for Door Fault and Door Disconnection.
- **Sense Type:** Select the Sense Type from the drop-down list options — Normally Open or Normally Closed.
- **Debounce Time (Sec):** Specify the Debounce Time in seconds. It defines the minimum time for which the door should remain in a given state to enable the system to take action on it. For example, if a Normal door state is changed to Alarm, the state must remain in Alarm for five seconds before an alarm is generated.

#### Auxiliary Output

- **Enable:** Select the check box to enable the feature.
- **Output Wait Time (Sec):** Specify the time in seconds that will be set as an additional waiting period before the Aux Output signal is sent.

#### Relay Output

- **Output Group Number (Door Unlock):** Select the Output Group Number to which the device output for Door Unlock is to be assigned from the picklist.
- **Output Group Number (Door Lock):** Select the Output Group Number to which the device output for Door Lock is to be assigned from the picklist.

## Linking



*Linking is applicable for Direct Door only.*

The COSEC application supports the Input/Output Linking feature to activate an output port based on a trigger received from an input port on the same Direct Door. This option enables the administrator to define how an event or events (input port) will trigger an output on the door.

Click **Linking** tab. The **Linking** page appears.

Configuration
Linking
Time Triggered

Search

Name	Active Input ▲	Output	Output Type	Pulse Time(Sec)	Reset Link	Reset Time	Supported Devices
	No	Aux. Input	Aux. Output		Inactive	00:00	0 »
	No	Aux. Input	Door Relay		Inactive	00:00	0 »
	No	Duress	Aux. Output		Inactive	00:00	0 »
	No	Duress	Door Relay		Inactive	00:00	0 »
	No	Intercom Panic	Aux. Output		Inactive	00:00	0 »

1 - 5 of 12 records

< 1 2 3 > »

Select a Input-Output linking row or click edit button.

- **Name:** Specify a Name for the new I/O linking program to be defined.
- **Active:** Select this check box to enable the IO Linking.
- **Output Type:** Specify the required type of Output from the drop-down list options—Pulse, Interlock, Latch, Toggle.


If you select **Pulse**, the output will be active for the defined pulse time, for example, 5 sec.

If you select **Interlock**, the output follows the input. The output will be active till the input is active, after which it returns to normal state.

If you select **Latch**, the relay output will be in energized condition for infinite period and needs to be reset manually. It means once the input is active, output will be active. It has to be reset manually. For example, during a Fire alarm, door should be unlocked permanently so Latch output can be used.

If you select **Toggle**, the output group toggles its state whenever an input group is activated.

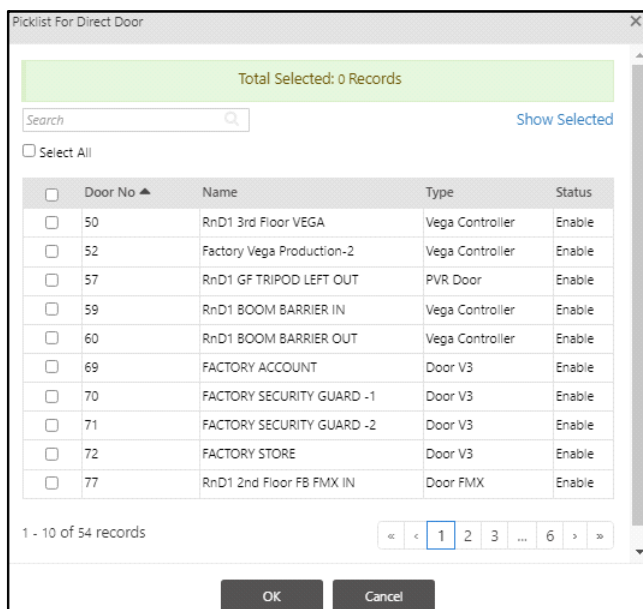
- **Pulse Time (sec):** If you select the Output Type as **Pulse**, specify the time until which the output should be active.
- **Reset Link:** Select this check box to enable the system to reset the IO link.
- **Reset Time:** Specify the time after which the IO link should be reset in HH:MM format.
- **Supported Devices** - All devices supported for external IO Linking will appear in this picklist for selection. Upto 255 external devices can be added by the administrator.

- Click **Supported Devices**  icon. The **Supported Devices** pop-up appears.



The **Supported Devices** pop-up window has a title bar with a close button. Below the title bar, there is a section labeled "Supported Devices" with two input fields: "ID" and "Name", and a list icon. Below this is a search bar with the placeholder text "Search" and a magnifying glass icon. The main area contains a table with the following columns: "ID", "Name", "IP Address", and a trash icon. The table is currently empty.

- In this pop-up, click the **Supported Devices** picklist. The **Picklist For Direct Door** pop-up appears.



The **Picklist For Direct Door** pop-up window has a title bar with a close button. Below the title bar, there is a green banner that says "Total Selected: 0 Records". Below this is a search bar with the placeholder text "Search" and a magnifying glass icon, and a "Show Selected" link. Below the search bar is a "Select All" checkbox. The main area contains a table with the following columns: "Door No", "Name", "Type", and "Status". The table contains 10 rows of data. Below the table is a pagination bar that says "1 - 10 of 54 records" and a set of navigation buttons: "<<", "<", "1", "2", "3", "...", "6", ">", ">>". At the bottom are "OK" and "Cancel" buttons.

Door No	Name	Type	Status	
<input type="checkbox"/>	50	RnD1 3rd Floor VEGA	Vega Controller	Enable
<input type="checkbox"/>	52	Factory Vega Production-2	Vega Controller	Enable
<input type="checkbox"/>	57	RnD1 GF TRIPOD LEFT OUT	PVR Door	Enable
<input type="checkbox"/>	59	RnD1 BOOM BARRIER IN	Vega Controller	Enable
<input type="checkbox"/>	60	RnD1 BOOM BARRIER OUT	Vega Controller	Enable
<input type="checkbox"/>	69	FACTORY ACCOUNT	Door V3	Enable
<input type="checkbox"/>	70	FACTORY SECURITY GUARD -1	Door V3	Enable
<input type="checkbox"/>	71	FACTORY SECURITY GUARD -2	Door V3	Enable
<input type="checkbox"/>	72	FACTORY STORE	Door V3	Enable
<input type="checkbox"/>	77	RnD1 2nd Floor FB FMX IN	Door FMX	Enable

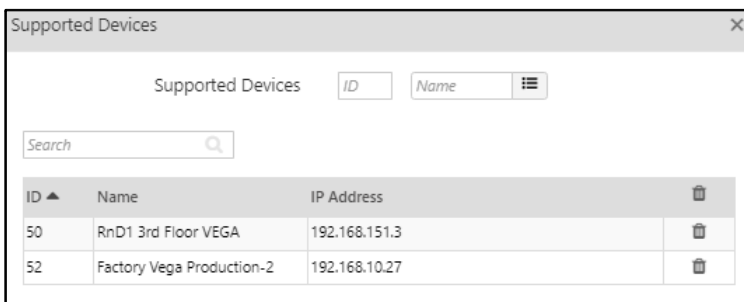
You can either select particular devices or can select all the devices at once.

To select particular devices, click the check boxes of the desired devices.



**OR**


To select all the devices, select the **Select All** check box. The devices on all the pages will be selected.

Click **OK**. You return to the **Supported Devices** pop-up and the selected devices are displayed here.



The **Supported Devices** pop-up window is shown with the selected devices. The table now contains two rows of data. The columns are "ID", "Name", "IP Address", and a trash icon.

ID	Name	IP Address	
50	RnD1 3rd Floor VEGA	192.168.151.3	
52	Factory Vega Production-2	192.168.10.27	

You can also delete the desired devices. To do so, click **Delete**  of the respective device.

Close the pop-up the number of selected devices are displayed under **Supported Devices** in the grid.

- Click the **OK** button and **Save** the configuration.

## Time Triggered

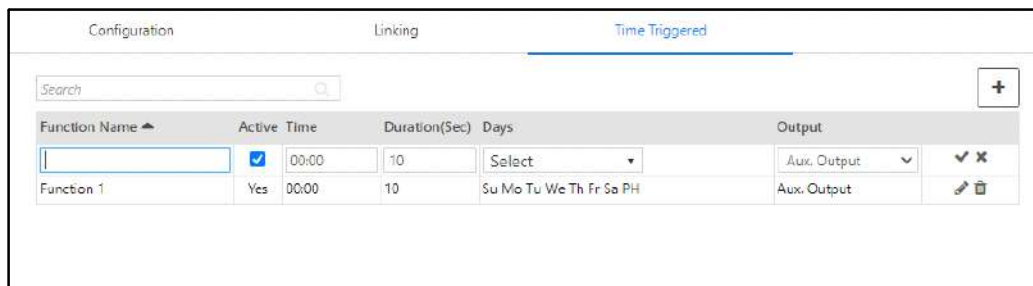


*Time Triggered is applicable for Direct Door only.*

This functionality enables the user to control the activity of an Output without manual intervention. The output gets active without the status of input, i.e. the selected output is triggered based on the configured time and not the IO link.

The time triggered functions are used for activating events like door unlock and siren activation that are set as per the start time and for the configured time duration. This functionality is designed to trigger outputs for predefined periods at the configured time. The COSEC access control system supports up to 20 Time Triggered functions on a Direct Door.

Click **Time Triggered** tab. The **Time Triggered** page appears.



Function Name	Active	Time	Duration(Sec)	Days	Output
<input type="text"/>	<input checked="" type="checkbox"/>	00:00	10	Select	Aux. Output
Function 1	Yes	00:00	10	Su Mo Tu We Th Fr Sa PH	Aux. Output

Click **Add**.

Configure the following parameters:

- **Function Name:** Specify a user friendly Function Name.
- **Active:** Select this check box to enable the Time Triggered function.
- **Time:** Specify the time when the Time Triggered function should be activated.
- **Duration:** Specify the time duration for which the Time Triggered function should be active.
- **Days:** Select the check boxes for the desired days on which you wish to apply the Time Triggered function from the drop-down list. Click **Check All**, if you wish to select all the days.
- **Output:** Select the Output on which the Time Triggered function should be applied from the drop-down list options—Aux Output or Door Relay.

Click **OK** and then **Save** to save the settings.

## Additional



*Additional is applicable for Direct Door only.*

Many countries observe the convention of adjusting clocks forward and backward. Clocks are set ahead during the spring and back to standard time in the autumn. COSEC doors can be configured to be compatible with this procedure keeping the RTC of the system updated with such changes

On the **Device Configuration** page, click the **Additional** tab in the left pane.

The screenshot shows the 'Device Configuration' window. On the left, a sidebar lists various configuration tabs: Profile, Enrollment, Advanced, Features, Video Surveillance, Special Functions, Input/Output, **Additional** (selected), Job Costing, Assign Users, and Identification Server. The main area is titled 'Daylight Saving' and contains the following fields:

- DST Type:** A dropdown menu set to 'Day-Month wise'.
- Time Period:** A text field containing '00:00'.
- Forward Clock:**
  - Month:** A dropdown menu set to 'January'.
  - Week No.:** A dropdown menu set to '1st'.
  - Day of Week:** A dropdown menu set to 'Sunday'.
  - Time:** A text field containing '00:00'.
- Backward Clock:**
  - Month:** A dropdown menu set to 'January'.
  - Week No.:** A dropdown menu set to '1st'.
  - Day of Week:** A dropdown menu set to 'Sunday'.
  - Time:** A text field containing '00:00'.

A 'Save' button is located at the bottom right of the configuration area.

The **Daylight Saving** configuration can be done in 2 ways — Day-Month wise or Date-Month wise.

- **DST Type:** Select the **DST Type** as Day-Month wise or Date-Month wise. Select Disable, if you wish to disable the application of DST on the system time.

If you select the **Day-Month wise** option, configure the following parameters.

This is a detailed view of the 'Daylight Saving' configuration form. It includes the same fields as the screenshot above:

- DST Type:** A dropdown menu set to 'Day-Month wise'.
- Time Period:** A text field containing '00:00'.
- Forward Clock:**
  - Month:** A dropdown menu set to 'January'.
  - Week No.:** A dropdown menu set to '1st'.
  - Day of Week:** A dropdown menu set to 'Sunday'.
  - Time:** A text field containing '00:00'.
- Backward Clock:**
  - Month:** A dropdown menu set to 'January'.
  - Week No.:** A dropdown menu set to '1st'.
  - Day of Week:** A dropdown menu set to 'Sunday'.
  - Time:** A text field containing '00:00'.

A 'Save' button is located at the bottom center of the form.

- **Time Period:** Specify the time period by which the time period will be set forward or backward to achieve Daylight Saving.

#### Forward Clock

- **Month:** Select the month when the DST starts for the Forward Clock from the drop-down list.
- **Week No.:** Select the week of the month when the DST starts for the Forward Clock from the drop-down list. For example, if DST starts from 4th week of March, select 4th.
- **Day of Week:** Select the day of the week when the DST starts for the Forward Clock from the drop-down list.
- **Time:** Specify the time when the DST starts for the Forward Clock in HH:MM format.

#### Backward Clock

- **Month:** Select the month when the DST ends for the Backward Clock from the drop-down list.
- **Week No.:** Select the week of the month when the DST ends for the Backward Clock from the drop-down list. For example, if DST starts from 4th week of March, select 4th.
- **Day of Week:** Select the day of the week when the DST ends for the Backward Clock from the drop-down list.
- **Time:** Specify the time when the DST ends for the Backward Clock in HH:MM format.

Click **Save** to save the configurations.

If you select the **Date-Month wise** option, configure the following parameters.

Daylight Saving

DST Type
Date-Month wise
Time Period
00:00

**Forward Clock**
Month
January
Date
1
Time
00:00

**Backward Clock**
Month
January
Date
1
Time
00:00

Save

- **Time Period:** Specify the time period by which the time period will be set forward or backward to achieve Daylight Saving.

### Forward Clock

- **Month:** Select the month when the DST starts for the Forward Clock from the drop-down list.
- **Date:** Select the date of the month when the DST starts for the Forward Clock from the drop-down list.
- **Time:** Specify the time when the DST starts for the Forward Clock in HH:MM format.

### Backward Clock

- **Month:** Select the month when the DST ends for the Backward Clock from the drop-down list.
- **Date:** Select the date of the month when the DST ends for the Backward Clock from the drop-down list.
- **Time:** Specify the time when the DST ends for the Backward Clock in HH:MM format.

Click **Save** to save the configurations.

Suppose, the DST period in a region is from Sunday, 27 March at 02:00:00 hours till Sunday, 30 October at 03:00:00. If DST is configured according to this period and the **Time Period** is specified as 1 hour, the clock will be forwarded by 01:00 hours on 27 March at 02:00:00 hours. The clock will be set back by 01:00 hours on 30 October at 03:00:00.

## Job Costing



*Job Costing is applicable for Direct Door only.*

When user punches on any device, there will be an option to select the Job Code on which the user is working. Job Costing enables the Administrator to show or hide Job Code selection on device. It also enables the Administrator to assign default jobs on device.

On the **Device Configuration** page, click **Job Costing** tab in the left pane.

The screenshot shows the 'Device Configuration' window with the 'Job Costing' tab selected in the left sidebar. The main area is titled 'Settings' and contains a 'Show Job Menu' dropdown set to 'Allocate Default' and a 'Retain Job Selection' checkbox. Below this is a 'Default Jobs' section with a search bar and a table with columns: Job Code, Name, Assignment Start, Assignment End, and Prioritize Job. The table currently shows 'No Data'.



*Make sure the **Device Based Job Assignment** check box is enabled for the desired Users.*

## Settings

The **Settings** page appears by default.

- **Show Job Menu:** Select the Job Menu to be displayed from the drop-down list options— **Show List** or **Allocate Default**.

## Show List

When **Show List** is selected; then multiple jobs can be assigned to the device. The user can select the relevant Job Code while punching on the device. His/her job hours will be recorded for that Job Code.

This screenshot shows the 'Device Configuration' window with the 'Job Costing' tab selected. The 'Show Job Menu' dropdown is now set to 'Show List', and the 'Retain Job Selection' checkbox is checked. Below the settings, there is an 'Assign Jobs' section with input fields for 'Job Group' (ID and Name) and 'Job' (ID and Name). A search bar is also present. At the bottom, there is a table with columns: Job Code, Name, Assignment Start, Assignment End, and a delete icon. The table currently shows 'No Data'.



- **Retain Job Selection:** If Retain Job Selection check box is selected, it allows the device to remember the last Job Code selected by a user and the same would be applicable for all the subsequent users until another job selection is done on the device. This is useful in environments where dynamic job selection prevails.

In this case, if the user selects a Job Code the same is saved and retained for future use by the device. If the user selects None option on the device, it ends the current job and assigns None until a new Job Code is selected by the user.

If the you clear the check box, then the device does not retain any job selection done by the user.

For example, in an educational setup, teachers may have dynamic job assignments, while students have static ones. After a teacher selects a Job Code, that code is retained by the device. Any student who punches in afterward will be assigned the teacher's Job Code until the teacher selects a new one or selects None.

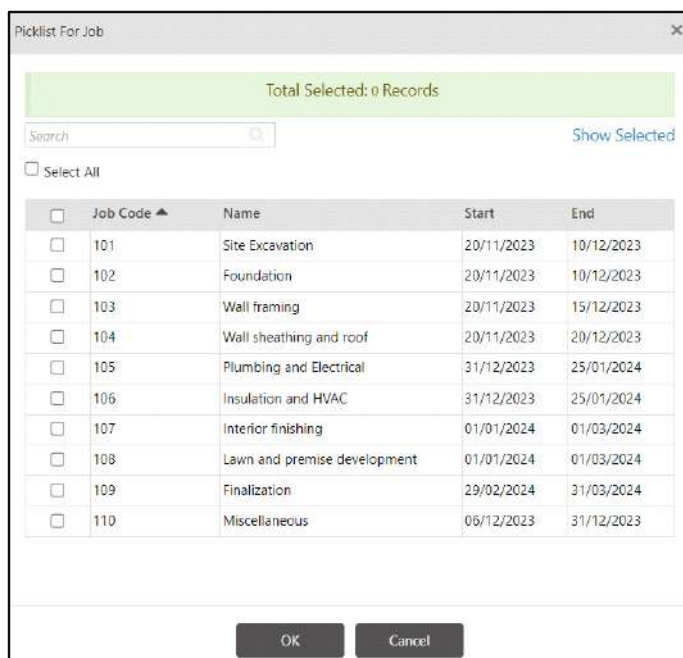
## Assign Jobs

- **Assign Jobs:** You can select Job Group as well as individual Jobs.
- To select **Job Group**, click the Job Group picklist. The **Picklist For Job Group** pop-up appears. Select the desired Job Group.

Click Save. The Jobs of the selected Job Group appear in the grid.

You can delete the desired Job. To do so, click **Edit**  icon and then click the **Delete**  icon of the respective Job.

- To select **Jobs**, click the Jobs picklist. The **Picklist For Job** pop-up appears.



Picklist For Job

Total Selected: 0 Records

Search Show Selected

☐ Select All

<input type="checkbox"/>	Job Code	Name	Start	End
<input type="checkbox"/>	101	Site Excavation	20/11/2023	10/12/2023
<input type="checkbox"/>	102	Foundation	20/11/2023	10/12/2023
<input type="checkbox"/>	103	Wall framing	20/11/2023	15/12/2023
<input type="checkbox"/>	104	Wall sheathing and roof	20/11/2023	20/12/2023
<input type="checkbox"/>	105	Plumbing and Electrical	31/12/2023	25/01/2024
<input type="checkbox"/>	106	Insulation and HVAC	31/12/2023	25/01/2024
<input type="checkbox"/>	107	Interior finishing	01/01/2024	01/03/2024
<input type="checkbox"/>	108	Lawn and premise development	01/01/2024	01/03/2024
<input type="checkbox"/>	109	Finalization	29/02/2024	31/03/2024
<input type="checkbox"/>	110	Miscellaneous	06/12/2023	31/12/2023

OK Cancel


You can either select particular jobs or can select all the jobs at once.

To select particular jobs, select the check boxes of the desired jobs.

**OR**

To select all the jobs, select the **Select All** check box. The jobs on all the pages will be selected.

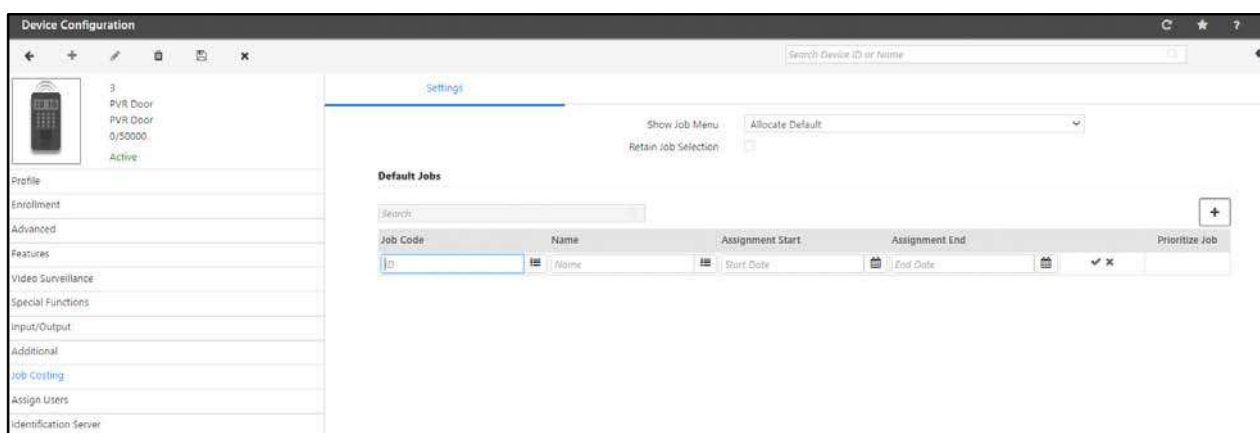
Click **OK**.

The selected Jobs appear in the grid. You can also delete the desired Job. To do so, click **Delete**  of the respective Job.

- Click **Save**.

## Allocate Default

When **Allocate Default** is selected; then default jobs for the device can be selected. The Job costing user can directly punch on this door for starting the default job.



## Default Jobs

Multiple default jobs can be assigned with overlapping Assignment Date Ranges. You can also set the priority of the assigned jobs if required. If you have jobs with overlapping dates and you have set their priority as per your requirement, then the first job will be considered as the default job.

- Click **Add**  . Click the picklist under **Job Code/Name** to select the desired Jobs.

The **Picklist For Job** appears.

Picklist For Job

Search  Ended Days (1-999)  Active

Job Code ▲	Name	Start	End
101	Site Excavation	20/11/2023	10/12/2023
102	Foundation	20/11/2023	10/12/2023
103	Wall framing	20/11/2023	15/12/2023
104	Wall sheathing and roof	20/11/2023	20/12/2023
105	Plumbing and Electrical	31/12/2023	25/01/2024
106	Insulation and HVAC	31/12/2023	25/01/2024
107	Interior finishing	01/01/2024	01/03/2024
108	Lawn and premise development	01/01/2024	01/03/2024
109	Finalization	29/02/2024	31/03/2024
110	Miscellaneous	06/12/2023	31/12/2023

1 - 10 of 11 records

1 2

Cancel

By default, all the **Active** jobs are displayed. Click **Active** and select the desired option — **All**, **Active**, **Expired** — to filter the jobs. The jobs appear as per the set filter. If you select **Expired**, you can set another filter.

Configure the number of days in Ended Days (1-999). The system will display the expired jobs, derived using the following: Current Date minus Number of days configured in Ended Days.

For example:

Ended Days configured = 2

Current Date= April 25, 2024

All the jobs expired between April 23, 2024 to April 25, 2024 (midnight), will be displayed.

Click to select the desired job from the list. You can also search for the desired job using the search bar.

The selected job appears in the grid.

- **Assignment Start** and **Assignment End**: The selected Jobs Start and End dates are displayed. You can change the Assignment Start and Assignment End dates of the job if required. To do so, click the calendar and select the desired start and end dates.
- Click **Save** to save the configuration.

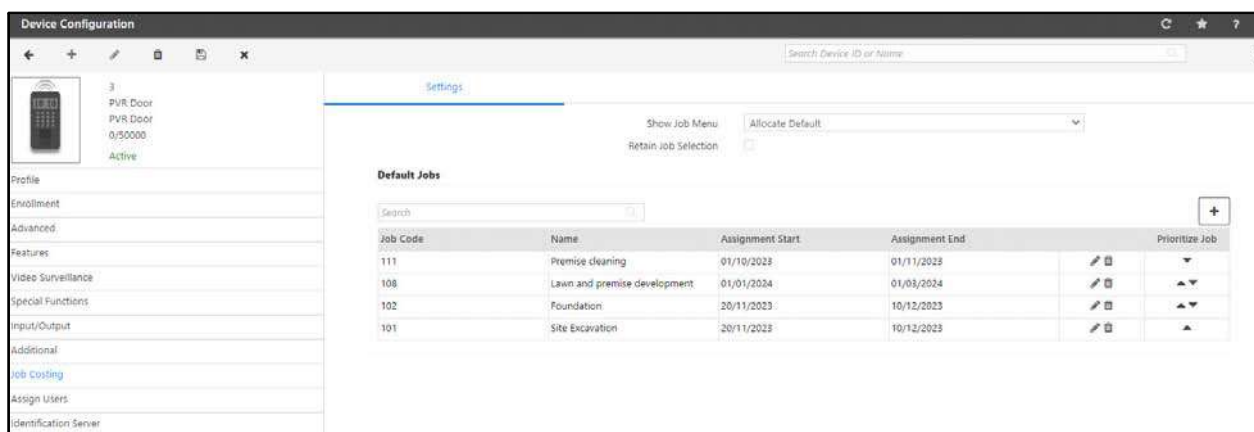
The **Default Jobs** grid will consist of all the jobs, that is expired, in-progress as well as assigned.



*It is recommended to set job priority only if overlapping dates are assigned to the jobs.*

*If a new job is assigned, by default it will appear at the highest priority. You can change the priority later, if required.*

You can set the priority of the jobs as per your requirement. To do so,



- Under **Prioritize Job**, click the **Up** arrow button to move a job upwards in the list. Similarly, click the **Down** arrow button to move a job downwards in the list.

If you have overlapping dates assigned to Jobs, in such scenarios there will be multiple Jobs in which the punches are possible.

To resolve this set the Job with highest priority at the first position, so that when the system searches for the Job as per the date, the punch will be marked in the first Job in which the date is detected.

Let us understand this with the help of an example.

#### Example:

User 1 has been assigned the following jobs:

Job Code	Job Name	Assignment Start	Assignment End	Prioritize Job
J1	Job 1	01/10/2023	10/10/2023	1
J2	Job 2	09/10/2023	15/10/2023	2
J3	Job 3	17/10/2023	25/10/2023	3
J4	Job 4	25/10/2023	31/10/2023	4

Now, User 1 changes the priority of the assigned jobs as follows:

Job Code	Job Name	Assignment Start	Assignment End	Prioritize Job
J2	Job 2	09/10/2023	15/10/2023	1
J1	Job 1	01/10/2023	10/10/2023	2
J4	Job 4	25/10/2023	31/10/2023	3
J3	Job 3	17/10/2023	25/10/2023	4

When User 1 will punch on 09/10/2023, the punch will be marked against Job 2 as it has been set at priority number 1. Similarly, when User 1 will punch on 25/10/2023, the punch will be marked against Job 4 as it is at a higher priority than Job 3.



*Make sure that the assigned jobs are prioritized correctly to ensure that the punches are in place.*

## Assign Users



*Assign Users is applicable for both Direct Door and Panel Door.*

### For Direct Doors

You can select and assign users to the door.


On the **Device configuration** page, click **Assign Users**. The Assign Users page appears.

ID	Name	
1111	Test_08	
105	Test_105	
1000	test_15	
1	ar3	

- **Users:** Click the picklist. The **Picklist For All Users** window appears.

Select the check boxes of the desired Users and click **OK**.

The grid displays the list of selected users.

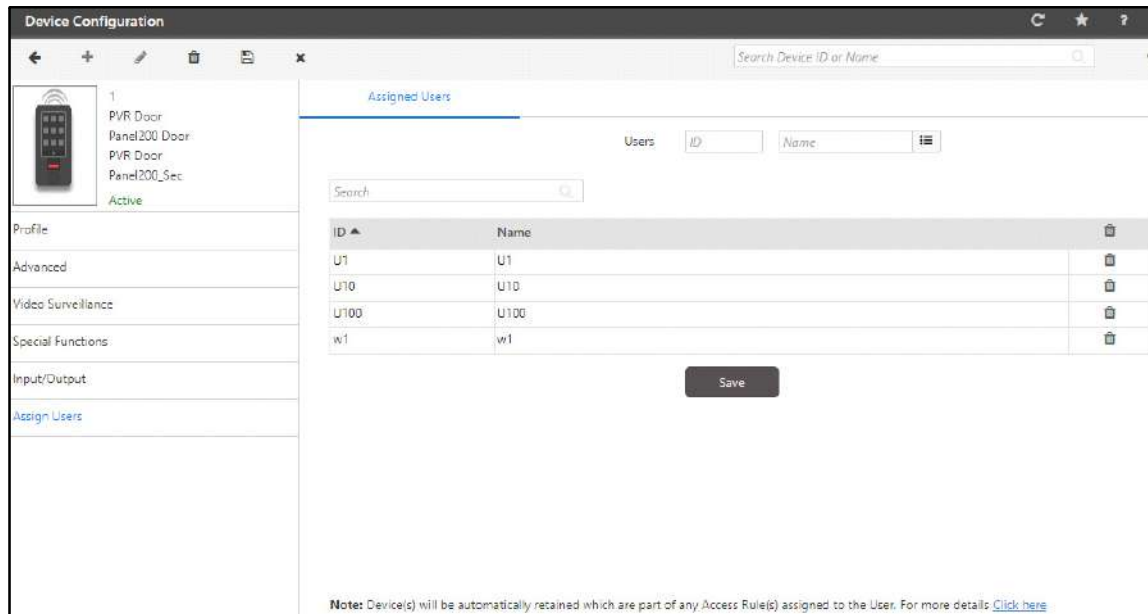
If you wish to remove any assigned user, click the respective **Delete**  icon.

- Click **Save**.

## For Panel Doors

You can select and assign users to the door.


On the **Device configuration** page, click **Assign Users**. The Assign Users page appears.



- **Users:** Click the picklist. The **Picklist For All Users** window appears.

Select the check boxes of the desired Users and click **OK**.

The grid displays the list of selected users.

If you wish to remove any assigned user, click the respective **Delete**  icon.



*If you wish to delete a user which is assigned to this device and it is a part of any Access Rule assigned to that user, then such user and door/s will be retained.*

- If you wish to check the users assigned against any Access Rule, click the **Click here** link at the bottom of the page. The **Access Rule List** pop-up appears.

User ID ▲	Access Rule ID
w1	999

It displays the list of User ID along with the Access Rule ID against which they are assigned.

- Click **Save** to assign all the added users to this door.

## Identification Server

This tab enables the device to be assigned to a pre-defined Identification Server.

The door has a limited memory capacity for storage of templates so, we can assign an Identification Server which will store the templates for the door and will respond to the door when asked for identification.

For more information on Identification Servers, refer to [“Identification Server”](#).

On the **Device Configuration** page, click the **Identification Server** tab in the left pane.

**Device Configuration**

Search Device ID or Name

**155 dummy PVR**  
PVR Door  
1/50000  
Active

Profile  
Enrollment  
Advanced  
Features  
Video Surveillance  
Special Functions  
Input/Output  
Additional  
Job Costing  
Assign Users  
**Identification Server**

**Settings**

**Other Biometric Credentials**

Enable Identification On Server ☒

Identification Server 1 Identification - 309C239A9457

Configure Alternate Server Address ☒

Server Address 192.168.103.88

Server Port 11005

Enable Palm Smart Identification ☒

Wait For Server Response ☒

Wait For Device Response ☒

Auto Send Enrolled Templates ☒

Maximum Template Count For Sequential Identification 0

Default Biometric Group No. 0

## Settings

Configure the following parameters:

### Other Biometric Credentials

- **Enable Identification On Server:** Select this check box to enable identification of palm/finger templates on this device.
- **Identification Server:** Select an Identification Server using the picklist button to which the device is to be assigned. The configuration of Identification Server is done from **Admin module > System Configuration > Identification Server Configuration** and make sure you start the Identification Service from the service tray. This IP Address of this Identification Server is displayed in **Server Address**.
- **Configure Alternate Server Address:** Select this check box to configure an external IP Address of the FR Identification Server and configure the Server Address.
  - **Server Address:** By default it displays the IP Address of the selected Identification Server. Enter the external network IP address which will be used for accessing Identification Server.
- **Server Port:** Enter the TCP Port number. Default: 11005.
- **Enable Palm Smart Identification:** Select this check box to enable Palm templates Identification through Identification Server for this device.
- **Wait For Server Response:** Select this check box if the Identification Server should wait for response from the COSEC Server before identifying a user. If enabled, the Identification Server will request the device as well as the COSEC Server to search for the template and wait till the response is received from the COSEC Server (even if a matching palm template is found locally).
- **Wait For Device Response:** Select this check box if the Identification Server should wait for response from the COSEC Device before identifying a user. If enabled, the Identification Server will request the device as well as the COSEC Server to search for the template and wait till the response is received from the device.
- **Auto Send Enrolled Templates:** Select this check box to enable any enrolled templates to be saved both in the COSEC database as well as saved locally in the configured Identification Server. This enables prompt identification of user on enrollment.
- **Maximum Template Count for Sequential Identification:** Specify the Maximum number of Templates upto which identification will be done locally through device after which the request will be forwarded to the Identification Server. For details, "[Device](#)" in Global Policy.
- **Default Biometric Group No.:** Specify the default Biometric Group Number to be assigned to the device. It is a number allotted to a device to be assigned to the Identification Server. This enables the Identification Server to match the template against only those devices that belong to the corresponding biometric group. This reduces false detection as well time to search template.

## Accessing the Door using QR code

The user can access the COSEC device using COSEC APTA installed in the mobile device. If the user has rights for COSEC APTA and access to this device is allowed to the user, then he can use his mobile device to scan the QR code which constitute the details of the door.



There is icon for QR code on COSEC APTA application. Clicking that icon will open the camera in your mobile. Now using the mobile camera you can scan the device QR code. The COSEC door will open after verifying the security key and access policies assigned to the user.

## Steps to create a QR code

**Step 1:** Enter details in JSON format

```
{"version":"x","ip": "x.x.x.x","port":"x","pdid":"x","mode":"x"}
```

Valid values:

Field	Field range	Default Value	Remark
version	1-255	1	
ip	0.0.0.0-255.255.255.255	0.0.0.0	
port	0-65535	0	
pdid	0-255	0	If door is in direct door mode then, then PDID will be 0  If door is in panel door mode then, PDID will have values from 1-255
mode	0,1	0	0= for entry mode 1=for exit mode



### Notes for Step1

- If door is in direct door mode enter IP and port of the direct door
- If door is a panel door, then enter IP and port of the panel door and in the pdid specify the door id which is to be accessed.

**Step 2:** Encrypt the JSON string using key "matrix12" with simple DES/ECB mode.

**Step 3:** Encode the encrypted string using Base 64.

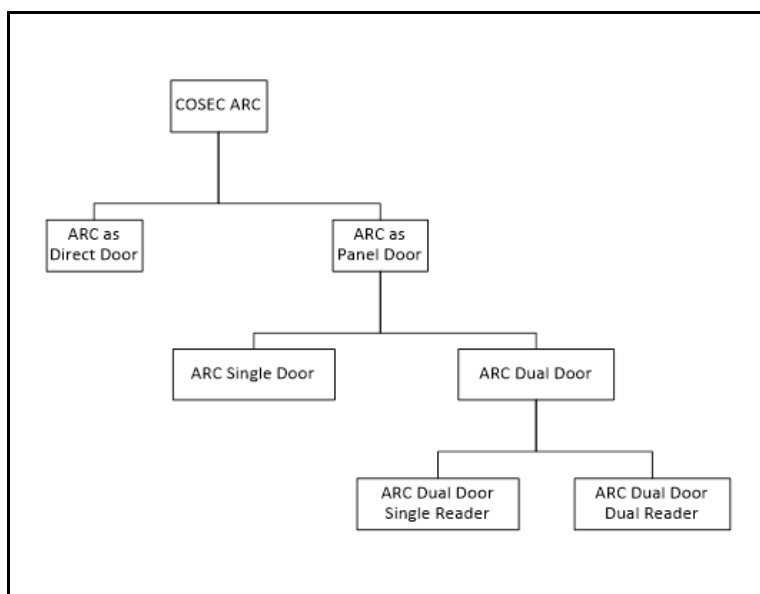
**Step 4:** Use this string to generate QR code through any third party software.

# ARC Door

---

COSEC ARC is an intelligent compact panel with PoE for two doors. The COSEC ARC can control two readers on Wiegand or RS-485, door lock and other auxiliary devices making it an ideal solution for any access control installation. **ARC DC100** and **ARC DC200** can be connected as **Direct Door** as well as **Panel Door**.

## ARC DC100 and ARC DC200



To configure the parameters, you can:

- copy the parameters from another device, refer to [“Copy Parameters From”](#) (applicable to ARC DC200 Direct Door only)  
**OR**
- can click each link to configure the parameters, refer to [“Selective Configuration”](#).

## Copy Parameters From

You can also copy the parameters from another device, if required.



*The Copy Configuration From option is applicable in Add (after you have selected the desired device type) as well as Edit mode of any added device. It is applicable to ARC DC200 Direct Door only.*

*If certain parameters are configured and Copy Parameters From option is clicked, then:*

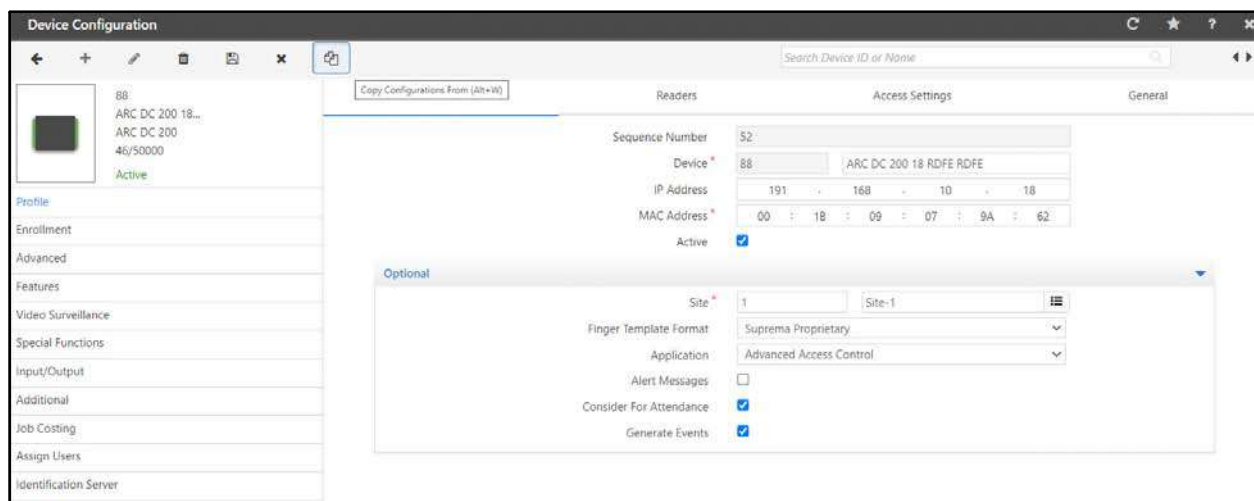
- the value of the applicable parameters already configured will be over-written with the values as configured in the selected device.*
- the values of other parameters that are configured will remain as they are.*

*If none of the parameters are configured and Copy Parameters From option is clicked, then*

- all the applicable parameter values will be copied from the selected device.*
- the values of the other parameters will be their default values.*

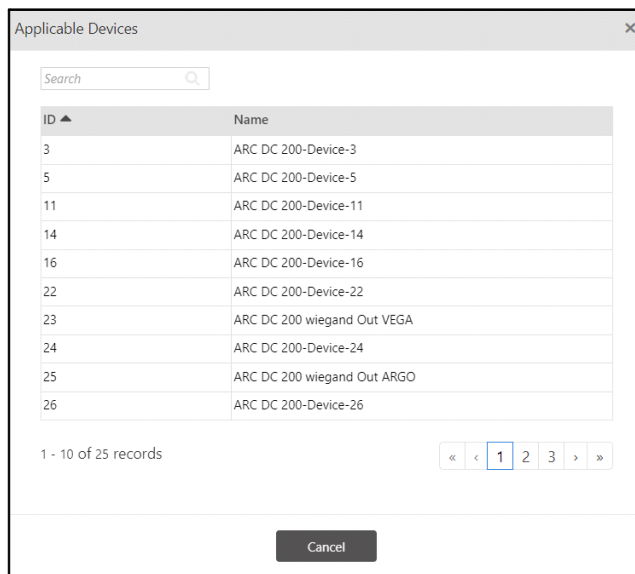
*To know more about the applicable parameters that will be copied, refer to [“Copy Parameter Details”](#)*

To do so, click **Copy Configuration From** .



The screenshot shows the 'Device Configuration' window with a sidebar on the left containing a list of devices and a main panel on the right. The sidebar lists devices like '88: ARC DC 200 18...', 'ARC DC 200', and '46/50000' with an 'Active' status. The main panel has tabs for 'Readers', 'Access Settings', and 'General'. The 'Readers' tab is active, showing fields for 'Sequence Number' (52), 'Device' (88), 'IP Address' (191.168.10.18), and 'MAC Address' (00:18:09:07:9A:62). Below these is an 'Optional' section with fields for 'Site' (1), 'Finger Template Format' (Suprema Proprietary), 'Application' (Advanced Access Control), 'Alert Messages' (unchecked), 'Consider For Attendance' (checked), and 'Generate Events' (checked). A 'Copy Configurations From (Alt+W)' button is visible at the top of the main panel.

The **Applicable Devices** pop-up appears.



ID ▲	Name
3	ARC DC 200-Device-3
5	ARC DC 200-Device-5
11	ARC DC 200-Device-11
14	ARC DC 200-Device-14
16	ARC DC 200-Device-16
22	ARC DC 200-Device-22
23	ARC DC 200 wiegand Out VEGA
24	ARC DC 200-Device-24
25	ARC DC 200 wiegand Out ARGO
26	ARC DC 200-Device-26

1 - 10 of 25 records

« < 1 2 3 > »

Cancel



*The devices that appear in the Applicable Devices pop-up will be of the same family and device type. Let us understand this:*

- *In case of Direct Door, the pop-up will display other ARC DC200 Direct Doors only. For example, if you have direct door devices — ARC DC1, ARC DC2, Vega1 and Vega2, then this pop-up will display only ARC DC1 and ARC DC2.*

Select the desired device from which you wish to copy the configurations.

OR

You can also search for the desired device using the Search option and then select the device.

A Warning pop-up appears. Click **Yes** to copy all the applicable parameters. A processing screen appears.



*Only applicable parameters will be copied. For details, refer to [“Copy Parameter Details”](#).*

*If during the processing screen, you click Cancel, then the entire copy process will be aborted.*

If all applicable parameters are copied successfully, then the Applicable Configurations are Successfully Copied message will be displayed.

If all applicable parameters are not copied successfully, then the Failed to copy. Please try again message will be displayed.

## Selective Configuration

To know more about configuring devices, click on the links for different tabs of Device configuration.

- [“Profile”](#)
  - [“ARC as Panel Door”](#)
  - [“ARC as Direct Door”](#)
- [“Enrollment”](#)
- [“Advanced”](#)

- *“Features”*
- *“Video Surveillance”*
- *“Special Functions”*
- *“Input/Output”*
- *“Additional”*
- *“Job Costing”*
- *“Assign Users”*
- *“Identification Server”*

## Profile

This section enables the user to set up the basic profile for any new device. Setting up a door profile involves defining basic parameters to set up any door controller device.

On the **Device Configuration** page, select the **Profile** tab. The Profile can be configured in the following sections:

### “ARC as Panel Door”

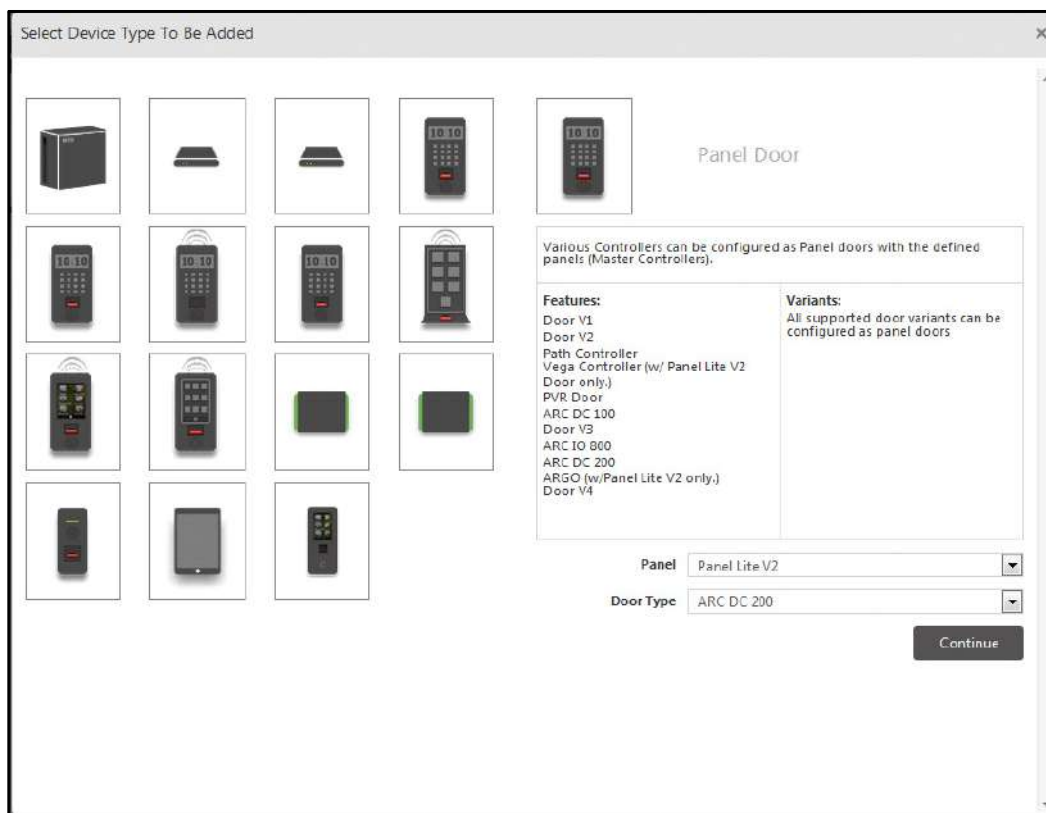
- “Basic”
- “Readers”
- “General”

### “ARC as Direct Door”

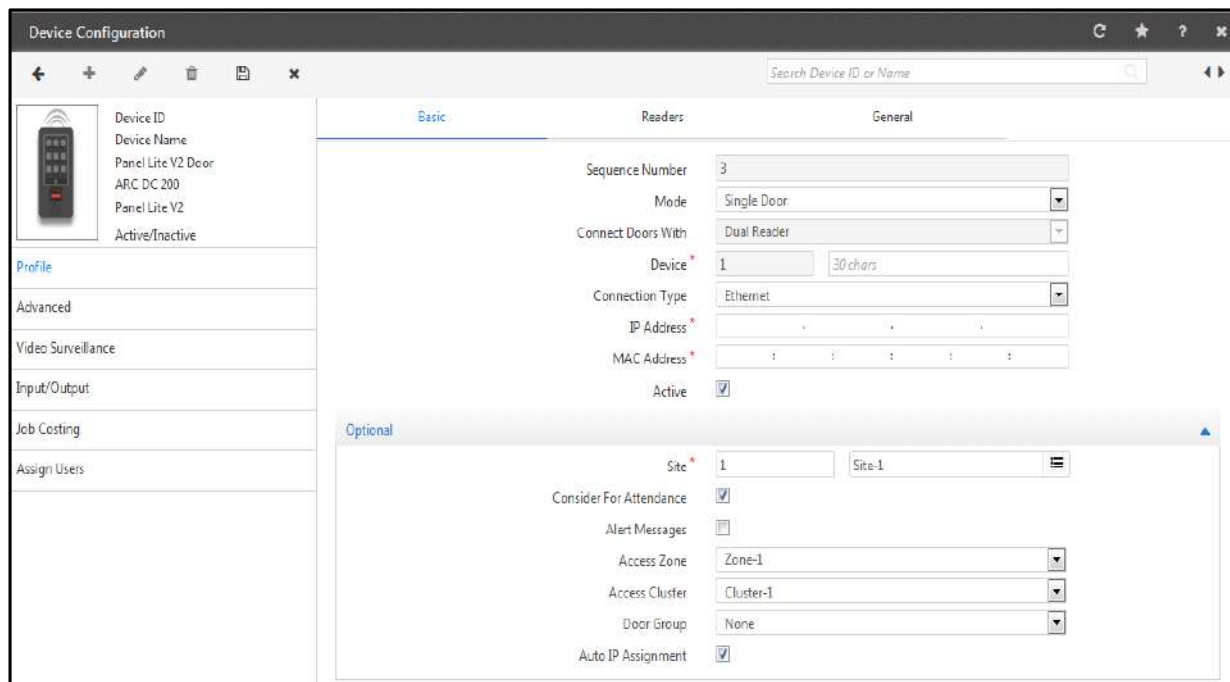
- “Basic”
- “Readers”
- “Access Settings”
- “General”

## ARC as Panel Door

To add ARC as Panel Door, click Panel Door from the device selection window and select the Panel as Panel Lite/ Panel200 and the door type as ARC DC100/ARC DC200. Then click Continue.



The Device Configuration window appears as shown below.



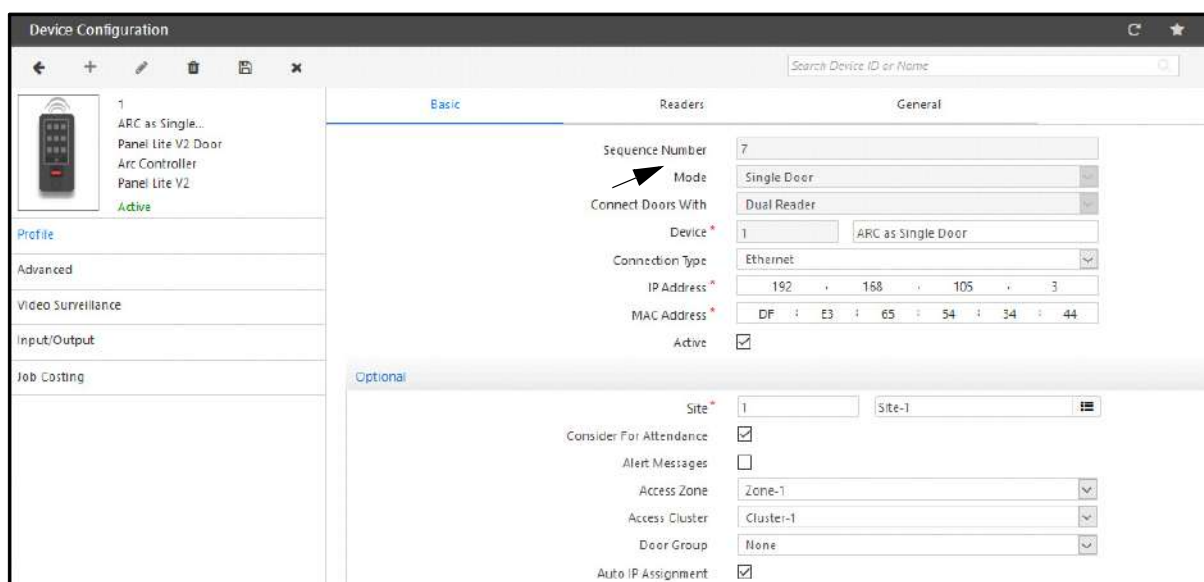
The Monitor Service must be running while adding the device to COSEC.

## Basic

**Sequence Number** - This is a system generated sequence number for each new device.

**Mode:** For connecting ARC as single door, select the mode as **Single Door**. For connecting ARC as dual door (ARC as 2door) select the Mode as **Dual Door**.

## Connecting ARC as Single Door



**Connect Doors with:** When Dual Door Mode is selected, you can connect doors with either **Single reader** or **Dual reader**.

**Device:** Specify the name of the door. The ID of the door is auto generated by the system.

**Connection Type:** Specify the connection type as Ethernet or RS485.

**IP Address/MAC address:** Enter the IP Address and MAC Address respectively of ARC DC100/ARC DC200. The IP address and MAC address of both the doors of ARC-2 door is same.



*MAC address of door is required while manually adding the door to the COSEC Monitor. You can note the MAC address from the device web page.*

**Active:** Check the box to activate the device on the network.



*To add the Device automatically, go to Admin Module> System Configuration> Global Policy> Device. Enable the “**Auto Add New Devices**” checkbox.*

*The device will be added automatically but make sure you enable the **Active** checkbox in order to connect the device to the network. Once the device is connected to the network, it will come online in COSEC Monitor.*

Click **Save** button to save the configuration.

## Optional

The optional tab shows the following configuration.

- **Site:** Select the site to which this door is to be assigned from the site picklist window. Site is created from Devices> Masters> Site.
- **Consider for Attendance:** Select this checkbox if the events sent by this door are to be considered for Time and Attendance data processing. If this option is disabled, then the system would consider all events coming from the door as access control events.
- **Alert Messages:** Select this checkbox to enable the application to send alerts based on events from this door.
- **Access Zone** (only for panel doors): Assign an access zone to the door by selecting from the drop down menu.



*Access Zone, Access Cluster, Door Group are configured while configuring Panel/Panel lite/Panel200.*



- **Access Cluster** (only for panel doors): Assign an access cluster to the door by selecting from the drop down menu.
- **Door Group**: Door Group drop down includes list of all configured Door groups on corresponding panel. An additional option as 'None' is available and selected by default.
- **Auto IP Assignment**: There is option where panel door can be assigned its IP from device webpage. To enable this check the Auto IP Assignment box.

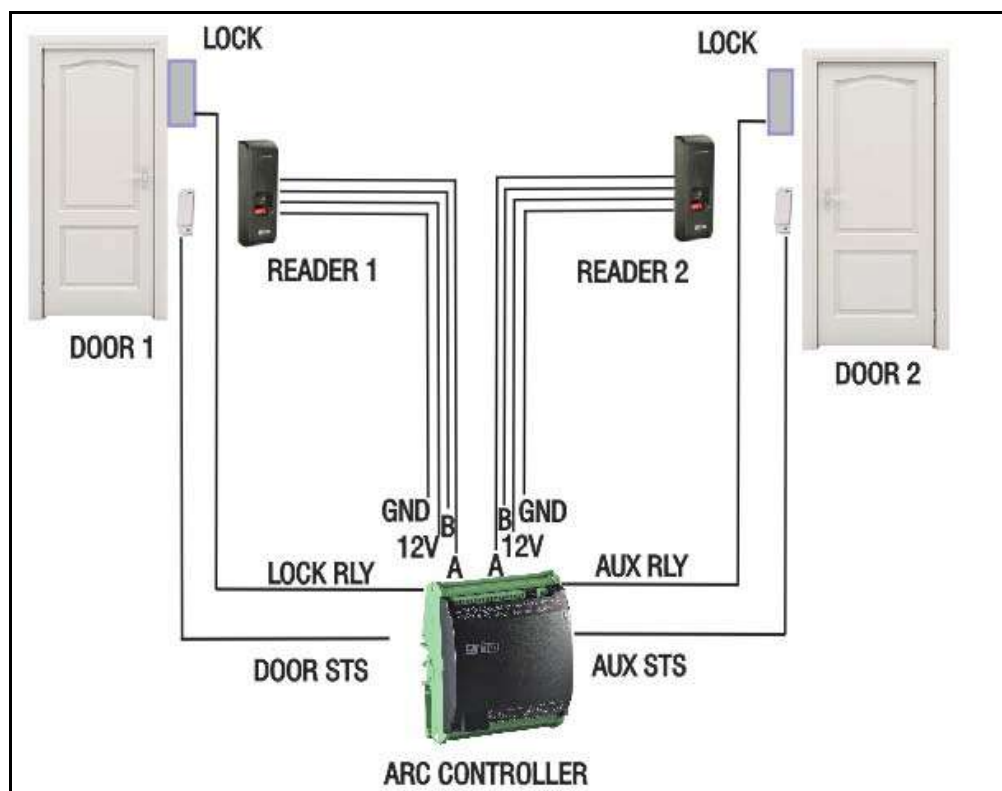
## Connecting ARC as Dual Door

ARC-2 door can be connected as Panel door only. The 2 doors will have the same IP address and MAC address.

### 1. ARC Dual Door- Dual Reader- Working

Two readers connected to ARC-2-Door will point to 2 separate Panel doors virtually by the system so as to control two separate physical doors using a single arc-controller. You can connect PATH readers or any other supported readers to ARC DC100/ARC DC200.

- Both the readers will have the same MAC and IP Address.
- Both the readers can be assigned different zones, polices as per choice.
- As there will be only one reader per physical door hence both ENTRY/EXIT cannot be monitored on a physical door.
- The exit reader can only be connected with the reader1 since there is only one PIN available for this purpose.



**Device Configuration**

Device ID: [Icon]  
 Device Name: Panel Lite V2 Door  
 ARC DC 200  
 Panel Lite V2  
 Active/Inactive

**Basic**

Sequence Number: 3  
 Mode: Dual Door  
 Connect Doors With: Dual Reader  
 Device: 1  
 Connection Type: Ethernet  
 IP Address: 192 . 168 . 104 . 112  
 MAC Address: 00 : 1B : 09 : 03 : E5 : 29  
 Active: ☒

**Optional**

Site: 1  
 Consider For Attendance: ☒  
 Alert Messages: ☐  
 Access Zone: Zone-1  
 Access Cluster: Cluster-1  
 Door Group: None  
 Auto IP Assignment: ☒



Once the door is added and connected, it will be shown in Device Status as shown below. The IP address and MAC address of both the doors of ARC-2 door is same.

**Device Status**

Filter List: All | Device Type: All | Device Status: All | Group By: None

Name	Status	IP	MAC Address	Device Type	Site
Panel Lite V2			EF:54:76:8D:87:BF	Panel Lite V2	
Panel Lite V2-Device-4		192.168.104.111	00:1B:09:03:F3:83	Panel Lite V2	
PVR as Panel door		192.168.104.113	00:1B:09:03:F2:80	Panel Lite V2 Door	Waghodia Site
Path as Panel door		192.168.105.2	54:76:8F:46:76:87	Panel Lite V2 Door	Waghodia Site
ARC as Single Door		192.168.105.3	DF:34:64:75:56:E3	Panel Lite V2 Door	Waghodia Site
ARC as Dual Door		192.168.104.112	00:1B:09:03:E5:29	Panel Lite V2 Door	Waghodia Site
ARC as Dual Door		192.168.104.112	00:1B:09:03:E5:29	Panel Lite V2 Door	Waghodia Site

### Connection Example:

When a reader (eg: PATH reader) is connected to ARC DC100/ARC DC200, connect the cables as mentioned below.

#### ARC Reader2 terminal

A+  
 B-  
 12V  
 GND

#### PATH RDFI terminal

Small connector - Blue  
 Small connector - Brown  
 Big connector- Red  
 Big connector- Black

Aux o/p port in ARC DC must be used as door relay for reader 2.  
 Aux i/p port in ARC DC must be used as door status for reader 2.  
 Unused pin in ARC DC must be used as exit switch for reader 2.

Both the doors of Arc as dual door will act as individual doors.

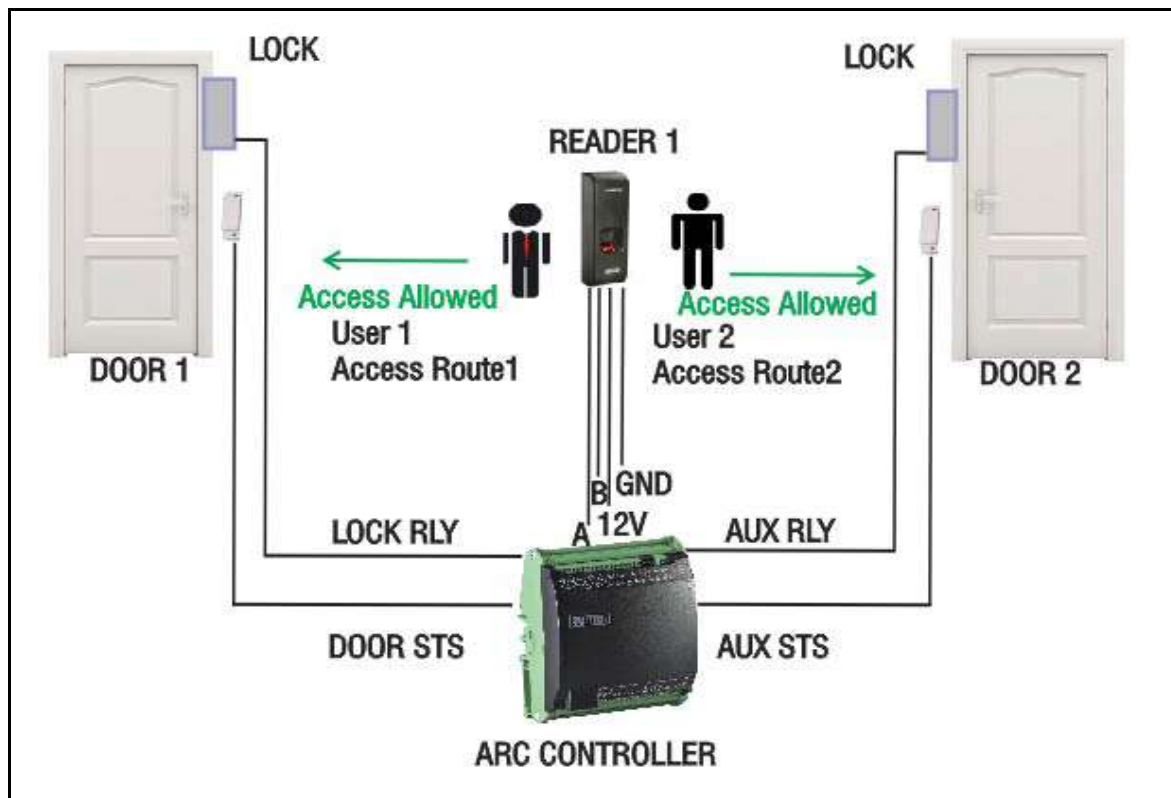
Thus, 2 sets of configurations will be generated and dispatched every-time whenever any of the parameters in one of the two door's (Dual Door) Configuration gets changed.

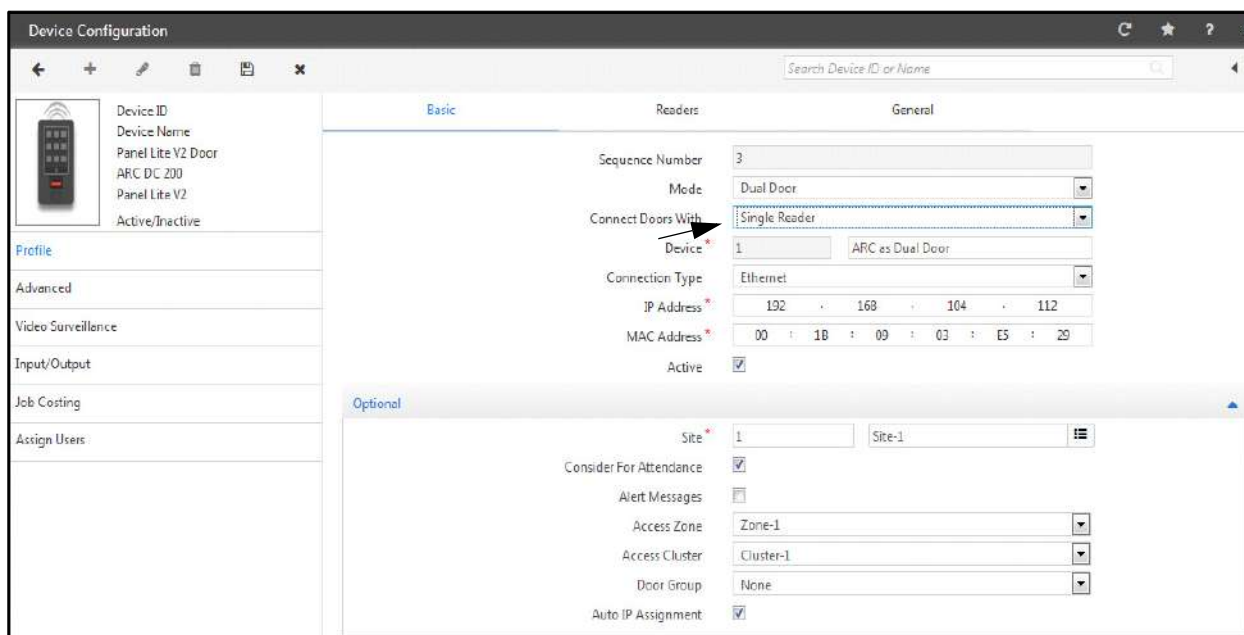
## 2. ARC Dual Door- Single Reader: Working

Single reader (Door controller) connected to ARC-2-Door will point to 2 separate Panel doors virtually by the system so as to control two separate physical doors using a single arc-controller. In this both the door will have same Reader Configuration except Exit Switch checkbox.

You can connect PATH readers or any other supported readers to ARC DC100/ARC DC200.

- The Door controller or the Reader must be connected to Reader1 port of ARC.
- LOCK Relay is connected to physical Door 1 and AUX Relay is connected to physical Door 2.
- As there is only 1 reader; If user punches on reader 1 and user is allowed on both doors then both doors will be opened simultaneously.
- If User1 is assigned Access Route1; then only Door1 will be opened when he punches on Reader1. similarly User 2 who is assigned Access Route2 can access Door2 only when he punches on Reader1.





**Device Configuration**

Device ID: 3  
Device Name: Panel Lite V2 Door  
ARC DC 200  
Panel Lite V2  
Active/Inactive: Active

**Readers**

Sequence Number: 3  
Mode: Dual Door  
Connect Doors With: Single Reader  
Device: 1  
Connection Type: Ethernet  
IP Address: 192.168.104.112  
MAC Address: 00:1B:09:03:E5:29  
Active: ☒

**Optional**

Site: 1  
Consider For Attendance: ☒  
Alert Messages: ☐  
Access Zone: Zone-1  
Access Cluster: Cluster-1  
Door Group: None  
Auto IP Assignment: ☒

## Readers

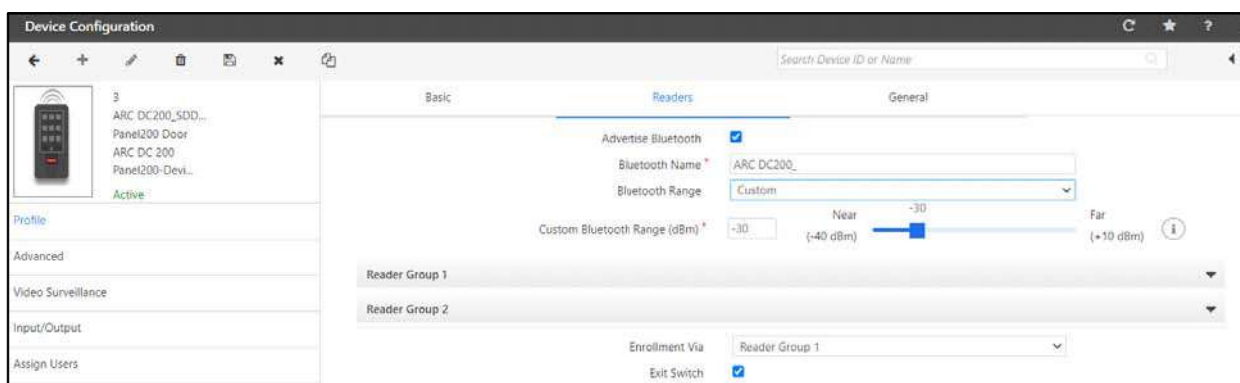
Readers are important hardware components in a biometric door device. They may be internal or external. This section enables the administrator to configure both internal and external readers for a door as shown.

For ARC DC100, refer to “ARC DC100 as Single Door- Dual Reader”, “ARC DC100 as Dual Door- Single Reader” and “ARC DC100 as Dual Door- Dual Reader”.

For ARC DC200, refer to “ARC DC200 as Single Door- Dual Reader”, “ARC DC200 as Dual Door- Single Reader” and “ARC DC200 as Dual Door- Dual Reader”.

### ARC DC200 as Single Door- Dual Reader

Configure the following parameters for ARC DC200 as Single Door- Dual Reader:



**Device Configuration**

Device ID: 3  
Device Name: ARC DC200\_SDD...  
Panel200 Door  
ARC DC 200  
Panel200-Devi...  
Active: Active

**Readers**

Advertise Bluetooth: ☒  
Bluetooth Name: ARC DC200\_  
Bluetooth Range: Custom  
Custom Bluetooth Range (dBm): -30  
Near: -40 dBm  
Far: +10 dBm  
Reader Group 1  
Reader Group 2  
Enrollment Via: Reader Group 1  
Exit Switch: ☒

- **Advertise Bluetooth:** Select this checkbox to enable Bluetooth of ARC DC200 and it will be visible to others. Then configure the following parameters.
- **Bluetooth Name:** By default, if the Device Name is configured then it will be displayed here.

If required, you can configure the bluetooth name as per your requirement. The Bluetooth Name can be a maximum of 10 characters.

- **Bluetooth Range:** The system supports different ranges of bluetooth using which the users can mark their attendance. You can set the desired range to control the boundary for marking the attendance. Select the Bluetooth Range as — Short (1m-2m), Medium (5m-7m), Long (>8m) or Custom.
- **Custom Bluetooth Range (dBm):** If you select **Custom** option for Bluetooth Range, enter the Bluetooth range manually or set the range using the slider. Drag the slider towards the left to decrease the value or drag the slider to the right to increase the value.

## Reader Group1/ Reader Group2

Configure the following parameters for Reader 1 or Reader 2:

The screenshot displays the configuration interface for two reader groups.   
**Reader Group 1:** RS-485 Interface Protocol is set to 'Matrix Proprietary', Matrix Reader Type is 'None', and Wiegand Reader is 'Short - Range Reader'. The table below has one row with Member No '1', Card Format 'Default Format', and Configurable Bits '0'. The Mode is set to 'Entry'.   
**Reader Group 2:** RS-485 Interface Protocol is 'Matrix Proprietary', Matrix Reader Type is 'EM Prox Reader', and Wiegand Reader is 'Short - Range Reader'. The table has one row with Member No '1', Card Format 'Default Format', and Configurable Bits '0'. The Mode is set to 'Exit'.   
 At the bottom of the Reader Group 2 panel, 'Enrollment Via' is set to 'Reader Group 1' and 'Exit Switch' is checked.

- **RS-485 Interface Protocol:** Select the desired option — Matrix Proprietary, OSDP.

If you select RS-485 Interface Protocol as Matrix Proprietary, you can configure the parameters for Matrix Reader Type as well as Wiegand Reader. For details, refer to [“Matrix Reader Type and Wiegand Reader”](#).

If you select RS-485 Interface Protocol as OSDP, you need to configure the OSDP Parameters. OSDP Protocol is supported for 3rd Party Readers only. For details refer to [“OSDP Parameters”](#).

## Matrix Reader Type and Wiegand Reader

- **Matrix Reader Type:** Select the desired reader type to be connected on RS-485 interface.

For the type of the supported Card/Credentials in the variants of each reader, refer [“Reader Types and supported credentials”](#).



*While connecting Matrix ATOM Reader with Matrix COSEC ARC200 DC, we recommend you to use RS-485 interface, as security concerns may arise if connecting via Wiegand interface.*

- **Wiegand Reader:** You can select **Short-Range Reader**, **Long-Range Reader**, **PIN-W Reader** or **CB W Reader**.

Select **Short-Range Reader** to identify the user from a short distance.

Select **Long-Range Reader** to identify the user from a long distance.

Long range reader is used at boom barriers where the user vehicle is identified by reading the tag on vehicle.

Select **PIN-W Reader** to support PIN pad device and accept the PIN from pin pad for identifying the user.



**CB W Reader** is a slave reader that works over BLE module.

Example: Punching on door via bluetooth technology of mobile.



*While connecting Matrix ATOM Reader with Matrix COSEC ARC200 DC, we recommend you to use RS-485 interface, as security concerns may arise if connecting via Wiegand interface.*

- **Card Format:** For ARC as panel door; you can assign multiple card format.

To assign multiple card formats to device click **Add**  button. Then click the picklist to select the card format. And click **OK**  to save the format and to discard the format, click **Cancel** .

Similarly you can add maximum 5 card formats. When the card format is saved, the Configurable bits of that format as configured from Masters > Card format will be displayed here.

Multiple Card format configurations will be dispatched to door separated by '**Format ID**' that is 'Member No.' along with all other format related parameters.

- **Mode:** Select the Mode as **Entry** or **Exit** for the reader group from the drop down list.
- **Configure Bluetooth from Server:** When you select **Matrix Reader Type** as — CB U Reader, ATOM RD300, ATOM RD200 or ATOM RD100, select **Configure Bluetooth from Server** checkbox to enable Bluetooth feature of aforementioned readers.

The screenshot displays the configuration interface for two reader groups in the Matrix COSEC System. Both groups are configured with the following parameters:

- RS-485 Interface Protocol:** Matrix Proprietary
- Matrix Reader Type:** ATOM RD200
- Wiegand Reader:** Long - Range Reader
- Search:** (Empty search bar)
- Member No:** 1
- Card Format:** Default Format
- Configurable Bits:** 0
- Mode:** Entry (for Reader Group 1) and Exit (for Reader Group 2)
- Configure Bluetooth From Server:** ☒
- Advertise Bluetooth:** ☒
- Bluetooth Name:** ARC DC200\_
- Bluetooth Range:** Custom
- Custom Bluetooth Range (dBm):** -30 (Near: -40 dBm, Far: +10 dBm)
- Enrollment Via:** Reader Group 1
- Exit Switch:** ☒
- Re-Detection Delay:** (Empty field) mins

Once you enable **Configure Bluetooth from Server**, configure the following Bluetooth parameters:

- **Advertise Bluetooth:** Select this checkbox to enable Bluetooth of the reader. Then configure the following parameters
- **Bluetooth Name:** By default, if the Device Name is configured then it will be displayed here along with the Mode. The prefix will be the Device Name and the suffix will be -IN or -OUT as per the set Mode.

If required, you can configure the bluetooth name as per your requirement. The **Bluetooth Name** can be a maximum of 20 characters.

- **Bluetooth Range:** The system supports different ranges of bluetooth using which the users can mark their attendance. You can set the desired range to control the boundary for marking the attendance.

Select the Bluetooth Range as — Short (1m-2m), Medium (5m-7m), Long (>8m) or Custom. If you select the **Matrix Reader Type** option as ATOM RD200/300, only then you can select the **Custom** option for Bluetooth Range.

- **Custom Bluetooth Range (dBm):** If you select **Custom** option for Bluetooth Range, enter the Bluetooth range manually or set the range using the slider. Drag the slider towards the left to decrease the value or drag the slider to the right to increase the value.

Similarly, configure the parameters of Reader Group 2.

- **Enrollment Via:** Select the preferred enrollment option — Reader Group1, Reader Group2 or Device.



*Make sure you have configured the desired Readers (as per the credentials you wish to enroll) in Reader Group 1 and Reader Group 2. To configure the Readers, refer [“Reader Group1/ Reader Group2”](#).*

- **Exit Switch:** Select this checkbox to enable the use of **Exit Switch**.
- **Re-Detection Delay:** If you selected **Long-Range Reader** as the **Wiegand Reader** option configure the Re-Detection Delay. Configure the time in minutes after which the card must be detected again after the previous detection.

## ARC DC200 as Dual Door- Single Reader



*In ARC as dual door; changing any of the control value in Reader of one Door will also change the value of this control in Reader of second door.*

### DOOR 1

Configure the following bluetooth parameters for ARC DC200 Door 1:



- **Advertise Bluetooth:** Select this checkbox to enable Bluetooth of ARC DC200 Door 1 and configure the following parameters.
- **Bluetooth Name:** By default, if the Device Name is configured then it will be displayed here.

If required, you can configure the bluetooth name as per your requirement. The **Bluetooth Name** can be a maximum of 10 characters.

- **Bluetooth Range:** The system supports different ranges of bluetooth using which the users can mark their attendance. You can set the desired range to control the boundary for marking the attendance.

Select the Bluetooth Range as — Short (1m-2m), Medium (5m-7m), Long (>8m) or Custom.

- **Custom Bluetooth Range (dBm):** If you select **Custom** option for Bluetooth Range, enter the Bluetooth range manually or set the range using the slider. Drag the slider towards the left to decrease the value or drag the slider to the right to increase the value.

## Door Group

- **RS-485 Interface Protocol:** Select the desired option — Matrix Proprietary, OSDP.

If you select RS-485 Interface Protocol as Matrix Proprietary, you can select the Matrix Reader Type as well as Wiegand Reader. For details, refer to [“Matrix Reader Type and Wiegand Reader”](#).

If you select RS-485 Interface Protocol as OSDP, you need to configure the OSDP Parameters. OSDP Protocol is supported for 3rd Party Readers only. For details refer to [“OSDP Parameters”](#).

## Matrix Reader Type and Wiegand Reader

- **Matrix Reader Type:** Select the desired reader type to be connected on RS-485 interface.

For the type of the supported Card/Credentials in the variants of each reader, refer [“Reader Types and supported credentials”](#).



*While connecting Matrix ATOM Reader with Matrix COSEC ARC200 DC, we recommend you to use RS-485 interface, as security concerns may arise if connecting via Wiegand interface.*

- **Wiegand Reader:** You can select **Short-Range Reader**, **Long-Range Reader**, **PIN-W Reader** or **CB W Reader**.

Select **Short-Range Reader** to identify the user from a short distance.

Select **Long-Range Reader** to identify the user from a long distance.

Long range reader is used at boom barriers where the user vehicle is identified by reading the tag on vehicle.

Select **PIN-W Reader** to support PIN pad device and accept the PIN from pin pad for identifying the user.



**CB W Reader** is a slave reader that works over BLE module.

Example: Punching on door via bluetooth technology of mobile.



While connecting Matrix ATOM Reader with Matrix COSEC ARC200 DC, we recommend you to use RS-485 interface, as security concerns may arise if connecting via Wiegand interface.

- **Card Format:** For ARC as panel door; you can assign multiple card format.

To assign multiple card formats to device click **Add**  button. Then click the picklist to select the card format. And click **OK**  to save the format and to discard the format, click **Cancel** .

Similarly you can add maximum 5 card formats. When the card format is saved, the Configurable bits of that format as configured from Masters > Card format will be displayed here.

Multiple Card format configurations will be dispatched to door separated by '**Format ID**' that is 'Member No.' along with all other format related parameters.

- **Mode:** Select the Mode as **Entry** or **Exit** for the Door Group from the drop down list.
- When you select **Matrix Reader Type** as — CB U Reader, ATOM RD300, ATOM RD200 or ATOM RD100, select **Configure Bluetooth from Server** checkbox to enable Bluetooth feature of aforementioned external readers.

Once you enable **Configure Bluetooth from Server**, configure the following Bluetooth parameters:

- **Advertise Bluetooth:** Select this checkbox to enable Bluetooth of the reader. Then configure the following parameters:
- **Bluetooth Name:** By default, if the Device Name is configured then it will be displayed here along with the Mode. The prefix will be the Device Name and the suffix will be -IN or -OUT as per the set Mode.

If required, you can configure the name of bluetooth as per your requirement. The **Bluetooth Name** can be a maximum of 20 characters.

- **Bluetooth Range:** The system supports different ranges of bluetooth using which the users can mark their attendance. You can set the desired range to control the boundary for marking the attendance.

Select the Bluetooth Range as — Short (1m-2m), Medium (5m-7m), Long (>8m) or Custom. If you select the **Matrix Reader Type** option as ATOM RD200/300, then only you can select the **Custom** option for Bluetooth Range.

- **Custom Bluetooth Range (dBm):** If you select **Custom** option for Bluetooth Range, enter the Bluetooth range manually or set the range using the slider. Drag the slider towards the left to decrease the value or drag the slider to the right to increase the value.
- **Enrollment Via:** Select the preferred enrollment option — Reader Group1 or Device.
- **Exit Switch:** You can enable the **Exit Switch** if required. For Dual door with single reader, **Exit Switch** checkbox can be set differently for both doors i.e. for one door it can be enabled, while for the other door it can be disabled. Select **Exit Switch** checkbox so that the door can be opened without checking for any access policies.

- **Re-Detection Delay:** If you selected **Long-Range Reader** as the **Wiegand Reader** option configure the Re-Detection Delay. Configure the time in minutes after which the card must be detected again after the previous detection.

Click on the **Save** button.

## DOOR 2

The DOOR 2 parameter configurations are similar to that of Door 1. For details refer to “[DOOR 1](#)”.

Click **Save**.

## ARC DC200 as Dual Door- Dual Reader

Configure the following parameters of ARC DC200 as Dual Door - Dual Reader:

The screenshot shows the configuration interface for the ARC DC200 device. The 'Readers' tab is selected, displaying various settings. At the top, there are checkboxes for 'Advertise Bluetooth' and 'Configure Bluetooth From Server', both of which are checked. Below these are fields for 'Bluetooth Name' (set to 'ARC DC200') and 'Bluetooth Range' (set to 'Custom'). A slider for 'Custom Bluetooth Range (dBm)' is shown, ranging from -40 dBm to +10 dBm, with a blue bar indicating the current range. Below this is a 'Door Group' section containing a table with columns for 'Member No', 'Card Format', and 'Configurable Bits'. Member 1 is listed with 'Default Format' and '0' bits. Below the table, there are settings for 'Mode' (set to 'Entry'), 'Advertise Bluetooth' (checked), 'Bluetooth Name' (set to 'ARC DC200 DDDR-IN'), and 'Bluetooth Range' (set to 'Custom'). At the bottom, there are settings for 'Enrollment Via' (set to 'Reader Group 1'), 'Exit Switch' (checked), and 'Re-Detection Delay' (set to 0 mins).

- **Advertise Bluetooth-** Select this checkbox to enable Bluetooth of ARC DC200 and it will be visible to others. Then configure the following parameters.
- **Bluetooth Name-** By default, if the Device Name is configured then it will be displayed here.

If required, you can configure the bluetooth name as per your requirement. It can be a maximum of upto 10 characters.

- **Bluetooth Range-** The system supports different ranges of bluetooth using which the users can mark their attendance. You can set the desired range to control the boundary for marking the attendance.

Select the Bluetooth Range as — Short (1m-2m), Medium (5m-7m), Long (>8m) or Custom.

- **Custom Bluetooth Range (dBm)**- If you select **Custom** option for Bluetooth Range, enter the Bluetooth range manually or set the range using the slider. Drag the slider towards the left to decrease the value or drag the slider to the right to increase the value.

## Door Group

- **RS-485 Interface Protocol:** Select the desired option — Matrix Proprietary, OSDP.

If you select RS-485 Interface Protocol as Matrix Proprietary, you can select the Matrix Reader Type as well as Wiegand Reader. For details, refer to [“Matrix Reader Type and Wiegand Reader”](#).

If you select RS-485 Interface Protocol as OSDP, you need to configure the OSDP Parameters. OSDP Protocol is supported for 3rd Party Readers only. For details refer to [“OSDP Parameters”](#).

### Matrix Reader Type and Wiegand Reader

- **Matrix Reader Type:** Select the desired reader type to be connected on RS-485 interface.

For the type of the supported Card/Credentials in the variants of each reader, refer [“Reader Types and supported credentials”](#).



*While connecting Matrix ATOM Reader with Matrix COSEC ARC200 DC, we recommend you to use RS-485 interface, as security concerns may arise if connecting via Wiegand interface.*

- **Wiegand Reader:** You can select **Short-Range Reader**, **Long-Range Reader**, **PIN-W Reader** or **CB W Reader**.

Select **Short-Range Reader** to identify the user from a short distance.

Select **Long-Range Reader** to identify the user from a long distance.

Long range reader is used at boom barriers where the user vehicle is identified by reading the tag on vehicle.

Select **PIN-W Reader** to support PIN pad device and accept the PIN from pin pad for identifying the user.




**CB W Reader** is a slave reader that works over BLE module.

Example: Punching on door via bluetooth technology of mobile.



*While connecting Matrix ATOM Reader with Matrix COSEC ARC200 DC, we recommend you to use RS-485 interface, as security concerns may arise if connecting via Wiegand interface.*

- **Card Format:** For ARC as panel door; you can assign multiple card format.

To assign multiple card formats to device click **Add**  button. Then click the picklist to select the card format. And click **OK**  to save the format and to discard the format, click **Cancel** .

Similarly you can add maximum 5 card formats. When the card format is saved, the Configurable bits of that format as configured from Masters > Card format will be displayed here.

Multiple Card format configurations will be dispatched to door separated by 'Format ID' that is 'Member No.' along with all other format related parameters.

- **Mode:** Select the Mode as **Entry** or **Exit** for both the reader groups from the drop down list.



*While connecting Matrix ATOM Reader with Matrix COSEC ARC200 DC, we recommend you to use RS-485 interface, as security concerns may arise if connecting via Wiegand interface.*

- **Configure Bluetooth from Server:** When you select **Matrix Reader Type** as — CB U Reader, ATOM RD300, ATOM RD200 or ATOM RD100, select **Configure Bluetooth from Server** checkbox to enable Bluetooth feature of aforementioned readers.

Once you enable **Configure Bluetooth from Server**, configure the following Bluetooth parameters:

- **Advertise Bluetooth-** Select this checkbox to enable Bluetooth of the reader. Then configure the following parameters:
- **Bluetooth Name-** By default, if the Device Name is configured then it will be displayed here along with the Mode. The prefix will be the Device Name and the suffix will be -IN or -OUT as per the set Mode.

If required, you can configure the name of bluetooth as per your requirement. The **Bluetooth Name** can be a maximum of 20 characters.

- **Bluetooth Range-** The system supports different ranges of bluetooth using which the users can mark their attendance. You can set the desired range to control the boundary for marking the attendance. Select the Bluetooth Range as — Short (1m-2m), Medium (5m-7m), Long (>8m) or Custom. If you select the **Matrix Reader Type** option as ATOM RD200/300, then only you can select the **Custom** option for Bluetooth Range.
- **Custom Bluetooth Range (dBm)-** If you select **Custom** option for Bluetooth Range, enter the Bluetooth range manually or set the range using the slider. Drag the slider towards the left to decrease the value or drag the slider to the right to increase the value.
- **Enrollment Via:** Select the preferred enrollment option — Reader Group1 or Device.



*Make sure you have configured the desired Readers (as per the credentials you wish to enroll) in Reader Group 1.*

- **Exit Switch** - Select this checkbox to enable the use of **Exit Switch**. Select Exit Switch checkbox so that the door can be opened without checking for any access policies.
- **Re-Detection Delay:** If you selected **Long-Range Reader** as the **Wiegand Reader** option configure the Re-Detection Delay. Configure the time in minutes after which the card must be detected again after the previous detection.

Similarly, configure the parameters for the second door.


Click **Save**.

### OSDP Parameters

If you select **RS-485 Interface Protocol** as **OSDP**, you need to configure the OSDP Parameters. OSDP Protocol is supported for 3rd Party Readers only.

Configure the following parameters:

- **Card Format:** For ARC as panel door; you can assign multiple card format.

To assign multiple card formats to device click **Add**  button. Then click the picklist to select the card format. And click **OK**  to save the format and to discard the format, click **Cancel** .

Similarly you can add maximum 5 card formats. When the card format is saved, the Configurable bits of that format as configured from Masters > Card format will be displayed here.

Multiple Card format configurations will be dispatched to door separated by '**Format ID**' that is 'Member No.' along with all other format related parameters.

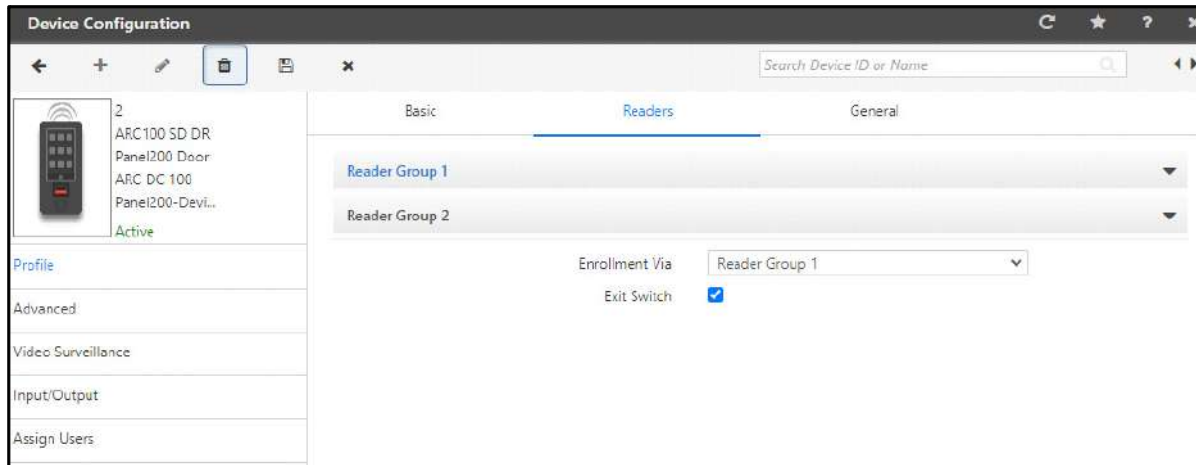
- **Mode:** Select the Mode as **Entry** or **Exit** for both the reader groups from the drop down list.
- **OSDP Address:** Configure the unique identifier assigned to the 3rd Party Reader (Peripheral Device - PD). This allows the Device (Control Panel - CP) to communicate and manage individual readers in the same network.
- **Baud Rate:** Configure the Baud Rate of the 3rd Party Reader. This is the rate at which data will be transmitted/received between the Device and 3rd Party Reader.
- **Enable OSDP Secure Channel:** If you wish that the Device and the 3rd Party Reader should utilize the Secure Channel Protocol (SCP) for communication using encryption and authentication mechanism select the **Enable OSDP Secure Channel** check box and configure the Encryption Key.
- **Encryption Key:** Configure the value which will be used as the key. This is a cryptographic value used in encryption algorithms to convert and transmit data in encrypted form or vice versa. Encryption Keys are used within Secure Channel Protocol (SCP) to encrypt or decrypt the transmitted data between Device and 3rd Party Readers.

Click **Save**.

For list of Commands and Responses supported in OSDP, refer [“Supported OSDP Commands and Responses”](#).

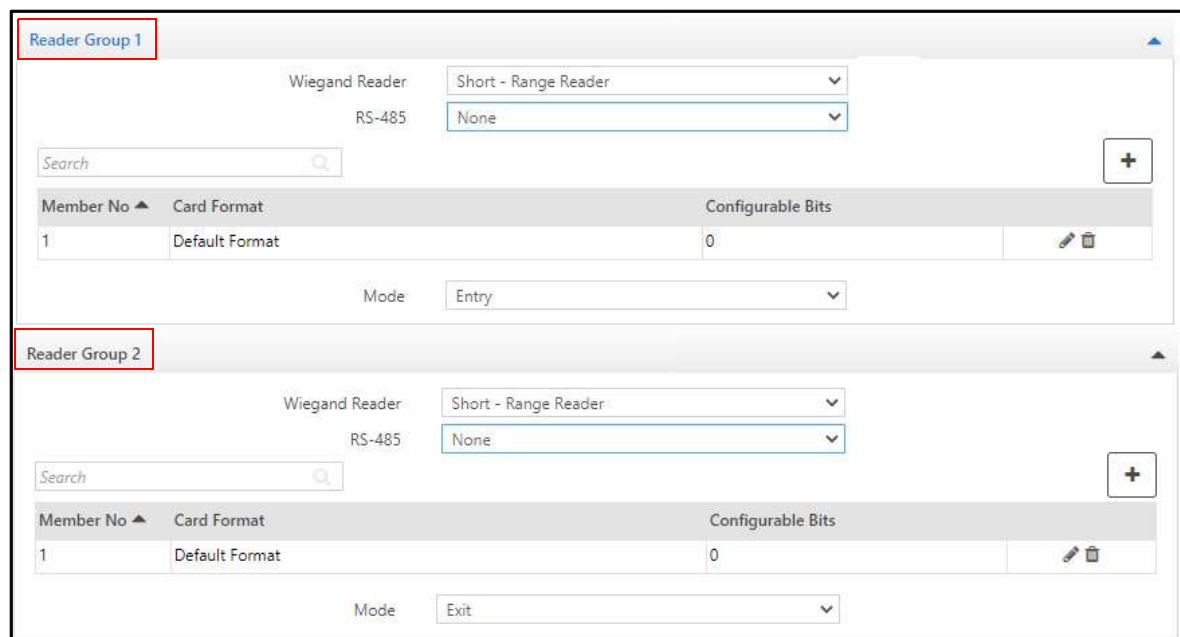
## ARC DC100 as Single Door- Dual Reader

Configure the following parameters for ARC DC100 as Single Door- Dual Reader



### Reader Group 1/ Reader Group 2

Configure the following parameters for Reader 1 and Reader 2.



- **Wiegand Reader:** You can select **Short-Range Reader**, **Long-Range Reader**, **PIN-W Reader**.

Select **Short-Range Reader** to identify the user from a short distance.

Select **Long-Range Reader** to identify the user from a long distance.


Long range reader is used at boom barriers where the user vehicle is identified by reading the tag on vehicle.

Select **PIN-W Reader** to support PIN pad device and accept the PIN from pin pad for identifying the user.

- **RS-485:** Select the desired reader type to be connected on RS-485 port.

For the type of the supported Card/Credentials in the variants of each reader, refer [“Reader Types and supported credentials”](#).

- **Card Format:** For ARC as panel door; you can assign multiple card format.

To assign multiple card formats to device click **Add**  button. Then click the picklist to select the card format. And click **OK**  to save the format and to discard the format, click **Cancel** .

Similarly you can add maximum 5 card formats. When the card format is saved, the Configurable bits of that format as configured from Masters> Card format will be displayed here.

Multiple Card format configurations will be dispatched to door separated by 'Format ID' that is 'Member No.' along with all other format related parameters.

- **Mode:** Select the Mode as **Entry** or **Exit** for both the reader groups from the drop down list.
- **Enrollment Via:** Select the preferred enrollment option — Reader Group1 or Reader Group 2.



*Make sure you have configured the desired Readers (as per the credentials you wish to enroll) in Reader Group 1 and Reader Group 2. To configure the Readers, refer [“Reader Group1/ Reader Group2”](#).*

- **Exit Switch:** Select this checkbox to enable the use of **Exit Switch**.
- **Re-Detection Delay:** If you selected **Long-Range Reader** as the **Wiegand Reader** option configure the Re-Detection Delay. Configure the time in minutes after which the card must be detected again after the previous detection.

## ARC DC100 as Dual Door- Single Reader



*In ARC as dual door; changing any of the control value in Reader of one Door will also change the value of this control in Reader of second door.*

### Door Group

- **Wiegand Reader:** Select a desired Wiegand Reader — **Short-Range Reader, Long-Range Reader, PIN-W Reader.**



Select **Short-Range Reader** to identify the user from a short distance.

Select **Long-Range Reader** to identify the user from a long distance.




Long Range Reader is used at boom barriers where the user vehicle is identified by reading the tag on vehicle.

Select **PIN-W Reader** to support PIN pad device and accept the PIN from pin pad for identifying the user.

- **RS-485:** Select the desired reader type to be connected on RS-485 port.

For the type of the supported Card/Credentials in the variants of each reader, refer [“Reader Types and supported credentials”](#)

- **Card Format:** For ARC as panel door; you can assign multiple card format.

To assign multiple card formats to device click **Add**  button. Then click the picklist to select the card format. And click **OK**  to save the format and to discard the format, click **Cancel** .

Similarly you can add maximum 5 card formats. When the card format is saved, the Configurable bits of that format as configured from Masters> Card format will be displayed here.

Multiple Card format configurations will be dispatched to door separated by 'Format ID' that is 'Member No.' along with all other format related parameters.

- **Mode:** Select the Mode as **Entry** or **Exit** for the door groups from the drop down list.
- **Exit Switch:** Select this checkbox to enable the use of **Exit Switch**. Select **Exit Switch** checkbox so that the door can be opened without checking for any access policies. For Dual door with single reader, **Exit Switch** checkbox can be set differently for both doors i.e. for one door it can be enabled, while for the other door it can be disabled.
- **Re-Detection Delay:** If you selected **Long-Range Reader** as the **Wiegand Reader** option configure the Re-Detection Delay. Configure the time in minutes after which the card must be detected again after the previous detection.

Click on the **Save** button.

## ARC DC100 as Dual Door- Dual Reader

Configure the following parameters of ARC DC100 as Dual Door - Dual Reader:

### Door Group

- **Wiegand Reader:** Select a desired Wiegand Reader — **Short-Range Reader, Long-Range Reader, PIN-W Reader**.

Select **Short-Range Reader** to identify the user from a short distance.

Select **Long-Range Reader** to identify the user from a long distance.

Long Range Reader is used at boom barriers where the user vehicle is identified by reading the tag on vehicle.

Select **PIN-W Reader** to support PIN pad device and accept the PIN from pin pad for identifying the user.

- **RS-485:** Select the desired reader type to be connected on RS-485 port.

For the type of the supported Card/Credentials in the variants of each reader, refer [“Reader Types and supported credentials”](#)

- **Card Format:** For ARC as panel door; you can assign multiple card format.

To assign multiple card formats to device click **Add**  button. Then click the picklist to select the card format. And click **OK**  to save the format and to discard the format, click **Cancel** .

Similarly you can add maximum 5 card formats. When the card format is saved, the Configurable bits of that format as configured from Masters> Card format will be displayed here.

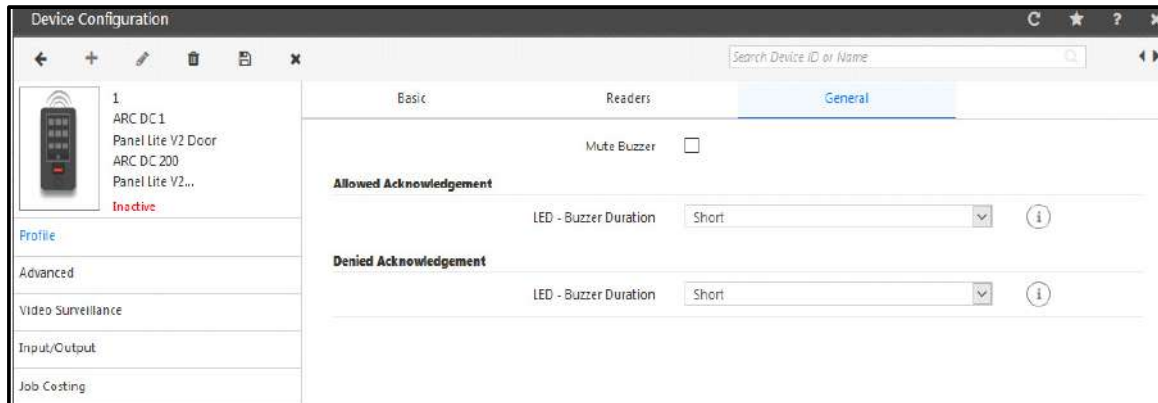
Multiple Card format configurations will be dispatched to door separated by '**Format ID**' that is 'Member No.' along with all other format related parameters.

- **Mode:** Select the Mode as **Entry** or **Exit** for the door groups from the drop down list.
- **Exit Switch:** Select this checkbox to enable the use of **Exit Switch**.
- **Re-Detection Delay:** If you selected **Long-Range Reader** as the **Wiegand Reader** option configure the Re-Detection Delay. Configure the time in minutes after which the card must be detected again after the previous detection.

Similarly, configure the parameters for the second door.

## General

The **General** page for ARC DC200 appears as follows.

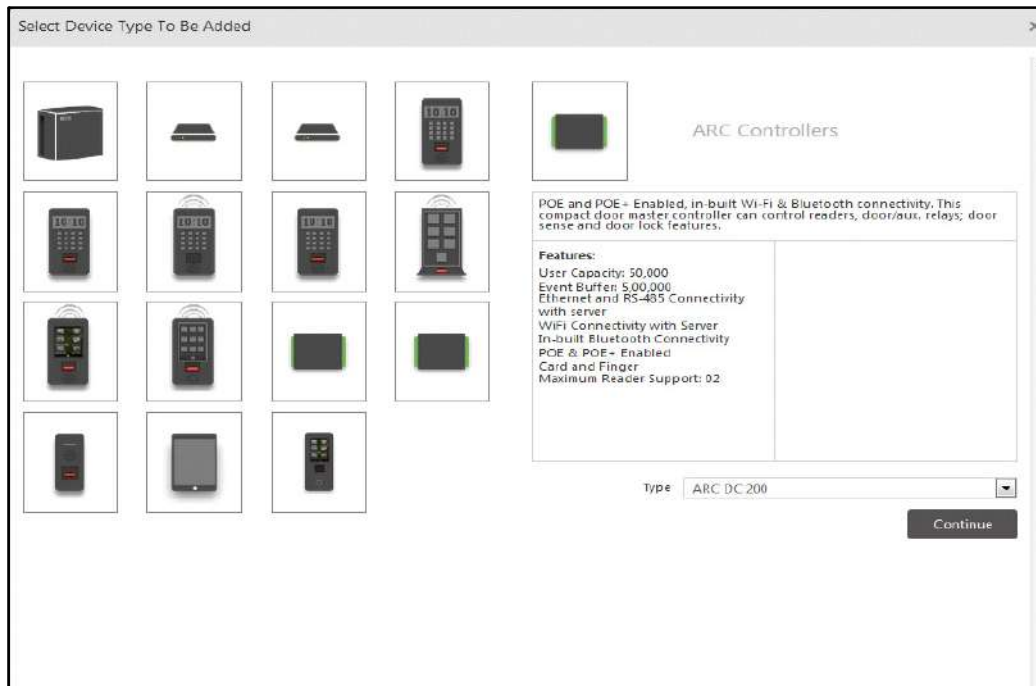


- **Mute Buzzer:** Select the check box to enable door buzzer muting.
- **Allowed Acknowledgment**
  - **Display Duration (ms):** Specify the time duration for which the **Acknowledgment Allowed** message should be displayed. Valid Range is 250 to 3000 ms.
  - **LED - Buzzer Duration:** Select the time duration for the LED Buzzer from the drop-down list options—Long, Medium, Short, Shortest.
- **Denied Acknowledgment**
  - **Display Duration (ms):** Specify the time duration for which the **Acknowledgment Denied** message should be displayed. Valid Range is 250 to 3000 ms.
  - **LED - Buzzer Duration:** Select the time duration for the LED Buzzer from the drop-down list options—Long, Medium, Short, Shortest.



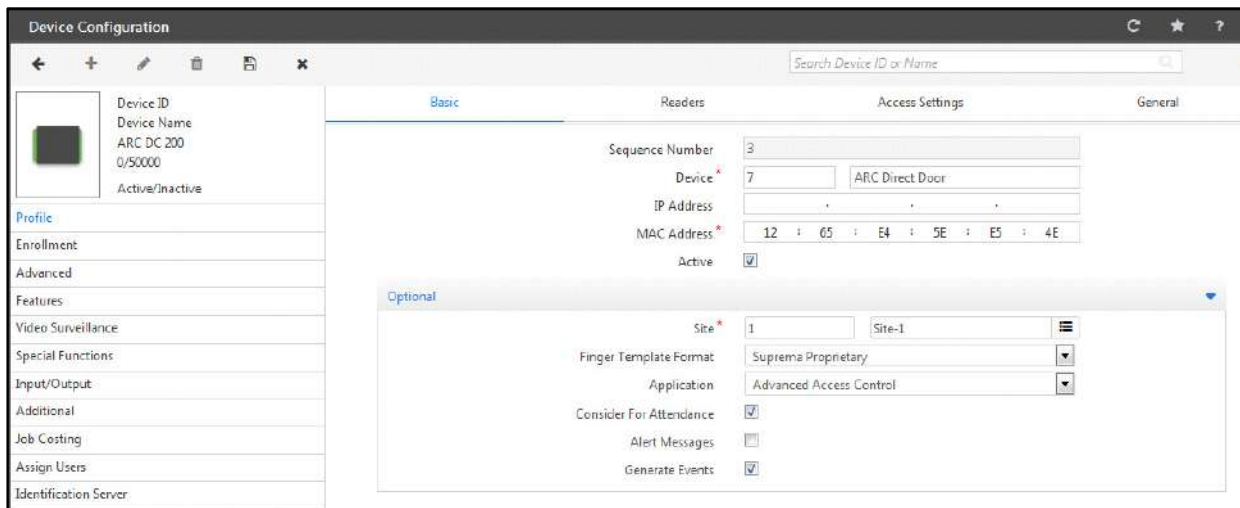
*If you have connected Readers — ATOM RD100/200/300, PATH — then the configurations for Allowed/ Denied Acknowledgment will be applicable to these readers as well.*

## ARC as Direct Door



The Device Configuration page for ARC Door appears as shown below.

## Basic



**Sequence Number** - This is a system generated sequence number for each new device.

**Device:** Specify the name of the door. The ID of the door is auto generated by the system.

Enter the **MAC address** of the door. The **IP address** will be displayed automatically once the device comes online in Monitor.

To add Devices automatically, go to Admin Module> System Configuration> Global Policy> Device. Enable the "Auto Add New Devices" check-box. Once the device is connected in network, it will come online in COSEC Monitor.

**Active** - Check the box to activate the device on the network.

Click **Save** button to save the configuration.



*The Monitor Service must be running while adding the device to COSEC.*

The **Basic** page also has an **Optional** tab which provides optional configurations as shown below:

- **Site** - Select the site to which this door is to be assigned from the site picklist window. Site is created from Devices> Masters> Site.
- **Finger Template Format** - Select the format as Suprema Proprietary or Suprema ISO according to which the templates will be enrolled. For globally setting the template format, you can set from Global policy.
- **Application** - Select the application type for which the device is to be used. The options are **Basic Access Control** and **Advanced Access Control**.



*The available license is ACS and Application is set to Basic Access Control. If this ACS voucher exhausts, then while dispatching Basic Configuration of device, application type will be sent as 'Advance Access Control'.*

- **Consider for Attendance** - Select this checkbox if the events sent by this door are to be considered for Time and Attendance data processing. If this option is disabled, then the system would consider all events coming from the door as access control events.
- **Alert Messages** - Select this checkbox to enable the application to send alerts based on events from this door.
- **Generate Events**: For ARC DC200, this check-box is enabled by default. You can disable the check-box if the server is not required to receive any events from the respective devices.

## Readers

Readers are important hardware components in a biometric door device. They may be internal or external. This section enables the administrator to configure both internal and external readers for a door as shown.

For ARC as Direct Door, configuration must be set separately for Reader Group 1 and Reader Group 2.

The screenshot displays the 'Readers' configuration page, which is divided into four tabs: 'Basic', 'Readers', 'Access Settings', and 'General'. The 'Readers' tab is currently active.

**Global Settings:**

- Auto Detect Readers:** ☐
- Advertise Bluetooth:** ☒
- Bluetooth Name:** ARC\_DC\_200
- Bluetooth Range:** Custom
- Custom Bluetooth Range (dBm):** -30. A slider is shown with 'Near' at -40 dBm and 'Far' at +10 dBm, with a blue marker at -30 dBm.

**Reader Group 1:**

- Wiegand Reader:** Short - Range Reader
- RS-485:** ATOM RD200
- Search:** [Search bar]
- Member No:** 1
- Card Format:** Default Format
- Configurable Bits:** 0
- Mode:** Entry
- User Access Mode:** Any One
- Visitor Access Mode:** Any One
- Configure Bluetooth From Server:** ☒
- Advertise Bluetooth:** ☒
- Bluetooth Name:** ARC\_DC\_200\_112-IN
- Bluetooth Range:** Custom
- Custom Bluetooth Range (dBm):** -30. A slider is shown with 'Near' at -40 dBm and 'Far' at +10 dBm, with a blue marker at -30 dBm.

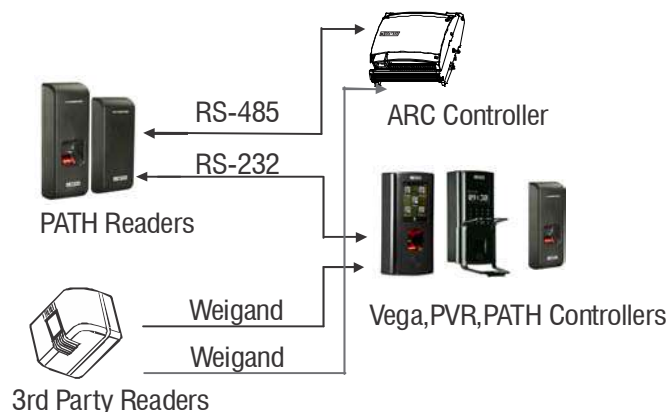
**Reader Group 2:**

- Wiegand Reader:** Short - Range Reader
- RS-485:** ATOM RD200
- Search:** [Search bar]
- Member No:** 1
- Card Format:** Default Format
- Configurable Bits:** 0
- Mode:** Exit
- User Access Mode:** Any One
- Visitor Access Mode:** Any One
- Configure Bluetooth From Server:** ☒
- Advertise Bluetooth:** ☒
- Bluetooth Name:** ARC\_DC\_200\_112-OUT
- Bluetooth Range:** Custom
- Custom Bluetooth Range (dBm):** -30. A slider is shown with 'Near' at -40 dBm and 'Far' at +10 dBm, with a blue marker at -30 dBm.

**Enrollment Via:** Reader Group 1

**Exit Switch:** ☒

**Access Control On Exit Mode:** ☐



**Auto Detect Readers** - Select this checkbox to enable auto detection of Readers on a door controller connected to the server.

**Advertise Bluetooth**- Select this checkbox to enable Bluetooth of ARC DC200 Door 1. Then configure the following parameters

**Bluetooth Name**- By default, the **Device** Name assigned is displayed along with the set **Mode**. You can change it as per your requirement. Name can be a maximum of 10 characters.

**Bluetooth Range**- The system supports different ranges of bluetooth using which the users can mark their attendance. You can set the desired range to control the boundary for marking the attendance.

Select the Bluetooth Range as — Short (1m-2m), Medium (5m-7m), Long (>8m) or Custom.

**Custom Bluetooth Range (dBm)**- If you select **Custom** option for Bluetooth Range, enter the Bluetooth range manually or set the range using the slider. Drag the slider towards the left to decrease the value or drag the slider to the right to increase the value.

## Reader Group1/ Reader Group2

- **Wiegand Reader:** You can select **Short-Range Reader**, **Long-Range Reader**, **PIN-W Reader** or **CB W Reader**.

The short-range reader is used where the user can access the door at short distance i.e. where the short distance identification can be done. Eg: Punching on the door by showing user credential on door. Long range reader is used at boom barriers where the user vehicle is identified by reading the tag on vehicle.



*While connecting Matrix ATOM Reader with Matrix COSEC ARC200 DC, we recommend you to use RS-485 interface, as security concerns may arise if connecting via Wiegand interface.*

- **RS-485:** Based on the COSEC PATH Reader (RDFM, RDFE, RDFI, RDFP, RDCM, RDCE, RDCI) and Reader CB; select the reader type to be connected on RS-485 port. (M- MiFare, E-EM Prox, I- HID iClass, P-HID Prox,CB U Reader). You can also connect ATOM Readers.



*If Auto Detect Reader is enabled, then **Wiegand Reader** and **RS-485** parameters will not be visible.*

- **Card Format:** Only Single card format is applicable to ARC as direct door. The default card format is applied to ARC as direct door. To assign another card format for internal readers of the device; delete the default format and select another format from the picklist. **See Devices> Master> Card Format**
- **Mode:** Select the Mode as **Entry** or **Exit** for both the Reader groups.
- **User/Visitor Access Mode** - Select the desired user and visitor access mode for both reader groups.
- **Configure Bluetooth from Server:** When you select **RS-485** as — CB U Reader, ATOM RD300, ATOM RD200 or ATOM RD100, select **Configure Bluetooth from Server** checkbox to enable Bluetooth feature of aforementioned readers.

Once you enable **Configure Bluetooth from Server**, configure the following Bluetooth parameters:

- **Advertise Bluetooth-** Select this checkbox to enable Bluetooth of the reader. Then configure the following parameters:
- **Bluetooth Name-** By default, if the Device Name is configured then it will be displayed here along with the Mode. The prefix will be the Device Name and the suffix will be -IN or -OUT as per the set Mode.

If required, you can configure the name of bluetooth as per your requirement. The **Bluetooth Name** can be a maximum of 20 characters.

- **Bluetooth Range-** The system supports different ranges of bluetooth using which the users can mark their attendance. You can set the desired range to control the boundary for marking the attendance.

Select the Bluetooth Range as — Short (1m-2m), Medium (5m-7m), Long (>8m) or Custom. If you select the **RS-485** option as ATOM RD200/300, then only you can select the **Custom** option for Bluetooth Range.

- **Custom Bluetooth Range (dBm)-** If you select **Custom** option for Bluetooth Range, enter the Bluetooth range manually or set the range using the slider. Drag the slider towards the left to decrease the value or drag the slider to the right to increase the value.
- **Enrollment Via:** Select the preferred enrollment option — Reader Group1, Reader Group2 or Device.



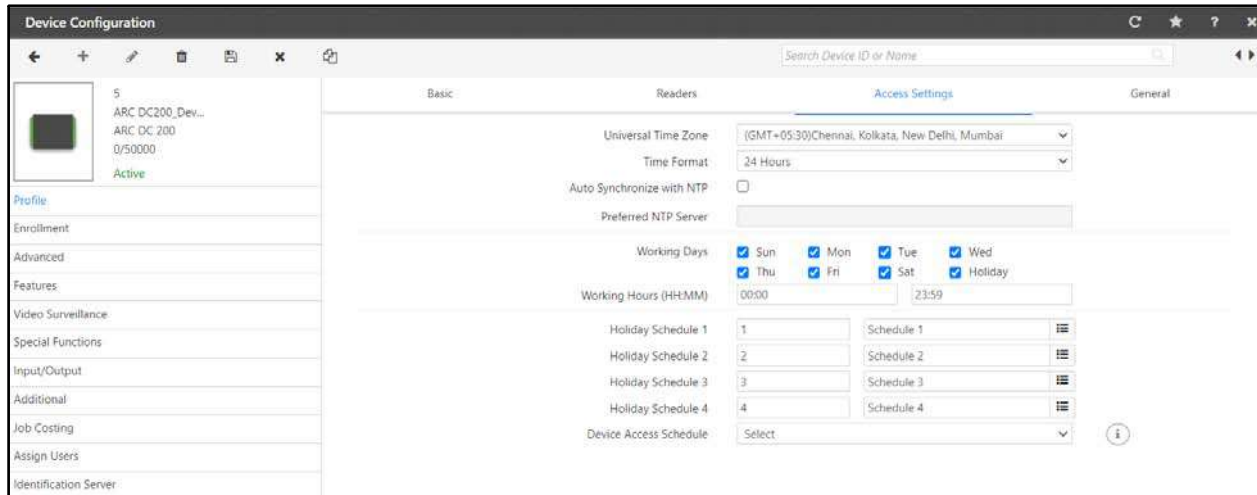
*Make sure you have configured the desired Readers (as per the credentials you wish to enroll) in Reader Group 1 and Reader Group 2. To configure the Readers, refer "[Reader Group1/ Reader Group2](#)".*

- **Exit Switch** - Select this checkbox to enable the use of Exit Switch.
- **Access Control On Exit Mode** - Select this check box to enable the checking of the following access control policies on door when the external reader is in the 'exit' mode.
  - User enabled
  - User validity
  - Blocked user
  - Time Based Access Check
  - ASC
  - User Access Group



## Access Settings

This section is available for direct doors. The **Access Settings** page appears as shown below:



- **Universal Time Zone** - Select the geographic time zone in which the DOOR will operate.
- **Time Format** - Specifies the time format to be displayed on Door Controller LCD display. The formats available are:
  - 24 Hours
  - 12 Hours

Select the relevant option from the drop down list as per the site requirements.

### Auto Synchronize with NTP

If Date and time is to be automatically synchronized as per the **Preferred NTP Server** (predefined or user-defined NTP server address) selected by user, then you must enable **Auto Synchronize With NTP** checkbox.

Independent of the mode set from server as Auto or Manual, the user can change the date and time settings from device webpage, which will be reflected on device display.

- When Auto Synchronization with NTP is disabled Preferred NTP Server field will be disabled.
- When Auto Synchronization with NTP is enabled,
  1. You can specify the Preferred NTP server of your choice. In this case device will first try to get Date and Time from that server address.  
If it does not get Date and Time in three tries; device will check from pre-defined NTP servers.  
If you have entered one of the three pre-defined NTP servers(ntp1.cs.wisc.edu , time.windows.com , time.nist.gov); then device will first check that server first.  
If it receives updated Date and Time then Updated Date and Time will be reflected on device webpage and display screen.
  2. You can keep the Preferred NTP server as blank. In this case device will check for Date and Time from the first NTP server.
  3. If user has manually entered Date and Time from webpage or Device Menu then those values of Date and Time will be reflected on device webpage and display screen.

In the case of the **Manual** option the administrator can manually update the time on the Door with that of the system time as and when required.

- **Working Days** - Specify the days on which the default working hours should be applicable. Check the relevant boxes to specify the active days.
- **Working Hours (HH:MM)** - Define the default working hours in HH:MM format.
- **Holiday Schedule** - This section allows the administrator to assign up to four holiday schedules to the device by using the Holiday Schedule picklist.



*If the same holiday schedule is configured for a user and for the door controller on which the user is assigned, then the user's attendance marking on this device, on any of the scheduled holidays will always be marked as a holiday.*



*Device Access Schedule is applicable for ARC DC200 only.*

- **Device Access Schedule:** All the Access Schedules created from the "[Access Schedules](#)" page appear in the drop-down list. By default, the Access Schedule, if assigned from the Access Schedule page is displayed here. If you wish to change the Access Schedule, select the desired Access Schedule to be assigned to the device from the drop-down list.

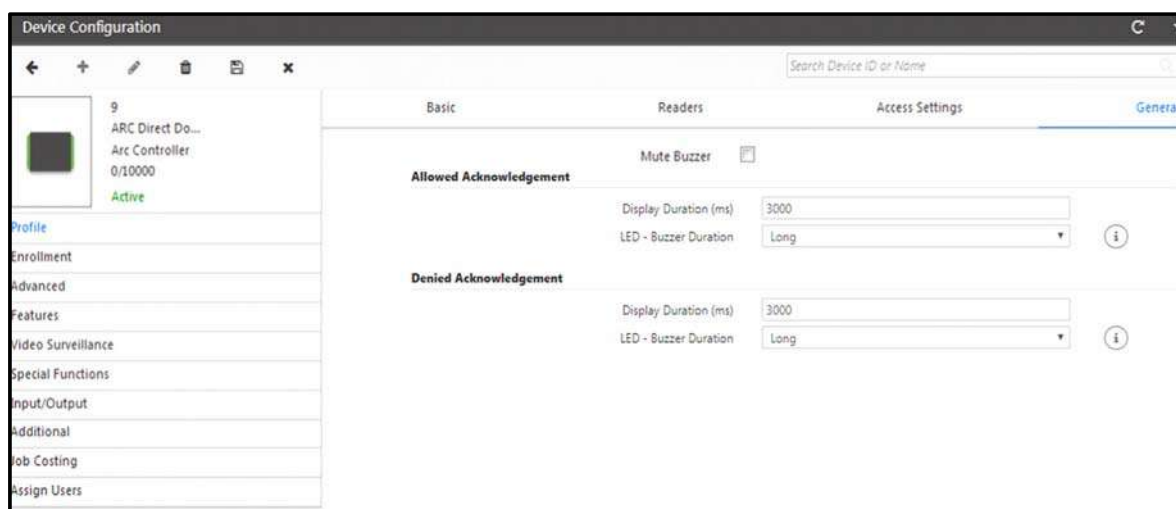
If an Access Schedule is selected, it will override the Working Days configuration.

If an Access Schedule is already assigned from "[Access Schedules](#)" page and a different schedule is selected here, it will override the schedule assigned from "[Access Schedules](#)" page and vice versa.

To revoke an Access Schedule, select the **Select** option from the list. The device will be removed from the Access Schedule under the "[Assign Doors](#)" section on the "[Access Schedules](#)" page.

## General

The **General** page appears as follows.



- **Mute Buzzer** - You can mute the door buzzer by selecting the check box.

- **Allowed Acknowledgment**

- **Display Duration (ms)** - Define the time duration in between 250 to 3000ms till which the 'Acknowledgment Allowed' message will be displayed.
- **LED - Buzzer Duration** - Select the time duration as Long, Medium, Short or Shortest for the LED Buzzer.

- **Denied Acknowledgment**

- **Display Duration (ms)** - Define the time duration in between 250 to 3000ms till which the 'Acknowledgment Denied' message will be displayed.
- **LED - Buzzer Duration** - Select the time duration as Long, Medium, Short or Shortest for the LED Buzzer.



*The range (250-3000ms) for Allowed/Denied Acknowledgment Display Duration and Shortest option for LED-Buzzer Duration is applicable for ARC DC200 only.*

*If you have connected Readers — ATOM RD100/200/300, PATH — then the configurations for Allowed/Denied Acknowledgment will be applicable to these readers as well.*

## Enrollment



*The Enrollment section is not available for panel doors.*

The Enrollment page appears as shown below.

The screenshot shows the 'Device Configuration' window for an 'ARC DC 200' device. The 'Enrollment' tab is selected in the sidebar. The main configuration area includes the following settings:

- Enroll From Device:** A checkbox that is checked.
- Enrollment Mode:** A dropdown menu set to 'Biometrics'.
- Template Per Finger:** A dropdown menu set to 'Single Template/Finger'.
- Max Number Of Fingers:** A dropdown menu set to 'Two'.
- Number of Fingers:** A dropdown menu set to 'One'.
- Number Of Cards:** A dropdown menu set to 'One'.

- **Enroll From Device** - Select this checkbox to enable the feature. This allows the user to specify the user credential that can be enrolled by using the enrollment devices such as DOOR Controllers.
- **Enrollment Mode** - Select the Credential from the drop-down list that can be enrolled using the special function at the DOOR. The options are **ReadOnlyCard**, **SmartCard**, **Biometric** and **BiometricthenCard**, and

**DuressFinger.** Refer “Enroll Credentials” or “Enrolling Users” to enroll User/Worker. Refer “Enrollment” or “Enroll Credentials” to enroll Worker. Refer “Enroll Credentials” to enroll a Visitor.



*DuressFinger is only applicable for User and Worker.*

- **Template Per Finger** - This parameter displays the values as configured at the global level. This field is not user editable from this page.
- **Max Number of Fingers** - This parameter displays the values of the maximum number of fingers configured at the global level. This field is not user editable from this page.
- **Number of Fingers/Cards** - Select the number of cards or fingerprints to be enrolled based on the credential option selected in the Enrollment Mode parameter.

## Advanced

The Advanced tab allows the user to configure some advanced parameters such as access control settings, alarms and device timers.

To access this, After selecting the device, Select the **Advanced** tab from **Device Configuration** page. The advanced settings can be configured from following two sections:

- “Settings”
- “Alarms”
- “Timers”

## Settings

The **Advanced Settings** page for ARC as **Direct Door** appears on your screen as shown below:

The following parameters are available for configuration:

- **Generate Exit Switch Events** - Select this checkbox to enable the door to generate events every time the exit switch is used.
- **Generate Invalid User Events** - Select this checkbox to enable the door to generate events for invalid user inputs.

- **Generate Sequential IN-OUT Events** - In ARC DC200; select this checkbox to generate user punches on device as the sequential IN-OUT events irrespective of the mode in which device is functioning.
- **Show PIN** - Select this checkbox to display the characters of PIN when the PIN is entered on device.
- **Allow Exit when Door Lock** - Select this checkbox if users are to be allowed to exit even when the Door relay is in locked condition.
- **Auto Relock** - Select this checkbox to allow the door to relock immediately when the door status changes to close after normal open irrespective of the defined pulse time. However, it is supported only if a door sense is installed and enabled.
- **Auto Relock Timer** - Specify the time in seconds for the Auto Relock operation. Valid Range: 1 to 65535.
- **Enable Additional Security** (for direct door) - Select this checkbox to enable additional security at the selected Door Controller.
- **Additional Security Code** - Enter a code (ranging from 1 to 65535) in the field provided. Re-enter the code to confirm.



*Changing this value can affect the SI function. Click on the **Default Code** button to reset the **Additional Security Code** to the value set in the **Global Additional Security Code** field on the Global System Policy page.*

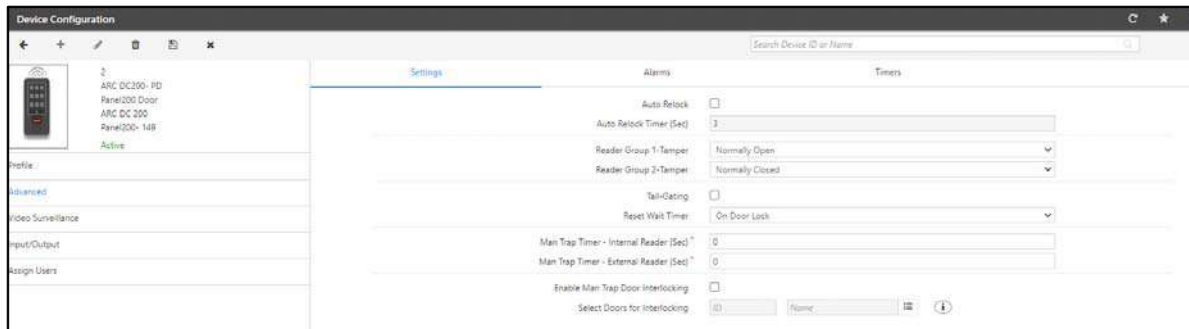
- **Reader Group 1&2 - Tamper** - For **ARC Door** this option allows the configuration of tamper input for Reader Group 1 and Reader Group 2 and setting the default signal type as Normally Open (NO) or Normally Closed (NC).
- **Enable Smart Identification** - Select this checkbox to enable this functionality at the selected Door Controller and select the **Access Level** and the **Access Mode** from the drop down list.
- **Auto Acknowledge Alarm** - Select this checkbox to enable the auto-acknowledgment of all alarms for this device.
- **Auto Acknowledge Alarm (sec)** - Set the time in seconds for the Auto Acknowledge Timer. The wait timer will start and on expiry of the timer, the alarm buzzer will stop automatically.
- **Facility Code** - In ARC DC200, Set a value for Facility Code to be set for access modes other than "Card", if Facility Code is expected in Wiegand Output.
- **Allow Access Through Mobile**- Check the box to allow the access to device using COSEC ACS App.
- **Mobile Entry/Exit Access Mode**- Select the entry and exit door access mode from the options of **Mobile Only**, **Mobile then Biometrics**, **Mobile then Card** and **Mobile then PIN**.



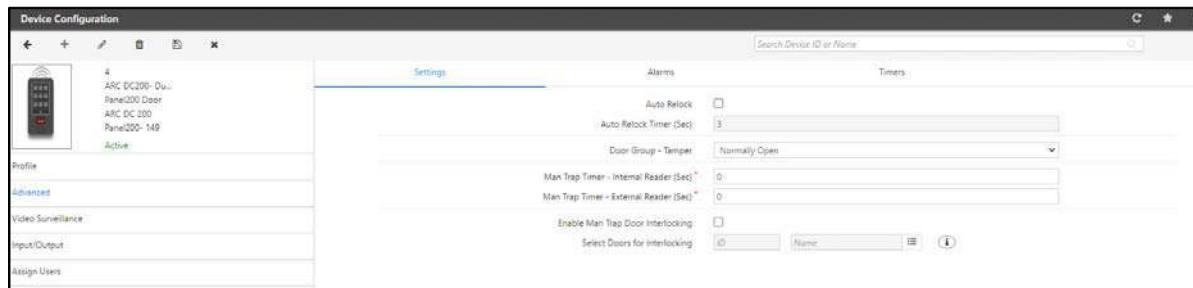
*If User Access Mode is selected as "None" in Zone Configuration and Mobile Access Mode is selected as "Mobile Then Biometrics" then door can be accessed through Mobile and then Biometric credential.*

The **Advanced Settings** for ARC as **Panel door** is shown below:

### For Single Door



### For Dual Door

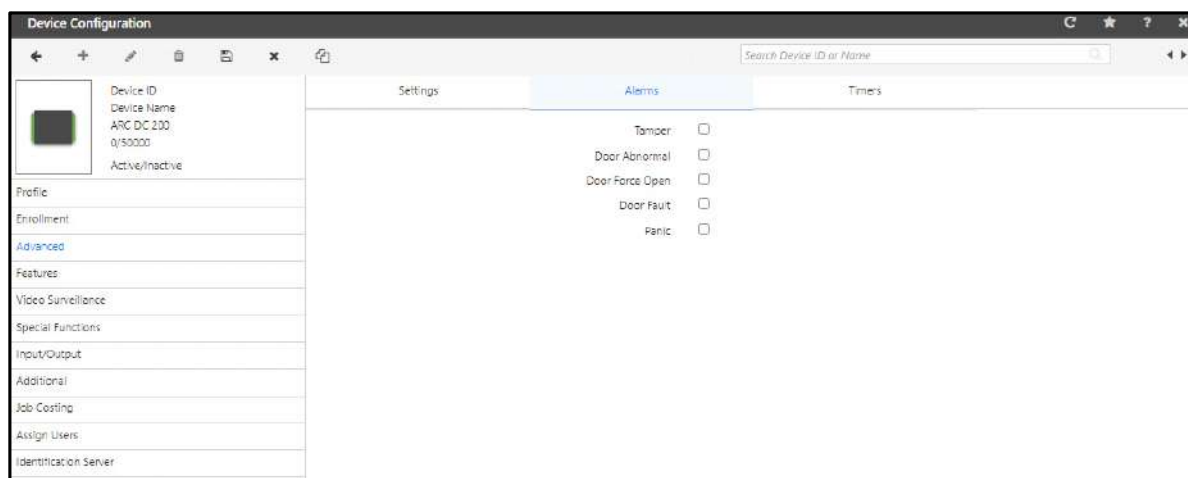


- **Auto Relock** - Select this checkbox to allow the door to relock immediately when the door status changes to close after normal open irrespective of the defined pulse time. However, it is supported only if a door sense is installed and enabled.
- **Auto Relock Timer** - Specify the time in seconds for the Auto Relock operation.
- **Reader Group 1&2 - Tamper** - For **ARC as Single door**; this option allows the configuration of tamper input for Reader Group 1 and Reader Group 2 and setting the default signal type as Normally Open (NO) or Normally Closed (NC).
- **Door Group -Tamper** - For **ARC as Dual door**; this option allows the configuration of tamper input for dual doors and setting the default signal type as Normally Open (NO) or Normally Closed (NC).
- **Tail-Gating (For ARC as Single Door)**- Tail-gating refers to an access violation which occurs when more than one person tries to enter a secured area using a single person's access credentials. If this option is enabled on the panel door, the occupancy count of a zone should be incremented or decremented considering both the punch as well as the auxiliary input port of the panel door (say, input from a beam-counter). Set the wait timer for resetting the tailgating count (**Reset Wait Timer**) based on the door lock status or the door pulse wait timer (as configured).
- **Man Trap Timer -Internal Reader (Sec)** - This checkbox enables an alarm wait timer on the panel door to ensure that the user enters the next sequential door of a man-trap within a specific time-frame.
- **Man Trap Timer External Reader (Sec)** - This checkbox enables an alarm wait timer on the panel door to ensure that the user exits the panel door to enter the next sequential door of a man-trap within a specific time-frame.

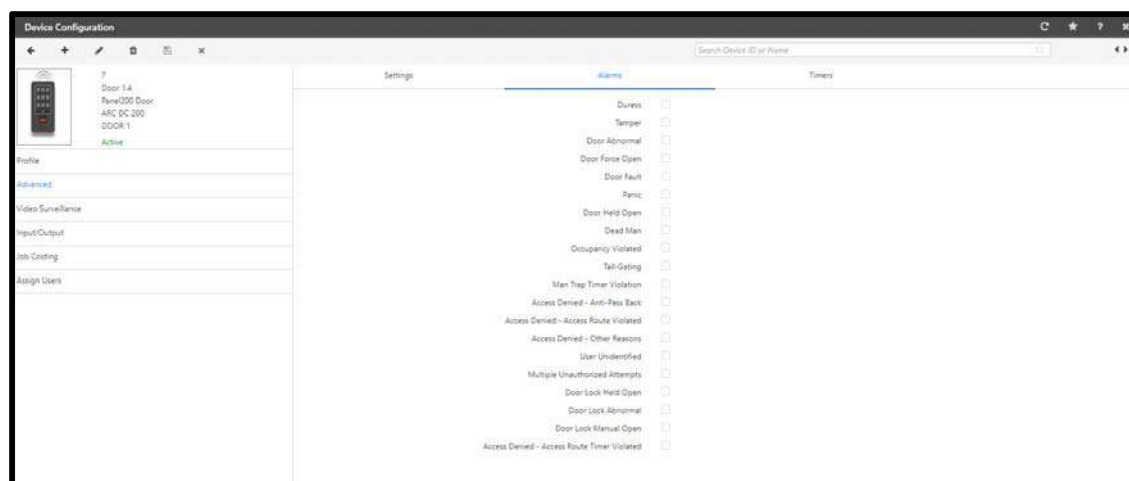
## Alarms

In Alarm tab, you can assign below list of alarms to the door.

### For Direct Door



### For Panel Door



Select the respective checkbox of alarms which you want to enable.



*The above list of alarms is available for the ARC DC200. For ARC DC100, the number of supported alarms may differ.*

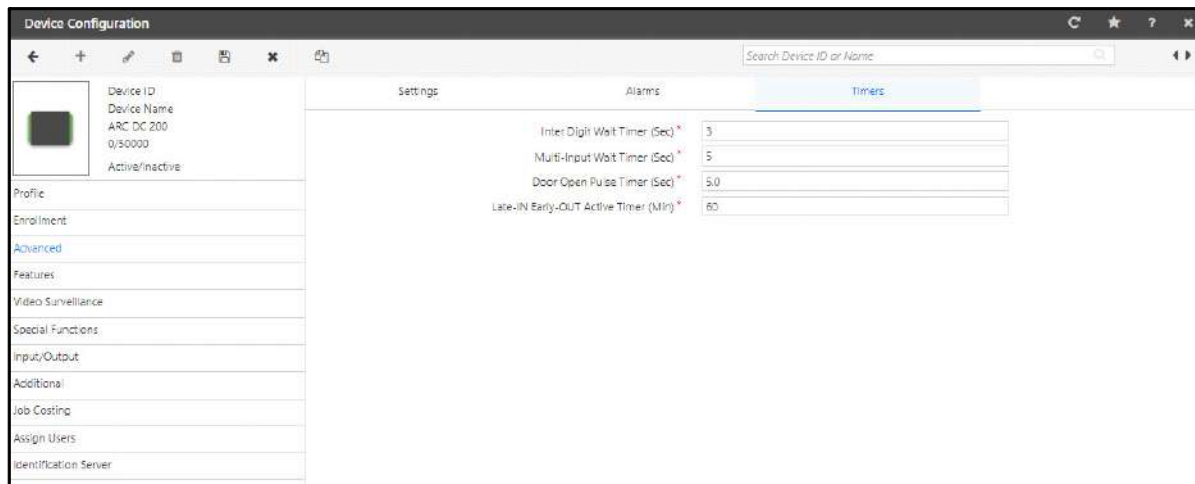
## Timers

This section allows the configuration of various types of pre-defined device timers which can trigger off specific responses. In COSEC, timers are often used to control door behavior and for triggering alarms.

The Timers parameters differ for ARC DC200 as Direct Door and Panel Door.

### Timers - Direct Door

Click the **Timers** tab. The **Timers** page for **ARC DC200** as a **Direct Door** appears.



- **Inter-Digit Wait Timer (sec) Applicable only for ARC DC200** - Specify the time period in seconds (1 to 99) between two key inputs on the device keypad. On expiry of this timer, the system considers the user input to be complete and is ready for the next input.
- **Multi-Input Wait Timer (sec)** - Specify the time in seconds (3 to 99) for which system needs to wait for the second credential input from the user when more than one credential is to be used to grant access.



*We recommend you to set the timer value as greater than or equal to 10 seconds to avoid access denial issues to users. This is applicable when the system reads the credentials (biometric) from the user's Smart Cards.*

- **Door Open Pulse Timer (sec)** - Specify the time in seconds (0.1 to 65535.0) for the door to be energized for a valid credential. If the opened door does not return to a closed state before the expiry of this timer, the door will generate a "Door Abnormal" alarm.



*The range (0.1 to 65535.0) seconds for **Door Open Pulse Timer** is applicable for ARC DC200 Direct Door only.*

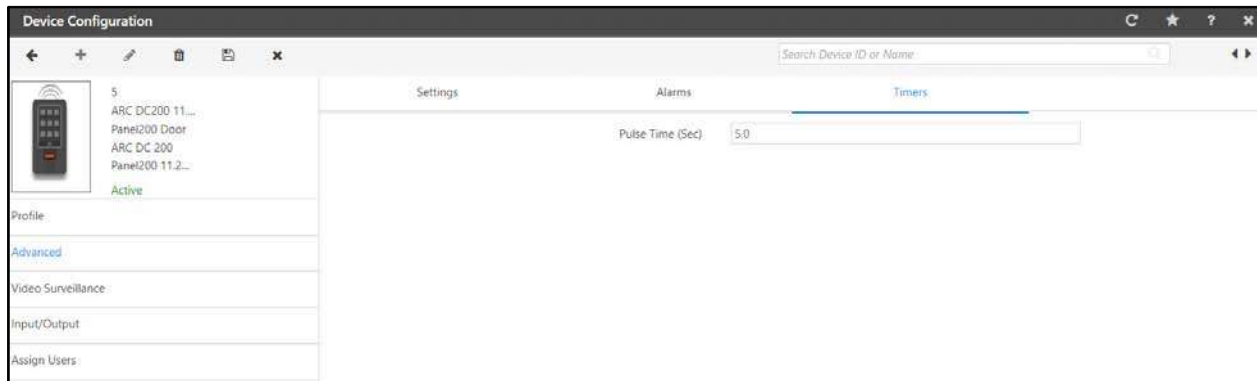
*To ensure smooth functioning of this feature, make sure the Server and Device Firmwares are upgraded to the latest version.*

- **Late-IN Early-OUT Active Timer (min)** - Specify the time in minutes (1 to 99) for which the Late-IN and Early-OUT special functions will remain active after being enabled at the Door Controller.



## Timers - Panel Door

Click the **Timers** tab. The **Timers** page for **ARC DC200** as a **Panel Door** appears.



- **Pulse Time (sec)** - Specify the time in seconds (0.1 to 65535.0) for the panel door to be energized for a valid credential.



*The range (0.1 to 65535.0) seconds for **Door Open Pulse Timer** is applicable for ARC DC200 Panel Door — Dual Door Single Reader and Dual Door Dual Reader— only.*

*To ensure smooth functioning of this feature, make sure the Server and Device Firmwares are upgraded to the latest version.*

## Features

The Features tab allows the user to enable certain Access Control features for a device



*The Features tab is available only with the Access Control Module license and is applicable only for Direct Doors.*

To access this, After selecting the device, Select **Device Configuration> Features**.

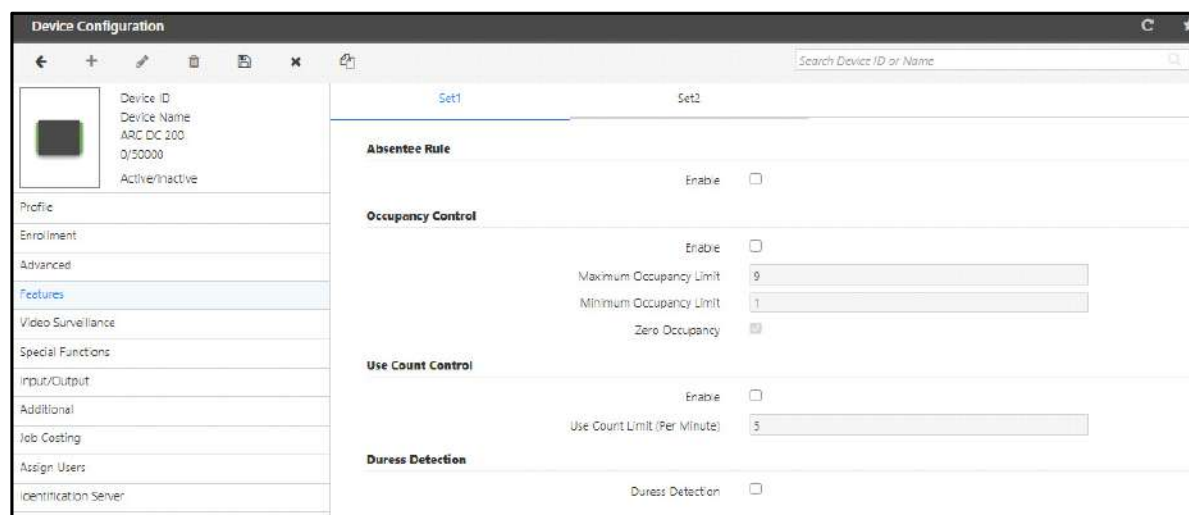
The access control features for the device can be set from the following two sections:

- “Set1”
- “Set2”

### Set1

This page allows the configuration of three rules - **Absentee Rule**, **Occupancy Control** and **Use Count Control**.

The page appears as shown below.



- Absentee Rule** - Select this checkbox to enable this feature at the door. This rule sets the maximum number of days for non-use of a credential. On expiration of days limit, the user will be automatically blocked.  
 For configuring the rule *See Access Control> Absentee Rule*.
- Occupancy Control** - Select this checkbox to enable the feature at the door and specify maximum number of users to be allowed within the controlled area after which a user exit is required to enable access to another user. Also specify the **Minimum Occupancy Limit** i.e. the minimum number of occupants the designated zone should have, and enable/disable the **Zero Occupancy** option to determine whether the designated zone should be allowed to be empty or not.  
 For configuring the rule *See Access Control> Occupancy Control*.
- Use Count Control** - Select this checkbox to enable the feature at the door and specify the maximum number of uses per minute.  
 For configuring the rule *See Access Control> Use Count Control*.
- Duress Detection** - Select the checkbox to enable the feature. Duress Detection is used to generate the duress alarm which informs that the user is forced to open the door under threat.

## Set2

This page allows the configuration of three rules - **First-IN User Rule**, **Anti-Pass-Back (APB)** and **2-Person Rule**.

The page appears as shown below.

The screenshot shows the 'Device Configuration' window for 'Set2'. On the left is a sidebar with a device icon and details: Device ID, Device Name (ARC DC 200), and a status indicator (Active/Inactive). Below this are tabs for Profile, Enrollment, Advanced, Features (selected), Video Surveillance, Special Functions, Input/Output, Additional, Job Costing, Assign Users, and Identification Server. The main area is divided into three sections for rule configuration:

- First-IN User Rule:** Includes an 'Enable' checkbox, 'Reset On' options (Day Change, Timer Expiry), 'Access Timer (Sec)' set to 3, and 'First IN User Group' set to 1.
- Anti-Pass Back (APB):** Includes 'On Entry' and 'On Exit' checkboxes, 'Hard/Soft' mode set to Soft, 'Forgiveness' checkbox, 'Reset After' options (Day Change, Timer Expiry), and 'Forgiveness Timer (Min)' set to 1.
- 2-Person Rule:** Includes an 'Enable' checkbox, 'Mode' set to Primary Must, 'Primary Group' set to 1, 'Secondary Group' set to ID, and '2nd Person Wait Timer (Sec)' set to 5.

- **First-IN User Rule** - Select this checkbox to enable the feature at the direct door and select the First-In User group which would be valid at the door.  
For configuring the rule *See Access Control> First- In User Rule> Assignment*
- **Anti-Pass Back (APB)** - Select this checkbox to enable the feature at the direct door.  
For configuring the rule *See Access Control> Anti-Pass Back*
- **2-Person Rule** - Select this checkbox to enable the feature at the door and set the **wait time** in seconds after which the second person is allowed to punch on the door.  
For configuring the rule *See Access Control> 2- Person Rule*.

## Video Surveillance

The Video Surveillance tab allows the user to configure parameters for video surveillance integration with the COSEC device.

It is available in Basic License.

To access this, Go to **Device Configuration> Video Surveillance**.

- [“Visual Tagging”](#)
- [“Satatya Integration”](#)

## Visual Tagging

The COSEC application can interface with some supported hybrid and network video recording systems and grab images triggered by user events at the Doors. The **Visual Tagging** option enables the administrator to define the video recorder parameters. The **Visual Tagging** page appears as shown below.

The screenshot shows the 'Device Configuration' window with the 'Visual Tagging' tab selected. On the left, a sidebar lists configuration categories: Profile, Enrollment, Advanced, Features, Video Surveillance (highlighted), Special Functions, Input/Output, Additional, and Assign Users. The main area shows settings for a device with ID '4' (ARC direct door, Arc Controller, 0/10000, Active). Under 'Visual Tagging', the 'Capturing Device' is a dropdown menu set to 'Matrix DVR/NVR/HVR'. Below this, there are input fields for 'MAC Address' (00\_1b\_09\_02\_1d\_58), 'Camera ID' (4), and 'Storage Root Folder' (ftp://192.168.104.23/dip/). Further down, the 'FTP Login Credentials' checkbox is checked, and there are input fields for 'User Name' (admin) and 'Password' (masked with asterisks).



To view the user events and related images, go to **Admin > Views/Logs > Event View**. To know more about viewing events, refer to “Event View”.

The following parameters are available for configuration:

- **Capturing Device** - Select the video recording device type from the dropdown menu as shown. The compatible device types are:

- Matrix HVR/NVR
- Milestone

### Matrix HVR/NVR

- **MAC Address** - In the event of selecting the Matrix HVR/NVR, the administrator needs to specify the MAC address of the video recorder device using “\_” (underscore) as the separator.
- **Camera ID** - Specify the camera number or camera ID for IP cameras. For analog cameras specify the camera number.
- **Storage Root Folder** - Specify the Root folder path or FTP Path where the uploaded images will be saved.
- **FTP Login Credentials** - Check this box to activate FTP login credentials for authentication.
- **Username** - Specify the FTP server username.
- **Password** - Specify the FTP server password.



Some COSEC devices do not support all the network connection options.

## Milestone

Event ID	Name	User-Defined Event ID	User-Defined Event Name
No Data			

Camera Name	GUID	Host Name	Port
MATRIX COMSEC CIDR20VL12CW-P (192.168.112.193) - Camera 1	ac5c0e92-9acd-410d-b21f-f593c2a9d33f	ketanpaliya	7563



For more information on integration with **Milestone** devices, refer to "[Milestone Integration](#)".

## Satatya Integration

This functionality is available for configuration only when the Matrix HVR/NVR device type is selected as the **Capturing Device** (from *Visual Tagging*). It enables the configured COSEC devices to directly send commands to the SATATYA HVR/NVR devices as per the configuration on this page. The Satatya configuration page appears as shown below:

Integration Type	Active	Network Connection	IP Address	Port Number
Network	<input checked="" type="checkbox"/>	Ethernet	192 . 168 . 104 . 30	8000

Name	Active	Schedule	Days	Event	Mode	Action	E-mail ID
ARC HVR Integration	<input checked="" type="checkbox"/>	09:00 - 12:00	Sun <input type="checkbox"/> Mon <input checked="" type="checkbox"/> Tue <input checked="" type="checkbox"/> Wed <input checked="" type="checkbox"/> Thu <input type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Holiday <input type="checkbox"/>	Access Allowed	Both	Mail Image	sheetalponnya2012@gmail.com

Camera	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

- **Integration type-** Select the integration type from the options of Wired and Network.

In wired integration, door is physically connected with Satatya Device. In Network integration, connection can be by Ethernet, wireless or broadband depending upon the COSEC device support.

- **Active-** Check the box to activate the connection.
- **Network Connection-** Select the Network connection from the options of Ethernet, Broadband, Wireless.
- **IP Address-** Specify the IP address of HVR/NVR if device is connected with Ethernet.
- **Port Number-** Specify the port number of HVR/NVR
- **Name-**Specify a user friendly name for the integration function.
- **Active-** Check the Active box to enable the SATATYA integration functionality.
- **Schedule -** Specify a schedule for the function by specifying the start and the end time (*24 Hours format*) as well as checking the boxes against the applicable **days** of the week.
- **Event-** Select a COSEC event from the drop down list for which the resultant action is to be configured.
- **Mode-** Select the event mode from the options of Entry, Exit and Both from the drop down list wherever applicable.
- **Action-**Select the action for the Satatya device from the drop down list. The options available are:
  - Recording - Specify the duration in minutes.
  - Upload Image - This will be uploaded as per the FTP settings.
  - Video Pop-up - Specify the duration in seconds. The video pop up will be generated on the local client of Satatya device on the selected camera.
  - PTZ Preset - Specify the PTZ position number as defined on the SATATYA device.
  - Mail Image - Specify the email-ID.
- **Camera-** Select the relevant camera channels depending on the action selected.

**Example:** For action as Mail Image, the image of Camera 8 will be mailed to the mentioned Email ID.

The screenshot shows a configuration form with the following fields and values:

- Event:** Access Allowed (dropdown)
- Mode:** Both (dropdown)
- Action:** Mail Image (dropdown)
- E-mail ID \*:** sheetalpandya2012@gmail.com (text input)
- Camera \*:** A grid of checkboxes for cameras 1 through 24. Camera 8 is selected.

- Click the **Add** button to finish the process of linking the event to the action. The user may configure another event-action linkage if required.

Name	Event	Action	Start Time	End Time	Active	
ARC HVR Integration	Access Allowed	Mail Image	09:00	12:00	Yes	


## Special Functions

To configure *Special Functions* for COSEC doors, refer to [“Special Functions”](#).

## Input/Output

The Input/Output (I/O) configuration of a system determines how the output or response of a system is influenced by the input applied on it. In case of the COSEC Access Control System, the I/O configuration should enable the system to monitor and trigger a specific response to any changes in door state or event occurrences at the door device. This change of door state or occurrence of events may be considered as an input while the response or action that is generated by the system on detection of this input, may be defined as the output.



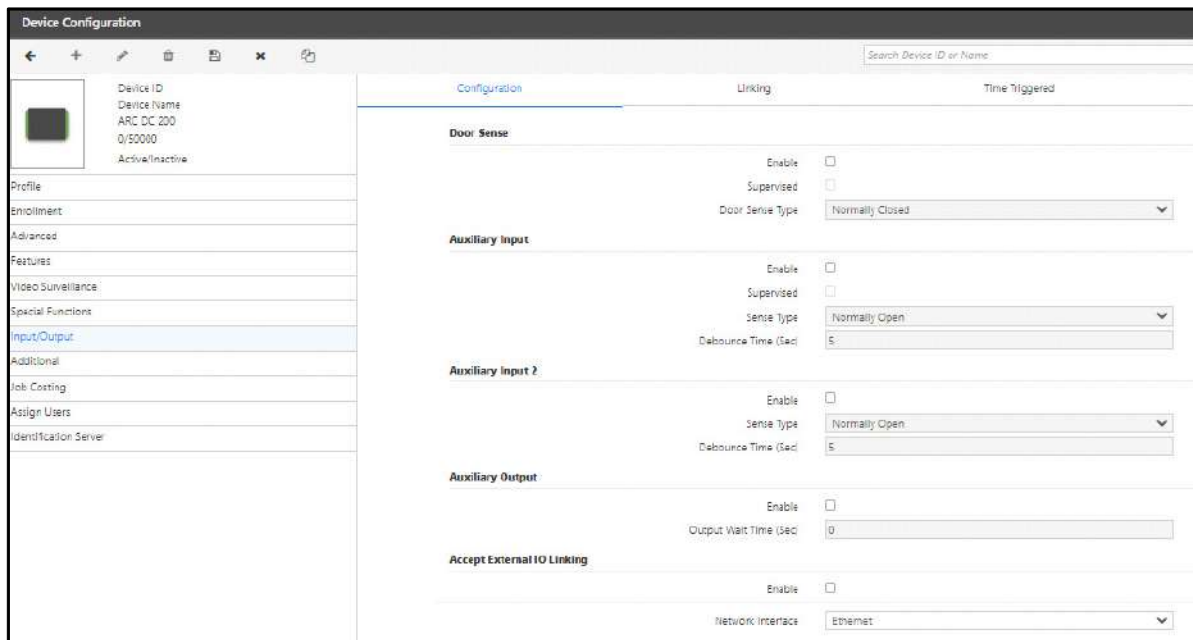
1. This functionality cannot be fully accessed in the Edit  mode for a selected device.
2. This functionality is available only with the Access Control add-on module license.

To access this, After selecting the device, Select **Device Configuration> Input Output**. The Input Output parameters can be set from the following sections:

- “Configuration”
- “Linking”
- “Time Triggered”

## Configuration

The **Configuration** section for a **ARC DC100 - Direct Door** appears as shown below.



The screenshot displays the 'Device Configuration' window for an 'ARC DC100 - Direct Door'. The left sidebar shows a list of configuration sections: Profile, Enrollment, Advanced, Features, Video Surveillance, Special Functions, **Input/Output** (selected), Additional, Job Costing, Assign Users, and Identification Server. The main area is divided into three tabs: Configuration, Linking, and Time Triggered. The 'Configuration' tab is active, showing the following settings:

- Door Sense:** Enable (checkbox), Supervised (checkbox), Door Sense Type (dropdown menu set to 'Normally Closed').
- Auxiliary Input:** Enable (checkbox), Supervised (checkbox), Sense Type (dropdown menu set to 'Normally Open'), Debounce Time (Sec) (input field set to '5').
- Auxiliary Input 2:** Enable (checkbox), Sense Type (dropdown menu set to 'Normally Open'), Debounce Time (Sec) (input field set to '5').
- Auxiliary Output:** Enable (checkbox), Output Wait Time (Sec) (input field set to '0').
- Accept External I/O Linking:** Enable (checkbox), Network Interface (dropdown menu set to 'Ethernet').

The **Configuration** section for a **ARC DC200 - Panel Door** appears as shown below.

The screenshot shows the 'Device Configuration' window for an 'ARC DC200 - Panel Door'. The left sidebar contains a device icon and a list of tabs: Profile, Advanced, Video Surveillance, Input/Output, and Assign Users. The main area is titled 'Configuration' and contains several sections:

- Door Sense:** Includes 'Enable' (checkbox), 'Supervised' (checkbox), and 'Door Sense Type' (dropdown menu set to 'Normally Closed').
- Lock Sense:** Includes 'Enable' (checkbox), 'Supervised' (checkbox), and 'Lock Sense Type' (dropdown menu set to 'Normally Open').
- Auxiliary Input:** Includes 'Enable' (checkbox), 'Supervised' (checkbox), 'Sense Type' (dropdown menu set to 'Normally Open'), and 'Debounce Time (Sec)' (input field set to 5).
- Auxiliary Input 2:** Includes 'Enable' (checkbox), 'Sense Type' (dropdown menu set to 'Normally Open'), and 'Debounce Time (Sec)' (input field set to 5).
- Auxiliary Output:** Includes 'Enable' (checkbox) and 'Output Group' (dropdown menu set to 1).
- Relay Output:** Includes 'Output Group Number (Door Unlock)' (input field set to 2), 'Output Group Number (Door Lock)' (input field set to 10), and 'Name' (input field set to 'Door Unlock').

The following parameters are available for configuration in both Direct door and Panel door:

- **Door Sense** - The system by default can sense two states of a door - **Normally Open (NO)** and **Normally Closed (NC)** depending on which the output is determined. For example, any deviation of the door from its normal state may lead to the trigger of a **Door Abnormal** alarm.

Select the **Enable** checkbox to enable the system for such two-state monitoring.

Select the **Supervised** checkbox to enable the door for four-state monitoring where the door is also monitored for **door fault** and **door disconnection**. Specify the **Door Sense Type** as **Normally Closed** or **Normally Open**. Default value is **Normally Closed**.

- **Lock Sense** - The system by default can sense two states of lock - **Normally Open (NO)** and **Normally Closed (NC)** depending on which the output is determined. For example, any deviation of the lock from its normal state may lead to the trigger of a **Lock** event.

Select the **Enable** checkbox to enable the lock sense. When Lock Sense is enabled, then Exit Switch in Readers tab will get disabled.



1. The Lock Sense must be connected with Exit Switch-2.

2. For Single Door, the configuration of Lock must be considered as: Lock Sense 1 & Lock Sense Type 1.

For Dual Door, the configuration of Lock is

- For first device it will be: Lock Sense 1 & Lock Sense Type 1
- For second device it will be: Lock Sense 2 & Lock Sense Type 2

- **Auxiliary Input** - Select the **Enable** checkbox option for **Auxiliary Input** (e.g. Smoke Detectors) depending on normal or supervised door state monitoring as described above.

Select the **Supervised** checkbox to enable the door for four-state monitoring where the door is also monitored for **door fault** and **door disconnection**.



Specify the **Door Sense Type** as **Normally Closed** or **Normally Open**. Default value is **Normally Closed**.

**Debounce Time (Sec)** - Specify the **Debounce Time** in seconds. Default value is **5 sec** and valid range is 0-99 sec. It defines the minimum time for which an input interface must be maintained in a given state before the system reports it. For example, if a Normal door state is changed to Alarm, the state must remain in Alarm for five seconds before an alarm is generated.

- **Auxiliary Input 2**- Select the **Enable** checkbox option for **Auxiliary Input 2**.

Specify the **Door Sense Type** as **Normally Closed** or **Normally Open**. Default value is **Normally Open**.

**Debounce Time (Sec)** - Specify the **Debounce Time** in seconds. Default value is **5 sec** and valid range is 0-99 sec. It defines the minimum time for which an input interface must be maintained in a given state before the system reports it. For example, if a Normal door state is changed to Alarm, the state must remain in Alarm for five seconds before an alarm is generated.



**Auxiliary Input 2** is only applicable for **ARC DC200 Direct** door and **ARC DC200 Single Door Dual Reader Panel** door.

- **Auxiliary Output** - Select the **Enable** checkbox to enable Auxiliary Output (e.g. Fire Alarm) for the selected device. To set an additional waiting period before the Aux Output signal is sent, enter an **Output Wait Time (Sec)**.
- **Accept External IO Linking** - Select the Enable checkbox to enable device-to-device IO Linking i.e. input from one Direct Door can trigger output in another Direct Door.
- **Network Interface** - Select anyone network interface out of **Ethernet**, **Wireless** and **Mobile Broadband**.
- **Relay Output**

**Output Group Number (Door Unlock)**- Select the Output Group Number to which the device output for Door Unlock is to be assigned from the picklist.

**Output Group Number (Door Lock)**- Select the Output Group Number to which the device output for Door Lock is to be assigned from the picklist.



The **Accept External IO Linking** is applicable to both **ARC DC100/200 Direct Door** and **Network Interface** is applicable to **ARD DC200 Direct Door** only.

For **ARC DC200 Dual Door Single\Dual Reader Panel** door; only **Door Sense**, **Lock Sense** and **Relay Output** are applicable.

## ARC DC200 Dual Door Single\Dual Reader Panel Door.

**Device Configuration**

Search Device ID or Name

1: ARC DC200- Du...  
Panel200 Door  
ARC DC 200  
Panel 1  
Active

Profile  
Advanced  
Video Surveillance  
Input/Output  
Assign Users

**Configuration**

**Door Sense**  
Enable ☐  
Supervised ☐  
Door Sense Type: Normally Open

**Lock Sense**  
Enable ☐  
Lock Sense Type: Normally Closed

**Relay Output**  
Output Group Number (Door Unlock): 2 Door Unlock: [ID]  
Output Group Number (Door Lock): 10 Name: [ID]

## ARC DC200 Single Door Dual Reader Panel Door.

**Device Configuration**

Search Device ID or Name

3: ARC DC200- Si...  
Panel200 Door  
ARC DC 200  
Panel 1  
Active

Profile  
Advanced  
Video Surveillance  
Input/Output  
Assign Users

**Configuration**

**Door Sense**  
Enable ☐  
Supervised ☐  
Door Sense Type: Normally Open

**Lock Sense**  
Enable ☐  
Lock Sense Type: Normally Closed

**Auxiliary Input**  
Enable ☐  
Supervised ☐  
Sense Type: Normally Closed  
Debounce Time (Sec): 5

**Auxiliary Input 2**  
Enable ☐  
Sense Type: Normally Closed  
Debounce Time (Sec): 5

**Auxiliary Output**  
Enable ☐  
Output Group: 1 DC Aux Ports: [ID]

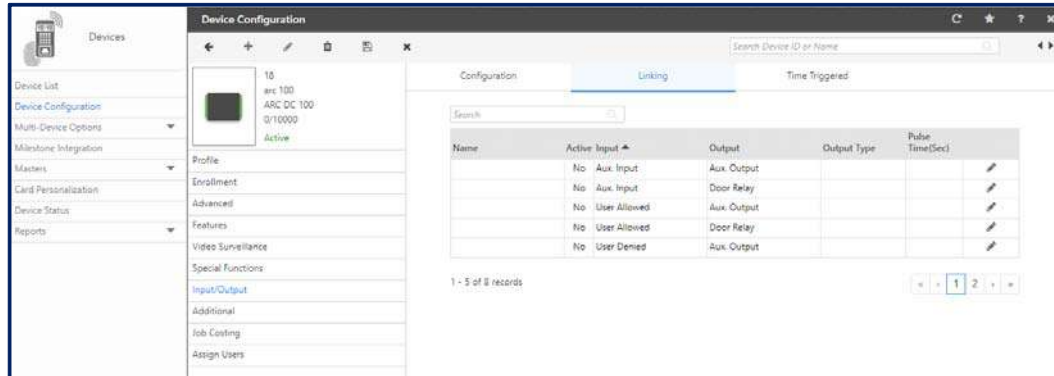
**Relay Output**  
Output Group Number (Door Unlock): 2 Door Unlock: [ID]  
Output Group Number (Door Lock): 10 Name: [ID]

## Linking

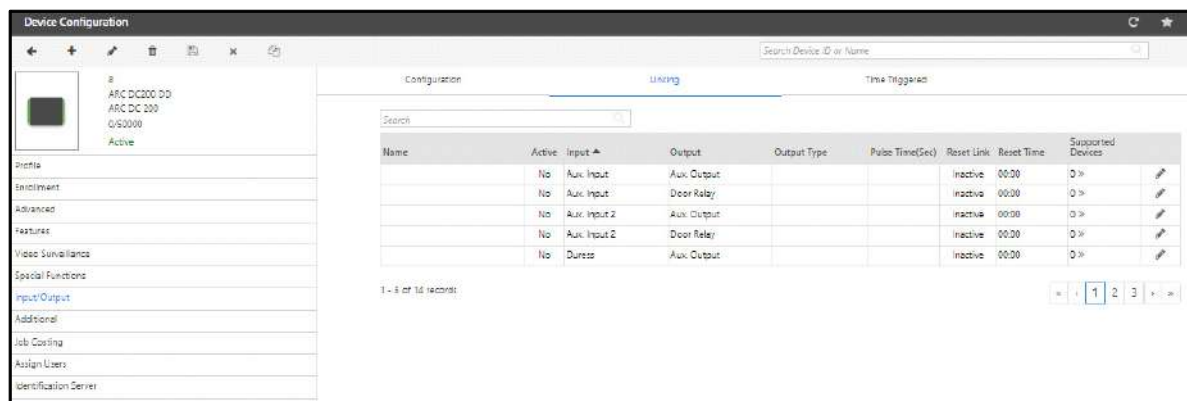


Linking is applicable for Direct Door only.

The **Linking** section for **ARC DC100** door appears as shown below.




The **Linking** section for **ARC DC200** door appears as shown below.

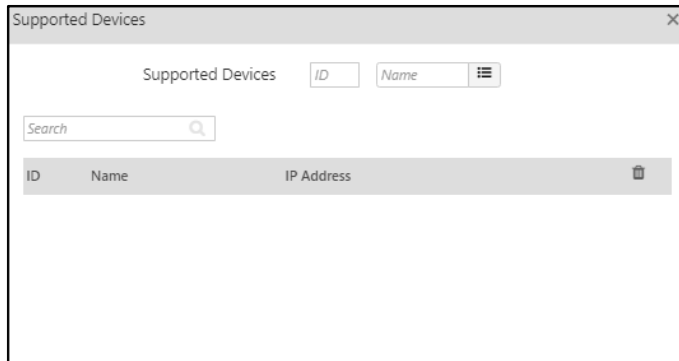


The COSEC application supports the Input/Output Linking feature to activate an output port based on a trigger received from an input port on the same Direct Door. This option enables the administrator to define how an event or events (input port) will trigger an output on the selected door.

Select a Input-Output linking row or click edit button.

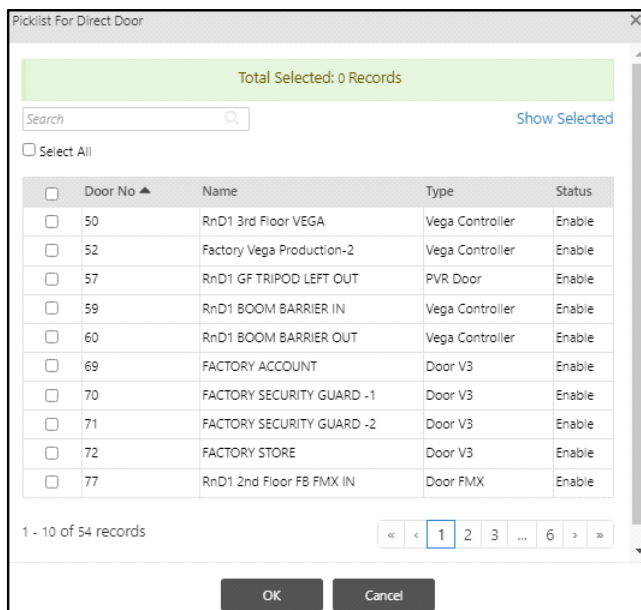
- **Name** - Specify a name for the new I/O linking program to be defined.
- **Output Type** - Specify the appropriate type of output from the following four options available in the drop down list:
  - **Pulse**: With this type of output, the user needs to define the Pulse time in seconds.
  - **Interlock**: With this option, the output follows the input. The relay output is triggered as long as the input is activated after which it returns to normal state.
  - **Latch**: With this option, it is denoted that the relay output will be in an energized condition for infinite period and needs to be reset manually.
  - **Toggle**: With this option, the output group toggles its state whenever an input group is activated.
- **Pulse Duration (sec)** - For a *Pulse* output type, specify the pulse duration in seconds.
- **Reset Link** - Select this checkbox to activate this linking program as well as set the time from **Reset Time**.

- **Reset Time**- Enter the time period in hh:mm format at which the link will get reset automatically. Suppose, an IO Link gets activated on 21/04/2017 at 15:00. And Reset Time is set as 18:00. When Device Time is 18:00 then that IO link will get reset.
- **Supported Devices** - All devices supported for external IO Linking will appear in this picklist for selection.
- Click **Supported Devices**  icon. The **Supported Devices pop-up** appears.



The 'Supported Devices' pop-up window contains a search bar, a table with columns 'ID', 'Name', and 'IP Address', and a close button in the top right corner.

- In this pop-up, click the **Supported Devices** picklist. The **Picklist For Direct Door** pop-up appears.



The 'Picklist For Direct Door' pop-up window displays a table of devices with columns: Door No, Name, Type, and Status. It includes a search bar, a 'Show Selected' button, a 'Select All' checkbox, and pagination controls at the bottom.

<input type="checkbox"/>	Door No ▲	Name	Type	Status
<input type="checkbox"/>	50	RnD1 3rd Floor VEGA	Vega Controller	Enable
<input type="checkbox"/>	52	Factory Vega Production-2	Vega Controller	Enable
<input type="checkbox"/>	57	RnD1 GF TRIPOD LEFT OUT	PVR Door	Enable
<input type="checkbox"/>	59	RnD1 BOOM BARRIER IN	Vega Controller	Enable
<input type="checkbox"/>	60	RnD1 BOOM BARRIER OUT	Vega Controller	Enable
<input type="checkbox"/>	69	FACTORY ACCOUNT	Door V3	Enable
<input type="checkbox"/>	70	FACTORY SECURITY GUARD -1	Door V3	Enable
<input type="checkbox"/>	71	FACTORY SECURITY GUARD -2	Door V3	Enable
<input type="checkbox"/>	72	FACTORY STORE	Door V3	Enable
<input type="checkbox"/>	77	RnD1 2nd Floor FB FMX IN	Door FMX	Enable

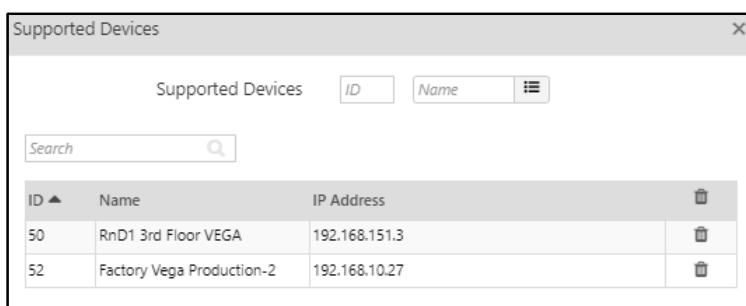
You can either select particular devices or can select all the devices at once.

To select particular devices, click the check boxes of the desired devices.

**OR**


To select all the devices, select the **Select All** check box. The devices on all the pages will be selected.

Click **OK**. You return to the **Supported Devices pop-up** and the selected devices are displayed here.



The 'Supported Devices' pop-up window displays a table of supported devices. At the top, there are filters for 'ID' and 'Name', and a search bar. The table has columns for ID, Name, IP Address, and a delete icon. Two devices are listed: 'RnD1 3rd Floor VEGA' with IP 192.168.151.3 and 'Factory Vega Production-2' with IP 192.168.10.27.

ID	Name	IP Address	
50	RnD1 3rd Floor VEGA	192.168.151.3	
52	Factory Vega Production-2	192.168.10.27	

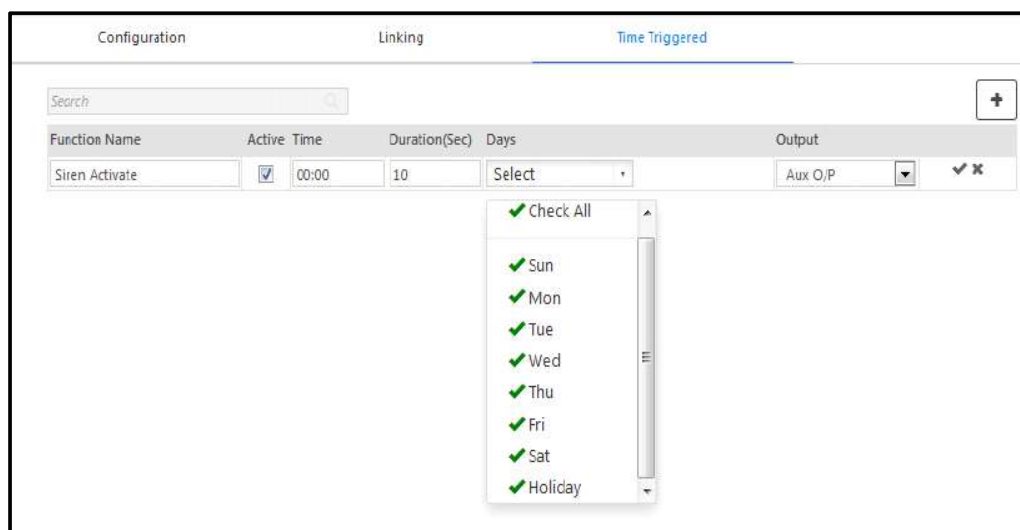
You can also delete the desired devices. To do so, click **Delete**  of the respective device.

Close the pop-up the number of selected devices are displayed under **Supported Devices** in the grid.

- Click the **OK** button and **Save** the configuration.

## Time Triggered

On the **Input Output** page, select the **Time Triggered** section as shown.



The 'Time Triggered' configuration window shows a table for setting up time-triggered functions. The table has columns for Function Name, Active, Time, Duration(Sec), Days, and Output. A dropdown menu is open for the 'Days' column, showing options for all days of the week and holidays, each with a green checkmark.

Function Name	Active	Time	Duration(Sec)	Days	Output
Siren Activate	<input checked="" type="checkbox"/>	00:00	10	Select	Aux O/P

- ✓ Check All
- ✓ Sun
- ✓ Mon
- ✓ Tue
- ✓ Wed
- ✓ Thu
- ✓ Fri
- ✓ Sat
- ✓ Holiday

This functionality enables the user to control the activity of an Output without manual intervention. The time triggered functions are used for activating events like door unlock and siren activation that are set as per the start time and for the configured time duration. This functionality is designed to energize outputs for predefined periods at the configured time. The COSEC access control system supports up to 20 Time Triggered functions on a Direct Door.

Search Device ID or Name						
Configuration      Linking      Time Triggered						
Search						
Function Name	Active	Time	Duration(Sec)	Days	Output	
Siren Activate	Yes	00:00	10	Su Mo Tu We Th Fr Sa Ph	Aux O/P	

## Additional

This section lists some additional configurations that can be enabled for door controllers.

To access these configurations, Go to **Device Configuration > Additional > Daylight Saving**



*This section is available only for Direct Doors.*

Many countries observe the convention of adjusting clocks forward and backward. Clocks are set ahead during the spring and back to standard time in the autumn. COSEC doors can be configured to be compatible with this procedure keeping the RTC of the system updated with such changes.

The **Daylight Saving** configuration can be done in 2 ways i.e. Day-Month wise or Date-Month wise.

- Select the **DST Type** as Day-Month wise or Date-Month wise. The **Disable** option when selected, disables the application of DST on the system time.
- On selection of the **Day-Month wise** option, the DST is set by the day of the month on which clock needs to be forwarded and reverted back to normal. Set the month, week number, day of the week, and time for both the **Forward Clock** and **Backward Clock** as shown.

The screenshot shows the 'Device Configuration' window with the 'Daylight Saving' tab selected. On the left is a sidebar with various configuration categories. The main area contains the following settings:

- DST Type:** A dropdown menu set to 'Day-Month wise'.
- Time Period:** A text field containing '00:00'.
- Forward Clock:**
  - Month:** A dropdown menu set to 'January'.
  - Week No.:** A dropdown menu set to '1st'.
  - Day of Week:** A dropdown menu set to 'Sunday'.
  - Time:** A text field containing '00:00'.
- Backward Clock:**
  - Month:** A dropdown menu set to 'January'.
  - Week No.:** A dropdown menu set to '1st'.
  - Day of Week:** A dropdown menu set to 'Sunday'.
  - Time:** A text field containing '00:00'.
- Save:** A button at the bottom right.

- On selection of the **Date-Month wise** option, the DST is set by date of the month on which clock needs to be forwarded and reverted back to normal. Define the **Time Period** for the date-month wise DST settings in **24-hours** format, and specify the day of the week, date and time for the **Forward Clock** and the **Backward Clock** as shown.

This DST Setting implies that on 1st Sunday of November at 09:00 hours, the clock will be forwarded by 08:00 hours. And on 1st Sunday of January at 10:00 hours, the clock will be reversed or set backwards by 08:00 hours.

The screenshot shows the 'Device Configuration' window for an 'ARC DC200 DD' device. The 'Daylight Saving' tab is selected. The settings are as follows:

- DST Type:** Date-Month wise
- Time Period:** 08:00
- Forward Clock:**
  - Month: January
  - Date: 1
  - Time: 09:00
- Backward Clock:**
  - Month: January
  - Date: 1
  - Time: 10:00

A 'Save' button is located at the bottom right of the configuration area.

- Click the **Save** button.

## Job Costing



*Job Costing is applicable for ARC DC200 Direct Door only.*

When user punches on any device, there will be an option to select the Job Code on which the user is working. Job Costing enables the Admin to show or hide Job Code selection on device. It also enables the admin to assign default jobs on device.

The screenshot shows the 'Device Configuration' window for an 'ARC DC200 DD' device. The 'Settings' tab is selected. The 'Job Costing' section is visible, with the following settings:

- Show Job Menu:** Allocate Default

Below the settings is a table titled 'Default Jobs' with the following columns: Job Code, Name, Assignment Start, Assignment End, and Prioritize Job. The table is currently empty, displaying 'No Data'.



*Make sure the **Device Based Job Assignment** check box is enabled for the desired Users.*

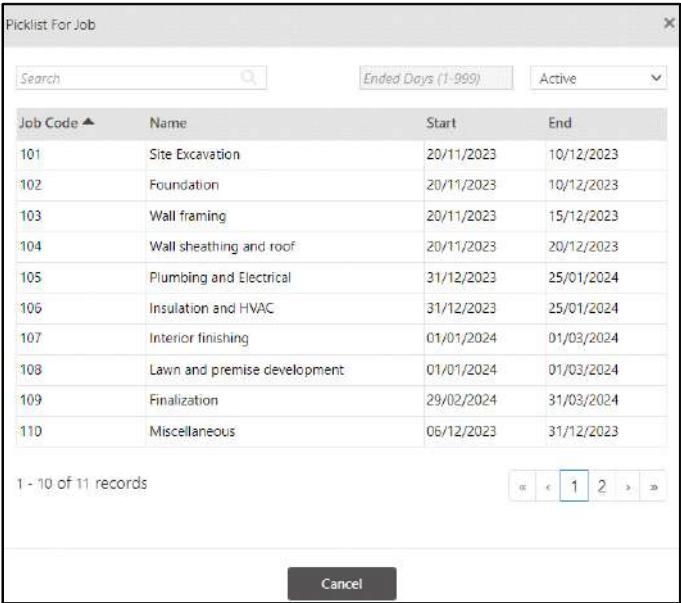
**Show Job Menu:** It is disabled for ARC DC200.

# Default Jobs

Multiple default jobs can be assigned with overlapping Assignment Date Ranges. You can also set the priority of the assigned jobs if required. If you have jobs with overlapping dates and you have set their priority as per your requirement, then the first job will be considered as the default job.

- Click **Add**  . Click the picklist under **Job Code/Name** to select the desired Jobs.

The **Picklist For Job** appears.



Job Code	Name	Start	End
101	Site Excavation	20/11/2023	10/12/2023
102	Foundation	20/11/2023	10/12/2023
103	Wall framing	20/11/2023	15/12/2023
104	Wall sheathing and roof	20/11/2023	20/12/2023
105	Plumbing and Electrical	31/12/2023	25/01/2024
106	Insulation and HVAC	31/12/2023	25/01/2024
107	Interior finishing	01/01/2024	01/03/2024
108	Lawn and premise development	01/01/2024	01/03/2024
109	Finalization	29/02/2024	31/03/2024
110	Miscellaneous	06/12/2023	31/12/2023

By default, all the **Active** jobs are displayed. Click **Active** and select the desired option — **All**, **Active**, **Expired** — to filter the jobs. The jobs appear as per the set filter.

If you select **Expired**, you can set another filter.

Configure the number of days in Ended Days (1-999). The system will display the expired jobs, derived using the following: Current Date minus Number of days configured in Ended Days.

For example:

Ended Days configured = 2

Current Date= April 25, 2024

All the jobs expired between April 23, 2024 to April 25, 2024 (midnight), will be displayed.

Click to select the desired job from the list. You can also search for the desired job using the search bar.

The selected job appears in the grid.

- Assignment Start** and **Assignment End**: The selected Jobs Start and End dates are displayed. You can change the Assignment Start and Assignment End dates of the job if required. To do so, click the calendar and select the desired start and end dates.
- Click **Save** to save the configuration.

The **Default Jobs** grid will consist of all the jobs, that is expired, in-progress as well as assigned.

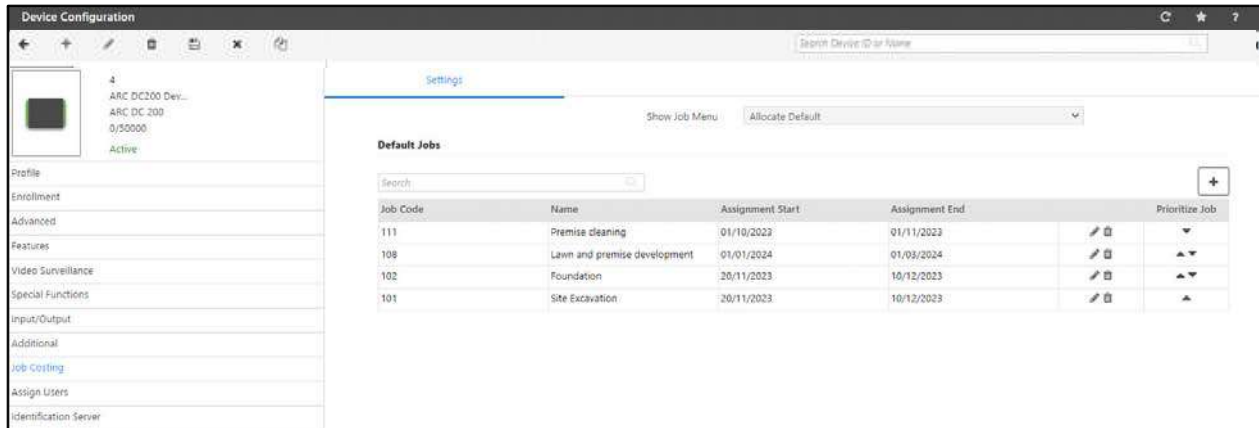




*It is recommended to set job priority only if overlapping dates are assigned to the jobs.*

*If a new job is assigned, by default it will appear at the highest priority. You can change the priority later, if required.*

You can set the priority of the jobs as per your requirement. To do so,



- Under **Prioritize Job**, click the **Up** arrow button to move a job upwards in the list. Similarly, click the **Down** arrow button to move a job downwards in the list.

If you have overlapping dates assigned to Jobs, in such scenarios there will be multiple Jobs in which the punches are possible.

To resolve this set the Job with highest priority at the first position, so that when the system searches for the Job as per the date, the punch will be marked in the first Job in which the date is detected.

Let us understand this with the help of an example.

#### Example:

User 1 has been assigned the following jobs:

Job Code	Job Name	Assignment Start	Assignment End	Prioritize Job
J1	Job 1	01/10/2023	10/10/2023	1
J2	Job 2	09/10/2023	15/10/2023	2
J3	Job 3	17/10/2023	25/10/2023	3
J4	Job 4	25/10/2023	31/10/2023	4

Now, User 1 changes the priority of the assigned jobs as follows:

Job Code	Job Name	Assignment Start	Assignment End	Prioritize Job
J2	Job 2	09/10/2023	15/10/2023	1
J1	Job 1	01/10/2023	10/10/2023	2

Job Code	Job Name	Assignment Start	Assignment End	Prioritize Job
J4	Job 4	25/10/2023	31/10/2023	3
J3	Job 3	17/10/2023	25/10/2023	4

When User 1 will punch on 09/10/2023, the punch will be marked against Job 2 as it has been set at priority number 1. Similarly, when User 1 will punch on 25/10/2023, the punch will be marked against Job 4 as it is at a higher priority than Job 3.



*Make sure that the assigned jobs are prioritized correctly to ensure that the punches are in place.*

## Assign Users



*Assign Users is applicable for both Direct Door and Panel Door.*

### For Direct Doors


You can select and assign users to the door.

On the **Device configuration** page, click **Assign Users**. The Assign Users page appears.

- **Users:** Click the picklist. The **Picklist For All Users** pop-up appears.

Select the check boxes of the desired Users and click **OK**.

The grid displays the list of selected users.

If you wish to remove any assigned user, click the respective **Delete**  icon.

- Click **Save**.

### For Panel Doors

You can select and assign users to the door.

On the **Device configuration** page, click **Assign Users**. The Assign Users page appears.

Device Configuration

Assigned Users

Users:

Search:

ID	Name
1	1
sa1	sa1


Save

Note: Device(s) will be automatically retained which are part of any Access Rule(s) assigned to the User. For more details [Click here](#).

- **Users:** Click the picklist. The **Picklist For All Users** pop-up appears.

Select the check boxes of the desired Users and click **OK**.

The grid displays the list of selected users.

If you wish to remove any assigned user, click the respective **Delete**  icon.



*If you wish to delete a user which is assigned to this device and it is a part of any Access Rule assigned to that user, then such user and door/s will be retained.*

- If you wish to check the users assigned against any Access Rule, click the **Click here** link at the bottom of the page. The **Access Rule List** pop-up appears.

Access Rule List

Search:

User ID	Access Rule ID
w1	999

It displays the list of User ID along with the Access Rule ID against which they are assigned.

- Click **Save** to assign all the added users to this door.

## Identification Server

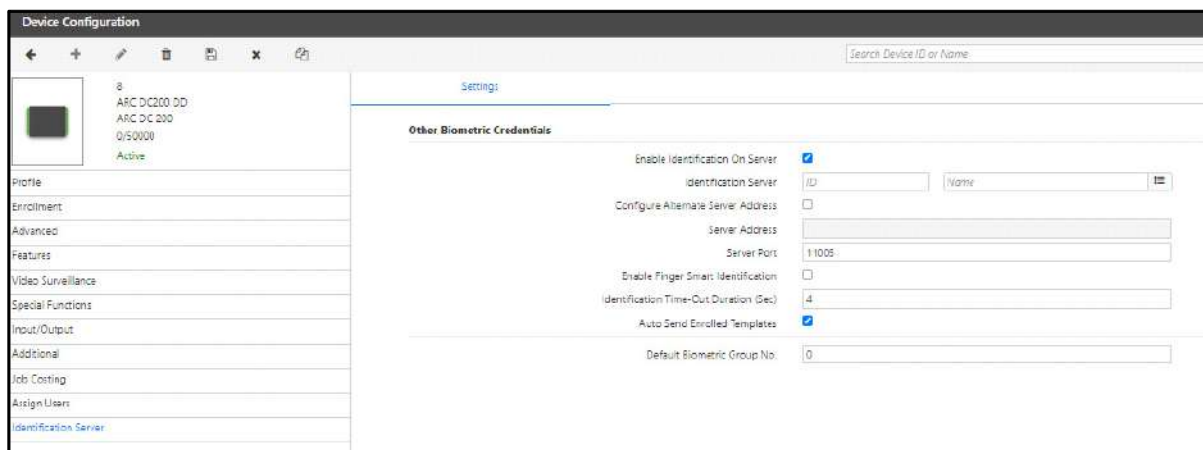
This tab enables the ARC DC200 to be assigned to a pre-defined Identification Server.

Device has a limited memory capacity for storage of templates so we need Identification Server which will store the more number of templates and respond to device when asked for identification.

For more information on Identification Servers, See *Admin> System Configuration> Identification Server Configuration*.

To access these configurations,

- On the **Device Configuration** page, select the **Identification Server** tab.



## Other Biometric Credentials

- **Enable Identification On Server:** Select the checkbox to enable the identification of finger templates on this device.
- **Identification Server:** Select an Identification Server using the picklist button to which the device is to be assigned. The configuration of server is done from **Admin module > System Configuration > Identification Server Configuration** and the Identification Service must be started from the service tray.
- **Configure Alternate Server Address:** Enable this checkbox to configure the alternate Server Address.
- **Server Address:** It displays the IP Address of the selected Identification Server.
- **Server Port:** Enter the server port number. The default port number is 11005.
- **Enable Finger Smart Identification:** For all other supported doors, select the checkbox to enable fingerprint templates identification through Identification Server.
- **Identification Time-Out Duration (Sec):** Specify the duration in seconds after which the fingerprint template identification will get time out.

**Example:** If 5 seconds is specified, then the identification server will try to identify the template till 5 seconds and if not found then it will show time-out to the user.

- **Auto Send Enrolled Templates:** Select the checkbox to enable any enrolled templates to be saved both on the COSEC database as well as saved locally on the configured Identification Server. This enables prompt identification of user on enrollment.
- **Default Biometric Group No.:** Specify the default biometric group number to be assigned to the device. It is a number allotted to a device to be assigned to the Identification Server. This enables the Identification Server to match the template against only those devices that belong to the corresponding biometric group. This reduces the false detection as well time to search template.

# ARC IO-800

COSEC ARC IO800 is an input and output controller to control multiple inputs and outputs of third party devices to perform multiple applications. ARC IO800 can be connected as **Direct Door** as well as **Panel Door**.



The Device Configuration page for ARC IO-800 appears as shown below.

Enter the MAC address of the door. The IP address will be displayed automatically once the device comes online in Monitor.

To add Devices automatically, go to Admin Module> System Configuration> Global Policy> Device. Enable the "Auto Add New Devices" check-box. Once the device is connected in network, it will come online in COSEC Monitor.



*The Monitor Service must be running while adding the device to COSEC.*



*ARC IO 800 (Direct door) is restricted to be added to the configured Device group even if the checkbox "Auto Assign New Device To Device Group". is enabled.*

To configure the parameters, you can:

- copy the parameters from another device, refer to ["Copy Parameters From"](#).
- OR
- can click each link to configure the parameters, refer to ["Selective Configuration"](#).

## Copy Parameters From

You can also copy the parameters from another device, if required.



*The Copy Configuration From option is applicable in Add (after you have selected the desired device type) as well as Edit mode of any added device.*

*If certain parameters are configured and Copy Parameters From option is clicked, then:*

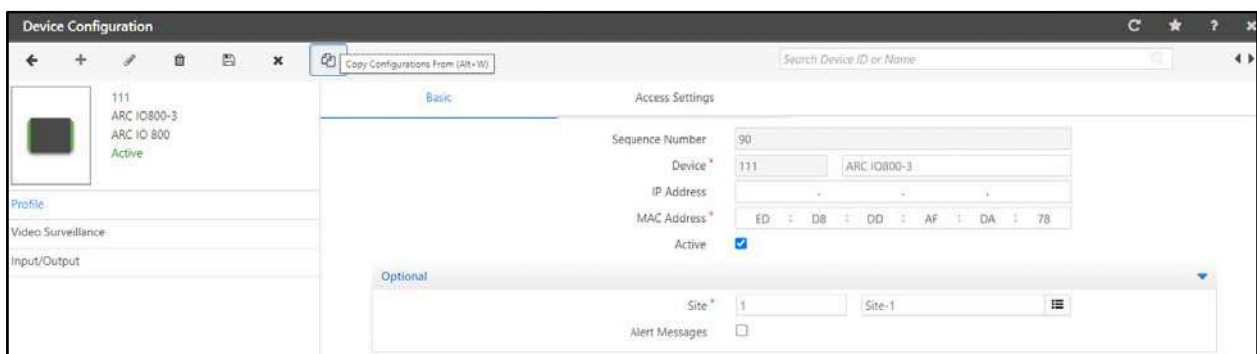
- *the value of the applicable parameters already configured will be over-written with the values as configured in the selected device.*
- *the values of other parameters that are configured will remain as they are.*

*If none of the parameters are configured and Copy Parameters From option is clicked, then*

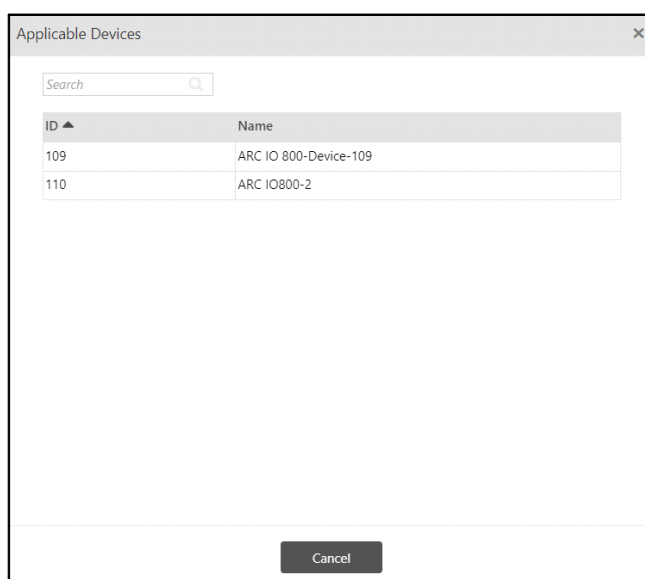
- *all the applicable parameter values will be copied from the selected device.*
- *the values of the other parameters will be their default values.*

*To know more about the applicable parameters that will be copied, refer to [“Copy Parameter Details”](#)*

To do so, click **Copy Configuration From** .



The **Applicable Devices** pop-up appears.





*The devices that appear in the Applicable Devices pop-up will be of the same family and device type. Let us understand this:*

- *In case of Direct Door, the pop-up will display other ARC IO800 Direct Doors only. For example, if you have direct door devices — ARCIO1, ARCIO2, Vega1 and Vega2, then this pop-up will display only ARC IO1 and ARC IO2.*
- *In case of Panel Door, the pop-up will display other ARC IO800 Panel Doors connected with the same Panel only. For example if you have two Panels — Panel1 and Panel2 connected. In Panel1 the connected Panel Doors are VegaPD1, VegaPD2, ARCPD1, ARCPD2. In Panel2 the Panel Doors connected are ARCPD3 and ARCPD4. Then, if you are adding the new ARGO Panel Door to Panel1, then this pop-up will display ARCPD1 and ARCPD2 only.*

Select the desired device from which you wish to copy the configurations.

OR

You can also search for the desired device using the Search option and then select the device.

A Warning pop-up appears. Click **Yes** to copy all the applicable parameters. A processing screen appears.



*Only applicable parameters will be copied. For details, refer to [“Copy Parameter Details”](#).*

*If during the processing screen, you click Cancel, then the entire copy process will be aborted.*

If all applicable parameters are copied successfully, then the Applicable Configurations are Successfully Copied message will be displayed.

If all applicable parameters are not copied successfully, then the Failed to copy. Please try again message will be displayed.

## Selective Configuration

To know more about configuring devices, click on the links for different tabs of Device configuration.

- [“Profile”](#)
- [“Video Surveillance”](#)
- [“Input/Output”](#)



## Profile

This section enables the user to set up the basic profile for any new device. Setting up a door profile involves defining basic parameters to set up any door controller device.

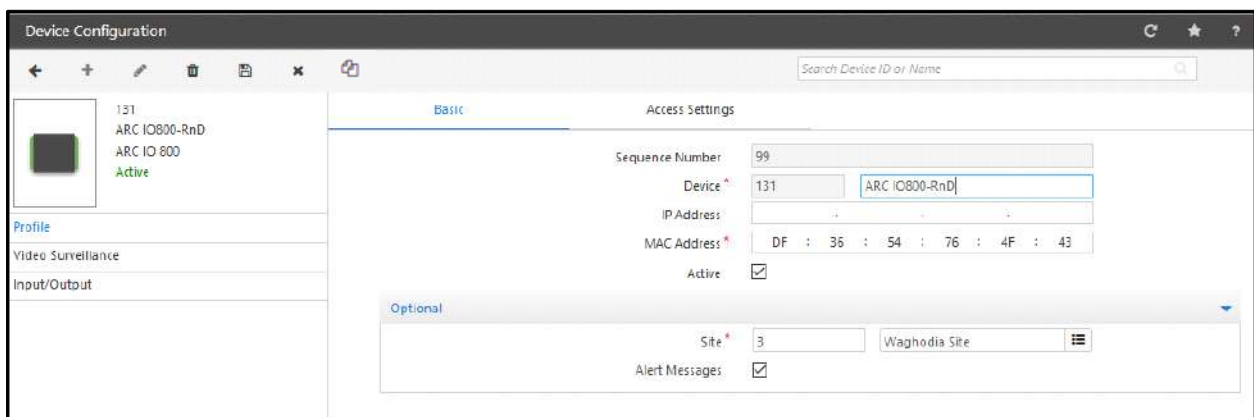
To do this, On the **Device Configuration** page, select the **Profile** tab. The Profile can be configured in the following sections:

- “Basic”
- “Access Settings”

## Basic

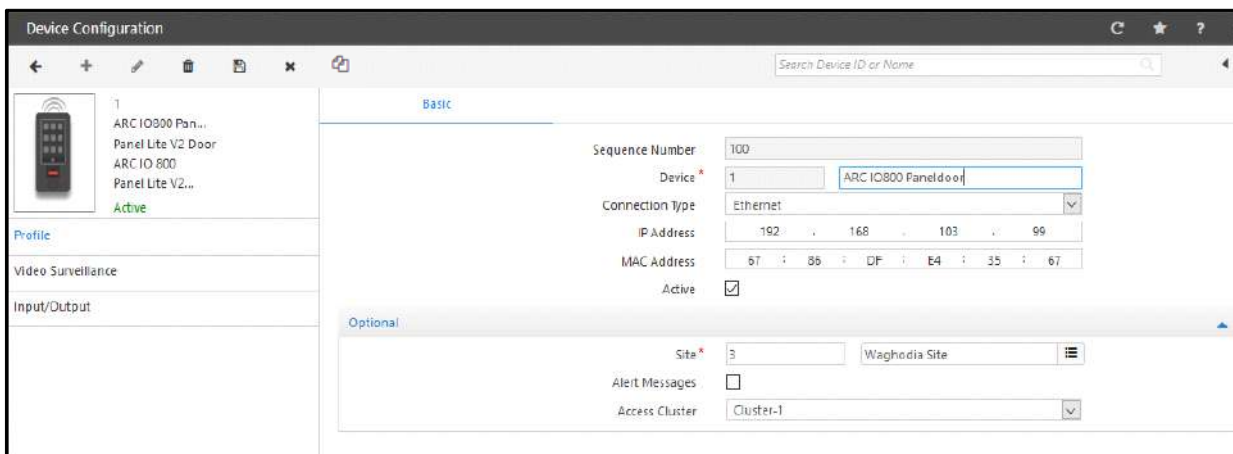
The **Basic** section for “ARC IO800 as Direct door and Panel door” is shown below:

### ARC IO800 as Direct Door



The screenshot shows the 'Device Configuration' window for an ARC IO800-RnD device. The 'Basic' tab is selected. The 'Sequence Number' is 99. The 'Device' field is 131. The 'IP Address' field is empty. The 'MAC Address' is DF : 35 : 54 : 76 : 4F : 43. The 'Active' checkbox is checked. The 'Optional' section shows 'Site' as 3 and 'Alert Messages' as checked.

### ARC IO800 as Panel Door



The screenshot shows the 'Device Configuration' window for an ARC IO800 Panel door device. The 'Basic' tab is selected. The 'Sequence Number' is 100. The 'Device' field is 1. The 'Connection Type' is Ethernet. The 'IP Address' is 192 : 168 : 103 : 99. The 'MAC Address' is 67 : 85 : DF : E4 : 35 : 67. The 'Active' checkbox is checked. The 'Optional' section shows 'Site' as 3, 'Alert Messages' as unchecked, and 'Access Cluster' as Cluster-1.

Configure the following options as required:

**Sequence Number** - This is a system generated sequence number for each new device.

**Device:** Specify the name of the door. The ID of the door is auto generated by the system.

**Connection Type** - Applicable only for Panel Doors. Specify the connection type as Ethernet or RS485.

**IP address/MAC address:** Enter the IP address and MAC address respectively of ARC IO800.



MAC address of door is required while manually adding the door to the COSEC Monitor. You can note the MAC address from the device web page.

**Active** - Check the box to activate the device on the network.



To add the Device automatically, go to Admin Module> System Configuration> Global Policy> Device. Enable the **“Auto Add New Devices”** checkbox.

The device will be added automatically but make sure you enable the **Active** checkbox in order to connect the device to the network. Once the device is connected to the network, it will come online in COSEC Monitor.

Click **Save** button to save the configuration.

The **Basic** page also has an **Optional** tab which provides optional configurations as shown below:

The screenshot shows the 'Optional' configuration tab. It contains three main settings: 'Site' with a value of '3' and a dropdown menu showing 'Waghodia Site'; 'Alert Messages' with an unchecked checkbox; and 'Access Cluster' with a dropdown menu showing 'Cluster-1'.

- **Site** - Select the site to which this door is to be assigned from the site picklist window. Site is created from Devices> Masters> Site.
- **Alert Messages** - Select this checkbox to enable the application to send alerts based on events from this door.
- **Access Cluster** (only for panel doors) - Assign an access cluster to the door by selecting from the drop down menu.



Access Cluster is configured while configuring Panel/Panel lite/Panel200.

## Access Settings

This section is available for direct door only. The **Access Settings** page appears as shown below:

The screenshot shows the 'Device Configuration' window with the 'Access Settings' tab selected. On the left, a sidebar shows the device '131' with details 'ARC IO800-RnD' and 'ARC IO 800', and a status 'Active'. The main area contains settings for 'Universal Time Zone' (set to '(GMT+05:30)Chennai, Kolkata, New Delhi, Mumbai'), 'Time Format' (set to '24 Hours'), 'Auto Synchronize with NTP' (unchecked), and 'Preferred NTP Server' (empty field).

- **Universal Time Zone** - Select the geographic time zone in which the DOOR will operate.
- **Time Format** - Specifies the time format to be displayed on Door Controller LCD display. The formats available are:
  - 24 Hours
  - 12 Hours

### Auto Synchronize with NTP

If Date and time is to be automatically synchronized as per the **Preferred NTP Server** (predefined or user-defined NTP server address) selected by user, then you must enable **Auto Synchronize With NTP** checkbox.

Independent of the mode set from server as Auto or Manual, the user can change the date and time settings from device webpage, which will be reflected on device display.

- When Auto Synchronization with NTP is disabled Preferred NTP Server field will be disabled.
- When Auto Synchronization with NTP is enabled,
  1. You can specify the Preferred NTP server of your choice. In this case device will first try to get Date and Time from that server address.  
 If it does not get Date and Time in three tries; device will check from pre-defined NTP servers.  
 If you have entered one of the three pre-defined NTP servers(ntp1.cs.wisc.edu , time.windows.com , time.nist.gov); then device will first check that server first.  
 If it receives updated Date and Time then Updated Date and Time will be reflected on device webpage and display screen.
  2. You can keep the Preferred NTP server as blank. In this case device will check for Date and Time from the first NTP server.
  3. If user has manually entered Date and Time from webpage or Device Menu then those values of Date and Time will be reflected on device webpage and display screen.

In the case of the **Manual** option the administrator can manually update the time on the Door with that of the system time as and when required.

## Video Surveillance

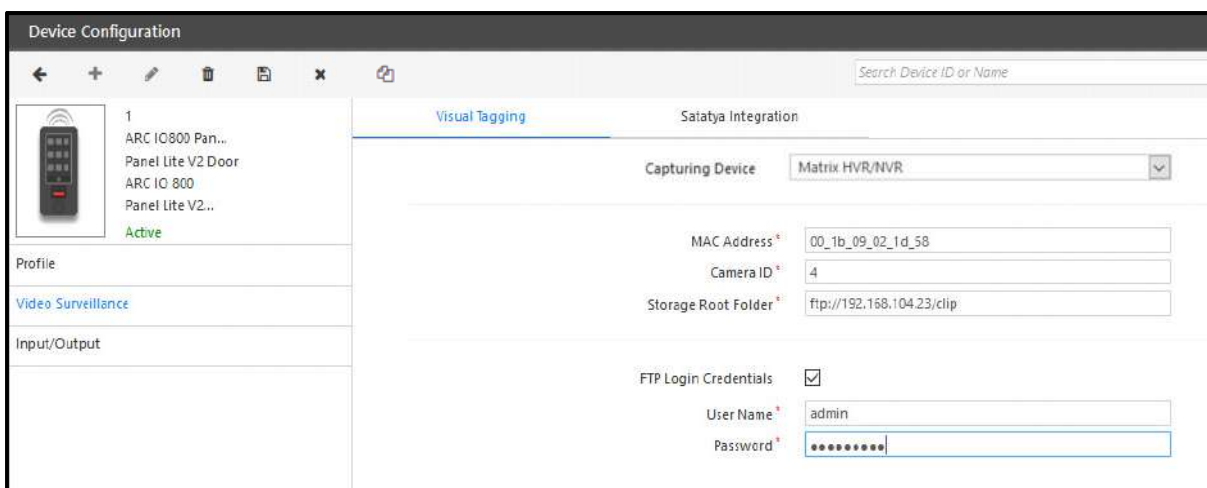
The Video Surveillance tab allows the user to configure parameters for video surveillance integration with the COSEC device. It is available in Basic License.

To access this, Go to **Device Configuration > Video Surveillance**.

- [“Visual Tagging”](#)
- [“Satatya Integration”](#)

## Visual Tagging

The COSEC application can interface with some supported hybrid and network video recording systems and grab images triggered by user events at the Doors. The **Visual Tagging** option enables the administrator to define the video recorder parameters. The **Visual Tagging** page appears as shown below.



To view the user events and related images, go to **Admin > Views/Logs > Event View**. To know more about viewing events, refer to “Event View”.

The following parameters are available for configuration:

- **Capturing Device** - Select the video recording device type from the dropdown menu as shown.

The compatible device types are:

- Matrix HVR/NVR
- Milestone



For more information on integration with **Milestone** devices, refer to [“Milestone Integration”](#).

- **MAC Address** - In the event of selecting the Matrix HVR/NVR, the administrator needs to specify the MAC address of the video recorder device using “\_” (underscore) as the separator.
- **Camera ID** - Specify the camera number or camera ID for IP cameras. For analog cameras specify the camera number.
- **Storage Root Folder** - Specify the Root folder path or FTP Path where the uploaded images will be saved.

- **FTP Login Credentials** - Check this box to activate FTP login credentials for authentication.
- **Username** - Specify the FTP server username.
- **Password** -Specify the FTP server password.



Some COSEC devices do not support all the network connection options.

## Satatya Integration

This functionality is available for configuration only when the Matrix HVR/NVR device type is selected as the **Capturing Device** (from *Visual Tagging*). It enables the configured COSEC devices to directly send commands to the SATATYA HVR/NVR devices as per the configuration on this page. The Satatya configuration page appears as shown below:

The screenshot shows the 'Device Configuration' window with the 'Satatya Integration' tab selected. The sidebar on the left lists devices: '1 ARCIO800 Pan...', 'Panel Lite V2 Door', 'ARCIO 800', and 'Panel Lite V2...', with the first device marked as 'Active'. The main configuration area includes the following fields:

- Active:** A checked checkbox.
- Network Connection:** A dropdown menu set to 'Ethernet'.
- IP Address:** A field showing '192 . 168 . 104 . 30'.
- Port Number:** A field showing '8000'.
- Name:** A text field containing 'ARCIO800HVR Integration'.
- Active:** A checked checkbox.
- Schedule:** Two time input fields showing '09:00' and '12:00'.
- Days:** A grid of checkboxes for days of the week: Sun, Mon, Tue, Wed, Thu, Fri, Sat, and Holiday. Tue, Wed, and Fri are checked.
- Event:** A dropdown menu set to 'Aux. Input 1'.
- Mode:** A dropdown menu set to 'Both'.
- Action:** A dropdown menu set to 'Mail Image'.
- E-mail ID:** A text field containing 'sheetalpandya2012@gmail.com'.
- Camera:** A 5x5 grid of checkboxes numbered 1 to 25. Box 8 is checked.

At the bottom right of the configuration area are 'Add' and 'Cancel' buttons.

- **Integration type-** Select the integration type from the options of Wired and Network. In wired integration, door is physically connected with Satatya Device. In Network integration, connection can be by ethernet, wireless or broadband depending upon the COSEC device support.
- **Active-** Check the box to activate the connection.
- **Network Connection-** Select the Network connection from the options of Ethernet, Broadband, Wireless.
- **IP Address-** Specify the IP address of HVR/NVR if device is connected with Ethernet.
- **Port Number-** Specify the port number of HVR/NVR
- **Name-**Specify a user friendly name for the integration function.
- **Active-** Check the Active box to enable the SATATYA integration functionality.
- **Schedule** - Specify a schedule for the function by specifying the start and the end time (*24 Hours format*) as well as checking the boxes against the applicable **days** of the week.

- **Event-** Select a COSEC event from the drop down list for which the resultant action is to be configured.
- **Mode-** Select the event mode from the options of Entry, Exit and Both from the drop down list wherever applicable.
- **Action-** Select the action for the Satatya device from the drop down list. The options available are:
  - Recording - Specify the duration in minutes.
  - Upload Image - This will be uploaded as per the ftp settings.
  - Video Pop-up - Specify the duration in seconds. The video pop up will be generated on the local client of Satatya device on the selected camera.
  - PTZ Preset - Specify the PTZ position number as defined on the SATATYA device.
  - Mail Image - Specify the email-ID.
- **Camera-** Select the relevant camera channels depending on the action selected.

**Example:** For action as Mail Image, the image of Camera 8 will be mailed to the mentioned Email ID.

The screenshot shows a configuration form with the following fields:

- Event:** Access Allowed (dropdown)
- Mode:** Both (dropdown)
- Action:** Mail Image (dropdown)
- E-mail ID \*:** sheetalpandya2012@gmail.com (text input)
- Camera \*:** A grid of checkboxes for cameras 1 through 24. Camera 8 is selected.

- Click the **Add** button to finish the process of linking the event to the action. The user may configure another event-action linkage if required.

Name	Event	Action	Start Time	End Time	Active	
ARCIO800HVR Integration	Aux. Input 1	Mail Image	09:00	12:00	Yes	

## Input/Output

The Input/Output (I/O) configuration of a system determines how the output or response of a system is influenced by the input applied on it. In case of the COSEC Access Control System, the I/O configuration should enable the system to monitor and trigger a specific response to any changes in door state or event occurrences at the door device. This change of door state or occurrence of events may be considered as an input while the response or action that is generated by the system on detection of this input, may be defined as the output.



1. This functionality cannot be fully accessed in the Edit mode for a selected device.
2. This functionality is available only with the Access Control add-on module license.

To access this, After selecting the device, Select **Device Configuration> Input Output**. The Input Output parameters can be set from the following sections:

- **“Configuration”**

- “Linking”
- “Time Triggered”

## Configuration

In ARC IO800 as Direct door- Configuration, Linking and Time Triggered sections are available. In ARC IO800-Panel200 Door- only Configuration section is available.

The **Configuration** section for **ARC IO800 - Direct Door** appears as shown below.

Device Configuration

6 ARC IO800-DD  
ARC IO 800  
Active

Profile  
Video Surveillance  
Input/Output

Configuration Linking Time Triggered

**Auxiliary Input**

Auxiliary Input Port	Enable	Supervised	Sense Type	Debounce Time (Sec)
Aux. Input 1	Disabled	No	Normally Open	5
Aux. Input 2	Disabled	No	Normally Open	5
Aux. Input 3	Disabled	No	Normally Open	5
Aux. Input 4	Disabled	No	Normally Open	5

1 - 4 of 8 records

**Auxiliary Output**

Auxiliary Output Port	Enable	Output Wait Time (Sec)
Aux. Output 1	Disabled	0
Aux. Output 2	Disabled	0
Aux. Output 3	Disabled	0
Aux. Output 4	Disabled	0

1 - 4 of 8 records

**Accept External IO Linking**

Enable ☐

The **Configuration** section for **ARC IO800 - Panel Door** appears as shown below.

Device Configuration

1 ARC IO800-PD  
Panel200 Door  
ARC IO 800  
Panel200-149  
Active

Profile  
Video Surveillance  
Input/Output

Configuration Linking Time Triggered

**Auxiliary Input**

Auxiliary Input Port	Enable	Supervised	Sense Type	Debounce Time (Sec)
Aux. Input 1	Disabled	No	Normally Open	5
Aux. Input 2	Disabled	No	Normally Open	5
Aux. Input 3	Disabled	No	Normally Open	5
Aux. Input 4	Disabled	No	Normally Open	5

1 - 4 of 8 records

**Auxiliary Output**

Auxiliary Output Port	Enable	Output Group	Name	Elevator ID	Name	Floor ID	Name
Aux. Output 1	Disabled	1	DC Aux Ports				
Aux. Output 2	Disabled	1	DC Aux Ports				
Aux. Output 3	Disabled	1	DC Aux Ports				
Aux. Output 4	Disabled	1	DC Aux Ports				

1 - 4 of 8 records

## Auxiliary Input

- Click the **Edit** button and select the **Enable** checkbox to enable the system for such two-state monitoring.
- Select the **Supervised** checkbox to enable the door for four-state monitoring where the door is also monitored for *door fault* and *door disconnection*. Specify the **Sense Type** as **Normally Closed** or **Normally Open**.
- **Debounce Time (Sec)** - Specify the Debounce time in seconds. Default value is 3 sec and range should be 0-99 sec. It defines the minimum time for which an input interface must be maintained in a given state

before the system reports it. For example, if a Normal door state is changed to Alarm, the state must remain in Alarm for five seconds before an alarm is generated.

- Click **OK** and **Save** to save the Auxiliary Input settings.

## Auxiliary Output

- Click the **Edit** button and select the **Enable** checkbox to enable Auxiliary Output (e.g. Fire Alarm) for the selected device. To set an additional waiting period before the Aux Output signal is sent, enter an **Output Wait Time (Sec)**.

## Direct Door

### Auxiliary Output

Auxiliary Output Port	Enable	Output Wait Time (Sec)	
Aux. Output 1	<input checked="" type="checkbox"/>	5	✓ ✕
Aux. Output 2	Disabled	0	
Aux. Output 3	Disabled	0	
Aux. Output 4	Disabled	0	

1 - 4 of 8 records

« < 1 2 > »

**Accept External IO Linking**

Enable ☒

- Click **OK** and **Save** to save the Auxiliary Output settings.
- Accept External IO Linking** - Select the Enable checkbox to enable device-to-device IO Linking i.e. input from one Direct Door can trigger output in another Direct Door.



**Accept External IO Linking** is applicable for Direct Door only.

## Panel Door

### Auxiliary Output

Auxiliary Output Port	Enable	Output Group	Name	Elevator ID	Name	Floor ID	Name	
Aux. Output 1	Disabled	1	DC Aux Ports	1	Elevator1	1	Ground Floor	
Aux. Output 2	Disabled	1	DC Aux Ports	1	Elevator1	3	Telecom Floor	
Aux. Output 3	Disabled	1	DC Aux Ports	2	Elevator2	2	Surveillance Fl	
Aux. Output 4	Disabled	1	DC Aux Ports					

1 - 4 of 8 records

« < 1 2 > »

The Auxiliary Output ports are mapped with floors of same or different Elevators as shown above.

If multiple floors are mapped with one Auxiliary Output port; then one floor mapping will be shown in Floor ID- Name column and other mappings will be shown on hovering over Info icon.

**Example:** Ground Floor and Canteen Floor of Elevator1 are mapped with Aux Output1 so the Floor column shows Ground Floor and Info icon shows Canteen Floor as shown below.



Auxiliary Output							
Auxiliary Output Port	Enable	Output Group	Name	Elevator ID	Name	Floor ID	Name
Aux. Output 1	Disabled	1	DC Aux Ports	1	Elevator1	1	Ground Floor
Aux. Output 2	Disabled	1	DC Aux Ports	1	Elevator1	3	Telecom Floor
Aux. Output 3	Disabled	1	DC Aux Ports	2	1-Elevator1 : 2-Canteen Floor	2	Surveillance FI
Aux. Output 4	Disabled	1	DC Aux Ports				

1 - 4 of 8 records



1. If the Auxiliary Output port is not mapped with any floor; then Elevator ID= Name and Floor ID-Name will be blank.

2. If Auxiliary Output port is mapped with more than 1 floors of same Elevator; then Floor No.- Name will be shown as the first entry data as per Floor No.

3. If Auxiliary Output port is mapped with more than 1 floors of different Elevator; then Elevator ID - Name will be shown as the first entry data as per Elevator ID and display its corresponding floor ID - Name.

## Linking



This section is available in Direct Door only.

The **Linking** section appears as shown below.

Device Configuration

131

ARC IO 800-RnD

ARC IO 800

Active

Profile

Video Surveillance

Input/Output

Configuration

Linking

Time Triggered

Search

Name	Active	Input	Output	Output Type	Pulse Time(Sec)	Reset Link	Reset Time
Emergency Door	<input checked="" type="checkbox"/>	Aux. Input 1	Aux. Output 1	Latch		<input type="checkbox"/>	00:00

The COSEC application supports the Input/Output Linking feature to activate an output port based on a trigger received from an input port on the same Direct Door. This option enables the administrator to define how an event or events (input port) will trigger an output on the selected door.

Select a Input-Output linking row or click edit button.

- **Name** - Specify a name for the new I/O linking program to be defined.
- **Active** - Select this checkbox to activate this linking program.
- **Input/Output-** Select the **Auxiliary Input** and **Auxiliary Output** for which the IO link is to be set.

- **Output Type** - Specify the appropriate type of output from the following four options available in the drop down list:
  - Pulse: With this type of output, the user needs to define the Pulse time in seconds.
  - Interlock: With this option, the output follows the input. The relay output is triggered as long as the input is activated after which it returns to normal state.
  - Latch: With this option, it is denoted that the relay output will be in an energized condition for infinite period and needs to be reset manually.
  - Toggle: With this option, the output group toggles its state whenever an input group is activated.
- **Pulse Time (sec)** - For a *Pulse* output type, specify the pulse duration in seconds.
- **Reset Link**- Select this checkbox to reset the link automatically after a defined time period.
- **Reset Time**- Enter the time period in hh:mm format at which the link will get reset automatically. Suppose, an IO Link gets activated on 21/04/2017 at 15:00. And Reset Time is set as 18:00. When Device Time is 18:00 then that IO link will get reset.
- Click the **OK** button and **Save** the configuration.

## Time Triggered

On the **Input Output** page, select the **Time Triggered** section as shown.

The screenshot shows the 'Time Triggered' configuration window. The 'Days' dropdown menu is open, showing a list of days with green checkmarks: Sun, Mon, Tue, Wed, Thu, Fri, Sat, and Holiday. The table below shows a single row for 'Siren Activate' with 'Active' checked, 'Time' set to '00:00', 'Duration(Sec)' set to '10', 'Days' set to 'Select', and 'Output' set to 'Aux O/P'.

Function Name	Active	Time	Duration(Sec)	Days	Output
Siren Activate	<input checked="" type="checkbox"/>	00:00	10	Select	Aux O/P

This functionality enables the user to control the activity of an Output without manual intervention. The time triggered functions are used for activating events like door unlock and siren activation that are set as per the start time and for the configured time duration. This functionality is designed to energize outputs for predefined periods at the configured time. The COSEC access control system supports up to 20 Time Triggered functions on a Direct Door.

Search Device ID or Name

Configuration

Linking

Time Triggered

Search

Function Name ▲	Active	Time	Duration(Sec)	Days	Output	
Siren Activate	Yes	00:00	10	Su Mo Tu We Th Fr Sa Ph	Aux O/P	✎ 🗑

# PATH Door

Compact, robust and cost-effective PATH series door controllers; '**PATH V1**' and '**PATH V2**' assure reliable and long term performance as at the building gates and doors for Access Control application. PATH Doors can be connected as **Direct Door** as well as **Panel Door**.

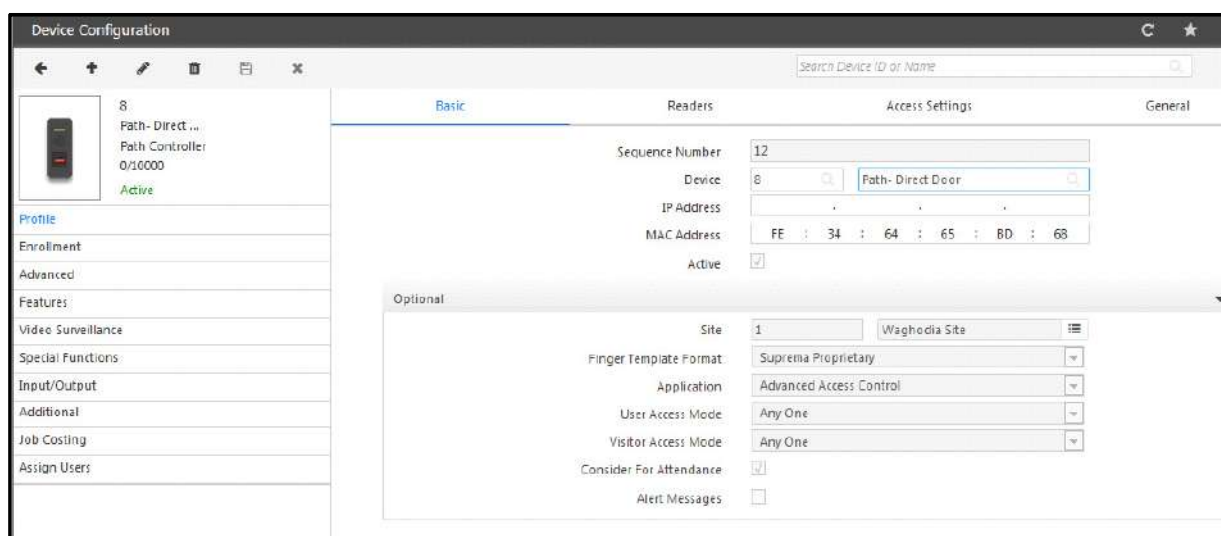


*The Configuration of PATH Controller and PATH V2 is similar. In this manual; configuration of PATH Controller (V1) is explained for reference.*

*The difference between PATH V1 and PATH V2 is the number of 'user capacity' and 'event storage'. PATH V1 supports 10,000 storage capacity and PATH V2 supports 50,000 user storage capacity. Also PATH V2 supports the Wi-fi as well as Bluetooth connectivity.*

*In addition, the PATH V1 contains PIC32 processor whereas PATH V2 runs with the AM3352 processor.*

The Device Configuration for Path Controller V1 appears as shown below.



The screenshot shows the 'Device Configuration' window for a 'Path- Direct Door' controller. The interface includes a sidebar with navigation options like Profile, Enrollment, Advanced, Features, Video Surveillance, Special Functions, Input/Output, Additional, Job Costing, and Assign Users. The main area is divided into tabs: Basic, Readers, Access Settings, and General. The 'Basic' tab is active, showing fields for Sequence Number (12), Device (8), IP Address, and MAC Address (FE : 34 : 64 : 65 : BD : 68). There is an 'Optional' section with fields for Site (1), Finger Template Format (Suprema Proprietary), Application (Advanced Access Control), User Access Mode (Any One), Visitor Access Mode (Any One), Consider For Attendance (checked), and Alert Messages (unchecked).

Enter the MAC address of the door. The IP address will be displayed automatically once the device comes online in Monitor.

To add devices automatically, click **Admin Module > System Configuration > Global Policy > Device**. Select the **Auto Add New Devices** check box. Once the device is connected in the network, it comes online in COSEC Monitor.



*While adding the device to COSEC Server, make sure the COSEC Monitor Service is running.*

To configure the parameters, you can:

- copy the parameters from another device, refer to [“Copy Parameters From”](#) (this is applicable to PATH V2 Direct Door/Panel Door only).
- OR**
- can click each link to configure the parameters, refer to [“Selective Configuration”](#).

## Copy Parameters From

You can also copy the parameters from another device, if required.



*The Copy Configuration From option is applicable in Add (after you have selected the desired device type) as well as Edit mode of any added device. It is applicable to PATH V2 (Direct Door and Panel Door) only.*

*If certain parameters are configured and Copy Parameters From option is clicked, then:*

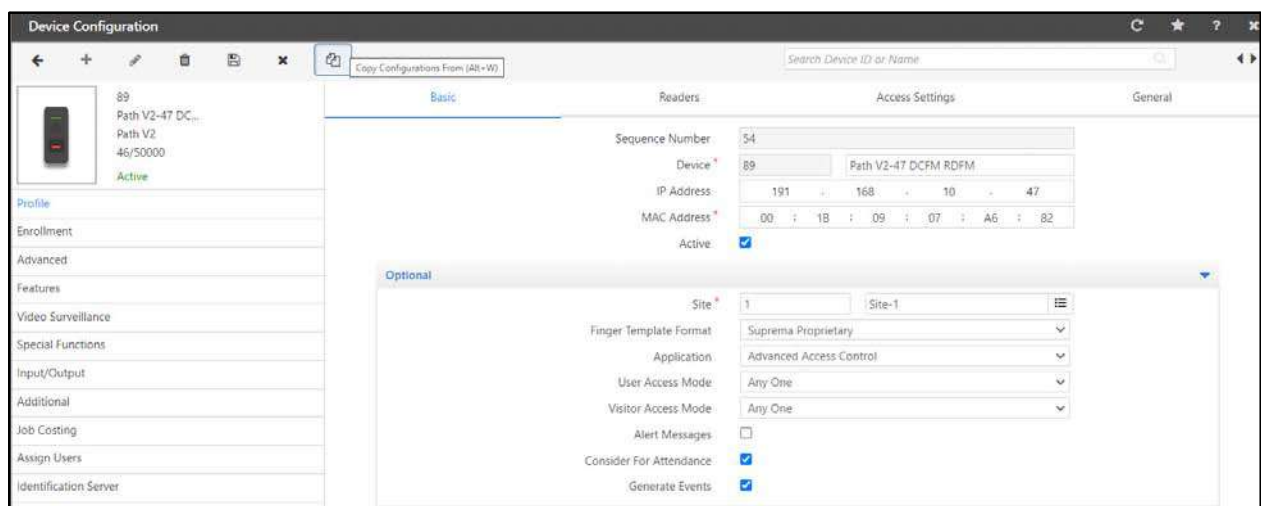
- the value of the applicable parameters already configured will be over-written with the values as configured in the selected device.
- the values of other parameters that are configured will remain as they are.

*If none of the parameters are configured and Copy Parameters From option is clicked, then*

- all the applicable parameter values will be copied from the selected device.
- the values of the other parameters will be their default values.

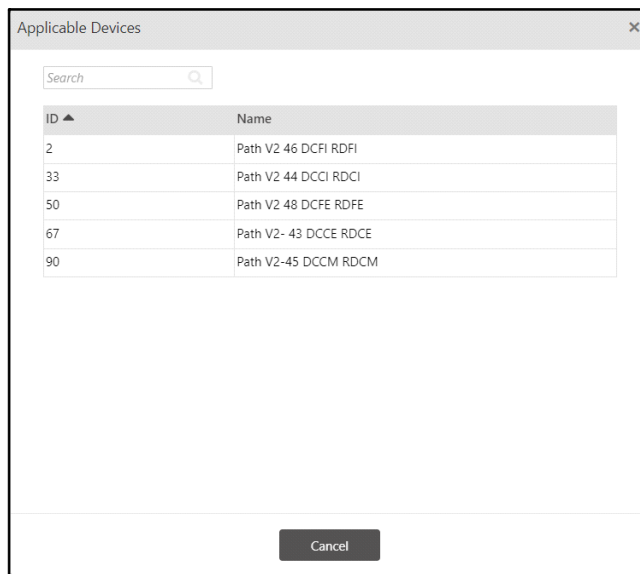
*To know more about the applicable parameters that will be copied, refer to [“Copy Parameter Details”](#)*

To do so, click **Copy Configuration From** .



The screenshot shows the 'Device Configuration' window. On the left, there is a sidebar with a list of configuration categories: Profile, Enrollment, Advanced, Features, Video Surveillance, Special Functions, Input/Output, Additional, Job Costing, Assign Users, and Identification Server. The main area is divided into tabs: Basic, Readers, Access Settings, and General. The 'Basic' tab is currently selected. Within the 'Basic' tab, there are fields for 'Sequence Number' (54), 'Device' (89), 'Path V2-47 DCFM RDPM', 'IP Address' (191.168.10.47), 'MAC Address' (00:1B:09:07:A6:82), and 'Active' (checked). Below these fields is an 'Optional' section with a 'Site' dropdown (set to '1'), 'Finger Template Format' (Suprema Proprietary), 'Application' (Advanced Access Control), 'User Access Mode' (Any One), 'Visitor Access Mode' (Any One), 'Alert Messages' (unchecked), 'Consider For Attendance' (checked), and 'Generate Events' (checked).

The **Applicable Devices** pop-up appears.



*The devices that appear in the Applicable Devices pop-up will be of the same family and device type. Let us understand this:*

- *In case of Direct Door, the pop-up will display other PATH V2 Direct Doors only. For example, if you have direct door devices — PATH1, PATH2, Vega1 and Vega2, then this pop-up will display only PATH1 and PATH2.*
- *In case of Panel Door, the pop-up will display other Vega Panel Doors connected with the same Panel only. For example if you have two Panels — Panel1 and Panel2 connected. In Panel1 the connected Panel Doors are VegaPD1, VegaPD2, PATHPD1, PATHPD2. In Panel2 the Panel Doors connected are PATHPD3 and PATHPD4. Then, if you are adding the new PATH Panel Door to Panel1, then this pop-up will display PATHPD1 PD1 and PATHPD2 only.*

Select the desired device from which you wish to copy the configurations.

OR

You can also search for the desired device using the Search option and then select the device.

A Warning pop-up appears. Click **Yes** to copy all the applicable parameters. A processing screen appears.



*Only applicable parameters will be copied. For details, refer to [“Copy Parameter Details”](#).*

*If during the processing screen, you click Cancel, then the entire copy process will be aborted.*

If all applicable parameters are copied successfully, then the Applicable Configurations are Successfully Copied message will be displayed.

If all applicable parameters are not copied successfully, then the Failed to copy. Please try again message will be displayed.

## Selective Configuration

To know more about configuring devices, click on the links for different tabs of Device configuration.

- [\*“Profile”\*](#)
- [\*“Enrollment”\*](#)
- [\*“Advanced”\*](#)
- [\*“Features”\*](#)
- [\*“Video Surveillance”\*](#)
- [\*“Special Functions”\*](#)
- [\*“Input/Output”\*](#)
- [\*“Additional”\*](#)
- [\*“Job Costing”\*](#)
- [\*“Assign Users”\*](#)
- [\*“Identification Server”\*](#)

## Profile

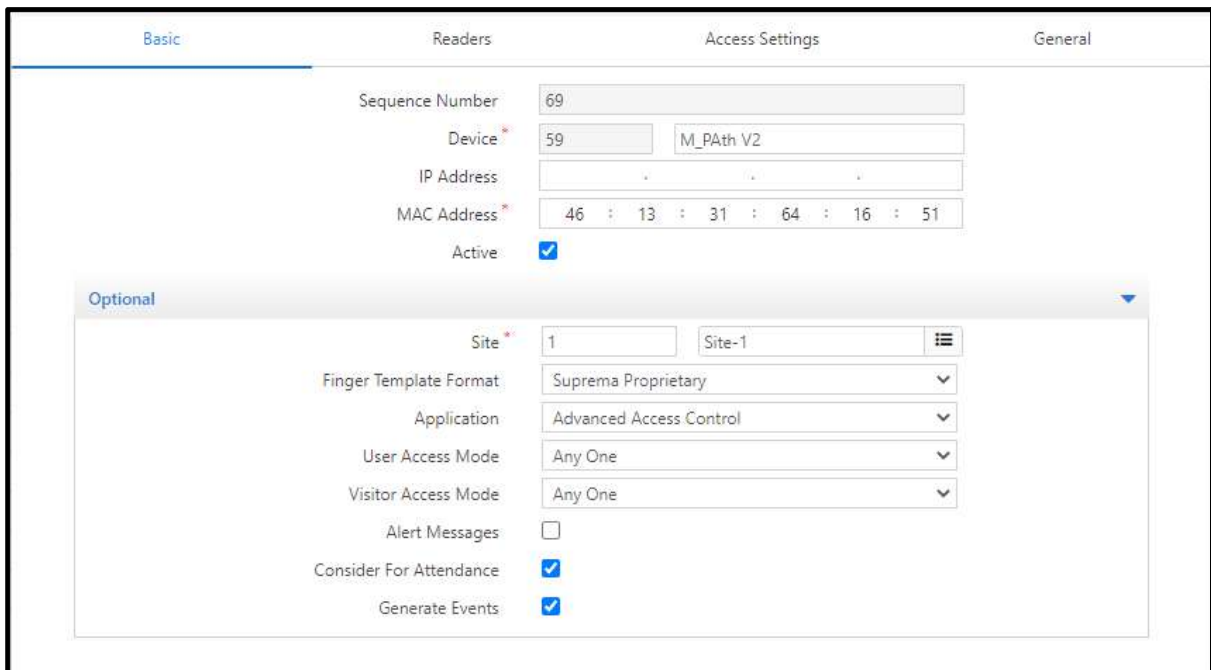
This section enables the user to set up the basic profile for any new device. Setting up a door profile involves defining basic parameters to set up any door controller device.

To do this, select **Device Configuration> Profile**. The Profile can be configured in the following sections:

- “Basic”
- “Readers”
- “Access Settings”
- “General”

## Basic

The **Basic** section for PATH as Direct door is shown below:



The screenshot displays the 'Basic' configuration tab for a door profile. The main configuration area includes the following fields:

- Sequence Number:** 69
- Device:** 59
- IP Address:** (empty field)
- MAC Address:** 46 : 13 : 31 : 64 : 16 : 51
- Active:** ☒

Below the main fields is an 'Optional' section, which is currently expanded. It contains the following fields:

- Site:** 1
- Finger Template Format:** Suprema Proprietary
- Application:** Advanced Access Control
- User Access Mode:** Any One
- Visitor Access Mode:** Any One
- Alert Messages:** ☐
- Consider For Attendance:** ☒
- Generate Events:** ☒

Configure the following options as required:

- **Sequence Number** - This is a system generated sequence number for each new device.
- **Device**- Specify a name that can be assigned to the door. The Door ID is auto-generated by the system.
- **Connection Type** - Applicable only for Panel Doors. Specify the connection type as **Ethernet** or **RS485**.
- **IP Address** - This is the IP address assigned to the door. Once the device connection is established, this field will automatically display the door IP address.
- **MAC Address** - Specify the MAC Address of the door.



MAC address of door is required while manually adding the door to the COSEC Monitor. Note the MAC address from the device when it is powered on.



- **Active** - Check the box to activate the device on the network.



To add the Device automatically, go to Admin Module> System Configuration> Global Policy> Device. Enable the “**Auto Add New Devices**” checkbox.

The device will be added automatically but make sure you enable the **Active** checkbox in order to connect the device to the network. Once the device is connected to the network, it will come online in COSEC Monitor.

For PATH as Direct door, the **Optional** tab shows the following configuration.

- **Site** - Select the site to which this door is to be assigned from the site picklist window. Site is created from Devices> Masters> Site.
- **Finger Template Format** - Select the format as Suprema Proprietary or Suprema ISO according to which the templates will be enrolled. For globally setting the template format, you can set from Global policy.
- **Application** - Select the application type for which the device is to be used. The options are **Basic Access Control**, **Advanced Access Control** or **Enrollment**.



The available license is ACS and Application is set to Basic Access Control. If this ACS voucher exhausts, then while dispatching Basic Configuration of device, application type will be sent as ‘Advance Access Control’.

- **User/Visitor Access Mode** - Defines the type and combination of credentials required to identify and validate a user/visitor at the Door Controller. Select the appropriate credential combination from the drop down list.

The options available are:

- Any one
- Card
- Card + Biometrics
- Card + Biometrics + PIN
- Card + PIN
- Biometrics
- Biometrics + PIN
- Biometrics then Card
- Card then Biometric
- **Consider for Attendance** - Select this checkbox if the events sent by this door are to be considered for Time and Attendance data processing. If this option is disabled, then the system would consider all events coming from the door as access control events.

- **Alert Messages** - Select this checkbox to enable the application to send alerts based on events from this door.
- **Generate Events:** This check-box is enabled by default. You can disable the check-box if the server is not required to receive any events from the respective devices.



*'Generate Events' option is available only for PATH V2 variants.*

For PATH as Panel door, the **Optional** tab shows the following configuration.

The screenshot shows the 'Optional' configuration window. It contains the following fields and values:

- Site: 1
- Waghodia Site: (selected from a dropdown menu)
- Consider For Attendance: ☒
- Alert Messages: ☐
- Access Zone: Zone-1 (selected from a dropdown menu)
- Access Cluster: Cluster-1 (selected from a dropdown menu)
- Door Group: None (selected from a dropdown menu)
- Auto IP Assignment: ☒

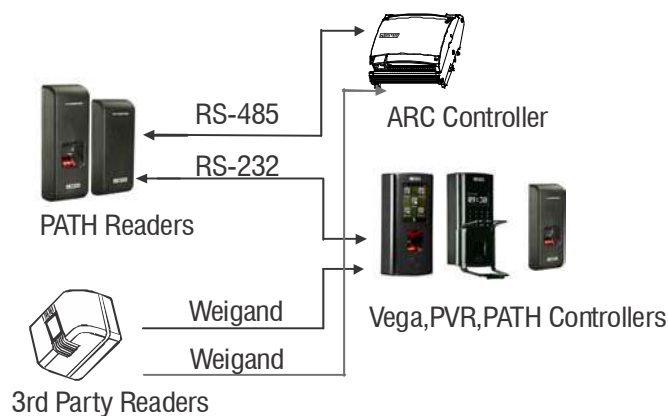
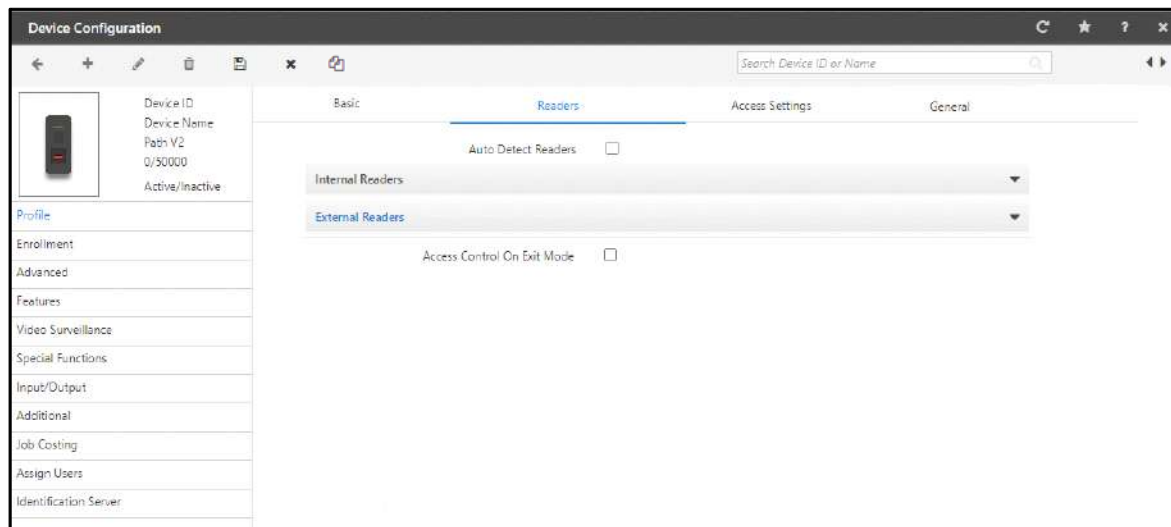
- **Access Zone** (only for panel doors) - Assign an access zone to the door by selecting from the drop down menu.
- **Access Cluster** (only for panel doors) - Assign an access cluster to the door by selecting from the drop down menu.
- **Door Group:** Door Group drop down includes list of all configured Door groups on corresponding panel. An additional option as 'None' is available and selected by default.
- **Auto IP Assignment:** There is option where panel door can be assigned its IP from device webpage. To enable this check the Auto IP Assignment box.



*Access Zone and Access Cluster are configured while configuring Panel200.*

## Readers

Readers are important hardware components in a biometric door device. They may be internal or external. This section enables the administrator to configure both internal and external readers for a door as shown.



The following parameters are available for configuration:

- **Auto Detect Readers** (for direct doors only) - Select this checkbox to enable auto detection of Readers on a door controller connected to the server.

## Internal Readers

This option allows the configuration of the Internal Reader for the selected door.



*Mode, Card Reader Type and Card Format are applicable for both Direct Door and Panel Door.*


- **Mode:** Select the Mode as **Entry** or **Exit** from the drop down list.
- **Card Reader Type;** Select the Card Reader Type from the following options:
  - EM Prox Reader
  - HID Prox Reader
  - MiFare Reader
  - HID iClass-U Reader
  - HID iClass-W Reader
- **Card Format:** Only Single card format is applicable to PATH as direct door. The default card format is applied to PATH as direct door. To assign another card format for internal readers of the device; delete the default format and select another format from the picklist. To know more about Card Formatting, refer ["Card Formats"](#).

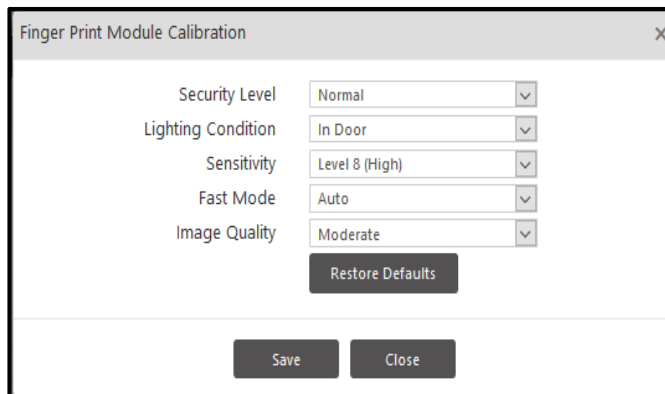
### Multiple Card Format

For PATH as panel door; you can assign multiple card format. To assign multiple card formats to device click on **Add** button. Then click the picklist to select the card format. And click **OK** to save the format.

Similarly you can add maximum 5 card formats. When the card format is saved, the Configurable bits of that format as configured from Masters> Card format will be displayed here. Multiple Card format configurations will be dispatched to door separated by '**Format ID**' that is 'Member No.' along with all other format related parameters.

- Select the **Finger Reader Type** as **Finger Reader**.

Click the **FP Reader Configuration**  button to set the **Security Level**, **Lighting Condition**, **Sensitivity**, **Fast Mode**, **Image Quality** and **Restore Defaults** for the selected FP Reader as shown.



### Finger Print Module Calibration

- **Security Level:** Security level specifies FAR (False Acceptance Ratio). Since FAR and FRR (False Rejection Ratio) is in inverse proportion to each other, FRR will increase with higher security levels.

For regular Time-Attendance system “**Normal**” level can be selected. For high security areas requiring complete or maximum matching of template, “**Highly Secure**” level must be selected. For approximate matching of template, “**Secure**” level can be selected.

- **Lighting Condition:** Optical sensors are sensitive to lighting condition. With this parameter, users can tune optical sensors to be adapted for their lighting environment. Select the In Door or Out Door option based on the device location.
- **Sensitivity:** Specifies sensor sensitivity to detect a finger. On high sensitivity, the module will accept the finger input more easily. Level 8 has the highest sensitivity.
- **Fast Mode:** Fast Mode parameter can be used to shorten the matching time with a little degradation of authentication performance. In typical cases, Fast Mode 1 is 2 to 3 times faster than Normal mode while Fast Mode 5 is 6 to 7 times faster than Normal mode. There is also an Auto mode.
- **Image Quality:** When a fingerprint is scanned, the module will check if the quality of the image is adequate for further processing. Image quality parameter specifies the strictness of this quality check. Strongest option might lead to higher number of finger rejections during the enrollment process.



*Good quality of enrollment (around 70-75% quality) is recommended for proper identification of enrolled templates.*

- Click on the **Restore Defaults** button to return the field values for this page to default values if needed.



*Advertise Bluetooth, Bluetooth Name and Bluetooth Range are applicable for both Direct Door and Panel Door.*

- **Advertise Bluetooth:** Select this checkbox to enable Bluetooth of the device by which the device will be visible to others. Then configure the following parameters.

- **Bluetooth Name:** By default, if the Device Name is configured then it will be displayed here along with the Mode. The prefix will be the Device Name and the suffix will be -IN or -OUT as per the set Mode.

If required, you can configure the bluetooth name as per your requirement. The Bluetooth Name can be a maximum of 10 characters.



*Custom option for Bluetooth Range is applicable for PATH V2 only.*

- **Bluetooth Range:** The system supports different ranges of bluetooth using which the users can mark their attendance. You can set the desired range to control the boundary for marking the attendance.

Select the Bluetooth Range as — Short (1m-2m), Medium (5m-7m), Long (>8m) or Custom.

- **Custom Bluetooth Range (dBm):** If you select **Custom** option for Bluetooth Range, enter the Bluetooth range manually or set the range using the slider. Drag the slider towards the left to decrease the value or drag the slider to the right to increase the value.

Click **Save** to save all the configurations.

## External Readers

This option allows the configuration of the External Reader for the selected door.



*Mode, External Reader Type, Card Format and Exit Switch are applicable for both Panel Door and Direct Door.*

Member No	Card Format	Configurable Bits
1	Default Format	0

- **Mode:** Select the Mode as **Entry** or **Exit** from the drop down list.
- **External Reader Type:** Select the desired type of External Reader from the drop-down list.
- **Card Format:** Select a card format to be applicable for external readers of the device. See Internal Readers section for details.
- **Exit Switch:** Select this checkbox to enable the use of **Exit Switch**.



*User Access Mode, Visitor Access Mode and Access Control on Exit Mode is applicable for Direct Door only.*

- **User/ Visitor Access Mode** (not for Panel Doors): Select the desired user/ visitor access mode applicable for external readers.



*Configure Bluetooth From Server, Advertise Bluetooth, Bluetooth Name and Bluetooth Range are applicable for both Direct Door and Panel Door.*

- **Configure Bluetooth from Server:** When you select **External Reader Type** as — CB U Reader, ATOM RD300, ATOM RD200 or ATOM RD100, select **Configure Bluetooth from Server** checkbox to enable Bluetooth feature for the mentioned external readers.

Once you enable **Configure Bluetooth from Server**, configure the following Bluetooth parameters:

- **Advertise Bluetooth:** Select this checkbox to enable Bluetooth of the PATH device by which the device will be visible to others. Then configure the following parameters
- **Bluetooth Name:** By default, if the Device Name is configured then it will be displayed here along with the Mode. The prefix will be the Device Name and the suffix will be -IN or -OUT as per the set Mode.

If required, you can configure the bluetooth name as per your requirement.

The Bluetooth Name can be a maximum of 20 characters.

- **Bluetooth Range:** The system supports different ranges of bluetooth using which the users can mark their attendance. You can set the desired range to control the boundary for marking the attendance.

Select the Bluetooth Range as — Short (1m-2m), Medium (5m-7m), Long (>8m) or Custom. If you select the **External Reader Type** option as ATOM RD200/300, then only you can select the **Custom** option for Bluetooth Range.

- **Custom Bluetooth Range (dBm):** If you select **Custom** option for Bluetooth Range, enter the Bluetooth range manually or set the range using the slider. Drag the slider towards the left to decrease the value or drag the slider to the right to increase the value.



If Auto Detect Reader is enabled, then External Reader Bluetooth parameters will not be visible.

- **Access Control On Exit Mode:** Select this check box to enable the checking of the following access control policies on door when the external reader is in the 'exit' mode.
  - User enabled
  - User validity
  - Blocked user
  - Time Based Access Check
  - ASC
  - User Access Group

When this parameter is unchecked, all the following access control features will be checked on door (which are applicable and configured).

- User enabled
- Blocked user
- Time Based Access Check
- ASC
- User Access Group
- Deadman
- Door application mode
- Use count
- Mantrap
- Anti-pass back
- Panel Route access
- Smart card based route access
- 2-person
- Access mode
- Occupancy control
- Visitor escort rule

Click **Save** to save all the configurations.

## Access Settings

This section is available for direct doors. The **Access Settings** page appears as shown below.

The screenshot displays the 'Device Configuration' window with the 'Access Settings' tab selected. The left sidebar shows a list of configuration categories: Profile, Enrollment, Advanced, Features, Video Surveillance, Special Functions, Input/Output, Additional, Job Costing, Assign Users, and Identification Server. The main content area is divided into sections for 'Basic', 'Readers', 'Access Settings', and 'General'. The 'Access Settings' section includes the following fields:

- Universal Time Zone: (GMT+05:30)Chennai, Kolkata, New Delhi, Mumbai
- Time Format: 24 Hours
- Auto Synchronize with NTP: ☐
- Preferred NTP Server:
- Working Days: ☒ Sun, ☒ Mon, ☒ Tue, ☒ Wed, ☒ Thu, ☒ Fri, ☒ Sat, ☒ Holiday
- Working Hours (HH:MM): 00:00 to 23:59
- Holiday Schedule 1: 1, Schedule 1
- Holiday Schedule 2: 2, Schedule 2
- Holiday Schedule 3: 3, Schedule 3
- Holiday Schedule 4: 4, Schedule 4
- Device Access Schedule: Select



- **Universal Time Zone** - Select the geographic time zone in which the DOOR will operate.
- **Time Format** - Specifies the time format to be displayed on Door Controller LCD display. The formats available are:
  - 24 Hours
  - 12 Hours

Select the relevant option from the drop down list as per the site requirements.

### Auto Synchronize with NTP

If Date and time is to be automatically synchronized as per the **Preferred NTP Server** (predefined or user-defined NTP server address) selected by user, then you must enable **Auto Synchronize With NTP** checkbox.

Independent of the mode set from server as Auto or Manual, the user can change the date and time settings from device webpage, which will be reflected on device display.

- When Auto Synchronization with NTP is disabled Preferred NTP Server field will be disabled.
- When Auto Synchronization with NTP is enabled,
  1. You can specify the Preferred NTP server of your choice. In this case device will first try to get Date and Time from that server address.  
If it does not get Date and Time in three tries; device will check from pre-defined NTP servers.  
If you have entered one of the three pre-defined NTP servers(ntp1.cs.wisc.edu , time.windows.com , time.nist.gov); then device will first check that server first.  
If it receives updated Date and Time then Updated Date and Time will be reflected on device webpage and display screen.
  2. You can keep the Preferred NTP server as blank. In this case device will check for Date and Time from the first NTP server.
  3. If user has manually entered Date and Time from webpage or Device Menu then those values of Date and Time will be reflected on device webpage and display screen.

In the case of the **Manual** option the administrator can manually update the time on the Door with that of the system time as and when required. This can be accomplished from the control application.

- **Working Days** - Specify the days on which the default working hours should be applicable. Check the relevant boxes to specify the active days.
- **Working Hours (HH:MM)** - Define the default working hours in HH:MM format.
- **Holiday Schedule** - This section allows the administrator to assign up to four holiday schedules to the device by using the Holiday Schedule pick-list.



*If the same holiday schedule is configured for a user and for the door controller on which the user is assigned, then the user's attendance marking on this device, on any of the scheduled holidays will always be marked as a holiday.*



*Device Access Schedule is applicable for PATH V2 only.*

- **Device Access Schedule:** All the Access Schedules created from the “Access Schedules” page appear in the drop-down list. By default, the Access Schedule, if assigned from the Access Schedule page appears here. If you wish to change the Access Schedule, select the desired Access Schedule to be assigned to the device from the drop-down list.

If an Access Schedule is selected, it will override the Working Days configuration.

If an Access Schedule is already assigned from “Access Schedules” page and a different schedule is selected here, it will override the schedule assigned from “Access Schedules” page and vice versa.

To revoke an Access Schedule, select the **Select** option from the list. The device will be removed from the Access Schedule under the “Assign Doors” section on the “Access Schedules” page.

## General

The **General** page appears as follows.



*Mute Buzzer, Allowed Acknowledgment and Denied Acknowledgment are applicable for both Direct Door and Panel Door.*

- **Mute Buzzer** - User can mute or unmute the door buzzer by checking or clearing the box respectively. This is applicable for both Direct and Panel door.
- **Allowed Acknowledgment**
  - **Display Duration (ms)** - Define the time duration in between 250 to 3000ms till which the ‘Acknowledgment Allowed’ message will be displayed.
  - **LED - Buzzer Duration** - Select the time duration as Long, Medium, Short or Shortest for the LED Buzzer.
- **Denied Acknowledgment**
  - **Display Duration (ms)** - Define the time duration in between 250 to 3000ms till which the ‘Acknowledgment Denied’ message will be displayed.

- **LED - Buzzer Duration** - Select the time duration as Long, Medium, Short or Shortest for the LED Buzzer.



The range (250-3000ms) for Allowed/Denied Acknowledgment Display Duration and Shortest option for LED-Buzzer Duration is applicable for PATH V2 only.

If you have connected Readers — ATOM RD100/200/300, PATH — then the configurations for Allowed/Denied Acknowledgment will be applicable to these readers as well.

## Enrollment



The Enrollment section is not available for panel doors.

The Enrollment page appears as shown below.

- **Enrollment through Special Function** - Select this check-box to enable the feature. This allows the user to specify the user credential that can be enrolled by using the enrollment special function from the DOOR Controllers.
- **Enrollment Mode** - Select the Credential from the drop-down list that can be enrolled using the special function at the DOOR. The options are **ReadOnlyCard**, **SmartCard**, **Biometric** and **BiometricthenCard**, and **DuressFinger**. Refer “[Enroll Credentials](#)” or “[Enrolling Users](#)” to enroll User/Worker. Refer “[Enrollment](#)” or “[Enroll Credentials](#)” to enroll Worker. Refer “[Enroll Credentials](#)” to enroll a Visitor.



*DuressFinger is only applicable for User and Worker.*

- **Template Per Finger** - This parameter displays the values as configured at the global level. It shows the number of templates per finger getting enrolled.
- **Max Number of Fingers** - This parameter displays the values of the maximum number of fingers configured at the global level.

- **Number of Fingers/Cards** - Select the number of cards or fingerprints to be enrolled based on the credential option selected in the Enrollment Mode parameter.

## Advanced

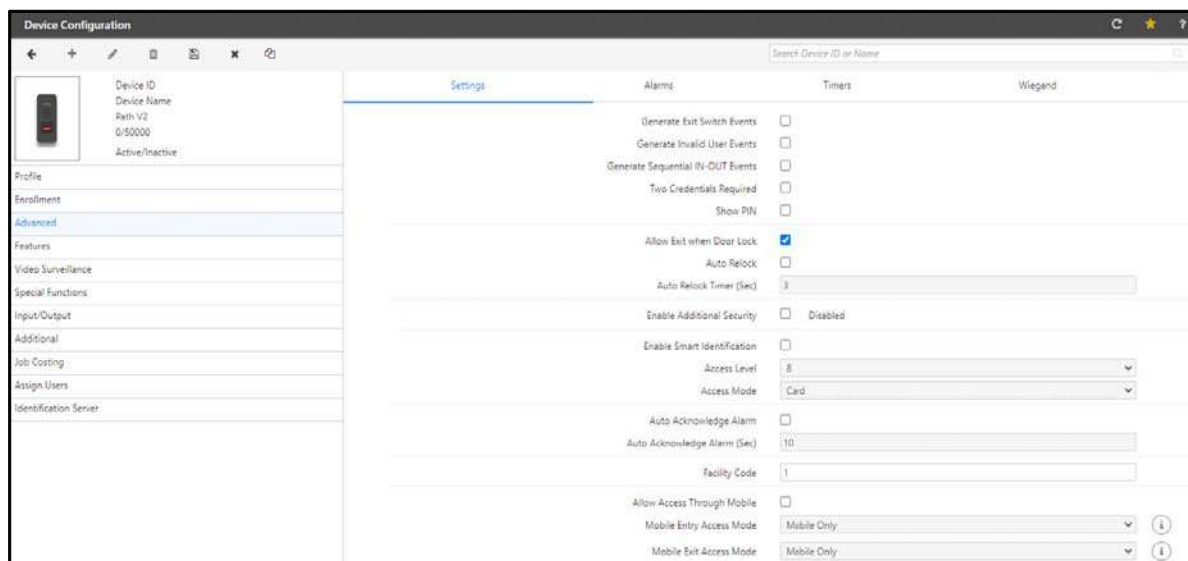
The Advanced tab allows the user to configure some advanced parameters such as access control settings, alarms and device timers.

To access this, After selecting the device, Select the **Advanced** tab from **Device Configuration** page. The advanced settings can be configured from following sections:

- *“Settings”*
- *“Alarms”*
- *“Timers”*
- *“Wiegand”*

## Settings

The **Advanced Settings** page for PATH Door as a **Direct Door** appears on your screen as shown below:



The following parameters are available for configuration:

- **Generate Exit Switch Events** - Select this checkbox to enable the door to generate events every time the exit switch is used.
- **Generate Invalid User Events** - Select this checkbox to enable the door to generate events for invalid user inputs.
- **Generate Sequential IN-OUT Events** - Select this checkbox to generate user punches on device as the sequential IN-OUT events irrespective of whichever mode in which device is functioning.

- **Two Credentials Required**- Select this checkbox to enable the feature of verifying 2 credentials mandatory for users allowed to By-pass finger/palm.
- **Show PIN** - Select this checkbox to display the characters of PIN when the PIN is entered on device.
- **Allow Exit when Door Lock** - Select this checkbox if users are to be allowed to exit even when the Door relay is in locked condition.
- **Auto Relock** - Select this checkbox to allow the door to relock immediately when the door status changes to close after normal open irrespective of the defined pulse time. However, it is supported only if a door sense is installed and enabled.
- **Auto Relock Timer** - Specify the time in seconds for the Auto Relock operation. Valid Range: 1 to 65535.
- **Enable Additional Security**- Select this checkbox to enable additional security at the selected Door Controller.



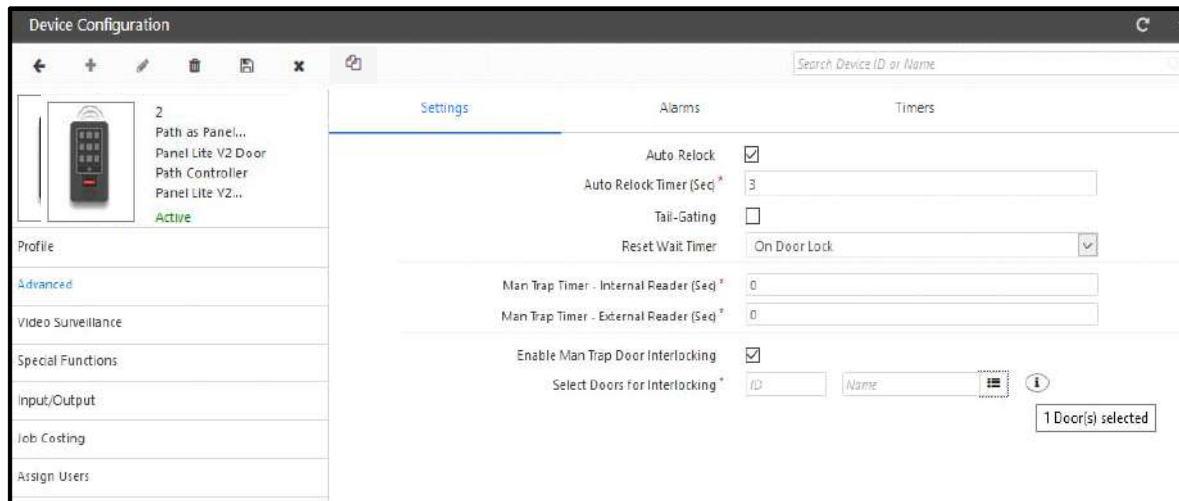
*Changing this value can affect the SI function. Click on the **Default Code** button to reset the **Additional Security Code** to the value set in the **Global Additional Security Code** field on the Global System Policy page.*

- **Enable Smart Identification** - Select this checkbox to enable this functionality at the selected Door Controller and select the **Access Level** and the **Access Mode** from the drop down list.
- **Auto Acknowledge Alarm** - Select this checkbox to enable the auto-acknowledgment of all alarms for this device.
- **Auto Acknowledge Alarm (sec)** - Set the time in seconds for the Auto Acknowledge Timer. The wait timer will start and on expiry of the timer, the alarm buzzer will stop automatically.
- **Facility Code** - Set a value for Facility Code to be set for access modes other than “Card”, if Facility Code is expected in Wiegand Output. This will be applicable to all direct doors except Door V1 and V2.
- **Allow Access Through Mobile**- Check the box to allow the access to device using COSEC ACS App.
- **Mobile Entry/Exit Access Mode**- Select the entry and exit door access mode from the options of **Mobile Only**, **Mobile then Biometrics**, **Mobile then Card** and **Mobile then PIN**.



*If User Access Mode is selected as “None” in Zone Configuration and Mobile Access Mode is selected as “Mobile Then Biometrics” then door can be accessed through Mobile and then Biometric credential.*

The **Advanced Settings** page for **PATH** as a **Panel door** will appear on screen as shown below:



1. **Tail-Gating** - Tail-gating refers to an access violation which occurs when more than one person tries to enter a secured area using a single person's access credentials. If this option is enabled on the panel door, the occupancy count of a zone should be incremented or decremented considering both the punch as well as the auxiliary input port of the panel door (say, input from a beam-counter). Set the wait timer for resetting the tailgating count (**Reset Wait Timer**) based on the door lock status or the door pulse wait timer (as configured).
2. **Man Trap Entry Timer (Sec)** - This check-box enables an alarm wait timer on the panel door to ensure that the user enters the next sequential door of a man-trap within a specific time-frame.
3. **Man Trap Exit Timer (Sec)** - This check-box enables an alarm wait timer on the panel door to ensure that the user exits the panel door to enter the next sequential door of a man-trap within a specific time-frame.
4. **Enable Man Trap Door Interlocking:** Select this check-box to activate the Door Interlock for the selected door (say Door1). This means if the Door1 is open then other doors will remain close.
5. **Select Doors for Interlocking:** Select the doors to be assigned for Interlocking from the picklist. You can select particular doors or all the doors at once.

- To do so, click the **Select Doors** for Interlocking picklist. The **Picklist For Panel Door** pop-up appears.

Picklist For Panel Door

Total Selected: 0 Records

Search  [Show Selected](#)

☐ Select All


<input type="checkbox"/>	ID	Name ▲
<input type="checkbox"/>	10	ARCDC100_DD_Door
<input type="checkbox"/>	9	ARCDC100_DD_Door
<input type="checkbox"/>	8	ARCDC100_SD_Door
<input type="checkbox"/>	1	ARGO_PANEL
<input type="checkbox"/>	2	DoorV3
<input type="checkbox"/>	7	DoorV3_Door
<input type="checkbox"/>	3	DOORV4_PANEL
<input type="checkbox"/>	6	dumy
<input type="checkbox"/>	4	PATHV2_PANEL
<input type="checkbox"/>	5	VEGA_PANEL

OK Cancel

To select particular doors, click the check boxes of the desired doors.

**OR**

To select all the doors, select the **Select All** check box.

Click **OK**. Hover over the **Info**  icon. It displays the number of selected doors.

Suppose Door2 and Door3 are selected for Interlock with Door1. So When Door1 opens; Door2 and Door3 will remain close.



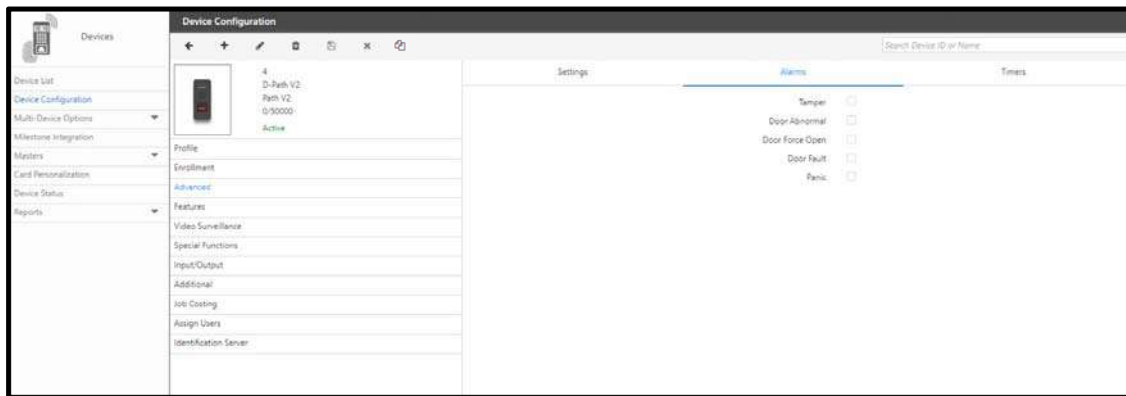
*For Degrade mode Door Interlocking feature will not work.*

*Whenever a door is in abnormal state and for that door interlocking is enabled then user access in other doors of the interlocking group is allowed.*

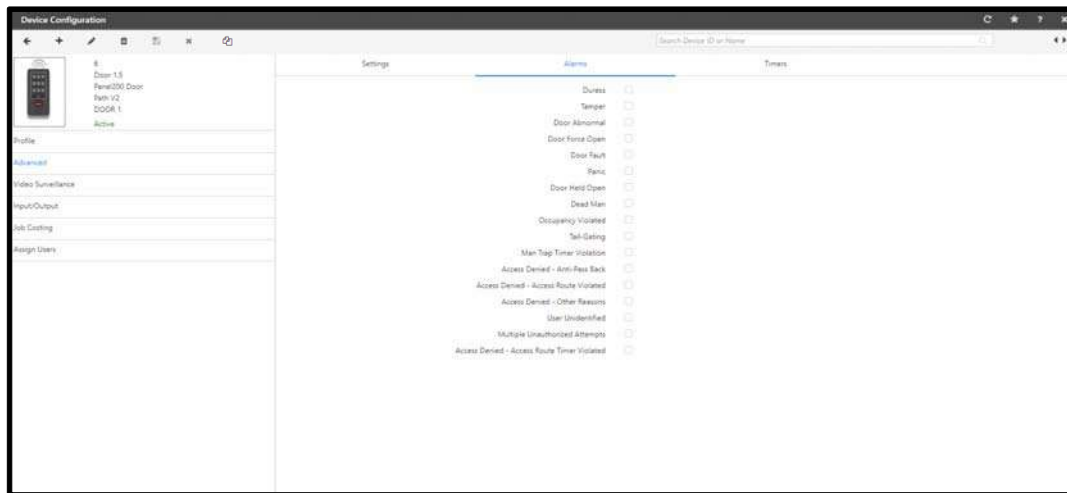
## Alarms

In Alarm tab, you can assign below list of alarms to the door.

## For Direct Door



## For Panel Door



Select the respective checkbox of alarms which you want to enable.



**Duress Alarm** is only configurable for **Panel200 Path V2 Door**.



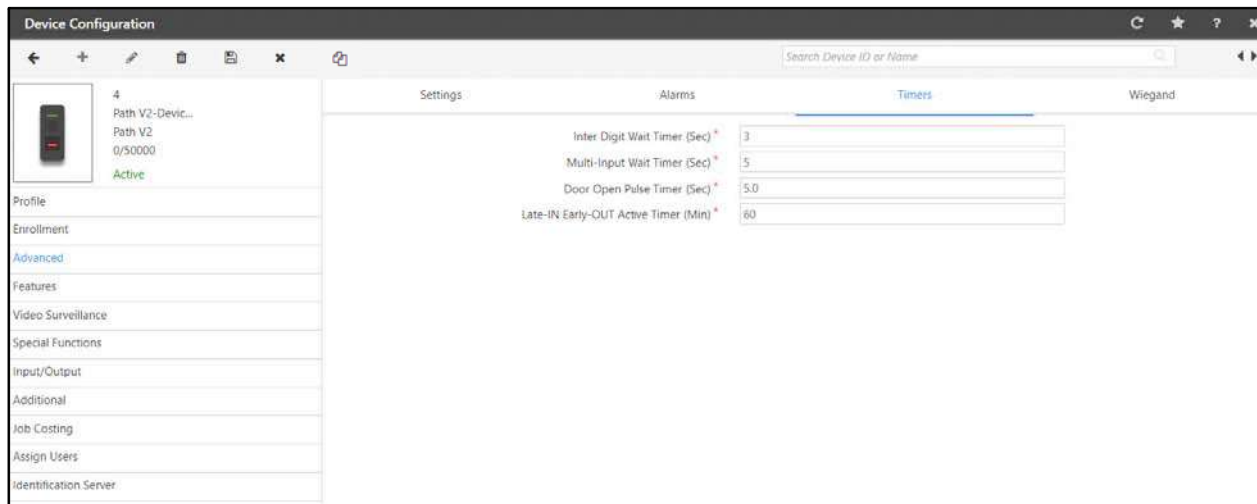
## Timers

This section allows the configuration of various types of pre-defined device timers which can trigger off specific responses. In COSEC, timers are often used to control door behavior and for triggering alarms.

The Timers parameters differ for PATH as Direct Door and Panel Door.

### Timers - Direct Door

Click the **Timers** tab. The **Timers** page for **PATH** as a **Direct Door** appears.



Configure the following parameters:

- **Inter-Digit Wait Timer (sec)** - Specify the time period in seconds (1 to 99) between two key inputs on the device keypad. On expiry of this timer, the system considers the user input to be complete and is ready for the next input.



***Inter-Digit Wait Timer** is applicable for PATHV2 Door only.*

- **Multi-Input Wait Timer (sec)** - Specify the time in seconds (3 to 99) for which system needs to wait for the second credential input from the user when more than one credential is to be used to grant access.



*We recommend you to set the timer value as greater than or equal to 10 seconds to avoid access denial issues to users. This is applicable when the system reads the credentials (biometric) from the user's Smart Cards.*

- **Door Open Pulse Timer (sec)** - Specify the time in seconds (0.1 to 65535.0) for the door to be energized for a valid credential. If the opened door does not return to a closed state before the expiry of this timer, the door will generate a "Door Abnormal" alarm.



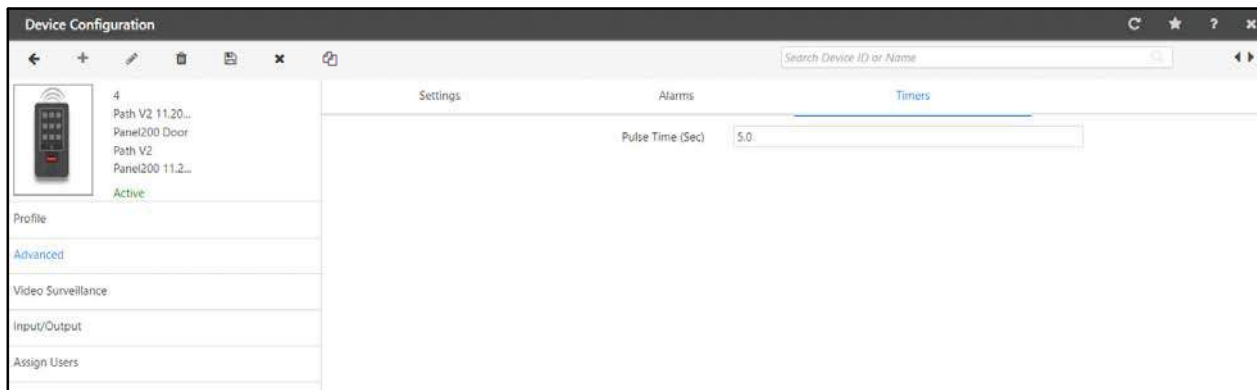
*The range (0.1 to 65535.0) seconds for **Door Open Pulse Timer** is applicable for PATH V2 Direct Door only.*

*To ensure smooth functioning of this feature, make sure the Server and Device Firmwares are upgraded to the latest version.*

- **Late-IN Early-OUT Active Timer (min)** - Specify the time in minutes (1 to 99) for which the Late-IN and Early-OUT special functions will remain active after being enabled at the Door Controller.

## Timers - Panel Door

Click the **Timers** tab. The **Timers** page for **PATH** as a **Panel Door** appears.



- **Pulse Time (sec)** - Specify the time in seconds (0.1 to 65535.0) for the panel door to be energized for a valid credential.



*The range (0.1 to 65535.0) seconds for **Pulse Time** is applicable for PATH V2 Panel Door only.*

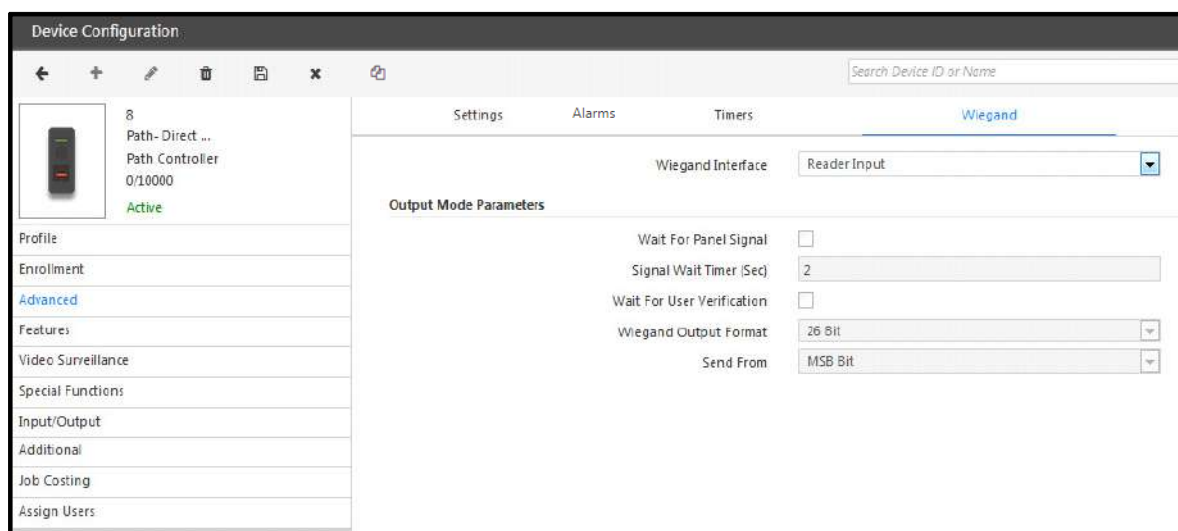
*To ensure smooth functioning of this feature, make sure the Server and Device Firmwares are upgraded to the latest version.*

## Wiegand

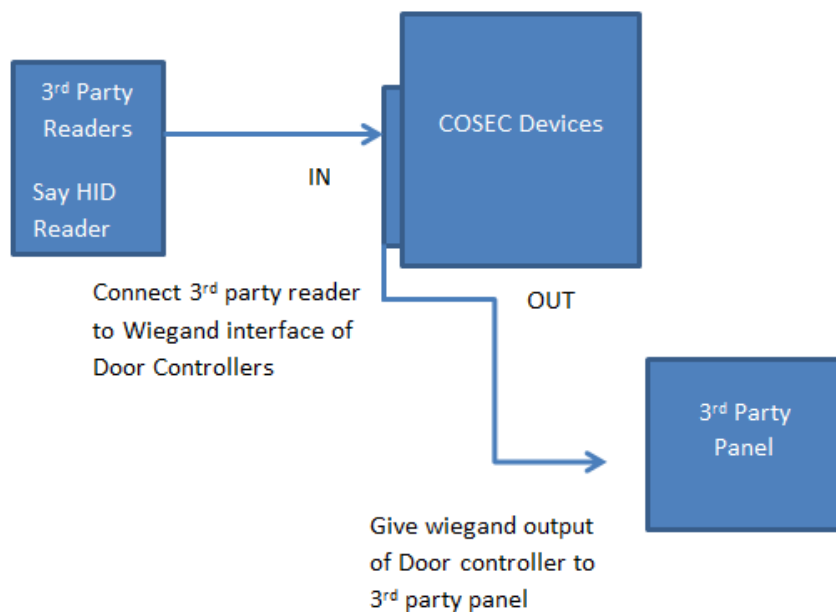


*Wiegand is applicable for Direct Door only.*

Click the **Wiegand** tab. The **Wiegand** page appears:



- **Wiegand Interface** -The PATH Controllers can be connected both as input devices (e.g. to receive data from a Wiegand Reader) or output devices (e.g. to support output to third party panel) via the Wiegand interface as shown below.

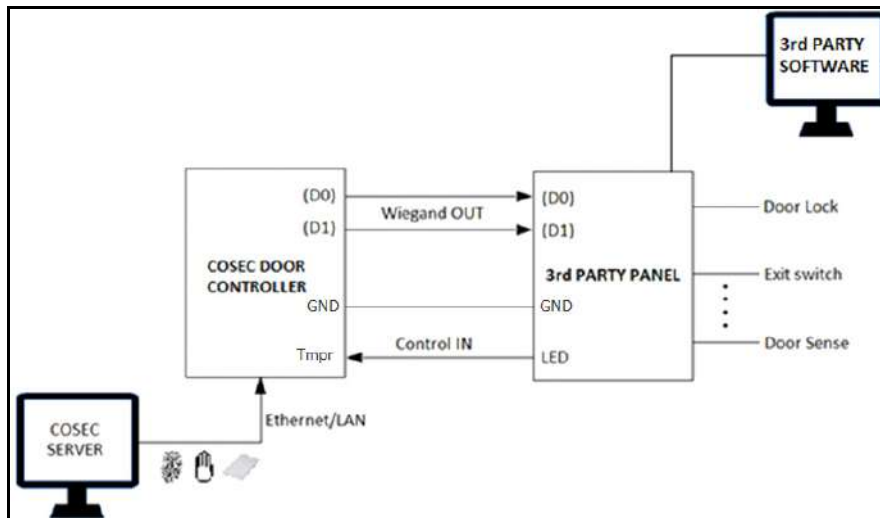


So select the interface of Door controller as **Output Mode** to work as wiegand output to panel or **Reader Input** to take data from third party reader. If Reader Input option is selected, all the output mode parameters will be disabled.

If you select Output mode then configure the **Output Mode Parameters**.

- **Wait For Panel Signal** - If this option is enabled the door will wait for reply from the connected third party device before triggering any output, as per the defined **Signal Wait Timer (Sec)**.
- **Wait For User Verification** - If this option is enabled, user verification will be requested on the third party device before triggering any output.
- Specify the **Wiegand Output Format** and sending order for reader data as MSB or LSB Bit in the **Send From** field.

## Wiegand Out Interface



- Also for the **Custom** format, user can configure details of fields to be sent as output from the Wiegand reader that has been added.

For each of the listed events, a custom Wiegand Output Format can be selected using the picklist button. Also an access code can be assigned for each communication (e.g. Invalid PIN Code). This will depend on the number of output bits configured for Access Code in the selected Wiegand Output Format. Also, See Devices> Masters> Wiegand Output Format.

## Features

The Features tab allows the user to enable certain Access Control features for a device



*The Features tab is available only with the Access Control Module license and is applicable only for direct doors.*

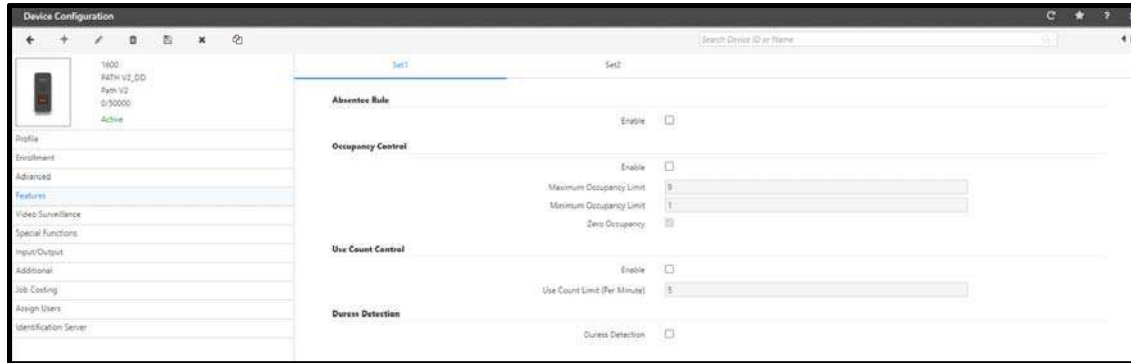
To access this, After selecting the device, Select **Device Configuration> Features**. The access control features for the device can be set from the following two sections:

- "Set1"
- "Set2"

## Set1

This page allows the configuration of three rules - **Absentee Rule**, **Occupancy Control** and **Use Count Control**.

The page appears as shown below.



- **Absentee Rule** - Select this checkbox to enable this feature at the door. This rule sets the maximum number of days for non-use of a credential. On expiration of days limit, the user will be automatically blocked.  
For configuring the rule See *Access Control> Absentee Rule*.
- **Occupancy Control** - Select this checkbox to enable the feature at the door and specify maximum number of users to be allowed within the controlled area after which a user exit is required to enable access to another user. Also specify the **Minimum Occupancy Limit** i.e. the minimum number of occupants the designated zone should have, and enable/disable the **Zero Occupancy** option to determine whether the designated zone should be allowed to be empty or not.  
For configuring the rule See *Access Control> Occupancy Control*.
- **Use Count Control** - Select this checkbox to enable the feature at the door and specify the maximum number of uses per minute.  
For configuring the rule See *Access Control> Use Count Control*.
- **Duress Detection** - Select the checkbox to enable the feature. Duress Detection is used to generate the duress alarm which informs that the user is forced to open the door under threat.

## Set2

This page allows the configuration of three rules - **First-IN User Rule**, **Anti-Pass-Back (APB)** and **2-Person Rule**.

The page appears as shown below.

The screenshot shows the 'Device Configuration' window for 'Set2'. On the left is a sidebar with a device icon and a list of configuration tabs: Profile, Enrollment, Advanced, Features (selected), Video Surveillance, Special Functions, Input/Output, Additional, Job Costing, and Assign Users. The main area is titled 'Set2' and contains three rule configurations:

- First-IN User Rule:**
  - Enable: ☒
  - Reset On: ☒ Day Change ☐ Timer Expiry
  - Access Timer (Sec): 3
  - First-IN User Group: 1 (with a list icon)
- Anti-Pass-Back (APB):**
  - On Entry: ☒
  - On Exit: ☒
  - Forgiveness: ☒
  - Hard/Soft: Soft (dropdown menu)
- 2-Person Rule:**
  - Enable: ☒
  - Mode: Primary Must (dropdown menu)
  - Primary Group: Select (dropdown menu)
  - Secondary Group: None (dropdown menu)
  - 2nd Person Wait Timer (Sec): 5

- **First-IN User Rule** -Select this checkbox to enable the feature at the direct door and select the First-In User group which would be valid at the door.  
For configuring the rule *See Access Control> First- In User Rule> Assignment*
- **Anti-Pass Back (APB)** - Select this checkbox to enable the feature at the direct door.  
For configuring the rule *See Access Control> Anti-Pass Back*
- **2-Person Rule** - Select this checkbox to enable the feature at the door and set the **wait time** in seconds after which the second person is allowed to punch on the door.  
For configuring the rule *See Access Control> 2- Person Rule*

## Video Surveillance

The Video Surveillance tab allows the user to configure parameters for video surveillance integration with the COSEC device.

It is available in Basic License.

To access this, Go to **Device Configuration> Video Surveillance**.

- “Visual Tagging”
- “Satatya Integration”

## Visual Tagging

The COSEC application can interface with some supported hybrid and network video recording systems and grab images triggered by user events at the Doors. The **Visual Tagging** option enables the administrator to define the video recorder parameters. The **Visual Tagging** page appears as shown below.



To view the user events and related images, go to **Admin > Views/Logs > Event View**. To know more about viewing events, refer to “Event View”.

The following parameters are available for configuration:

- **Capturing Device** - Select the video recording device type from the dropdown menu as shown.

The compatible device types are:

- Matrix HVR/NVR
- Milestone

### Matrix HVR/NVR

- **MAC Address** - In the event of selecting the Matrix HVR/NVR, the administrator needs to specify the MAC address of the video recorder device using “\_” (underscore) as the separator.

- **Camera ID** - Specify the camera number or camera ID for IP cameras. For analog cameras specify the camera number.
- **Storage Root Folder** - Specify the Root folder PATH or FTP PATH where the uploaded images will be saved.
- **FTP Login Credentials** - Check this box to activate FTP login credentials for authentication.
- **Username** - Specify the FTP server username.
- **Password** -Specify the FTP server password.



Some COSEC devices do not support all the network connection options.

## Milestone



For more information on integration with **Milestone** devices, refer to [“Milestone Integration”](#).

## Satatya Integration

This functionality is available for configuration only when the Matrix HVR/NVR device type is selected as the **Capturing Device** (from *Visual Tagging*). It enables the configured COSEC devices to directly send commands to the SATATYA HVR/NVR devices as per the configuration on this page. The Satatya configuration page appears as shown below:



- **Integration type-** Select the integration type from the options of Wired and Network. In wired integration, door is physically connected with Satatya Device. In Network integration, connection can be by ethernet, wireless or broadband depending upon the COSEC device support.
- **Active-** Check the box to activate the connection.
- **Network Connection-** Select the Network connection from the options of Ethernet, Broadband, Wireless.
- **IP Address-** Specify the IP address of HVR/NVR if device is connected with Ethernet.
- **Port Number-** Specify the port number of HVR/NVR
- **Name-**Specify a user friendly name for the integration function.
- **Active-** Check the Active box to enable the SATATYA integration functionality.
- **Schedule** - Specify a schedule for the function by specifying the start and the end time (*24 Hours format*) as well as checking the boxes against the applicable **days** of the week.
- **Event-** Select a COSEC event from the drop down list for which the resultant action is to be configured.
- **Mode-** Select the event mode from the options of Entry, Exit and Both from the drop down list wherever applicable.
- **Action-**Select the action for the Satatya device from the drop down list. The options available are:
  - Recording - Specify the duration in minutes.
  - Upload Image - This will be uploaded as per the ftp settings.
  - Video Pop-up - Specify the duration in seconds. The video pop up will be generated on the local client of Satatya device on the selected camera.
  - PTZ Preset - Specify the PTZ position number as defined on the SATATYA device.
  - Mail Image - Specify the email-ID.

- **Camera-** Select the relevant camera channels depending on the action selected.

**Example1:** For action as Video Pop up, the pop up of Camera 24 will be shown for 10 seconds.

**Example2:** For Access allowed event on COSEC Device, recording of camera channel 4,6,8 and 10 will be done for 10 seconds.

The first screenshot shows the configuration for 'Video Pop-Up' action. The 'Event' is 'Access Allowed', 'Mode' is 'Both', 'Duration Sec.' is '10', and 'Camera' 24 is selected.

The second screenshot shows the configuration for 'Recording' action. The 'Event' is 'Access Allowed', 'Mode' is 'Both', 'Duration Min.' is '10', and cameras 4, 6, 8, and 10 are selected. 'Add' and 'Cancel' buttons are at the bottom.

- Click the **Add** button to finish the process of linking the event to the action. The user may now configure another event-action linkage if required.

Name	Event	Action	Start Time	End Time	Active	
Path HVR Intergration	Access Allowed	Recording	09:00	12:00	Yes	

## Special Functions

To configure *Special Functions* for COSEC doors, refer to [“Special Functions”](#).



*‘Special Function’ section is available only for PATH V1 variants.*

## Input/Output

The Input/Output (I/O) configuration of a system determines how the output or response of a system is influenced by the input applied on it. In case of the COSEC Access Control System, the I/O configuration should enable the system to monitor and trigger a specific response to any changes in door state or event occurrences at the door device. This change of door state or occurrence of events may be considered as an input while the response or action that is generated by the system on detection of this input, may be defined as the output.



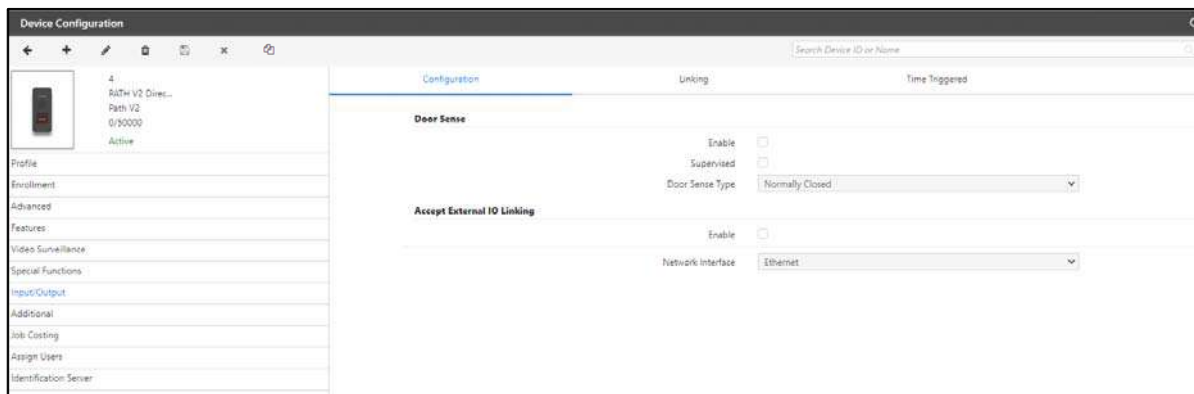
1. This functionality cannot be fully accessed in the Edit mode for a selected device.
2. This functionality is available only with the Access Control add-on module license.

To access this, After selecting the device, Select **Device Configuration> Input Output**. The Input Output parameters can be set from the following sections:

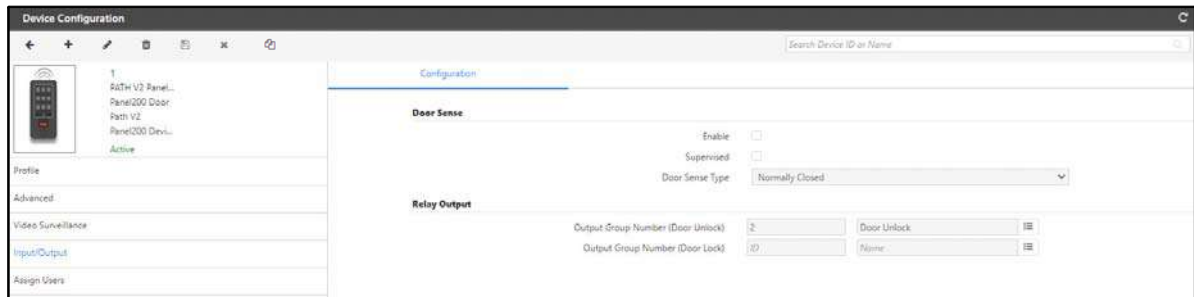
- “Configuration”
- “Linking”
- “Time Triggered”

## Configuration

The **Configuration** section for **PATH - Direct Door** appears as shown below.



The **Configuration** section for **PATH- Panel Door** appears as shown below.



The following parameters are available for configuration:

- **Door Sense** - The system by default can sense two states of a door - *Normally Open* and *Normally Closed* depending on which the output is determined. For example, any deviation of the door from its normal state may lead to the trigger of a *Door Abnormal* alarm.

Select the **Enable** checkbox to enable the system for such two-state monitoring.

Select the **Supervised** checkbox to enable the door for four-state monitoring where the door is also monitored for *door fault* and *door disconnection*. Specify the **Sense Type** as **Normally Closed** or **Normally Open** (Default: Normally Closed).

- **Accept External IO Linking** - Select the Enable checkbox to enable device-to-device IO Linking i.e. input from one Direct Door can trigger output in another Direct Door.
- **Network Interface**- Select the interface option for IO linking with external devices. The options are

- Ethernet
- Wireless
- Mobile Broadband



**Accept External IO Linking** is applicable for Direct Door only.

**Network Interface** is applicable for Direct Doors and PATH V2 only.

#### • Relay Output

**Output Group Number (Door Unlock)**- Select the Output Group Number to which the device output for Door Unlock is to be assigned from the picklist.

**Output Group Number (Door Lock)**- Select the Output Group Number to which the device output for Door Lock is to be assigned from the picklist.



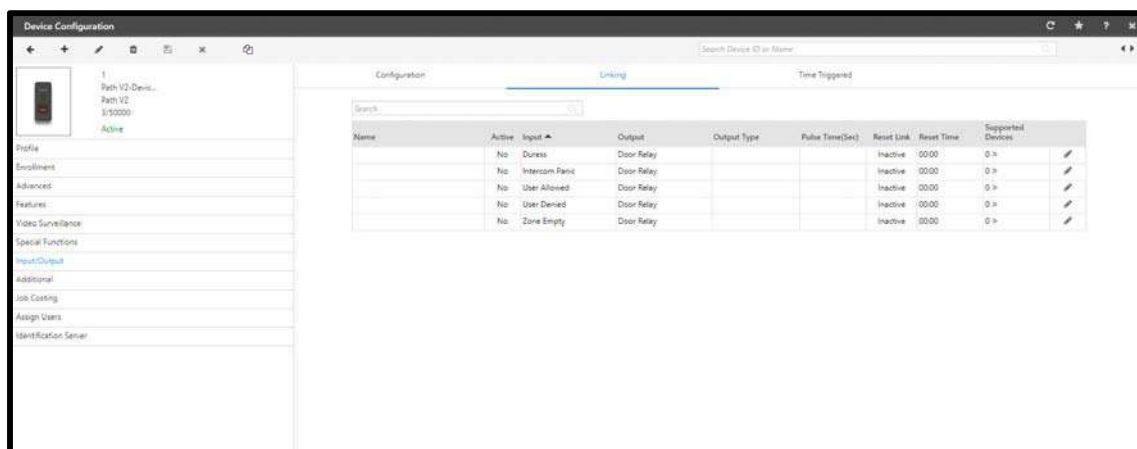
**Relay Output** is applicable for Panel Door only.

## Linking



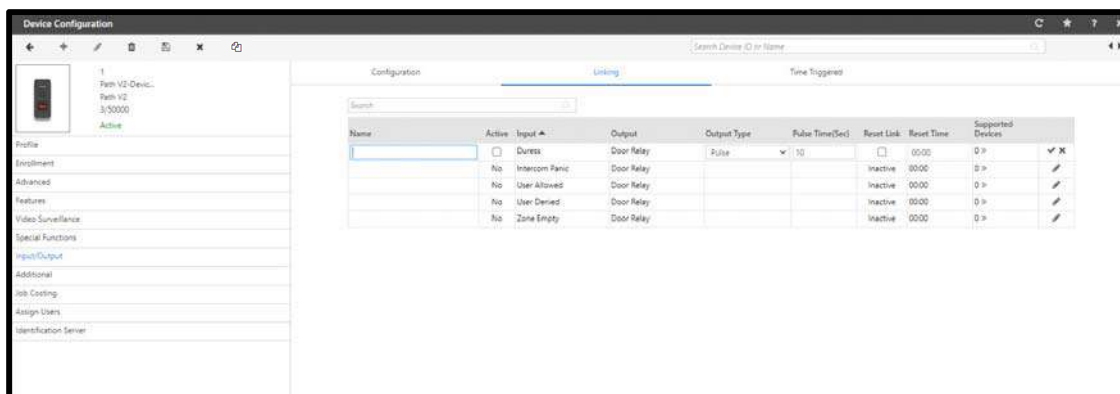
**Linking** is applicable for Direct Door only.

The **Linking** section appears as shown below.



The COSEC application supports the Input/Output Linking feature to activate an output port based on a trigger received from an input port on the same Direct Door. This option enables the administrator to define how an event or events (input port) will trigger an output on the selected door.


Select a Input-Output linking row or click edit button.

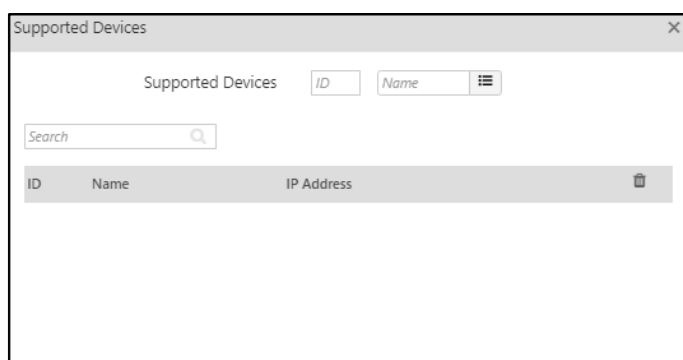


- **Name** - Specify a name for the new I/O linking program to be defined.
- **Active** - Select this checkbox to activate this linking program.
- **Output Type** - Specify the appropriate type of output from the following four options available in the drop down list:
  - **Pulse**: With this type of output, the user needs to define the Pulse time in seconds.
  - **Interlock**: With this option, the output follows the input. The relay output is triggered as long as the input is activated after which it returns to normal state.
  - **Latch**: With this option, it is denoted that the relay output will be in an energized condition for infinite period and needs to be reset manually.
  - **Toggle**: With this option, the output group toggles its state whenever an input group is activated.
- **Pulse Duration (sec)** - For a *Pulse* output type, specify the pulse duration in seconds.



**Reset Link, Reset Time and Supported Devices** is applicable for Path V2 only.

- **Reset Link** - Select this check box to activate this linking program as well as set the time from **Reset Time**.
- **Reset Time**- Enter the time period in hh:mm format at which the link will get reset automatically. Suppose, an IO Link gets activated on 21/04/2017 at 15:00. And Reset Time is set as 18:00. When Device Time is 18:00 then that IO link will get reset.
- **Supported Devices** - All devices supported for external IO Linking will appear in this picklist for selection.
- Click **Supported Devices**  icon. The **Supported Devices pop-up** appears.



- In this pop-up, click the **Supported Devices** picklist. The **Picklist For Direct Door** pop-up appears.

Picklist For Direct Door

Total Selected: 0 Records

Search  Show Selected

☐ Select All

<input type="checkbox"/>	Door No ▲	Name	Type	Status
<input type="checkbox"/>	50	RnD1 3rd Floor VEGA	Vega Controller	Enable
<input type="checkbox"/>	52	Factory Vega Production-2	Vega Controller	Enable
<input type="checkbox"/>	57	RnD1 GF TRIPOD LEFT OUT	PVR Door	Enable
<input type="checkbox"/>	59	RnD1 BOOM BARRIER IN	Vega Controller	Enable
<input type="checkbox"/>	60	RnD1 BOOM BARRIER OUT	Vega Controller	Enable
<input type="checkbox"/>	69	FACTORY ACCOUNT	Door V3	Enable
<input type="checkbox"/>	70	FACTORY SECURITY GUARD -1	Door V3	Enable
<input type="checkbox"/>	71	FACTORY SECURITY GUARD -2	Door V3	Enable
<input type="checkbox"/>	72	FACTORY STORE	Door V3	Enable
<input type="checkbox"/>	77	RnD1 2nd Floor FB FMX IN	Door FMX	Enable

1 - 10 of 54 records

« < 1 2 3 ... 6 > »

OK Cancel

You can either select particular devices or can select all the devices at once.

To select particular devices, click the check boxes of the desired devices.

**OR**

To select all the devices, select the **Select All** check box. The devices on all pages will be selected.


Click **OK**. You return to the **Supported Devices pop-up** and the selected devices are displayed here.

Supported Devices

Supported Devices ID Name

Search

ID ▲	Name	IP Address	
50	RnD1 3rd Floor VEGA	192.168.151.3	
52	Factory Vega Production-2	192.168.10.27	

You can also delete the desired devices. To do so, click the **Delete**  icon of the respective device.

Close the pop-up the number of selected devices are displayed under **Supported Devices** in the grid.

- Click the **OK** button and **Save** the configuration.

# Time Triggered

On the **Input Output** page, select the **Time Triggered** section as shown.

The screenshot shows the 'Time Triggered' configuration window. At the top, there are tabs for 'Configuration', 'Linking', and 'Time Triggered'. Below the tabs is a search bar and a table with the following columns: 'Function Name', 'Active', 'Time', 'Duration(Sec)', 'Days', and 'Output'. The first row in the table is 'Siren Activate', with 'Active' checked, 'Time' set to '00:00', 'Duration(Sec)' set to '10', 'Days' set to 'Select', and 'Output' set to 'Aux O/P'. A dropdown menu is open for the 'Days' column, showing a list of days with green checkmarks: 'Check All', 'Sun', 'Mon', 'Tue', 'Wed', 'Thu', 'Fri', 'Sat', and 'Holiday'.

This functionality enables the user to control the activity of an Output without manual intervention. The time triggered functions are used for activating events like door unlock and siren activation that are set as per the start time and for the configured time duration. This functionality is designed to energize outputs for predefined periods at the configured time. The COSEC access control system supports up to 20 Time Triggered functions on a Direct Door.

The screenshot shows the 'Time Triggered' configuration window. At the top, there are tabs for 'Configuration', 'Linking', and 'Time Triggered'. Below the tabs is a search bar and a table with the following columns: 'Function Name', 'Active', 'Time', 'Duration(Sec)', 'Days', and 'Output'. The first row in the table is 'Siren Activate', with 'Active' set to 'Yes', 'Time' set to '00:00', 'Duration(Sec)' set to '10', 'Days' set to 'Su Mo Tu We Th Fr Sa Ph', and 'Output' set to 'Aux O/P'. The 'Days' column has a small interface with a plus icon and a minus icon.

## Additional

This section lists some additional configurations that can be enabled for door controllers.

To access these configurations, Go to **Device Configuration > Additional > Daylight Saving**



*This section is available only for Direct Doors.*

Many countries observe the convention of adjusting clocks forward and backward. Clocks are set ahead during the spring and back to standard time in the autumn. COSEC doors can be configured to be compatible with this procedure keeping the RTC of the system updated with such changes.

The **Daylight Saving** configuration can be done in 2 ways i.e. Day-Month wise or Date-Month wise.

- Select the **DST Type** as Day-Month wise or Date-Month wise. The **Disable** option when selected, disables the application of DST on the system time.
- On selection of the **Day-Month wise** option, the DST is set by the day of the month on which clock needs to be forwarded and reverted back to normal. Set the month, week number, day of the week, and time for both the **Forward Clock** and **Backward Clock** as shown.

- On selection of the **Date-Month wise** option, the DST is set by date of the month on which clock needs to be forwarded and reverted back to normal. Define the **Time Period** for the date-month wise DST settings in **24-hours** format, and specify the day of the week, date and time for the **Forward Clock** and the **Backward Clock** as shown.

This DST Setting implies that on 1st Sunday of November at 09:00 hours, the clock will be forwarded by 08:00 hours. And on 1st Sunday of January at 10:00 hours, the clock will be reversed or set backwards by 08:00 hours.



- Click the **Save** button

## Job Costing



*Job Costing is applicable for PATH V2 and PATH Controller Direct Door only.*

When user punches on any device, there will be an option to select the Job Code on which the user is working. Job Costing enables the Admin to show or hide Job Code selection on device. It also enables the admin to assign default jobs on device.



*Make sure the **Device Based Job Assignment** check box is enabled for the desired Users.*

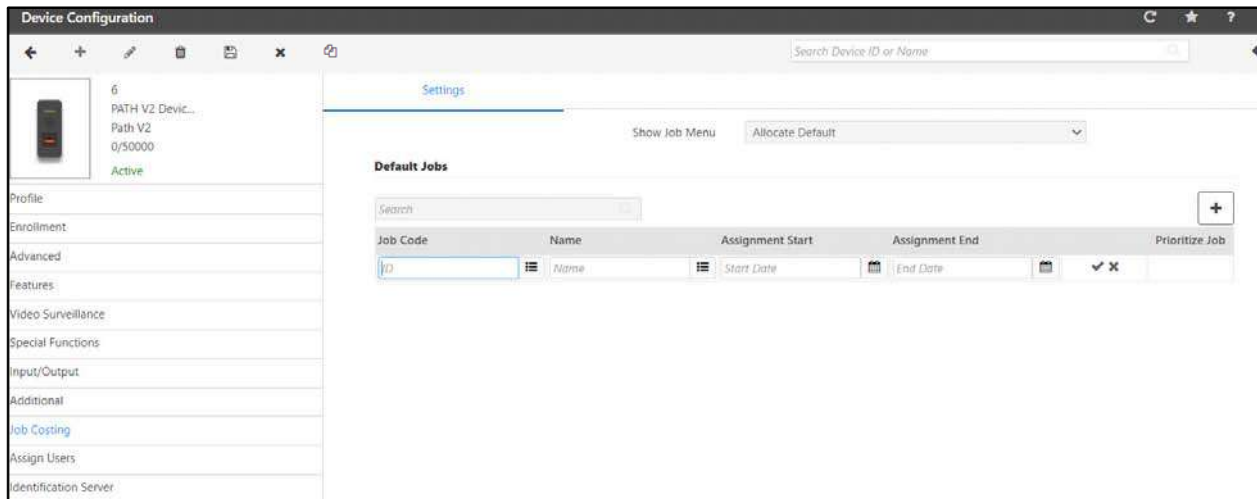
**Show Job Menu:** It is disabled for PATH Controller and PATH V2.

## Allocate Default

When **Allocate Default** is selected; then default jobs for the device can be selected. The Job costing user can directly punch on this door for starting the default job.

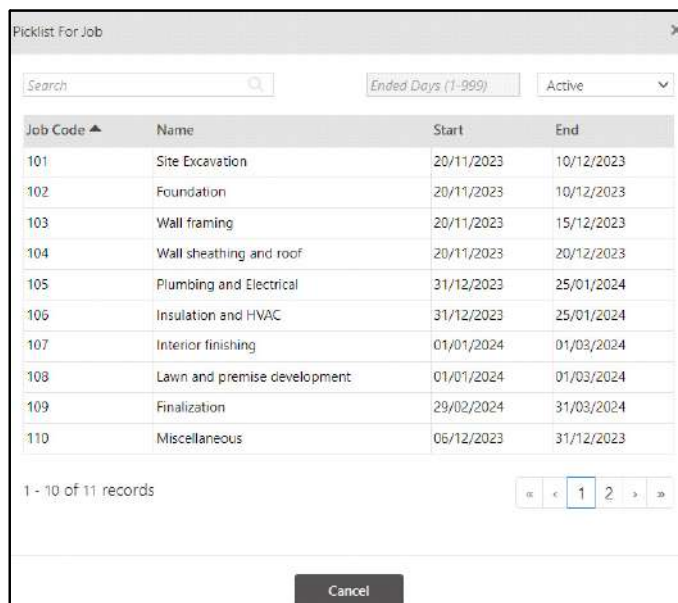
## Default Jobs

Multiple default jobs can be assigned with overlapping Assignment Date Ranges. You can also set the priority of the assigned jobs if required. If you have jobs with overlapping dates and you have set their priority as per your requirement, then the first job will be considered as the default job.



- Click **Add**  . Click the picklist under **Job Code/Name** to select the desired Jobs.

The **Picklist For Job** appears.



By default, all the **Active** jobs are displayed. Click **Active** and select the desired option — **All**, **Active**, **Expired** — to filter the jobs. The jobs appear as per the set filter.

If you select **Expired**, you can set another filter.

Configure the number of days in Ended Days (1-999). The system will display the expired jobs, derived using the following: Current Date minus Number of days configured in Ended Days.

For example:

Ended Days configured = 2

Current Date= April 25, 2024

All the jobs expired between April 23, 2024 to April 25, 2024 (midnight), will be displayed.

Click to select the desired job from the list. You can also search for the desired job using the search bar.

The selected job appears in the grid.

- **Assignment Start** and **Assignment End:** The selected Jobs Start and End dates are displayed. You can change the Assignment Start and Assignment End dates of the job if required. To do so, click the calendar and select the desired start and end dates.

- Click **Save** to save the configuration.

The **Default Jobs** grid will consist of all the jobs, that is expired, in-progress as well as assigned.



*It is recommended to set job priority only if overlapping dates are assigned to the jobs.*

*If a new job is assigned, by default it will appear at the highest priority. You can change the priority later, if required.*

You can set the priority of the jobs as per your requirement. To do so,

The screenshot shows the 'Device Configuration' window. On the left is a sidebar with a device icon and a list of configuration categories: Profile, Enrollment, Advanced, Features, Video Surveillance, Special Functions, Input/Output, Additional, Job Costing, Assign Users, and Identification Server. The main area is titled 'Settings' and contains a 'Show Job Menu' dropdown set to 'Allocate Default'. Below this is the 'Default Jobs' section, which includes a search bar and a table with the following data:

Job Code	Name	Assignment Start	Assignment End		Prioritize Job
111	Premise cleaning	01/10/2023	01/11/2023		
108	Lawn and premise development	01/01/2024	01/03/2024		
102	Foundation	20/11/2023	10/12/2023		
101	Site Excavation	20/11/2023	10/12/2023		

- Under **Prioritize Job**, click the **Up** arrow button to move a job upwards in the list. Similarly, click the **Down** arrow button to move a job downwards in the list.

If you have overlapping dates assigned to Jobs, in such scenarios there will be multiple Jobs in which the punches are possible.

To resolve this set the Job with highest priority at the first position, so that when the system searches for the Job as per the date, the punch will be marked in the first Job in which the date is detected.

Let us understand this with the help of an example.

### Example:

User 1 has been assigned the following jobs:

Job Code	Job Name	Assignment Start	Assignment End	Prioritize Job
J1	Job 1	01/10/2023	10/10/2023	1
J2	Job 2	09/10/2023	15/10/2023	2
J3	Job 3	17/10/2023	25/10/2023	3
J4	Job 4	25/10/2023	31/10/2023	4

Now, User 1 changes the priority of the assigned jobs as follows:

Job Code	Job Name	Assignment Start	Assignment End	Prioritize Job
J2	Job 2	09/10/2023	15/10/2023	1
J1	Job 1	01/10/2023	10/10/2023	2
J4	Job 4	25/10/2023	31/10/2023	3
J3	Job 3	17/10/2023	25/10/2023	4

When User 1 will punch on 09/10/2023, the punch will be marked against Job 2 as it has been set at priority number 1. Similarly, when User 1 will punch on 25/10/2023, the punch will be marked against Job 4 as it is at a higher priority than Job 3.



*Make sure that the assigned jobs are prioritized correctly to ensure that the punches are in place.*

## Assign Users

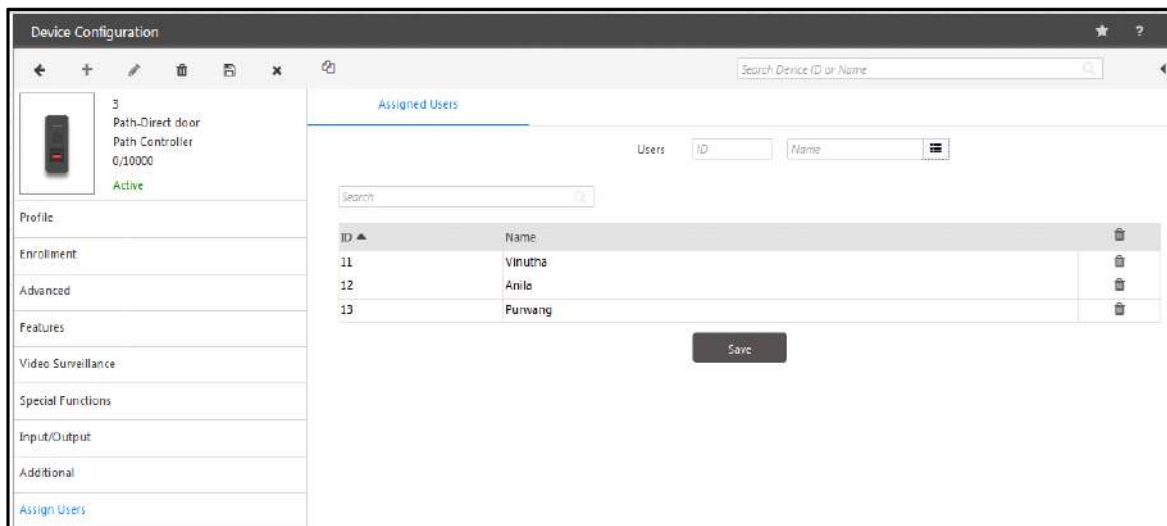


*Assign Users is applicable for both Direct Door and Panel Door.*

### For Direct Doors

You can select and assign users to the door.


On the **Device configuration** page, click **Assign Users**. The Assign Users page appears.



- **Users:** Click the picklist. The **Picklist For All Users** window appears.

Select the check boxes of the desired Users and click **OK**.

The grid displays the list of selected users.

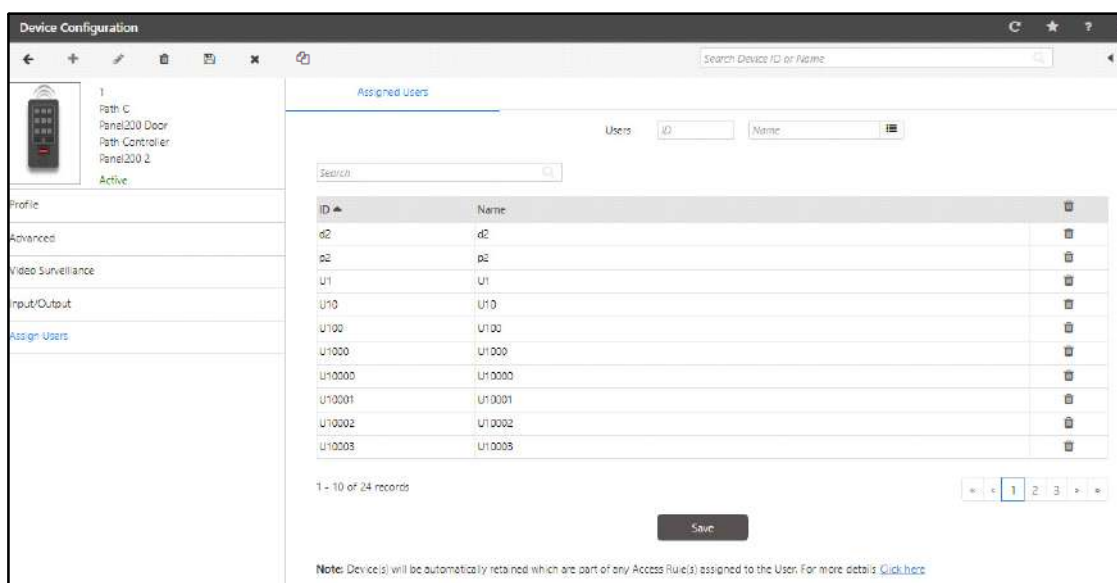
If you wish to remove any assigned user, click the respective **Delete**  icon.

- Click **Save**.

## For Panel Doors

You can select and assign users to the door.


On the **Device configuration** page, click **Assign Users**. The Assign Users page appears.



- **Users:** Click the picklist. The **Picklist For All Users** window appears.

Select the check boxes of the desired Users and click **OK**.

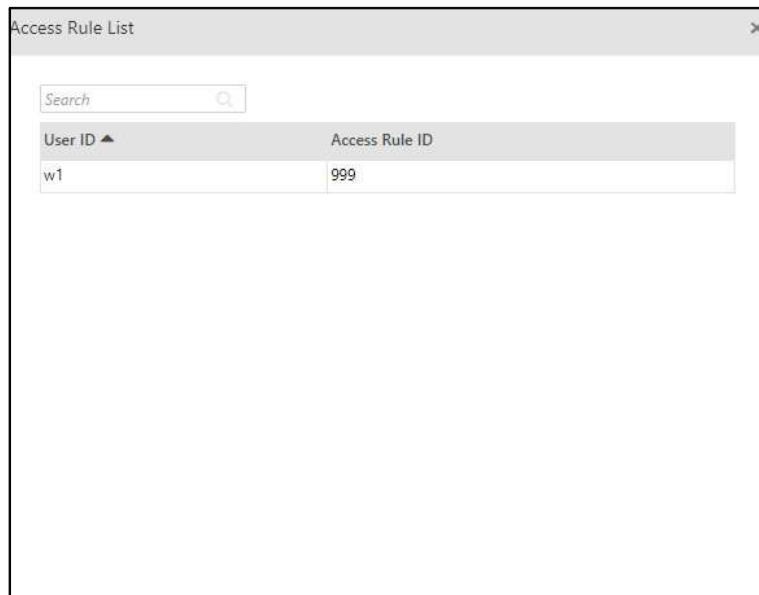
The grid displays the list of selected users.

If you wish to remove any assigned user, click the respective **Delete**  icon.



*If you wish to delete a user which is assigned to this device and it is a part of any Access Rule assigned to that user, then such user and door/s will be retained.*

- If you wish to check the users assigned against any Access Rule, click the **Click here** link at the bottom of the page. The **Access Rule List** pop-up appears.



The image shows a pop-up window titled "Access Rule List" with a close button (X) in the top right corner. Inside the window, there is a search bar with the placeholder text "Search" and a magnifying glass icon. Below the search bar is a table with two columns: "User ID" and "Access Rule ID". The table contains one row with the values "w1" and "999".

User ID	Access Rule ID
w1	999

It displays the list of User ID along with the Access Rule ID against which they are assigned.

- Click **Save** to assign all the added users to this door.

## Identification Server

This tab enables the selected device to be assigned to a pre-defined Identification Server.

Device has a limited memory capacity for storage of templates so we need Identification Server which will store the more number of templates and respond to device when asked for identification.

For more information on Identification Servers, See *Admin> System Configuration> Identification Server Configuration*.

To access these configurations, select the **Identification Server** tab.

The screenshot shows the 'Device Configuration' window. On the left, a sidebar lists configuration categories: Profile, Enrollment, Advanced, Features, Video Surveillance, Special Functions, Input/Output, Additional, Job Costing, Assign Users, and Identification Server (selected). The main panel shows the 'Settings' for the 'Identification Server' tab. Under 'Other Biometric Credentials', the following settings are visible:

- Enable Identification On Server:** ☒
- Identification Server:** A dropdown menu showing 'ID' and 'Name' options.
- Configure Alternate Server Address:** ☐
- Server Address:** A text input field.
- Server Port:** A text input field with the value '11005'.
- Enable Finger Smart Identification:** ☐
- Identification Time-Out Duration (Sec):** A text input field with the value '4'.
- Auto Send Enrolled Templates:** ☒
- Default Biometric Group No.:** A text input field with the value '0'.

## Other Biometric Credentials

- **Enable Identification On Server:** Select the checkbox to enable the identification of palm/finger templates on this device.
- **Identification Server:** Select an Identification Server using the picklist button to which the device is to be assigned. The configuration of server is done from **Admin module > System Configuration > Identification Server Configuration** and the Identification Service must be started from the service tray.
- **Server Address:** It displays the IP Address of the selected Identification Server.

This is a close-up view of the configuration section shown in the previous image. The settings are as follows:

- Enable Identification On Server:** ☒
- Identification Server:**
- Configure Alternate Server Address:** ☐
- Server Address:**
- Server Port:**
- Enable Finger Smart Identification:** ☐
- Identification Time-Out Duration (Sec):**
- Auto Send Enrolled Templates:** ☒
- Default Biometric Group No.:**

- **Configure Alternate Server Address:** Enable this check-box to configure external IP address of Identification Server.
- **Server Address:** Enter the external network IP address which will be used for accessing identification server.
- **Server Port:** Enter the server port number. The default port number is 11005.

- **Enable Finger Smart Identification:** For all other supported doors, select the checkbox to enable fingerprint templates identification through Identification Server.
- **Identification Time-Out Duration (Sec):** Specify the duration in seconds after which the fingerprint template identification will get time out.  
**Example:** If 5 seconds is specified, then the identification server will try to identify the template till 5 seconds and if not found then it will show time-out to the user.
- **Auto Send Enrolled Templates:** Select the checkbox to enable any enrolled templates to be saved both on the COSEC database as well as saved locally on the configured Identification Server. This enables prompt identification of user on enrollment.
- **Default Biometric Group No.:** Specify the default biometric group number to be assigned to the device. It is a number allotted to a device to be assigned to the Identification Server. This enables the Identification Server to match the template against only those devices that belong to the corresponding biometric group. This reduces the false detection as well time to search template.



# Door Controllers

DOOR series controllers are versatile devices designed for reliability, modularity, and performance. These doors come in multiple variants specifically targeted at Time-Attendance and Access Control applications. The **Door V3** and **Door V4** can be connected as **Direct Door** as well as **Panel Door**.

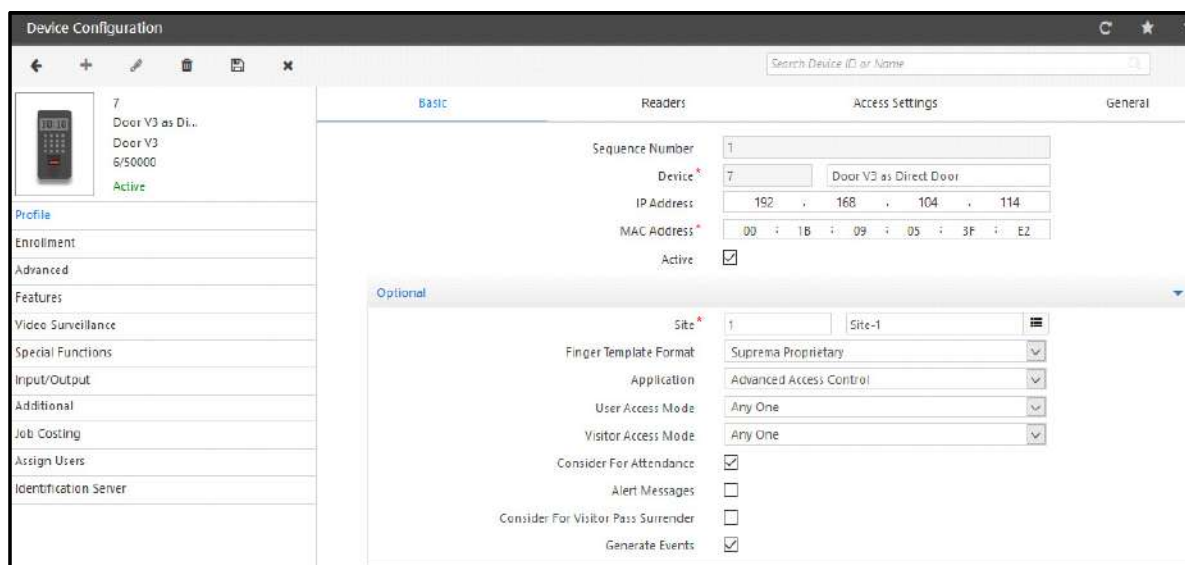


*The Configuration of Door V1 and Door V2 is similar to Door V3/Door V4. In this manual; configuration of Door V3 is explained for reference.*

*The basic difference between Door V1, Door V2, Door V3 and Door V4 is the support of user capacity and event buffer. Also Door V4 supports Wiegand Out feature.*

*The Door V3 uses 400 MHz ARM 9 based processors (ATMEL 9G45) while Door V4 uses 800MHz ARM CORTEX A8 based processors(AM3352).*

The Device Configuration page for Door V3 appears as shown below.



Enter the MAC address of the door. The IP address will be displayed automatically once the device comes online in Monitor.

To add Devices automatically, go to Admin Module> System Configuration> Global Policy> Device. Enable the “Auto Add New Devices” checkbox. Once the device is connected in network, it will come online in COSEC Monitor.



*The Monitor Service must be running while adding the device to COSEC.*

Once the device is configured, click the **Save** button to save the configuration.

To know more about configuring devices, click on the links for different tabs of Device configuration.

- [“Profile”](#)
- [“Enrollment”](#)
- [“Advanced”](#)
- [“Features”](#)
- [“Video Surveillance”](#)
- [“Special Functions”](#)
- [“Input/Output”](#)
- [“Additional”](#)
- [“Job Costing”](#)
- [“Assign Users”](#)
- [“Cafeteria”](#)
- [“Identification Server”](#)

## Profile

This section enables the user to set up the basic profile for any new device. Setting up a door profile involves defining basic parameters to set up any door controller device.

To do this, On the **Device Configuration** page, select the **Profile** tab. The Profile can be configured in the following sections:

- *“Basic”*
- *“Readers”*
- *“Access Settings”*
- *“General”*

## Basic

The **Basic** section for “Door V3 as Direct door” is shown below:

The screenshot displays the 'Device Configuration' window with the 'Basic' tab selected. On the left, a sidebar lists various configuration sections: Profile, Enrollment, Advanced, Features, Video Surveillance, Special Functions, Input/Output, Additional, Job Costing, Assign Users, and Identification Server. The main area shows the configuration for a device named 'M\_DOOR V3' (ID: 56, MAC: 1/50000, Status: Active). The 'Basic' tab includes fields for Sequence Number (65), Device (56), IP Address, and MAC Address (87, 96, 45, 11, 19, 13). The 'Active' checkbox is checked. Below this, an 'Optional' section is expanded, showing settings for Site (1), Finger Template Format (Suprema Proprietary), Application (Advanced Access Control), User Access Mode (Any One), Visitor Access Mode (Any One), Alert Messages (unchecked), Consider For Visitor Pass Surrender (unchecked), Consider For Attendance (checked), and Generate Events (checked).

The **Basic** section for “Door V3 as Panel door” is shown below:

Configure the following options as required:

- **Sequence Number** - This is a system generated sequence number for each new device.
- **Device**- Specify a name that can be assigned to the door. The Door ID is auto-generated by the system.
- **Connection Type** - Applicable only for Panel Doors. Specify the connection type as **Ethernet** or **RS485**.
- **IP Address** - This is the IP address assigned to the door. Once the device connection is established, this field will automatically display the door IP address.
- **MAC Address** - Specify the MAC Address of the door.



*MAC address of door is required while manually adding the door to the COSEC Monitor. Note the MAC address from the device when it is powered on.*

- **Active** - Check the box to activate the device on the network.



*To add the Device automatically, go to Admin Module> System Configuration> Global Policy> Device. Enable the “**Auto Add New Devices**” checkbox.*

*The device will be added automatically but make sure you enable the **Active** checkbox in order to connect the device to the network. Once the device is connected to the network, it will come online in COSEC Monitor.*

For Door V3 as Direct Door, the **Option** tab is as shown below:

- **Site** - Select the site to which this door is to be assigned from the site picklist window. Site is created from Devices> Masters> Site.
- **Finger Template Format** - Select the format as Suprema Proprietary or Suprema ISO according to which the templates will be enrolled. For globally setting the template format, you can set from Global policy.
- **Application** - Select the application type for which the device is to be used. The options are **Basic Access Control**, **Advanced Access Control** and **Cafeteria**. All devices set to **Cafeteria** will subsequently be available for Cafeteria configuration.



**For Door V2 :** The available license is ACS and Application is set to Basic Access Control. If this ACS voucher exhausts, then while dispatching Basic Configuration of device, application type will be sent as 'Advance Access Control'.

- **User/Visitor Access Mode** - Defines the type and combination of credentials required to identify and validate a user at the Door Controller. Select the appropriate credential combination from the drop down list.

The options available are:

- Any one
- Card
- Card + Biometrics
- Card + Biometrics + PIN
- Card + PIN
- Biometrics
- Biometrics + PIN
- Biometrics then Card
- Card then Biometric
- None
- **Consider for Attendance** - Select this checkbox if the events sent by this door are to be considered for Time and Attendance data processing. If this option is disabled, then the system would consider all events coming from the door as access control events.
- **Alert Messages** - Select this checkbox to enable the application to send alerts based on events from this door.
- **Consider for Visitor Pass Surrender:** Check the box to consider the selected device for visitor pass surrender. The Visitor can show his credential on this device to surrender the pass.

- **Generate Events:** This check-box is enabled by default. You can disable the check-box if the server is not required to receive any events from the respective devices.

For Door V3 as Panel door, the **Optional** tab shows the following configuration

- **Access Zone** (only for panel doors) - Assign an access zone to the door by selecting from the drop down menu.
- **Access Cluster** (only for panel doors) - Assign an access cluster to the door by selecting from the drop down menu.
- **Door Group:** Door Group drop down includes list of all configured Door groups on corresponding panel. An additional option as 'None' is available and selected by default.
- **Auto IP Assignment:** There is option where panel door can be assigned its IP from device webpage. To enable this check the Auto IP Assignment box.



Access Zone is configured while configuring Panel200.

## Readers

Readers are important hardware components in a biometric door device. They may be internal or external. This section enables the administrator to configure both internal and external readers for a door as shown.

The following parameters are available for configuration:

**Door Mode Selection** - If this option is enabled, then user will be prompted to select punch type as IN or OUT while punching on the device.

Eg: When a door is in Entry mode, your punches will always be in Entry side. But if you want to mark the punch in exit mode then you can select the door mode if "Door Mode Selection" is enabled.

If not selected, user will need to enable Scheduling to set reader mode of door as entry or exit as per user-defined schedules. For information on creating Reader Mode Schedules, **see Devices > Masters > Reader Mode Scheduler**.

**Prompt Special Function**- This will provide selection of special function on device screen and based on the selection of particular type of special function, job codes for JPC user will be prompted. This can be enabled only when "Door Mode Selection" is enabled.

**Auto Detect Readers** (for direct doors only) - Select this checkbox to enable auto detection of Readers on a door controller connected to the server.

#### Internal Readers

This option allows the configuration of the Internal Reader for the selected door.

- **Mode:** Select the Mode as **Entry** or **Exit** from the drop down list.
- **Card Reader Type;** Select the Card Reader Type from the following options:
  - EM Prox Reader
  - HID Prox Reader
  - MiFare Reader
  - HID iClass-U Reader
  - HID iClass-W Reader
- **Card Format:** The single or multiple card formats can be assigned to the readers of both direct and panel doors. The default card format is assigned to device as shown in the grid. If no other card format is assigned to device; then this default format will be applied.



*The formatting of card is described in Devices> Master> Card Format*

#### Multiple Card Format

To assign multiple card formats to device click on **Add** button. Then click the picklist to select the card format. And click **OK** to save the format.

Member No ▲	Card Format	Configurable Bits
1	Default Format	0


Member No ▲	Card Format	Configurable Bits
1	Default Format	0
2	Format1	0

Similarly you can add maximum 5 card formats. When the card format is saved, the Configurable bits of that format as configured from Masters> Card format will be displayed here. Multiple Card format configurations will be dispatched to door separated by 'Format ID' that is 'Member No.' along with all other format related parameters.

Mode: Entry  
Card Reader Type: EM Prox Reader

Member No ▲	Card Format	Configurable Bits
1	Default Format	0
2	Format1	26
3	Format2	32

- Select the **Finger Reader Type** as **Finger Reader**.

Click the **FP Reader Configuration**  button to set the **Security Level**, **Lighting Condition**, **Sensitivity**, **Fast Mode**, **Image Quality** and **Restore Defaults** for the selected FP Reader as shown.

Security Level: Normal  
Lighting Condition: In Door  
Sensitivity: Level 8 (High)  
Fast Mode: Auto  
Image Quality: Moderate

Restore Defaults

Save Close

### Finger Print Module Calibration

- **Security Level:** Security level specifies FAR (False Acceptance Ratio). Since FAR and FRR (False Rejection Ratio) is in inverse proportion to each other, FRR will increase with higher security levels.



For regular Time-Attendance system “**Normal**” level can be selected. For high security areas requiring complete or maximum matching of template, “**Highly Secure**” level must be selected. For approximate matching of template, “**Secure**” level can be selected.

- **Lighting Condition:** Optical sensors are sensitive to lighting condition. With this parameter, users can tune optical sensors to be adapted for their lighting environment. Select the In Door or Out Door option based on the device location.
- **Sensitivity:** Specifies sensor sensitivity to detect a finger. On high sensitivity, the module will accept the finger input more easily. Level 8 has the highest sensitivity.
- **Fast Mode:** Fast Mode parameter can be used to shorten the matching time with a little degradation of authentication performance. In typical cases, Fast Mode 1 is 2 to 3 times faster than Normal mode while Fast Mode 5 is 6 to 7 times faster than Normal mode. There is also an Auto mode.
- **Image Quality:** When a fingerprint is scanned, the module will check if the quality of the image is adequate for further processing. Image quality parameter specifies the strictness of this quality check. Strongest option might lead to higher number of finger rejections during the enrollment process.



*Good quality of enrollment( around 70-75% quality) is recommended for proper identification of enrolled templates.*

- Click on the **Restore Defaults** button to return the field values for this page to default values if needed.
- Click on the **Save** button.
- **Enable Scheduling:** Select this checkbox to **Enable Scheduling** to set reader mode of door as entry or exit as per user-defined schedules. For information on creating Reader Mode Schedules, **see Devices > Masters > Reader Mode Scheduler.**

## External Readers

This option allows the configuration of the External Reader for the selected door.

- **Mode:** Select the Mode as **Entry** or **Exit** from the drop down list.
- **External Reader Type:** Select the desired type of External Reader from the drop-down list.



*Using PIN-W Reader; user can change their PIN number through devices.*

- **Card Format** - Select a card format to be applicable for external readers of the device. This is applicable for all direct doors and all Panel doors. For multiple format description [See “Multiple Card Format” on page 997.](#)
- **Exit Switch** - Select this checkbox to enable the use of **Exit Switch**.
- **User/Visitor Access Mode** - Select the access mode from the options shown below:
  - Any One
  - Card
  - Biometrics

- Card + Biometrics
  - Biometrics then Card
  - None
- 
- **Access Control On Exit Mode** - Select this check box to enable the checking of the following access control policies on door when the external reader is in the 'exit' mode.
    - User enabled
    - User validity
    - Blocked user
    - Time Based Access Check
    - ASC
    - User Access Group

## Access Settings

This section is available for direct doors. The **Access Settings** page appears as shown below:

The screenshot shows the 'Device Configuration' window with the 'Access Settings' tab selected. The left sidebar lists various configuration categories: Profile, Enrollment, Advanced, Features, Video Surveillance, Special Functions, Input/Output, Additional, Job Costing, Assign Users, and Identification Server. The main area contains the following settings:

- Universal Time Zone:** A dropdown menu showing '(GMT+05:30)Chennai, Kolkata, New Delhi, Mumbai'.
- Time Format:** A dropdown menu showing '12 Hours'.
- Auto Synchronize with NTP:** A checkbox that is currently checked.
- Preferred NTP Server:** A text input field.
- Working Days:** A grid of checkboxes for Sun, Mon, Tue, Wed, Thu, Fri, Sat, and Holiday, all of which are checked.
- Working Hours(HH:MM):** Two text input fields showing '00:00' and '23:59'.
- Holiday Schedules:** A table with four rows, each containing a 'Holiday Schedule' number (1-4) and a 'Schedule' name (Schedule 1-4).

- **Universal Time Zone** - Select the geographic time zone in which the DOOR will operate.
- **Time Format** - Specifies the time format to be displayed on Door Controller LCD display. The formats available are:
  - 24 Hours
  - 12 Hours

Select the relevant option from the drop down list as per the site requirements.

### Auto Synchronize with NTP

If Date and time is to be automatically synchronized as per the **Preferred NTP Server** (predefined or user-defined NTP server address) selected by user, then you must enable **Auto Synchronize With NTP** checkbox.

Independent of the mode set from server as Auto or Manual, the user can change the date and time settings from device webpage, which will be reflected on device display.

- When Auto Synchronization with NTP is disabled Preferred NTP Server field will be disabled.
- When Auto Synchronization with NTP is enabled,
  1. You can specify the Preferred NTP server of your choice. In this case device will first try to get Date and Time from that server address.  
If it does not get Date and Time in three tries; device will check from pre-defined NTP servers.  
If you have entered one of the three pre-defined NTP servers(ntp1.cs.wisc.edu , time.windows.com , time.nist.gov); then device will first check that server first.  
If it receives updated Date and Time then Updated Date and Time will be reflected on device webpage and display screen.
  2. You can keep the Preferred NTP server as blank. In this case device will check for Date and Time from the first NTP server.

3. If user has manually entered Date and Time from webpage or Device Menu then those values of Date and Time will be reflected on device webpage and display screen.

In the case of the **Manual** option the administrator can manually update the time on the Door with that of the system time as and when required. This can be accomplished from the COSEC Monitor and control application.

- **Working Days** - Specify the days on which the default working hours should be applicable. Check the relevant boxes to specify the active days.
- **Working Hours (HH:MM)** - Define the default working hours in HH:MM format.
- **Holiday Schedule** - This section allows the administrator to assign up to four holiday schedules to the device by using the Holiday Schedule picklist.



*If the same holiday schedule is configured for a user and for the door controller on which the user is assigned, then the user's attendance marking on this device, on any of the scheduled holidays will always be marked as a holiday.*

## General

The **General** page appears as follows. Enter all general details applicable to the device in this section.

Device Configuration

Search Device ID or Name

Basic Readers Access Settings **General**

Mute Buzzer ☐

**Allowed Acknowledgement**

Display Duration (ms) 3000

LED - Buzzer Duration Long

**Denied Acknowledgement**

Display Duration (ms) 3000

LED - Buzzer Duration Long

Enable Display Messages ☒

Custom Birthday Message Happy Birthday

Display Message 1 ☒

Schedule 00:00 11:59

Message Good Morning

Display Message 2 ☒

Schedule 12:00 15:59

Message Good Afternoon

Display Message 3 ☒

Schedule 16:00 20:59

Message Good Night

Multi-Language Support ☐

- **Mute Buzzer** - User can mute or unmute the door buzzer by checking or clearing the box respectively.
- **Allowed Acknowledgment**
  - **Display Duration (ms)** - Define the time duration in between 500 to 3000ms till which the 'Acknowledgment Allowed' message will be displayed.
  - **LED - Buzzer Duration** - Select the time duration as Long, Medium or short for the LED Buzzer.
- **Denied Acknowledgment**
  - **Display Duration (ms)** - Define the time duration in between 500 to 3000ms till which the 'Acknowledgment Denied' message will be displayed.
  - **LED - Buzzer Duration** - Select the time duration as Long, Medium or short for the LED Buzzer.



*The below mentioned features are available in direct door only.*

- **Enable Display Messages** - This feature allows the user to enable custom birthday message and display messages to be displayed on the door device. Upto 4 display messages can be configured for a door.
- **Custom Birthday Message**- Enter the birthday message which would appear on the door when the user punches on the door on his birth date.  
The valid values are

**A-Z**

a-z

0-9

`~!@#\$%^&\*()\_+-{}\\|:;?<>,.\'"

- **Display Message** - Enable each display message individually by selecting this checkbox.
- **Schedule** - For each message, the user needs to define the time period between which this message is to be displayed.
- **Message** - Enter the message to be displayed in this field. Maximum 21 characters allowed.
- **Multi-Language Support** - Select this checkbox to enable multi-language support for the selected device.

The **Display From** field shall display the reading order for the selected language.



*However Door V3 will support languages with english fonts (A-Z,a-z) only.*

## Enrollment



The Enrollment section is not available for panel doors.

The Enrollment page appears as shown below.

The screenshot shows the 'Device Configuration' window for a device named '55 Door V3-Devic...'. The left sidebar lists various configuration sections, with 'Enrollment' selected. The main area displays the 'Settings' tab for enrollment. The 'Enroll From Device' checkbox is checked. The 'Enrollment Mode' is set to 'Biometrics' and 'Enrollment Using' is set to 'User ID'. Below these, 'Template Per Finger' is 'Single Template/Finger', 'Max Number Of Fingers' is 'Ten', and 'Number of Fingers' is 'One'. At the bottom, 'Number Of Cards' is 'One' and 'Enable Self-Enrollment' is unchecked.

- **Enroll from Device** - Select this check-box to enable the enrollment of user from the door controller. When this check-box is enabled, 'Enroll User' special function on that device will get active as shown below.

If 'Enroll User' special function & 'Enroll From Device' check-box both are inactive in device configuration, then on activating 'Enroll User' special function, 'Enroll From Device' check-box will be enabled.

The screenshot shows the 'Device Configuration' window with the 'Special Functions' section selected in the sidebar. The main area displays a table of special functions. An arrow points to the 'Enroll User' function (row 11), which is active.

No.	Function Name	Active	JOB Selection	User Group	Card-1
1	Official Work - IN	Yes	Yes	All	
2	Official Work - OUT	Yes	Yes	All	
3	Short Leave - IN	Yes	Yes	All	
4	Short Leave - OUT	Yes	Yes	All	
5	Regular - IN	Yes	Yes	All	
6	Regular - OUT	Yes	Yes	All	
7	Break End	Yes	Yes	All	
8	Break Start	Yes	Yes	All	
9	Overtime - IN	Yes	Yes	All	
10	Overtime - OUT	No	No	All	897897978767878 97880
11	Enroll User	Yes	No	All	
12	Enroll Special Card	Yes	No	All	

- **Enrollment Mode** - Select the Credential from the drop-down list that can be enrolled using the special function at the DOOR. The options are **ReadOnlyCard**, **SmartCard**, **Biometric** and **BiometricthenCard**, and

**DuressFinger.** Refer [“Enroll Credentials”](#) or [“Enrolling Users”](#) to enroll User/Worker. Refer [“Enrollment”](#) or [“Enroll Credentials”](#) to enroll Worker. Refer [“Enroll Credentials”](#) to enroll a Visitor.



*DuressFinger is only applicable for User and Worker.*

- **Enrollment Using** - Select the option **User ID** or **Reference No.** using which enrollment will be done.
- **Template Per Finger** - This parameter displays the values as configured at the global level. This field is not user editable from this page.
- **Max Number of Fingers** - This parameter displays the values of the maximum number of fingers configured at the global level. This field is not user editable from this page.
- **Number of Fingers/Cards** - Select the number of cards or fingerprints to be enrolled based on the credential option selected in the Enrollment Mode parameter.
- **Enable Self-Enrollment** - Select this check-box to enable the self-enrollment feature on this door.

## Advanced

The Advanced tab allows the user to configure some advanced parameters such as access control settings, alarms and device timers.

To access this, After selecting the device, Select the **Advanced** tab from **Device Configuration** page. The advanced settings can be configured from following sections:

- [“Settings”](#)
- [“Alarms”](#)
- [“Timers”](#)
- [“Wiegand”](#)



## Settings

The **Advanced Settings** page for Door V3 as Direct Door appears on your screen as shown below:

The screenshot displays the 'Advanced Settings' page for a device named 'Door V3 as DI...'. The left sidebar contains a list of settings categories: Profile, Enrollment, Advanced (selected), Features, Video Surveillance, Special Functions, Input/Output, Additional, Job Costing, Assign Users, and Identification Server. The main content area is divided into four tabs: Settings, Alarms, Timers, and Wiegand. The 'Settings' tab is active, showing a list of configuration options with checkboxes and input fields. The 'Temperature Logging' section is expanded, showing detailed settings for temperature monitoring.

Setting	Value
Generate Exit Switch Events	<input type="checkbox"/>
Generate Invalid User Events	<input type="checkbox"/>
Generate Sequential IN-OUT Events	<input type="checkbox"/>
Two Credentials Required	<input type="checkbox"/>
Show Pin	<input type="checkbox"/>
Allow Exit When Door Lock	<input type="checkbox"/>
Auto Relock	<input type="checkbox"/>
Auto Relock Timer (Sec)	3
Enable Additional Security	<input type="checkbox"/> Disabled
Enable Smart Identification	<input type="checkbox"/>
Access Level	8
Access Mode	Card
Auto Acknowledge Alarm	<input type="checkbox"/>
Auto Acknowledge Alarm (Sec)	10
Facility Code	1

Temperature Logging	
Enable	<input type="checkbox"/>
Sensor Type	AST
Sensor Interface	USB
Emissivity	0.95
Calibration Parameter	+ 0.0
Approach to Sensor Wait-Time (Sec)	3.0
Temperature Detection Time Out (Sec)	10
Tolerance between Consecutive Readings	0.5
Consecutive Readings Count within Tolerance	5
Temperature Threshold (°F)	99.5
Minimum Temperature for Access (°F)	95.0
Restriction Type	Soft
Bypass If Sensor Disconnected	<input type="checkbox"/>

The following parameters are available for configuration:

- **Generate Exit Switch Events** - Select this check-box to enable the door to generate events every time the exit switch is used.
- **Generate Invalid User Events** - Select this check-box to enable the door to generate events for invalid user inputs.
- **Generate Sequential IN-OUT Events** - Select this check-box to generate user punches on device as the sequential IN-OUT events irrespective of whichever mode in which device is functioning.
- **Two Credentials Required**- Select this check-box to enable the feature of verifying 2 credentials mandatorily for users allowed to By-pass finger/palm.
- **Show Pin**- Select this check-box to display the characters of PIN when the PIN is entered on device.

- **Allow Exit when Door Lock** - Select this check-box if users are to be allowed to exit even when the Door relay is in locked condition.
- **Auto Relock** - Select this checkbox to allow the door to relock immediately when the door status changes to close after normal open irrespective of the defined pulse time. However, it is supported only if a door sense is installed and enabled.
- **Auto Relock Timer** - Specify the time in seconds for the Auto Relock operation. Valid Range: 1 to 65535.
- **Enable Additional Security** (for direct door) - Select this checkbox to enable additional security at the selected Door Controller.
- **Additional Security Code** - Enter a code (ranging from 1 to 65535) in the field provided. Re-enter the code to confirm.



*Changing this value can affect the SI function. Click on the **Default Code** button to reset the **Additional Security Code** to the value set in the **Global Additional Security Code** field on the Global System Policy page.*

- **Enable Smart Identification** - Select this checkbox to enable this functionality at the selected Door Controller and select the **Access Level** and the **Access Mode** from the drop down list.
- **Auto Acknowledge Alarm** - Select this check-box to enable the auto-acknowledgment of all alarms for this device.
- **Auto Acknowledge Alarm (sec)** - Set the time in seconds for the Auto Acknowledge Timer. The wait timer will start and on expiry of the timer, the alarm buzzer will stop automatically.
- **Facility Code** - Set a value for Facility Code to be set for access modes other than “Card”, if Facility Code is expected in Wiegand Output. This will be applicable to all direct doors except Door V1 and V2.
- **Allow Access Through Mobile**- Check the box to allow the access to device using COSEC ACS App.
- **Mobile Entry/Exit Access Mode**- Select the entry and exit door access mode from the options of **Mobile Only**, **Mobile then Biometrics** and **Mobile then Card**.



*If User Access Mode is selected as “None” in Zone Configuration and Mobile Access Mode is selected as “Mobile Then Biometrics” then door can be accessed through Mobile and then Biometric credential.*

## Temperature Logging

- **Enable:** Enable the temperature logging feature on the zone.
- **Sensor Type:** Select the type of thermal sensor integrated in the device. There are three sensors: *AST*, *Web-Based* and *FEVOBOT*. Default sensor set is *FEVOBOT*.
- **Sensor Interface:** Select the interface on which device will communicate with the sensor.  
For Sensor Type-AST  
Sensor Interface options will be: RS-232 and USB  
For Sensor Type- Web-based  
Sensor Interface options will be: HTTP/S  
For Sensor Type-FEVOBOT  
Sensor Interface options will be: USB

- **Emissivity:** Set the emissivity parameter for Sensor. This parameter should only be visible when Sensor Type is AST. Default value is 0.95.

It is used to define accuracy in sensor to detect temperature of different skin or objects.  
Not applicable for FEVOBOT.

- **Calibration Parameter:** Set the calibration parameter for the thermal sensor.  
On click of + the value should increase by 0.1 and on click of – it should decrease by 0.1.  
Not applicable for FEVOBOT.
- **Approach to Sensor Wait-Timer:** Time for which the device will wait for user to approach the device before starting Temperature Detection.
- **Temperature Detection Time-Out:** The timer till which temperature detection will be done for the user and if valid temperatures are not found till the expiry of timer then timeout will be declared.
- **Tolerance between consecutive readings:** The Tolerance range of reference temperature within which the consecutive readings are considered to be valid user temperature readings. If current temperature doesn't fall in tolerance range the reference temperature is updated with the current temperature and the process continues.  
Not applicable for FEVOBOT.
- **Consecutive readings count within tolerance:** The Tolerance range of reference temperature within which the consecutive readings are considered to be valid user temperature readings. If current temperature doesn't fall in tolerance range the reference temperature is updated with the current temperature and the process continues.  
Not applicable for FEVOBOT.
- **Minimum Temperature for Access:** The minimum temperature value that should be detected is to be considered as valid temperature.  
It should be less than threshold temperature. If user tries to enter a value equal to or greater than threshold temperature validation should be shown.  
The default value, unit and range should be updated based on the Temperature unit set on Panel.
- **Temperature Threshold:** To set the threshold value of the temperature. The default value, unit and range can be updated based on the Temperature unit set on Panel.
- **Restriction Type:** To set restriction type as soft/hard.
- **Bypass if Sensor Disconnected:** Enable this check-box to give provision of bypassing the feature if sensor connectivity is lost.

The **Advanced Settings** for **Door V3** as **Panel Door** is shown below:

- **Auto Relock** - Select this checkbox to allow the door to relock immediately when the door status changes to close after normal open irrespective of the defined pulse time. However, it is supported only if a door sense is installed and enabled.
- **Auto Relock Timer** - Specify the time in seconds for the Auto Relock operation.
- **Tail-Gating** - Tail-gating refers to an access violation which occurs when more than one person tries to enter a secured area using a single person's access credentials. If this option is enabled on the panel door, the occupancy count of a zone should be incremented or decremented considering both the punch as well as the auxiliary input port of the panel door (say, input from a beam-counter). Set the wait timer for resetting the tailgating count (**Reset Wait Timer**) based on the door lock status or the door pulse wait timer (as configured).
- **Man Trap Entry Timer(Sec)** - This checkbox enables an alarm wait timer on the panel door to ensure that the user enters the next sequential door of a man-trap within a specific time-frame.
- **Man Trap Exit Timer(Sec)** - This checkbox enables an alarm wait timer on the panel door to ensure that the user exits the panel door to enter the next sequential door of a man-trap within a specific time-frame.
- **Enable Man Trap Door Interlocking:** Select this check-box to activate the Door Interlock for the selected door (say Door1). This means if the Door1 is open then other doors will remain close.
- **Select Doors for Interlocking:** Select the doors to be assigned for Interlocking from the picklist. You can select particular doors or all the doors at once.

- To do so, click the **Select Doors** for Interlocking picklist. The **Picklist For Panel Door** pop-up appears.

Picklist For Panel Door

Total Selected: 0 Records

Search  [Show Selected](#)

☐ Select All


<input type="checkbox"/>	ID	Name ▲
<input type="checkbox"/>	10	ARCDC100_DD_Door
<input type="checkbox"/>	9	ARCDC100_DD_Door
<input type="checkbox"/>	8	ARCDC100_SD_Door
<input type="checkbox"/>	1	ARGO_PANEL
<input type="checkbox"/>	2	DoorV3
<input type="checkbox"/>	7	DoorV3_Door
<input type="checkbox"/>	3	DOORV4_PANEL
<input type="checkbox"/>	6	dummy
<input type="checkbox"/>	4	PATHV2_PANEL
<input type="checkbox"/>	5	VEGA_PANEL

OK Cancel

To select particular doors, click the check boxes of the desired doors.

**OR**

To select all the doors, select the **Select All** check box.

Click **OK**. Hover over the **Info**  icon. It displays the number of selected doors.

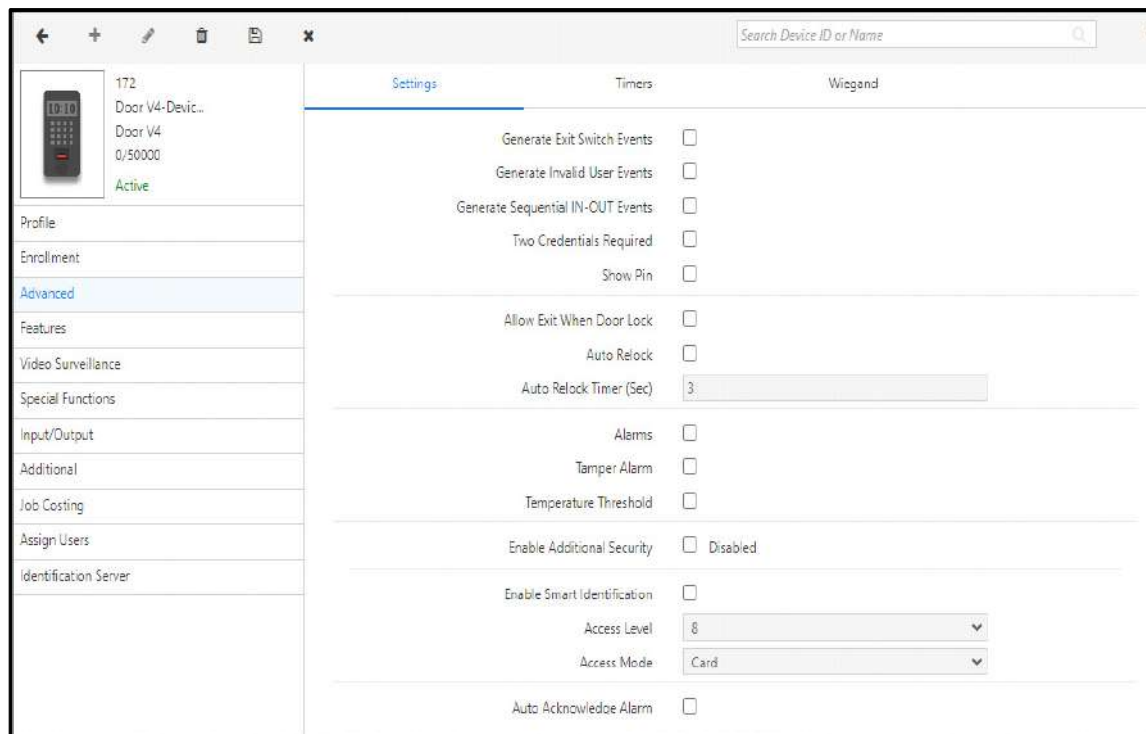
Suppose Door2 and Door3 are selected for Interlock with Door1. So When Door1 opens; Door2 and Door3 will remain close.



*For Degrade mode Door Interlocking feature will not work.*

*Whenever a door is in abnormal state and for that door interlocking is enabled then user access in other doors of the interlocking group is allowed.*

The **Advanced** Setting page for **Door V4** as **Direct Door** appears on screen as shown below:



172  
Door V4-Devic...  
Door V4  
0/50000  
Active

Profile  
Enrollment  
Advanced  
Features  
Video Surveillance  
Special Functions  
Input/Output  
Additional  
Job Costing  
Assign Users  
Identification Server

Settings Timers Wiegand

Generate Exit Switch Events ☐  
Generate Invalid User Events ☐  
Generate Sequential IN-OUT Events ☐  
Two Credentials Required ☐  
Show Pin ☐  
Allow Exit When Door Lock ☐  
Auto Relock ☐  
Auto Relock Timer (Sec) 3  
Alarms ☐  
Tamper Alarm ☐  
Temperature Threshold ☐  
Enable Additional Security ☐ Disabled  
Enable Smart Identification ☐  
Access Level 8  
Access Mode Card  
Auto Acknowledge Alarm ☐

Auto Acknowledge Alarm (Sec) 10  
Facility Code 1  
Allow Access Through Mobile ☐  
Mobile Entry Access Mode Mobile Only  
Mobile Exit Access Mode Mobile Only  
Advertise Bluetooth ☐  
Bluetooth Name MATRIX  
Bluetooth Range Medium (5m - 7m)

**Temperature Logging**

Enable ☐  
Sensor Type AST  
Sensor Interface USB  
Emissivity 0.95  
Calibration Parameter + 0.0  
Approach to Sensor Wait-Timer (Sec) 3.0  
Temperature Detection Time Out (Sec) 10  
Tolerance between Consecutive Readings 0.5  
Consecutive Readings Count within Tolerance 5  
Temperature Threshold (°F) 99.5  
Minimum Temperature for Access (°F) 95.0  
Restriction Type Soft  
Bypass If Sensor Disconnected ☐

In addition to the features same as Door V3, there are 3 more features. They are:

- **Mobile Entry/Exit Access Mode-** Select the entry and exit door access mode from the options of **Mobile Only**, **Mobile then Biometrics**, **Mobile then Card** and **Mobile then PIN**.
- **Advertise Bluetooth-** Check the box to enable Bluetooth of the device by which the device will be visible to others.
- **Bluetooth Name-** When “Advertise Bluetooth” checkbox is enabled, you can enter the bluetooth name. The default name is Matrix.
- **Bluetooth Range-** You can select the bluetooth range as Short, Medium or Long based on which user can mark the attendance. Suppose if you select “Short” range; then user can mark the punch via bluetooth from near by office premises only.
  - Short(1m-2m)
  - Medium(5m-7m)
  - Long (>8m)

By default, the range will be set to “Medium”. If you want to allow punch marking from long distance, then you can select “Long” range.

## Temperature Logging

- **Enable:** Enable the temperature logging feature on the zone.
- **Sensor Type:** Select the type of thermal sensor integrated in the device. There are three sensors: *AST*, *Web-Based* and *FEVOBOT*. Default sensor set is *FEVOBOT*.
- **Sensor Interface:** Select the interface on which device will communicate with the sensor.  
For Sensor Type-AST  
Sensor Interface options will be: RS-232 and USB  
For Sensor Type- Web-based  
Sensor Interface options will be: HTTP/S  
For Sensor Type-FEVOBOT  
Sensor Interface options will be: USB
- **Emissivity:** Set the emissivity parameter for Sensor. This parameter should only be visible when Sensor Type is AST. Default value is 0.95.  
It is used to define accuracy in sensor to detect temperature of different skin or objects.  
Not applicable for FEVOBOT.
- **Calibration Parameter:** Set the calibration parameter for the thermal sensor.  
On click of + the value should increase by 0.1 and on click of – it should decrease by 0.1.  
Not applicable for FEVOBOT.
- **Approach to Sensor Wait-Timer:** Time for which the device will wait for user to approach the device before starting Temperature Detection.
- **Temperature Detection Time-Out:** The timer till which temperature detection will be done for the user and if valid temperatures are not found till the expiry of timer then timeout will be declared.
- **Tolerance between consecutive readings:** The Tolerance range of reference temperature within which the consecutive readings are considered to be valid user temperature readings. If current temperature

doesn't fall in tolerance range the reference temperature is updated with the current temperature and the process continues.

Not applicable for FEVOBOT.

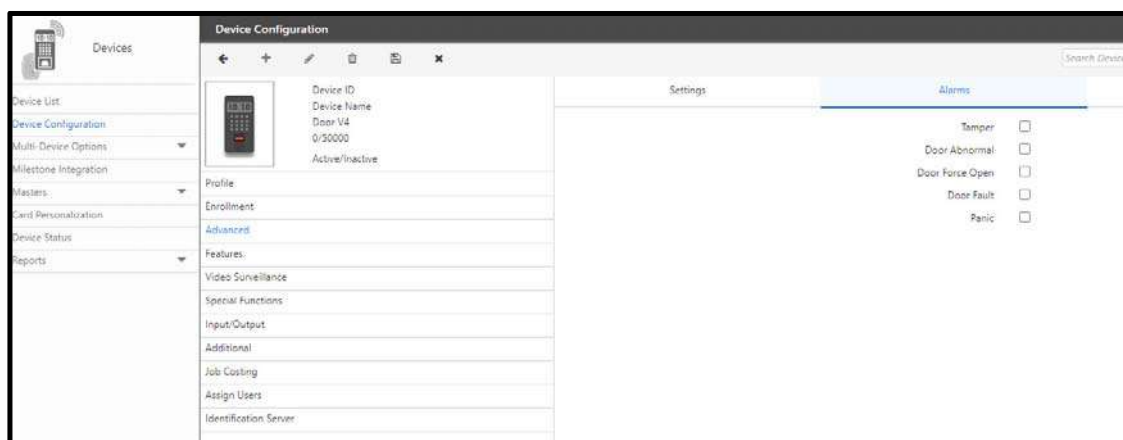
- **Consecutive readings count within tolerance:** The Tolerance range of reference temperature within which the consecutive readings are considered to be valid user temperature readings. If current temperature doesn't fall in tolerance range the reference temperature is updated with the current temperature and the process continues.  
Not applicable for FEVOBOT.
- **Minimum Temperature for Access:** The minimum temperature value that should be detected is to be considered as valid temperature.  
It should be less than threshold temperature. If user tries to enter a value equal to or greater than threshold temperature validation should be shown.  
The default value, unit and range should be updated based on the Temperature unit set on Panel.
- **Temperature Threshold:** To set the threshold value of the temperature. The default value, unit and range can be updated based on the Temperature unit set on Panel.
- **Restriction Type:** To set restriction type as soft/hard.
- **Bypass if Sensor Disconnected:** Enable this check-box to give provision of bypassing the feature if sensor connectivity is lost.



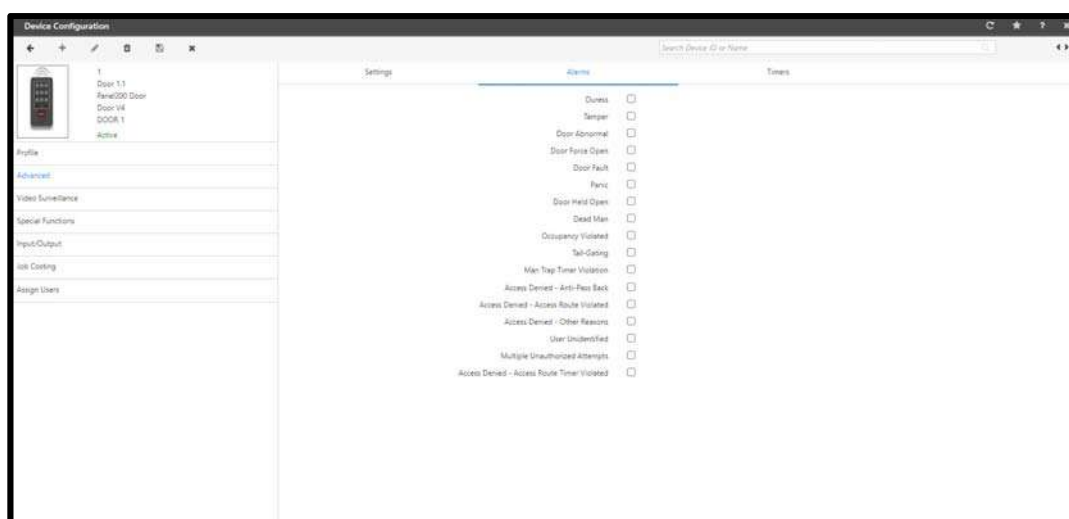
## Alarms

In Alarm tab, you can assign below list of alarms to the door.

### For Direct Door



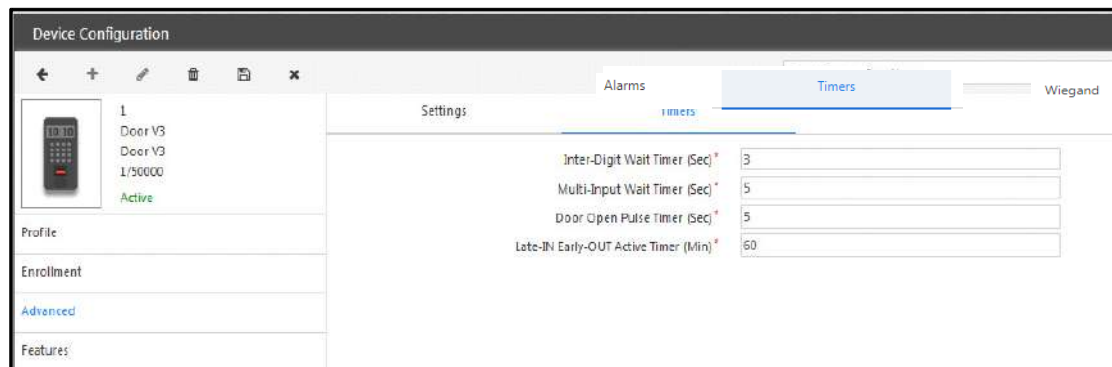
### For Panel Door



Select the respective check-box of alarms which you want to enable.

## Timers

This section allows the configuration of various types of pre-defined device timers which can trigger off specific responses. In COSEC, timers are often used to control door behaviour and for triggering alarms. The **Timers** page appears on your screen as shown below:



- **Inter-Digit Wait Timer (sec)** - Specify the time period in seconds between two key inputs on the device keypad. On expiry of this timer, the system considers the user input to be complete and is ready for the next input.
- **Multi-Input Wait Timer (sec)** - Specify the time in seconds for which system needs to wait for the second credential input from the user when more than one credential is to be used to grant access.



*We recommend you to set the timer value as greater than or equal to 10 seconds to avoid access denial issues to users. This is applicable when the system reads the credentials (biometric) from the user's Smart Cards.*

- **Door Open Pulse Timer (sec)** - Specify the time in seconds (1 to 65535) for the door to be energized for a valid credential. If the opened door does not return to a closed state before the expiry of this timer, the door will generate a "Door Abnormal" alarm.
- **Late-IN Early-OUT Active Timer (min)** - Specify the time in minutes for which the Late-IN and Early-OUT special functions will remain active after being enabled at the Door Controller.



*The above features are available only for direct doors.*

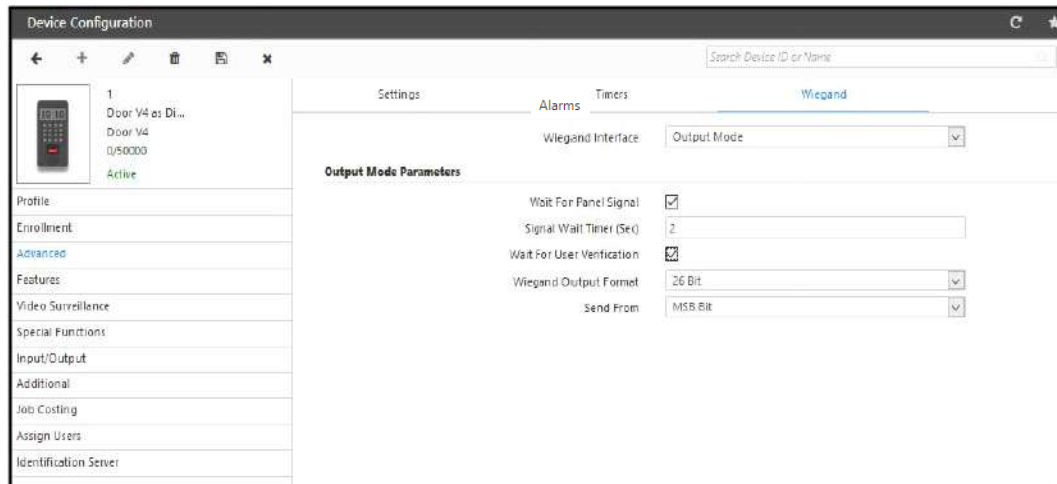
- **Pulse Time (sec)** - Specify the time in seconds for the panel door to be energized for a valid credential.



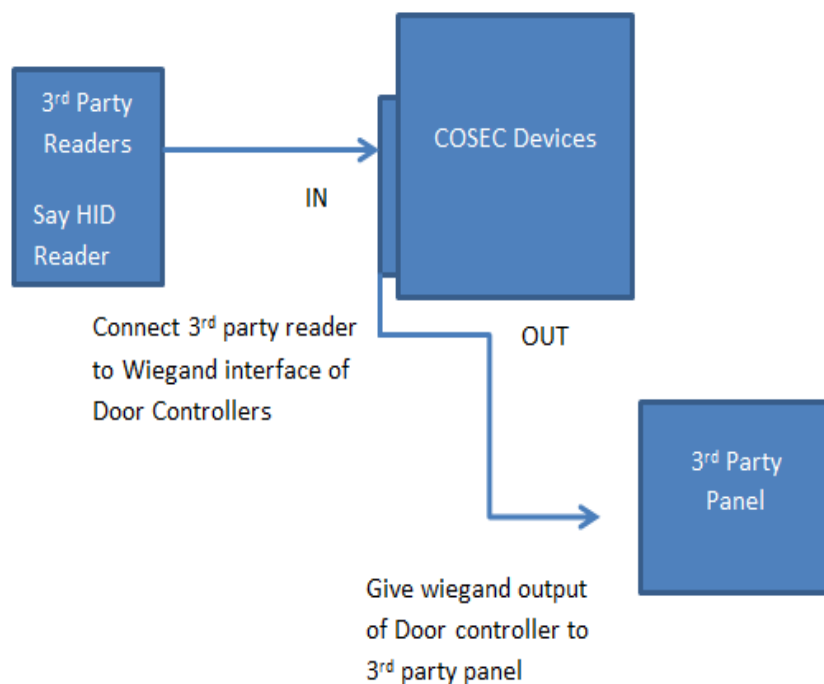
*This feature is available only for panel doors.*

## Wiegand

Wiegand Interface is available in Door V4 only.



- **Wiegand Interface** - The COSEC device can be connected both as input devices (e.g. to receive data from a Wiegand Reader) or output devices (e.g. to support output to third party panel) via the Wiegand interface as shown below.

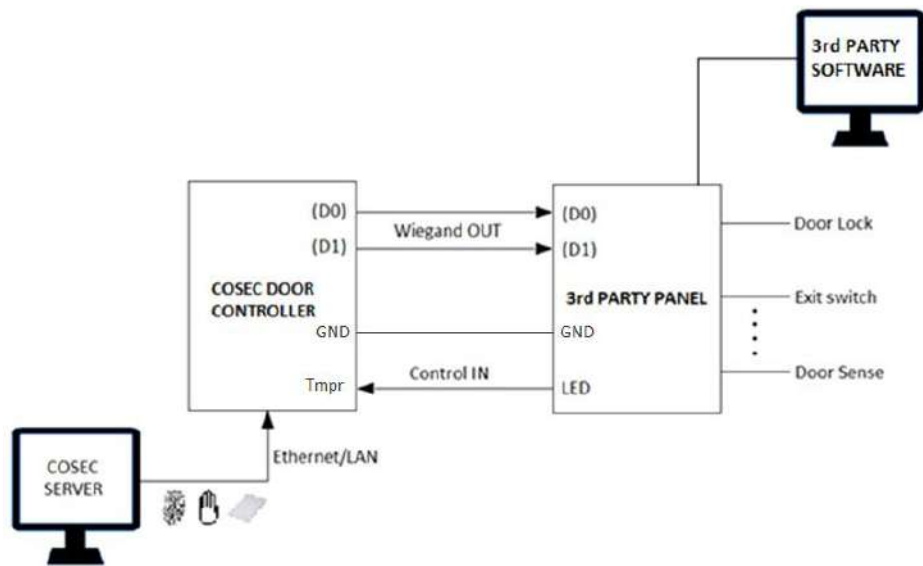


So select the interface of Door controller as **Output Mode** to work as Wiegand output to panel or **Reader Input** to take data from third party Reader. If Reader Input option is selected, all the output mode parameters will be disabled.

If you select Output mode then configure the **Output Mode Parameters**.

- **Wait For Panel Signal** - If this option is enabled the door will wait for reply from the connected third party device before triggering any output, as per the defined Signal Wait Timer (Sec).
- **Wait For User Verification** - If this option is enabled, user verification will be requested on the third party device before triggering any output.
- Specify the **Wiegand Output Format** and sending order for reader data as MSB or LSB Bit in the **Send From** field.

### Wiegand Out Interface



Also for the **Custom** format, user can configure details of fields to be sent as output from the Wiegand reader that has been added.

### Door Access using QR code

The user can access the COSEC device using COSEC APTA installed in the mobile device. If the user has rights for COSEC APTA and the access to the device is allowed for the user, then he can use his mobile device to scan the QR code which constitute the details of the COSEC door.

There is icon for QR code on COSEC APTA application. Clicking that icon will open the camera in your mobile. Now you can show the mobile camera to scan the QR code. The COSEC door will get opened after verifying the security key and access policies of the user.

### Steps to create a QR code

Step 1: Enter details in JSON format

```
{"version":"x","ip": "x.x.x.x","port":"x","pdid":"x","mode":"x"}
```

Valid values:

Field	Field range	Default Value	Remark
version	1-255	1	

Field	Field range	Default Value	Remark
ip	0.0.0.0-255.255.255.255	0.0.0.0	
port	0-65535	0	
pdid	0-255	0	If door is in direct door mode then, then PDID will be 0  If door is in panel door mode then, PDID will have values from 1-255
mode	0,1	0	0= for entry mode 1=for exit mode



**Note:**

**Step1a.** If door is in direct door mode enter IP & port of the direct door

b. If door is a panel door, then enter IP & port of the panel door and in the pdid specify the door id which is to be accessed.

**Step 2:** Encrypt the JSON string using key "matrix12" with simple DES/ECB mode.

**Step 3:** Encode the encrypted string using Base 64.

**Step 4:** Use this string to generate QR code through any third party software.

## Features

The Features tab allows the user to enable certain Access Control features for a device



*The Features tab is available only with the Access Control Module license and is applicable only for direct doors.*

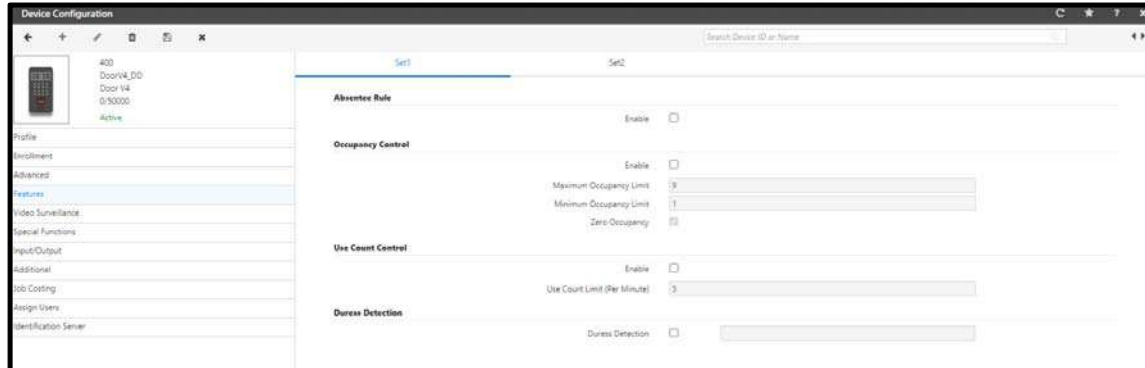
To access this, After selecting the device, Select **Device Configuration> Features**. The access control features for the device can be set from the following two sections:

- "Set1"
- "Set2"

## Set1

This page allows the configuration of three rules - **Absentee Rule**, **Occupancy Control** and **Use Count Control**.

The page appears as shown below.



- **Absentee Rule** - Select this checkbox to enable this feature at the door. This rule sets the maximum number of days for non-use of a credential. On expiration of days limit, the user will be automatically blocked.  
For configuring the rule See *Access Control> Absentee Rule*.
- **Occupancy Control** - Select this checkbox to enable the feature at the door and specify maximum number of users to be allowed within the controlled area after which a user exit is required to enable access to another user. Also specify the **Minimum Occupancy Limit** i.e. the minimum number of occupants the designated zone should have, and enable/disable the **Zero Occupancy** option to determine whether the designated zone should be allowed to be empty or not.  
For configuring the rule See *Access Control> Occupancy Control*.
- **Use Count Control** - Select this checkbox to enable the feature at the door and specify the maximum number of uses per minute.  
For configuring the rule See *Access Control> Use Count Control*.
- **Duress Detection** - Select this checkbox to enable the feature. The default duress detection code is displayed which is used to generate the duress alarm which informs that the user is forced to open the door under threat.



*Duress Detection (PIN+ Finger) is supported only in Door V4.*

*Duress Detection (PIN only) is supported only in Door V3.*

*Duress Detection is not supported in Door V1 and Door V2.*

## Set2

This page allows the configuration of three rules - **First-IN User Rule**, **Anti-Pass-Back (APB)** and **2-Person Rule**. The page appears as shown below.

The screenshot shows the 'Device Configuration' window for 'Set2'. On the left is a sidebar with a list of configuration categories: Profile, Enrollment, Advanced, Features (highlighted), Video Surveillance, Special Functions, Input/Output, Additional, Job Costing, Assign Users, and Identification Server. Below the sidebar is a small device icon and status 'Active'. The main panel is titled 'Set2' and contains three rule configurations:

- First-IN User Rule:** Enabled (checkbox checked). Reset On: Day Change (radio selected), Timer Expiry (radio unselected). Access Timer (Sec): 3. First-IN User Group: 1 (dropdown menu).
- Anti-Pass-Back (APB):** Enabled (checkbox checked). On Entry: checked (checkbox). On Exit: unchecked (checkbox). Hard/Soft: Soft (dropdown menu). Forgiveness: checked (checkbox). Reset After: Day Change (radio selected), Timer Expiry (radio unselected). Forgiveness Timer (Mins): 1 (input field).
- 2-Person Rule:** Enabled (checkbox unchecked). Mode: Primary Must (dropdown menu). Primary Group: Select (dropdown menu). Secondary Group: None (dropdown menu).

- **First-IN User Rule** - Select this checkbox to enable the feature at the direct door and select the First-In User group which would be valid at the door.  
For configuring the rule See *Access Control > First- In User Rule > Assignment*
- **Anti-Pass Back (APB)** - Select this checkbox to enable the feature at the direct door.
  - **On Entry:** Check this box so that the system monitors the entry reader for APB violation.
  - **On Exit:** Check this box also so that the system monitors the entry as well as the exit readers for APB violations.
  - **Hard/Soft:** Select the restriction type as Hard or Soft option from the drop down options.
    - **Hard APB:** The access will be denied if the exit is not registered first. It does not allow a second entry using the same card without an exit.
    - **Soft APB:** The access will be granted even if the exit is not registered. It allows a second entry of the same user without an exit; however, an event and a warning are generated that indicates the second entry.
- **Forgiveness:** Check this box to enable the system to reset the APB status. When forgiveness is enabled, then there will be following options to reset the pass.
  - **Reset After Day Change:** This will reset the APB status of all the users to NULL at midnight. This enables a user, who left the building in the evening without exit punch, to use his card for entry in the next morning.
  - **Reset After Timer Expiry:** This will reset the APB status of all the users after the expiry of user defined time.
  - **Forgiveness Timer (Mins):** Enter the time duration in minutes after which Anti-pass back status will get reset and the pass will be in original state.
- **2-Person Rule** - Select this checkbox to enable the feature at the door and set the **wait time** in seconds after which the second person is allowed to punch on the door.  
For configuring the rule See *Access Control > 2- Person Rule*

## Video Surveillance

The Video Surveillance tab allows the user to configure parameters for video surveillance integration with the COSEC device. It is available in Basic License.

To access this, Go to **Device Configuration > Video Surveillance**.

- [“Visual Tagging”](#)
- [“Satatya Integration”](#)

## Visual Tagging

The COSEC application can interface with some supported hybrid and network video recording systems and grab images triggered by user events at the Doors. The **Visual Tagging** option enables the administrator to define the video recorder parameters. The **Visual Tagging** page appears as shown below.

The screenshot displays the 'Device Configuration' window with the 'Visual Tagging' tab selected. On the left, a sidebar lists various configuration categories: Profile, Enrollment, Advanced, Features, Video Surveillance (highlighted), Special Functions, Input/Output, Additional, Job Costing, Assign Users, and Identification Server. The main area is divided into two sections: 'Visual Tagging' and 'Satatya Integration'. Under 'Visual Tagging', there are fields for 'MAC Address' (00\_1b\_09\_01\_5c\_25), 'Camera ID' (2), and 'Storage Root Folder' (vw). The 'Satatya Integration' section includes a 'Capturing Device' dropdown menu set to 'Matrix HVR/NVR', an 'FTP Login Credentials' checkbox, and fields for 'User Name' and 'Password'.



To view the user events and related images, go to **Admin > Views/Logs > Event View**. To know more about viewing events, refer to “Event View”.

The following parameters are available for configuration:

- **Capturing Device** - Select the video recording device type from the dropdown menu as shown. The compatible device types are:
  - Matrix HVR/NVR
  - Milestone

### Matrix HVR/NVR

- **MAC Address** - In the event of selecting the Matrix HVR/NVR, the administrator needs to specify the MAC address of the video recorder device using “\_” (underscore) as the separator.
- **Camera ID** - Specify the camera number or camera ID for IP cameras. For analog cameras specify the camera number.



- **Storage Root Folder** - Specify the Root folder path or FTP Path where the uploaded images will be saved.
- **FTP Login Credentials** - Check this box to activate FTP login credentials for authentication.
- **User name** - Specify the FTP server user name.
- **Password** -Specify the FTP server password.



*Some COSEC devices do not support all the network connection options.*

## Milestone

The screenshot shows the 'Device Configuration' window with the 'Visual Tagging' tab selected. The 'Capturing Device' is set to 'Milestone'. Below this, there is a search bar and a table for 'Event ID', 'Name', 'User-Defined Event ID', and 'User-Defined Event Name'. The table currently shows 'No Data'. Below the table, there is a section for 'Camera' with fields for 'ID' and 'Name'. At the bottom, there is a table with columns for 'Camera Name', 'GUID', 'Host Name', and 'Port'. The table contains one entry: 'MATRIX COMSEC CIDR20VL12CW-P (192.168.112.193) - Camera 1' with GUID 'ac6c0e92-9ecd-410d-b21f-f393c2b9d33f', Host Name 'ketanpipaliya', and Port '7563'.

Event ID	Name	User-Defined Event ID	User-Defined Event Name
No Data			

Camera Name	GUID	Host Name	Port
MATRIX COMSEC CIDR20VL12CW-P (192.168.112.193) - Camera 1	ac6c0e92-9ecd-410d-b21f-f393c2b9d33f	ketanpipaliya	7563



*For more information on integration with **Milestone** devices, refer to "[Milestone Integration](#)".*

## Satatya Integration

This functionality is available for configuration only when the Matrix HVR/NVR device type is selected as the **Capturing Device** (from *Visual Tagging*). It enables the configured COSEC devices to directly send commands to the SATATYA HVR/NVR devices as per the configuration on this page. The Satatya Integration configuration page appears as shown below:

The screenshot shows the 'Device Configuration' window with the 'Satatya Integration' tab selected. On the left, a sidebar lists various configuration options: Profile, Enrollment, Advanced, Features, Video Surveillance (highlighted), Special Functions, Input/Output, Additional, Job Costing, Assign Users, and Identification Server. The main area displays the configuration for a device named '5 Door V3' (0/50000, Active). The 'Satatya Integration' section includes the following fields and options:

- Integration Type:** Network (selected from a dropdown)
- Active:** ☒
- IP Address:** 192 . 168 . 104 . 37
- Port Number:** 8000
- Name:** NR16S Integration
- Active:** ☒
- Schedule:** 00:00 to 23:59
- Days:** ☐ Sun, ☒ Mon, ☒ Tue, ☒ Wed, ☒ Thu, ☒ Fri, ☐ Sat, ☐ Holiday
- Event:** Access Allowed (selected from a dropdown)
- Mode:** Both (selected from a dropdown)
- Action:** Video Pop-Up (selected from a dropdown)
- Duration Sec.:** 20
- Camera:** A grid of checkboxes for cameras 1 through 24. Camera 2 is selected.

At the bottom right, there are 'Update' and 'Cancel' buttons.

- **Integration type-** Select the integration type from the options of Wired and Network.  
In wired integration, door is physically connected with Satatya Device. In Network integration, connection can be by Ethernet, wireless or broadband depending upon the COSEC device support.
- **Active-** Check the box to activate the connection.
- **IP Address-** Specify the IP address of HVR/NVR.
- **Port Number-** Specify the port number of HVR/NVR
- **Name-**Specify a user friendly name for the integration function.
- **Active-** Check the Active box to enable the SATATYA integration functionality.
- **Schedule -** Specify a schedule for the function by specifying the start and the end time (*24 Hours format*) as well as checking the boxes against the applicable **days** of the week.
- **Event-** Select a COSEC event from the drop down list for which the resultant action is to be configured.
- **Mode-** Select the event mode from the options of Entry, Exit and Both from the drop down list wherever applicable.
- **Action-**Select the action for the Satatya device from the drop down list. The options available are:
  - Recording - Specify the duration in minutes.
  - Upload Image - This will be uploaded as per the ftp settings.

- Video Pop-up - Specify the duration in seconds. The video pop up will be generated on the local client of Satatya device on the selected camera.
  - PTZ Preset - Specify the PTZ position number as defined on the SATATYA device.
  - Mail Image - Specify the email-ID.
- **Camera-** Select the relevant camera channels depending on the action selected.

**Example1:** For action as Video Pop up, the pop up of Camera 24 will be shown for 10 seconds as configured below.

**Example2:** For Access allowed event on COSEC Device, recording of camera channel 4,6,8 and 10 will be done for 10 seconds.

The left screenshot shows the configuration for 'Video Pop-Up' action. The 'Event' is 'Access Allowed', 'Mode' is 'Both', and 'Duration Sec.' is 10. Under 'Camera', camera 24 is selected.

The right screenshot shows the configuration for 'Recording' action. The 'Event' is 'Access Allowed', 'Mode' is 'Both', and 'Duration Min.' is 10. Under 'Camera', cameras 4, 6, 8, and 10 are selected. 'Add' and 'Cancel' buttons are at the bottom.

- Click the **Add** button to finish the process of linking the event to the action. The user may now configure another event-action linkage if required.

Search						
Name	Event	Action	Start Time	End Time	Active	
NR16S integration	Access Allowed	Video Pop-Up	00:00	23:59	Yes	

## Special Functions

To configure *Special Functions* for COSEC doors, refer to [“Special Functions”](#).

## Input/Output

The Input/Output (I/O) configuration of a system determines how the output or response of a system is influenced by the input applied on it. In case of the COSEC Access Control System, the I/O configuration should enable the system to monitor and trigger a specific response to any changes in door state or event occurrences at the door device. This change of door state or occurrence of events may be considered as an input while the response or action that is generated by the system on detection of this input, may be defined as the output.



1. This functionality cannot be fully accessed in the Edit mode for a selected device.
2. This functionality is available only with the Access Control add-on module license.

To access this, After selecting the device, Select **Device Configuration> Input Output**. The Input Output parameters can be set from the following sections:

- “Configuration”
- “Linking”
- “Time Triggered”

## Configuration

The **Configuration** section for **Door V3- Direct Door** appears as shown below.

The screenshot shows the 'Device Configuration' window for 'Door V3- DD'. The left sidebar lists various configuration sections: Profile, Enrollment, Advanced, Features, Video Surveillance, Special Functions, Input/Output (selected), Additional, Job Costing, Assign Users, and Identification Server. The main panel displays the 'Configuration' tab with the following settings:

- Door Sense:** Enable (checkbox), Supervised (checkbox), Door Sense Type (Normally Open dropdown).
- Auxiliary Input:** Enable (checkbox), Supervised (checkbox), Sense Type (Normally Closed dropdown), Debounce Time (Sec) (5).
- Auxiliary Output:** Enable (checkbox), Output Wait Time (Sec) (0).
- Accept External IO Linking:** Enable (checkbox), Network Interface (Ethernet dropdown).

The **Configuration** section for **Door V3- Panel Door** appears as shown below.

The screenshot shows the 'Device Configuration' window for 'Door V3- PD'. The left sidebar lists various configuration sections: Profile, Enrollment, Advanced, Features, Video Surveillance, Special Functions, Input/Output (selected), Additional, Job Costing, Assign Users, and Identification Server. The main panel displays the 'Configuration' tab with the following settings:

- Door Sense:** Enable (checkbox), Supervised (checkbox), Door Sense Type (Normally Open dropdown).
- Auxiliary Input:** Enable (checkbox), Supervised (checkbox), Sense Type (Normally Closed dropdown), Debounce Time (Sec) (5).
- Auxiliary Output:** Enable (checkbox), Output Group (1), DC Aux Ports (checkbox).
- Relay Output:** Output Group Number (Door Unlock) (2), Door Unlock (checkbox), Output Group Number (Door Lock) (10), Door Lock (checkbox).

The following parameters are available for configuration in both Direct door and Panel door:

- **Door Sense** - The system by default can sense two states of a door - *Normally Open* and *Normally Closed* depending on which the output is determined. For example, any deviation of the door from its normal state may lead to the trigger of a *Door Abnormal* alarm.

Select the **Enable** checkbox to enable the system for such two-state monitoring.

Select the **Supervised** checkbox to enable the door for four-state monitoring where the door is also monitored for *door fault* and *door disconnection*. Specify the **Sense Type** as **Normally Closed** or **Normally Open**.

- **Auxiliary Input** - Select the **Enable** checkbox option for Auxiliary Input (e.g. Smoke Detectors) depending on normal or supervised door state monitoring as described above.

**Debounce Time (Sec)** - Specify the Debounce time in seconds. Default value is 3 sec and range should be 0-99 sec. It defines the minimum time for which an input interface must be maintained in a given state before the system reports it. For example, if a Normal door state is changed to Alarm, the state must remain in Alarm for five seconds before an alarm is generated.

- **Auxiliary Output** - Select the **Enable** checkbox to enable Auxiliary Output (e.g. Fire Alarm) for the selected device. To set an additional waiting period before the Aux Output signal is sent, enter an **Output Wait Time (Sec)**.



**Auxiliary Input and Auxiliary Output** is not applicable for Door V1- Direct Door only.

- **Relay Output**

**Output Group Number (Door Unlock)**- Select the Output Group Number to which the device output for Door Unlock is to be assigned from the picklist.

**Output Group Number (Door Lock)**- Select the Output Group Number to which the device output for Door Lock is to be assigned from the picklist.



**Relay Output** is applicable for Door V1/V2/V3/V4- Panel Door only.

- **Accept External IO Linking** - Select the Enable checkbox to enable device-to-device IO Linking i.e. input from one Direct Door can trigger output in another Direct Door.



**Accept External IO Linking** is not applicable for Door V1-Direct Door and Door V1/V2/V3/V4- Panel Door.

- **Network Interface**- Select the interface option for IO linking with external devices. The options are
  - Ethernet
  - Wireless
  - Mobile Broadband



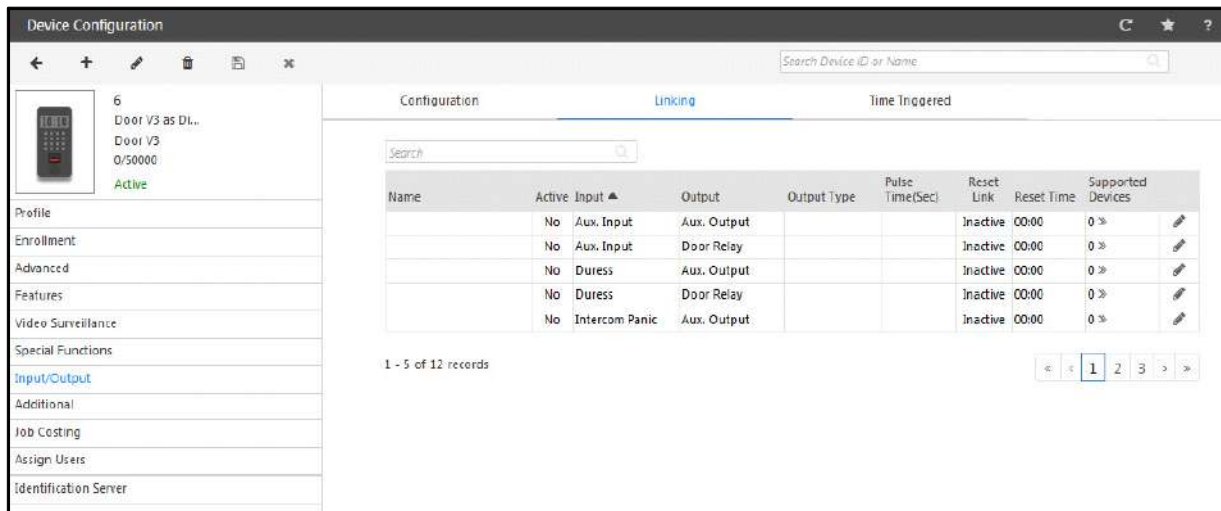
**Network Interface** is applicable for Door V3/V4- Direct Door only.

## Linking



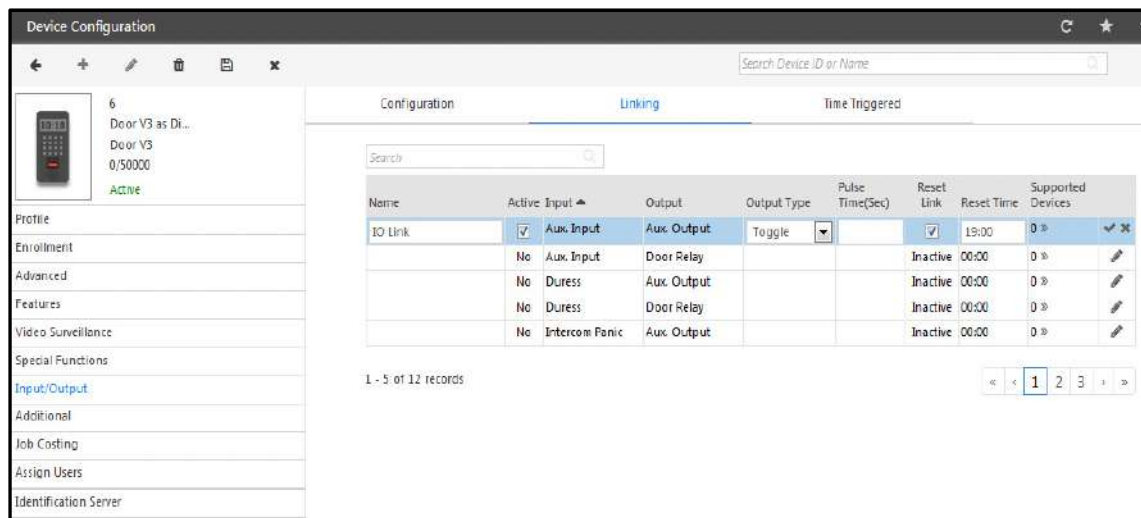
This section is not available for Panel doors.

The **Linking** section appears as shown below.




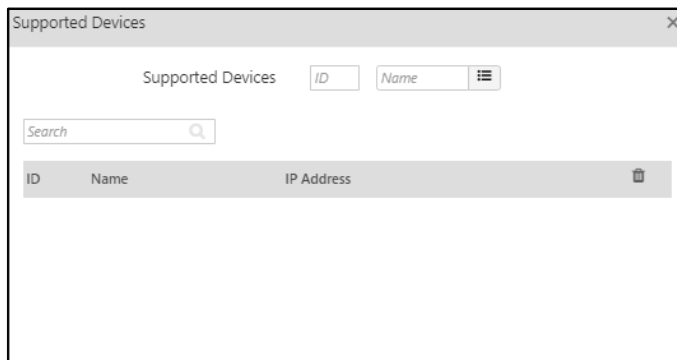
The COSEC application supports the Input/Output Linking feature to activate an output port based on a trigger received from an input port on the same Direct Door. This option enables the administrator to define how an event or events (input port) will trigger an output on the selected door.

Select a Input-Output linking row or click edit button.



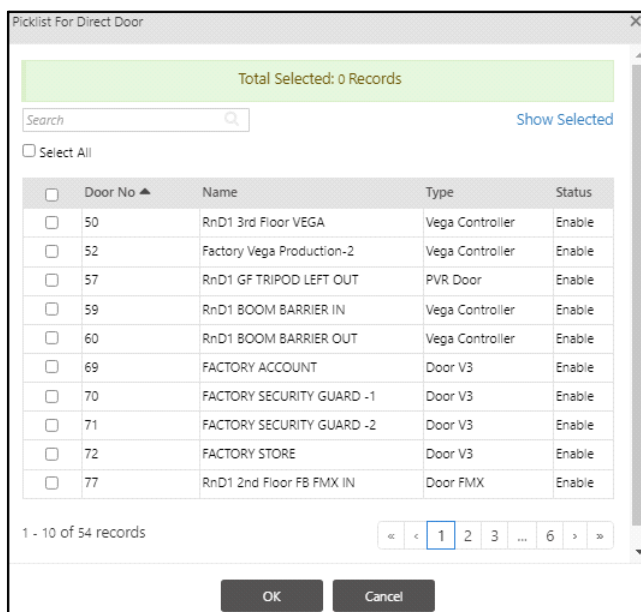
- **Name** - Specify a name for the new I/O linking program to be defined.
- **Output Type** - Specify the appropriate type of output from the following four options available in the drop down list:
  - Pulse: With this type of output, the user needs to define the Pulse time in seconds.
  - Interlock: With this option, the output follows the input. The relay output is triggered as long as the input is activated after which it returns to normal state.
  - Latch: With this option, it is denoted that the relay output will be in an energized condition for infinite period and needs to be reset manually.
  - Toggle: With this option, the output group toggles its state whenever an input group is activated.
- **Pulse Duration (sec)** - For a *Pulse* output type, specify the pulse duration in seconds.

- **Active** - Select this checkbox to activate this linking program.
- **Reset Link**- Select this checkbox to reset the link automatically after a defined time period.
- **Reset Time**- Enter the time period in hh:mm format at which the link will get reset automatically. Suppose, an IO Link gets activated on 21/04/2017 at 15:00. And Reset Time is set as 18:00. When Device Time is 18:00 then that IO link will get reset.
- **Supported Devices** -All devices supported for external IO Linking will appear in this picklist for selection. Upto 255 external devices can be added by the administrator.
- Click **Supported Devices**  icon. The **Supported Devices** pop-up appears.



The 'Supported Devices' pop-up window has a title bar with a close button. Below the title bar, there are two input fields labeled 'ID' and 'Name', followed by a list icon. A search bar with a magnifying glass icon is located below these fields. The main area contains a table with the following headers: 'ID', 'Name', 'IP Address', and a trash icon. The table is currently empty.

- In this pop-up, click the **Supported Devices** picklist. The **Picklist For Direct Door** pop-up appears.



The 'Picklist For Direct Door' pop-up window has a title bar with a close button. Below the title bar, there is a green banner that says 'Total Selected: 0 Records'. A search bar with a magnifying glass icon is located below the banner. To the right of the search bar is a 'Show Selected' button. Below the search bar is a 'Select All' checkbox. The main area contains a table with the following headers: 'Door No', 'Name', 'Type', and 'Status'. The table contains 10 rows of data. Below the table, there is a pagination bar that says '1 - 10 of 54 records'. To the right of the pagination bar are navigation buttons: '<<', '<', '1', '2', '3', '...', '6', '>', '>>'. At the bottom of the window are 'OK' and 'Cancel' buttons.

Door No	Name	Type	Status
<input type="checkbox"/> 50	RnD1 3rd Floor VEGA	Vega Controller	Enable
<input type="checkbox"/> 52	Factory Vega Production-2	Vega Controller	Enable
<input type="checkbox"/> 57	RnD1 GF TRIPOD LEFT OUT	PVR Door	Enable
<input type="checkbox"/> 59	RnD1 BOOM BARRIER IN	Vega Controller	Enable
<input type="checkbox"/> 60	RnD1 BOOM BARRIER OUT	Vega Controller	Enable
<input type="checkbox"/> 69	FACTORY ACCOUNT	Door V3	Enable
<input type="checkbox"/> 70	FACTORY SECURITY GUARD -1	Door V3	Enable
<input type="checkbox"/> 71	FACTORY SECURITY GUARD -2	Door V3	Enable
<input type="checkbox"/> 72	FACTORY STORE	Door V3	Enable
<input type="checkbox"/> 77	RnD1 2nd Floor FB FMX IN	Door FMX	Enable

You can either select particular devices or can select all the devices at once.

To select particular devices, click the check boxes of the desired devices.


**OR**

To select all the devices, select the **Select All** check box. The devices on all the pages will be selected.

Click **OK**. You return to the **Supported Devices pop-up** and the selected devices are displayed here.



ID	Name	IP Address	
50	RnD1 3rd Floor VEGA	192.168.151.3	
52	Factory Vega Production-2	192.168.10.27	

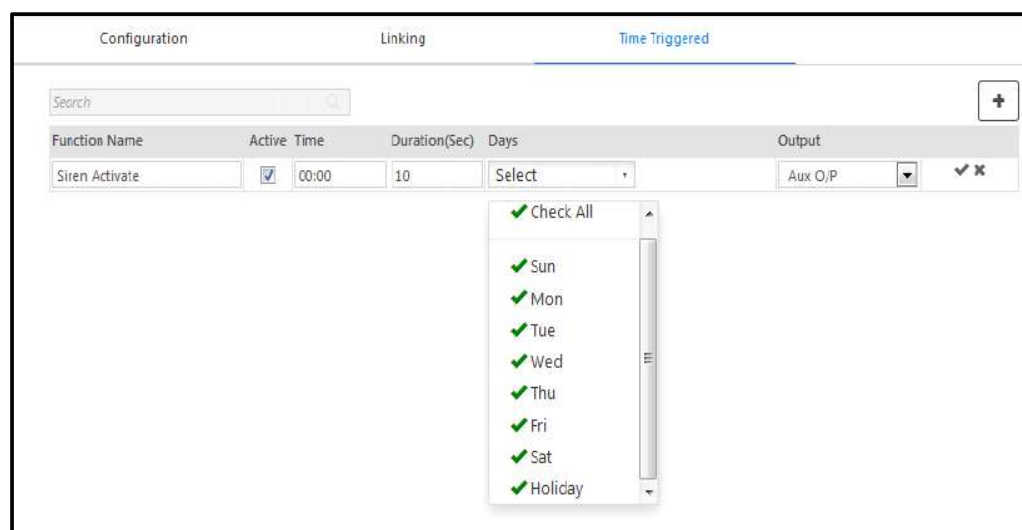
You can also delete the desired devices. To do so, click **Delete**  of the respective device.

Close the pop-up the number of selected devices are displayed under **Supported Devices** in the grid.

- Click the **OK** button and **Save** the configuration.

## Time Triggered

On the **Input Output** page, select the **Time Triggered** section as shown.



Function Name	Active	Time	Duration(Sec)	Days	Output	
Siren Activate	<input checked="" type="checkbox"/>	00:00	10	Select	Aux O/P	

✓ Check All

✓ Sun

✓ Mon

✓ Tue

✓ Wed

✓ Thu

✓ Fri

✓ Sat

✓ Holiday

This functionality enables the user to control the activity of an Output without manual intervention. The time triggered functions are used for activating events like door unlock and siren activation that are set as per the start time and for the configured time duration. This functionality is designed to energize outputs for predefined periods at the configured time. The COSEC access control system supports up to 20 Time Triggered functions on a Direct Door.



Function Name	Active	Time	Duration(Sec)	Days	Output	
Siren Activate	Yes	00:00	10	Su Mo Tu We Th Fr Sa Ph	Aux O/P	



## Additional

This section lists some additional configurations that can be enabled for door controllers.

To access these configurations, Go to **Device Configuration > Additional > Daylight Saving**



*This section is available only for Direct Doors.*

Many countries observe the convention of adjusting clocks forward and backward. Clocks are set ahead during the spring and back to standard time in the autumn. COSEC doors can be configured to be compatible with this procedure keeping the RTC of the system updated with such changes.

The **Daylight Saving** configuration can be done in 2 ways i.e. Day-Month wise or Date-Month wise.

- Select the **DST Type** as Day-Month wise or Date-Month wise. The **Disable** option when selected, disables the application of DST on the system time.
- On selection of the **Day-Month wise** option, the DST is set by the day of the month on which clock needs to be forwarded and reverted back to normal. Set the month, week number, day of the week, and time for both the **Forward Clock** and **Backward Clock** as shown.

The screenshot shows the 'Daylight Saving' configuration page in the 'Device Configuration' web interface. The sidebar on the left lists various configuration categories, with 'Additional' currently selected. The main panel displays settings for Daylight Saving Time (DST). The 'DST Type' is set to 'Day-Month wise'. The 'Time Period' is set to '08:00'. Under the 'Forward Clock' section, the 'Month' is 'November', 'Week No.' is '1st', 'Day of Week' is 'Sunday', and 'Time' is '09:00'. Under the 'Backward Clock' section, the 'Month' is 'January', 'Week No.' is '1st', 'Day of Week' is 'Sunday', and 'Time' is '10:00'. A 'Save' button is located at the bottom right of the configuration area.

- On selection of the **Date-Month wise** option, the DST is set by date of the month on which clock needs to be forwarded and reverted back to normal. Define the **Time Period** for the date-month wise DST settings in 24-hours format, and specify the day of the week, date and time for the **Forward Clock** and the **Backward Clock** as shown.

This DST Setting implies that on 1st Sunday of November at 09:00 hours, the clock will be forwarded by 08:00 hours. And on 1st Sunday of January at 10:00 hours, the clock will be reversed by 08:00 hours.

- Click the **Save** button.

## Job Costing



*Job Costing is applicable for Door V3 and Door V4 Direct Door only.*

When user punches on any device, there will be an option to select the Job Code on which the user is working. Job Costing enables the Admin to show or hide Job Code selection on device. It also enables the admin to assign default jobs on device.



*Make sure the **Device Based Job Assignment** check box is enabled for the desired Users.*

- **Show Job Menu:** Select the desired option— **Show List** or **Allocate Default**.

## Show List

When **Show List** is selected; then multiple jobs can be assigned to the device. The user can select the relevant Job Code while punching on the device. His/her job hours will be recorded for that Job Code.

- **Retain Job Selection:** If Retain Job Selection check box is selected, it allows the device to remember the last Job Code selected by a user and the same would be applicable for all the subsequent users until another job selection is done on the device. This is useful in environments where dynamic job selection prevails.

In this case, if the user selects a Job Code the same is saved and retained for future use by the device. If the user selects None option on the device, it ends the current job and assigns None until a new Job Code is selected by the user.

If the you clear the check box, then the device does not retain any job selection done by the user.

For example, in an educational setup, teachers may have dynamic job assignments, while students have static ones. After a teacher selects a Job Code, that code is retained by the device. Any student who punches in afterward will be assigned the teacher's Job Code until the teacher selects a new one or selects None.

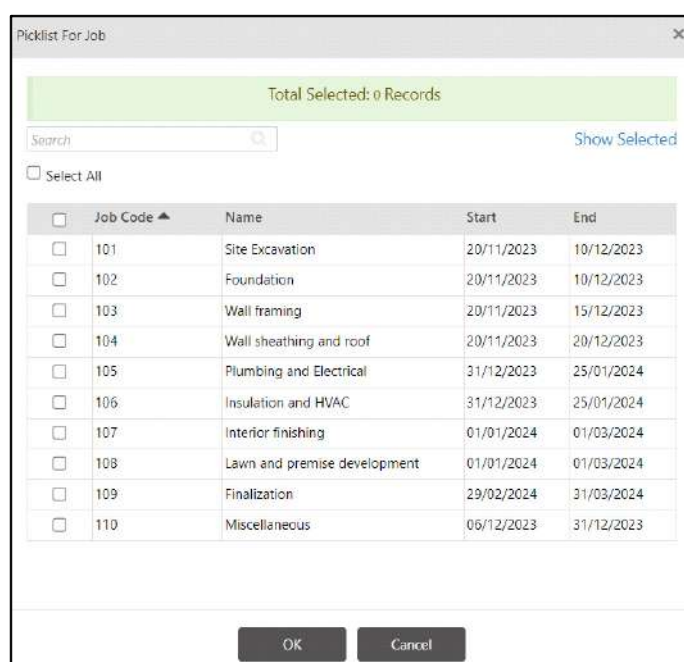
## Assign Jobs

- **Assign Jobs:** You can select Job Group as well as individual Jobs.
- To select **Job Group**, click the Job Group picklist, the **Picklist For Job Group** pop-up appears. Select the desired Job Group.

Click **Save**. The Jobs of the selected Job Group appear in the grid.


You can delete the desired Job. To do so, click **Edit**  and then click **Delete**  of the respective Job.

- To select **Jobs**, click the Jobs picklist. The **Picklist For Job** pop-up appears.



Picklist For Job

Total Selected: 0 Records

Search 

☐ Select All

<input type="checkbox"/>	Job Code ▲	Name	Start	End
<input type="checkbox"/>	101	Site Excavation	20/11/2023	10/12/2023
<input type="checkbox"/>	102	Foundation	20/11/2023	10/12/2023
<input type="checkbox"/>	103	Wall framing	20/11/2023	15/12/2023
<input type="checkbox"/>	104	Wall sheathing and roof	20/11/2023	20/12/2023
<input type="checkbox"/>	105	Plumbing and Electrical	31/12/2023	25/01/2024
<input type="checkbox"/>	106	Insulation and HVAC	31/12/2023	25/01/2024
<input type="checkbox"/>	107	Interior finishing	01/01/2024	01/03/2024
<input type="checkbox"/>	108	Lawn and premise development	01/01/2024	01/03/2024
<input type="checkbox"/>	109	Finalization	29/02/2024	31/03/2024
<input type="checkbox"/>	110	Miscellaneous	06/12/2023	31/12/2023

OK Cancel


You can either select particular jobs or can select all the jobs at once.

To select particular jobs, select the check boxes of the desired jobs.

**OR**

To select all the jobs, select the **Select All** check box. The jobs on all the pages will be selected.

Click **OK**.

The selected Jobs appear in the grid. You can also delete the desired Job. To do so, click **Delete**  of the respective Job.

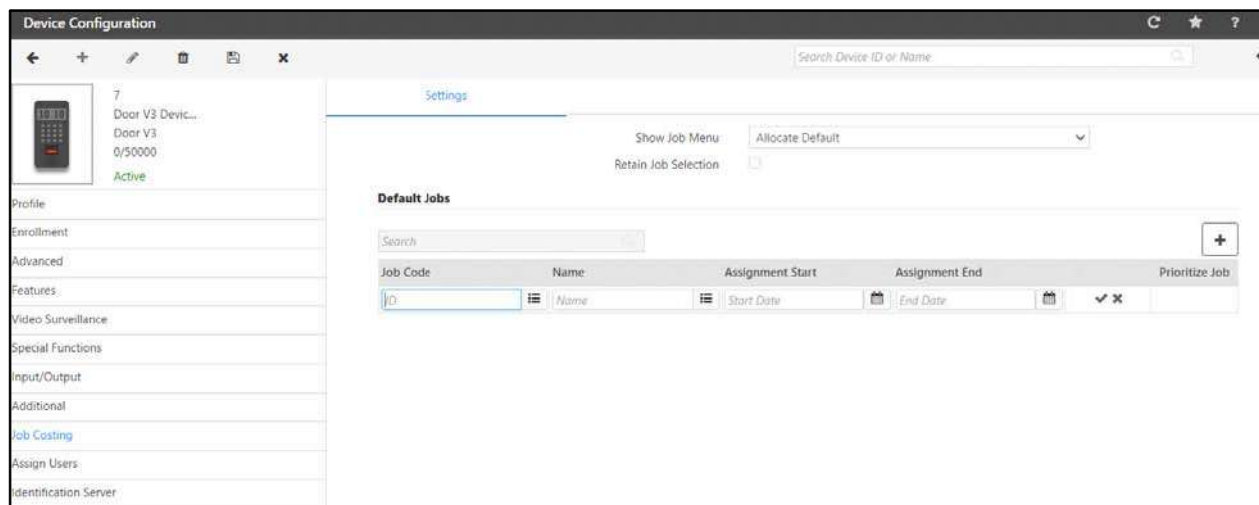
- Click **Save**.

## Allocate Default

When **Allocate Default** is selected; then default jobs for the device can be selected. The Job costing user can directly punch on this door for starting the default job.

## Default Jobs

Multiple default jobs can be assigned with overlapping Assignment Date Ranges. You can also set the priority of the assigned jobs if required. If you have jobs with overlapping dates and you have set their priority as per your requirement, then the first job will be considered as the default job.



The screenshot shows the 'Device Configuration' window. On the left is a sidebar with a device icon and a list of settings: Profile, Enrollment, Advanced, Features, Video Surveillance, Special Functions, Input/Output, Additional, Job Costing (highlighted), Assign Users, and Identification Server. The main area is titled 'Settings' and contains a search bar 'Search Device ID or Name'. Below this, there are two dropdowns: 'Show Job Menu' set to 'Allocate Default' and 'Retain Job Selection' with a checkbox. The 'Default Jobs' section features a search bar and a table with columns: Job Code, Name, Assignment Start, Assignment End, and Prioritize Job. The table has one row with values: '10', 'Name', 'Start Date', 'End Date', and a set of icons. A '+' button is in the top right of the table area.

- Click **Add**  . Click the picklist under **Job Code/Name** to select the desired Jobs.

The **Picklist For Job** appears.

Picklist For Job

Search  Ended Days (1-999)  Active

Job Code	Name	Start	End
101	Site Excavation	20/11/2023	10/12/2023
102	Foundation	20/11/2023	10/12/2023
103	Wall framing	20/11/2023	15/12/2023
104	Wall sheathing and roof	20/11/2023	20/12/2023
105	Plumbing and Electrical	31/12/2023	25/01/2024
106	Insulation and HVAC	31/12/2023	25/01/2024
107	Interior finishing	01/01/2024	01/03/2024
108	Lawn and premise development	01/01/2024	01/03/2024
109	Finalization	29/02/2024	31/03/2024
110	Miscellaneous	06/12/2023	31/12/2023

1 - 10 of 11 records

1 2

Cancel

By default, all the **Active** jobs are displayed. Click **Active** and select the desired option — **All**, **Active**, **Expired** — to filter the jobs. The jobs appear as per the set filter.

If you select **Expired**, you can set another filter.

Configure the number of days in Ended Days (1-999). The system will display the expired jobs, derived using the following: Current Date minus Number of days configured in Ended Days.

For example:

Ended Days configured = 2

Current Date= April 25, 2024

All the jobs expired between April 23, 2024 to April 25, 2024 (midnight), will be displayed.

Click to select the desired job from the list. You can also search for the desired job using the search bar.

The selected job appears in the grid.

- **Assignment Start** and **Assignment End**: The selected Jobs Start and End dates are displayed. You can change the Assignment Start and Assignment End dates of the job if required. To do so, click the calender and select the desired start and end dates.
- Click **Save** to save the configuration.

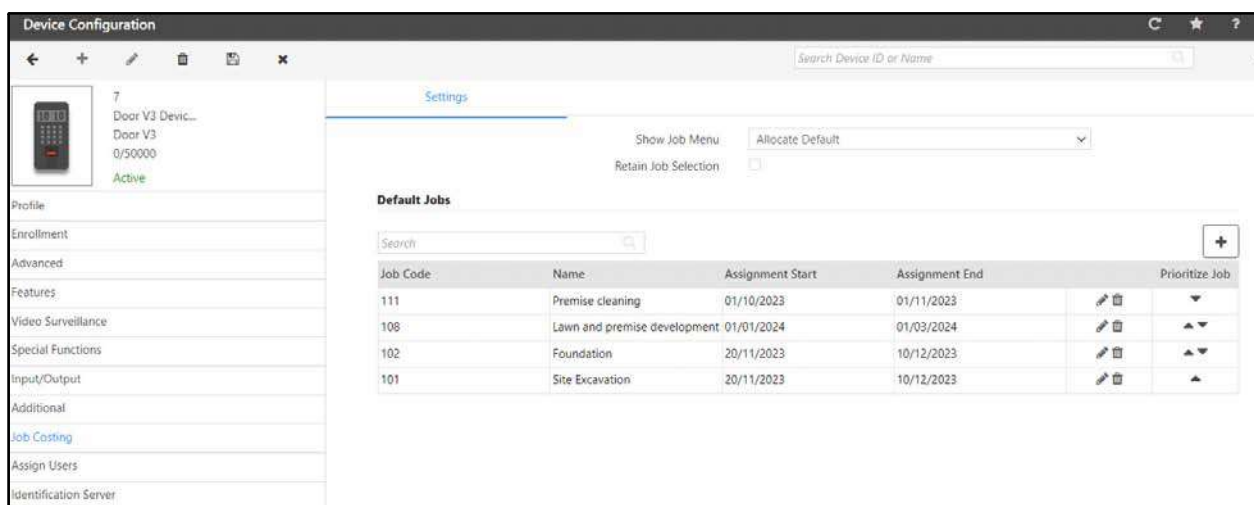
The **Default Jobs** grid will consist of all the jobs, that is expired, in-progress as well as assigned.



*It is recommended to set job priority only if overlapping dates are assigned to the jobs.*

*If a new job is assigned, by default it will appear at the highest priority. You can change the priority later, if required.*

You can set the priority of the jobs as per your requirement. To do so,



- Under **Prioritize Job**, click the **Up** arrow button to move a job upwards in the list. Similarly, click the **Down** arrow button to move a job downwards in the list.

If you have overlapping dates assigned to Jobs, in such scenarios there will be multiple Jobs in which the punches are possible.

To resolve this set the Job with highest priority at the first position, so that when the system searches for the Job as per the date, the punch will be marked in the first Job in which the date is detected.

Let us understand this with the help of an example.

#### Example:

User 1 has been assigned the following jobs:

Job Code	Job Name	Assignment Start	Assignment End	Prioritize Job
J1	Job 1	01/10/2023	10/10/2023	1
J2	Job 2	09/10/2023	15/10/2023	2
J3	Job 3	17/10/2023	25/10/2023	3
J4	Job 4	25/10/2023	31/10/2023	4

Now, User 1 changes the priority of the assigned jobs as follows:

Job Code	Job Name	Assignment Start	Assignment End	Prioritize Job
J2	Job 2	09/10/2023	15/10/2023	1
J1	Job 1	01/10/2023	10/10/2023	2
J4	Job 4	25/10/2023	31/10/2023	3
J3	Job 3	17/10/2023	25/10/2023	4

When User 1 will punch on 09/10/2023, the punch will be marked against Job 2 as it has been set at priority number 1. Similarly, when User 1 will punch on 25/10/2023, the punch will be marked against Job 4 as it is at a higher priority than Job 3.



*Make sure that the assigned jobs are prioritized correctly to ensure that the punches are in place.*

## Assign Users



*Assign Users is applicable for both Direct Door and Panel Door.*

### For Direct Doors

You can select and assign users to the door.


On the **Device configuration** page, click **Assign Users**. The Assign Users page appears.

ID	Name	
1220	Sheetal	
13	Purwang	
1320	Shruti	

- **Users:** Click the picklist. The **Picklist For All Users** window appears.

Select the check boxes of the desired Users and click **OK**.

The grid displays the list of selected users.

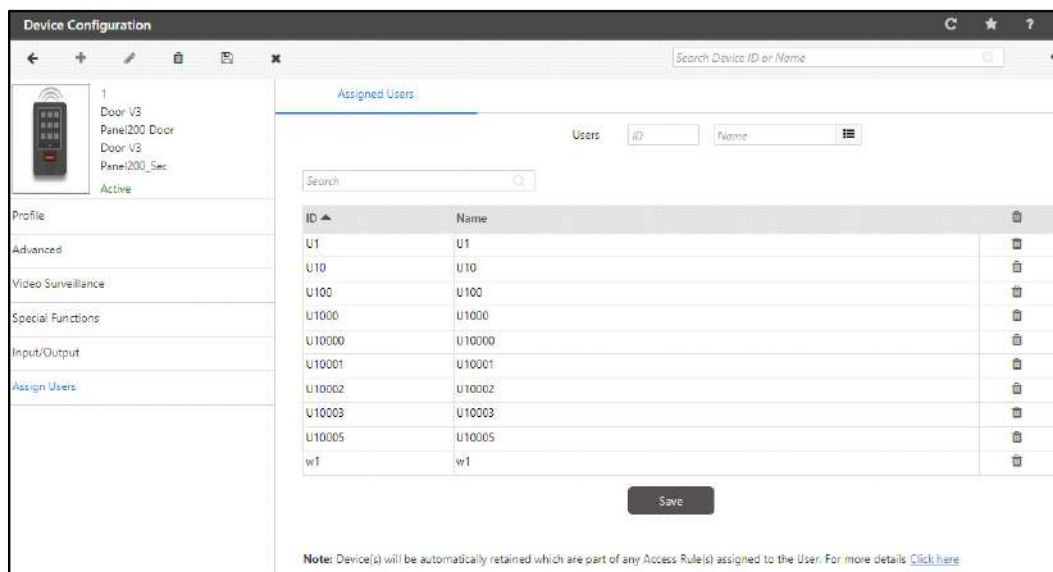
If you wish to remove any assigned user, click the respective **Delete**  icon.

- Click **Save**.

### For Panel Doors

You can select and assign users to the door.


On the **Device configuration** page, click **Assign Users**. The Assign Users page appears.



- **Users:** Click the picklist. The **Picklist For All Users** window appears.

Select the check boxes of the desired Users and click **OK**.

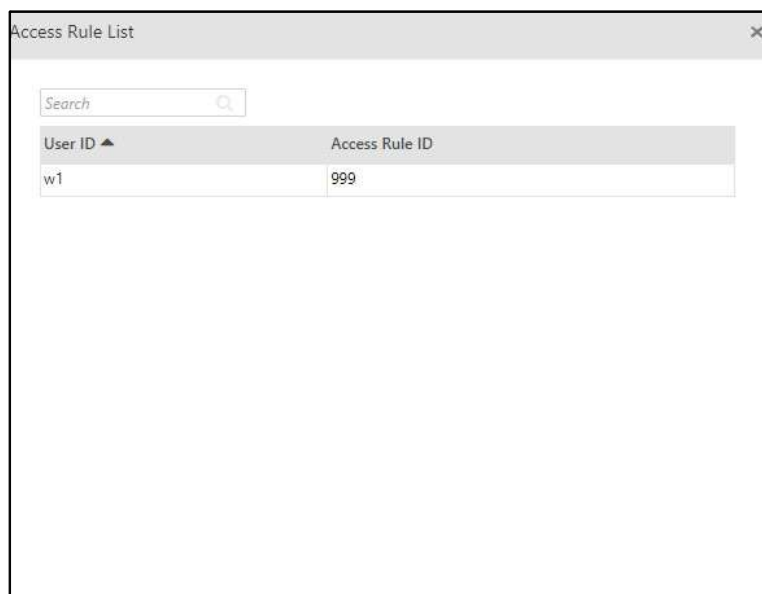
The grid displays the list of selected users.

If you wish to remove any assigned user, click the respective **Delete**  icon.



*If you wish to delete a user which is assigned to this device and it is a part of any Access Rule assigned to that user, then such user and door/s will be retained.*

- If you wish to check the users assigned against any Access Rule, click the **Click here** link at the bottom of the page. The **Access Rule List** pop-up appears.



It displays the list of User ID along with the Access Rule ID against which they are assigned.

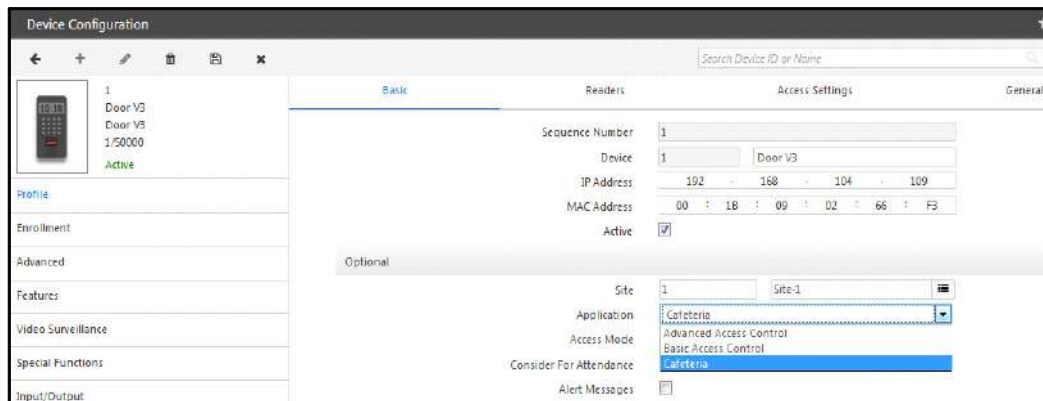


- Click **Save** to assign all the added users to this door.

## Cafeteria

The COSEC system enables the user to configure devices which will be used by the Cafeteria management module.

To configure a door for Cafeteria application, select **Cafeteria** option in Device Profile> Basic> Application as shown below.

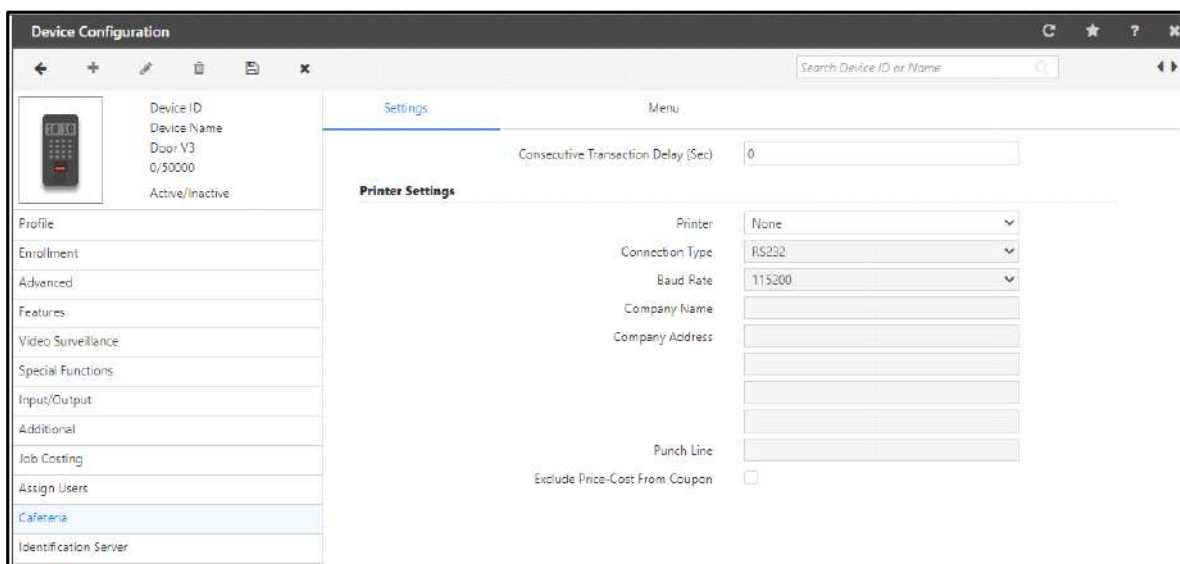


The Cafeteria tab will appear in Device Configuration page.

Select **Device Configuration> Cafeteria> Settings**.

## Settings

The Cafeteria configuration for Door V3 is shown as below.



- **Consecutive Transaction Delay (Sec):** Enter the time interval between two transactions, wherein any user transaction would be restricted.

## Printer Settings

- **Printer:** Select the printer from the dropdown list based on the site requirements.
- **Connection Type:** Select the printer connection type from the drop down list. The options available are:
  - RS232 (serial)
  - USB
- **Baud Rate:** In the event of a serial printer, select the appropriate baud rate from the drop down list.
- Specify the **Company Name**, **Company Address** and the **Punch Line** as per the site requirements. These details will be printed on the receipt dispensed from the selected printer.
- Select the **Exclude Price-Cost From Coupon** check box if you want to exclude the price from the coupon.

## Menu

COSEC allows the administrator to assign one or more cafeteria menus (Menu 1, Menu 2, Menu 3... upto 99.) to a device. These can be configured by selecting pre-defined menus from the Menu picklist.



*The Menu is created from Cafeteria module.*

The Menu can be scheduled from Cafeteria module and is displayed in “Schedule Menu” as shown above.

If you have to assign another menu and schedule it on the door then select the Menu from the picklist. The Menu will be shown in the grid as shown below.

**Assign Menu**

Menu: ID: Name:

Search:

Menu No	ID	Menu Name
1	1	Menu 1
2	2	Menu 2

Save

**Schedule Menu**

Search:

Menu No	ID	Menu Name	Start Time	End Time	Schedule Days
1	1	Menu 1	12:00	15:00	Mo Tu We Th Fr Sa

Add

Now to schedule the menu click **Add** button as shown above.

Then select the menu to be scheduled from the **ID** picklist. Specify the **Start** and **End time** for which the Menu will be active and is available to users on the selected door. Select the **days** for which this menu will be available i.e. scheduled on the door.

Then click **OK** and **Save** the Menu schedule on the door.

**Device Configuration**

Settings Menu

Assign Menu

Menu: ID: Name:

Search:

Menu No	ID	Menu Name
1	1	Menu 1
2	2	Menu 2

Save

**Schedule Menu**

Search:

Menu No	ID	Menu Name	Start Time	End Time	Schedule Days
1	1	Menu 1	12:00	15:00	Mo Tu We Th Fr Sa
2	2	Menu 2	16:30	23:00	Mo Tu We Th Fr Sa

Add



*Two Menus cannot be scheduled for same timing.*

## Identification Server

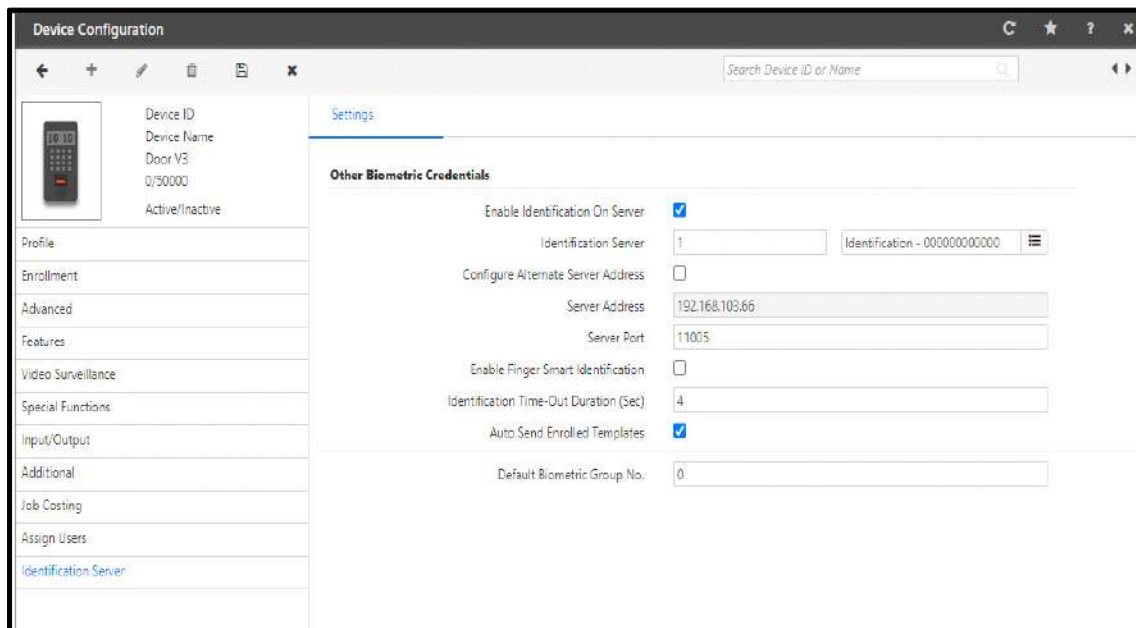
This tab enables the selected device to be assigned to a pre-defined Identification Server.

Device has a limited memory capacity for storage of templates so we need Identification Server which will store the more number of templates and respond to device when asked for identification.

For more information on Identification Servers, See *Admin> System Configuration> Identification Server Configuration*.

To access these configurations,

- On the **Device Configuration** page, select the **Identification Server** tab.



## Other Biometric Credentials

- **Enable Identification On Server:** Select the checkbox to enable the identification of palm/finger templates on this device.
- **Identification Server:** Select an Identification Server using the picklist button to which the device is to be assigned. The configuration of server is done from **Admin module > System Configuration > Identification Server Configuration** and the Identification Service must be started from the service tray.
- **Configure Alternate Server Address:** Enable this check-box to configure external IP address of Identification Server.
- **Server Address:** It displays the IP Address of the selected Identification Server.
- **Server Port:** Enter the server port number. The default port number is 11005.
- **Enable Finger Smart Identification:** For all other supported doors, select the checkbox to enable fingerprint templates identification through Identification Server.
- **Identification Time-Out Duration (Sec):** Specify the duration in seconds after which the fingerprint template identification will get time out.  
**Example:** If 5 seconds is specified, then the identification server will try to identify the template till 5 seconds and if not found then it will show time-out to the user.
- **Auto Send Enrolled Templates:** Select the checkbox to enable any enrolled templates to be saved both on the COSEC database as well as saved locally on the configured Identification Server. This enables prompt identification of user on enrollment.

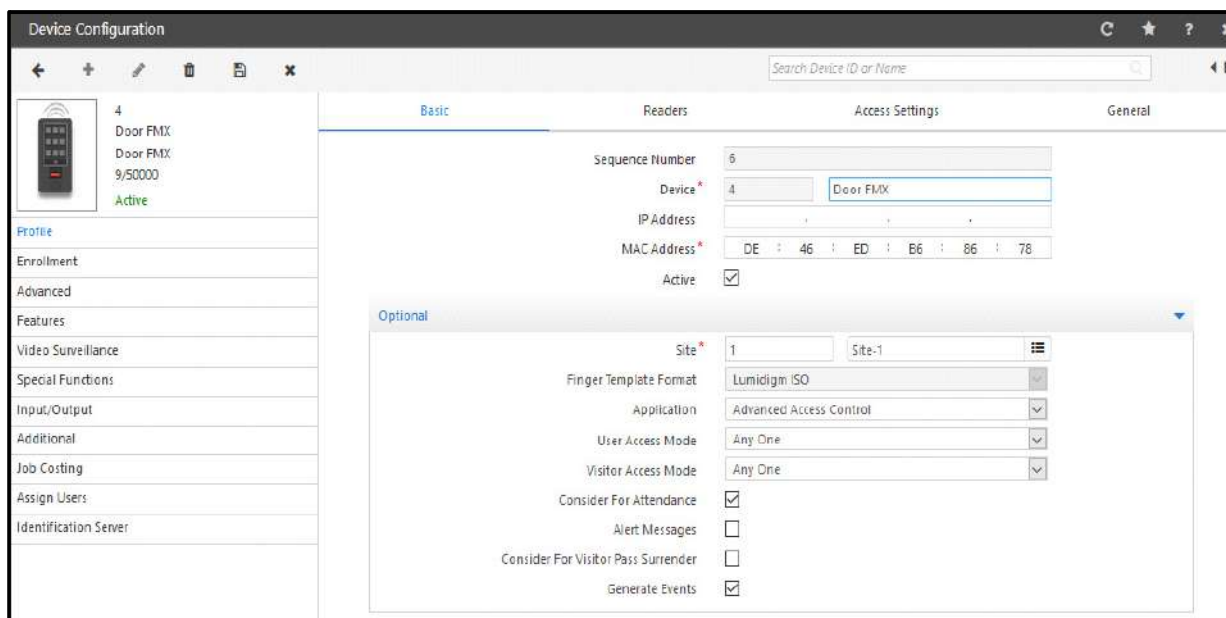
- **Default Biometric Group No.:** Specify the default biometric group number to be assigned to the device. It is a number allotted to a device to be assigned to the Identification Server. This enables the Identification Server to match the template against only those devices that belong to the corresponding biometric group. This reduces the false detection as well time to search template.

# Door FMX

COSEC DOOR FMX makes use of advance multispectral fingerprint sensor. It reads surface and subsurface of a finger and gives very clear and strong image. Door FMX can be connected as **Direct Door** only.



The Device Configuration page for Door FMX appears as shown below:



Device	Sequence Number	Device	IP Address	MAC Address	Active
4 Door FMX Door FMX 9/50000 Active	6	4 Door FMX		DE : 46 : ED : B6 : 86 : 78	<input checked="" type="checkbox"/>

Optional
Site* 1 Site-1
Finger Template Format Lumidigm ISO
Application Advanced Access Control
User Access Mode Any One
Visitor Access Mode Any One
Consider For Attendance <input checked="" type="checkbox"/>
Alert Messages <input type="checkbox"/>
Consider For Visitor Pass Surrender <input type="checkbox"/>
Generate Events <input checked="" type="checkbox"/>

Enter the MAC address of the door. The IP address will be displayed automatically once the device comes online in Monitor.

To add Devices automatically, go to Admin Module> System Configuration> Global Policy> Device. Enable the "Auto Add New Devices" checkbox. Once the device is connected in network, it will come online in COSEC Monitor.



*The Monitor Service must be running while adding the device to COSEC.*

Once the device is configured, click the **Save** button to save the configuration.

To know more about configuring devices, click on the links for different tabs of Device configuration.

- [“Profile”](#)
- [“Enrollment”](#)
- [“Advanced”](#)
- [“Features”](#)
- [“Video Surveillance”](#)
- [“Special Functions”](#)
- [“Input/Output”](#)
- [“Additional”](#)
- [“Job Costing”](#)
- [“Assign Users”](#)
- [“Cafeteria”](#)
- [“Identification Server”](#)

## Profile

This section enables the user to set up the basic profile for any new device. Setting up a door profile involves defining basic parameters to set up any door controller device.

To do this, On the **Device Configuration** page, select the **Profile** tab. The Profile can be configured in the following sections:

- [“Basic”](#)
- [“Readers”](#)
- [“Access Settings”](#)
- [“General”](#)

## Basic

The **Basic** section for “Door FMX” is shown below:

The screenshot shows the 'Device Configuration' window for a 'Door FMX' device. The 'Basic' tab is selected, showing fields for 'Sequence Number' (6), 'Device' (5), 'IP Address', and 'MAC Address' (FD:ED:46:31:12:12). The 'Active' checkbox is checked. The left sidebar shows the device profile and various configuration tabs.

Configure the following options as required:

- **Sequence Number** - This is a system generated sequence number for each new device.
- **Device**- Specify a name that can be assigned to the door. The Door ID is auto-generated by the system.
- **IP Address** - This is the IP address assigned to the door. Once the device connection is established, this field will automatically display the door IP address.
- **MAC Address** - Specify the MAC Address of the door.



*MAC address of door is required while manually adding the door to the COSEC Monitor. Note the MAC address from the device when it is powered on.*

- **Active** - Check the box to activate the device on the network.



*To add the Device automatically, go to Admin Module> System Configuration> Global Policy> Device. Enable the “**Auto Add New Devices**” checkbox.*

*The device will be added automatically but make sure you enable the **Active** checkbox in order to connect the device to the network. Once the device is connected to the network, it will come online in COSEC Monitor.*



The **Basic** page also offers an **Optional** tab which provides optional configurations as shown below:

- **Site** - Select the site to which this door is to be assigned from the site picklist window. Site is created from Devices> Masters> Site.
- **Finger Template Format** - For FMX door, the finger templates will be enrolled in Lumidigm ISO format. For globally setting the template format, you can set from Global policy.
- **Application** - Select the application type for which the device is to be used. The options are **Basic Access Control**, **Advanced Access Control** and **Cafeteria**. All devices set to **Cafeteria** will subsequently be available for Cafeteria configuration.
- **User/Visitor Access Mode** - Defines the type and combination of credentials required to identify and validate a user at the Door Controller. Select the appropriate credential combination from the drop down list.

The options available are:

- Any one
  - Card
  - Card + Biometrics
  - Card + Biometrics + PIN
  - Card + PIN
  - Biometrics
  - Biometrics + PIN
  - Biometrics then Card
  - None
  - Face
  - Card+ Face
  - PIN + Face
  - Biometrics+ Face
  - Card then Biometric
- **Cafeteria Face Access Mode** - When Application is set as '**Cafeteria**', only then this configuration is available to the Admin and to add provision of using face as a credential to make transactions on cafeteria devices.
    - Select the mode type from the drop down to allow a user to choose multiple menu items and upon checkout do transaction using face as credential.
    - The options available are **None**, **Default Item** and **Item Selection**.

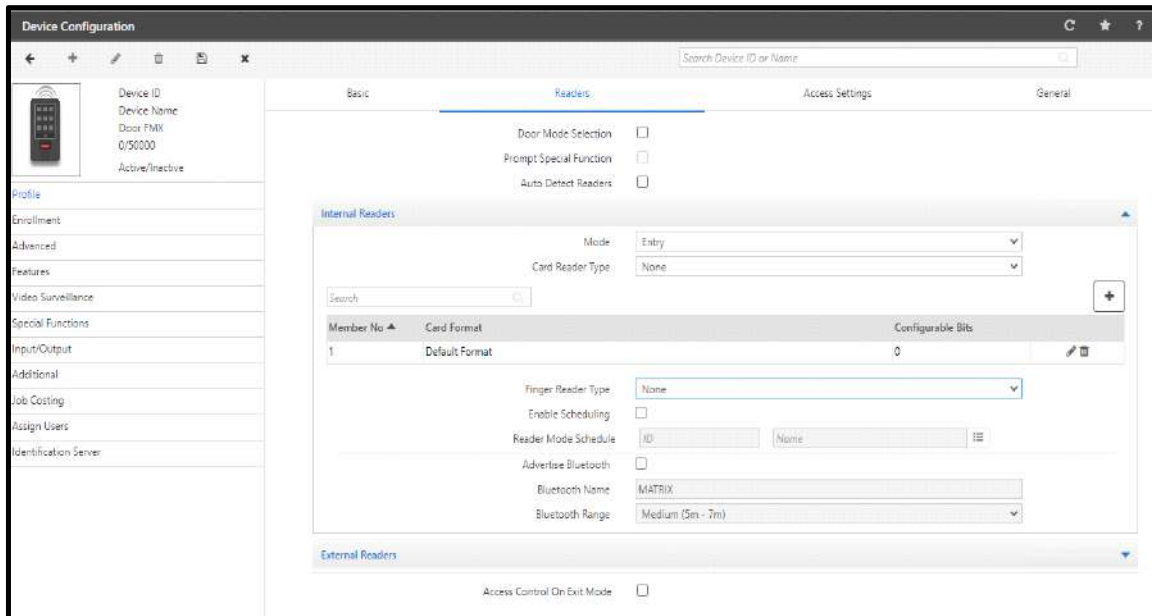
The screenshot shows the 'Optional' configuration window. The settings are as follows:

Setting	Value
Site *	1 Site-1
Finger Template Format	Suprema Proprietary
Application	Cafeteria
User Access Mode	Any One
Visitor Access Mode	Any One
Cafeteria Face Access Mode	None (selected)
Consider For Attendance	None
Alert Messages	Default Item
Consider For Visitor Pass Surrender	Item Selection
Generate Events	<input checked="" type="checkbox"/>

- Default Item mode in cafeteria will allow users a touch less cafeteria experience. In Default Item mode only the transaction for default item is allowed. A default item is assigned in each scheduled menu.
- Item Selection mode in cafeteria will allow users to select the desired menu items and make a transaction using Face as a credential.
- **Consider for Attendance** - Select this check box if the events sent by this door are to be considered for Time and Attendance data processing. If this option is disabled, then the system would consider all events coming from the door as access control events.
- **Alert Messages** - Select this check box to enable the application to send alerts based on events from this door.
- **Consider for Visitor Pass Surrender:** Check the box to consider the selected device for visitor pass surrender. The Visitor can show his credential on this device to surrender the pass.
- **Generate Events:** This check-box is enabled by default. You can disable the check-box if the server is not required to receive any events from the respective devices.

## Readers

Readers are important hardware components in a biometric door device. They may be internal or external. This section enables the administrator to configure both internal and external readers for a door as shown.



The following parameters are available for configuration:

- **Door Mode Selection** - If this option is enabled, then user will be prompted to select punch type as IN or OUT while punching on the device.  
  
E.g.: When a door is in Entry mode, your punches will always be in Entry side. But if you want to mark the punch in exit mode then you can select the door mode if “Door Mode Selection” is enabled.
- **Prompt Special Function**- This will provide selection of special function on device screen and based on the selection of particular type of special function, job codes for JPC user will be prompted. This can be enabled only when “Door Mode Selection” is enabled.
- **Auto Detect Readers** - Select this checkbox to enable auto detection of Readers on a door controller connected to the server.

### Internal Readers

This option allows the configuration of the Internal Reader for the selected door.

- **Mode:** Select the Mode as **Entry** or **Exit** from the drop down list.
- **Card Reader Type;** Select the Card Reader Type from the following options:
  - EM Prox Reader
  - HID Prox Reader
  - MiFare Reader
  - HID iClass-U Reader
  - HID iClass-W Reader

- **Card Format:** The single or multiple card formats can be assigned to the readers. The default card format is assigned to device as shown in the grid. If no other card format is assigned to device; then this default format will be applied.



The formatting of card is described in Devices> Master> Card Format

### Multiple Card Format

To assign multiple card formats to device click on **Add** button. Then click the picklist to select the card format. And click **OK** to save the format.

Member No ▲	Card Format	Configurable Bits
1	Default Format	0

Member No ▲	Card Format	Configurable Bits
2	Format1	0
1	Default Format	0

Similarly you can add maximum 5 card formats. When the card format is saved, the Configurable bits of that format as configured from Masters> Card format will be displayed here. Multiple Card format configurations will be dispatched to door separated by 'Format ID' that is 'Member No.' along with all other format related parameters.


Internal Readers

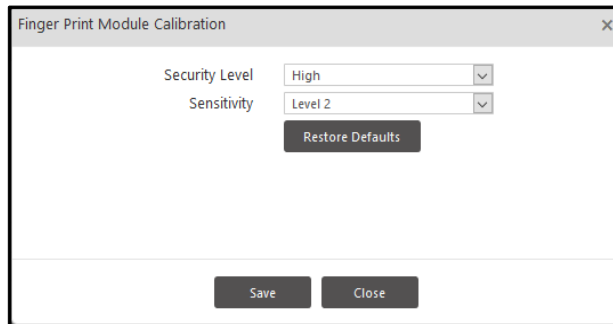
Mode: Entry

Card Reader Type: EM Prox Reader

Member No ▲	Card Format	Configurable Bits
1	Default Format	0
2	Format1	26
3	Format2	32

- Select the **Finger Reader Type** as **Finger Reader**.

Click the **FP Reader Configuration**  button to set the **Security Level** and **Sensitivity** and **Restore Defaults** for the selected FP Reader as shown.



### Finger Print Module Calibration

- **Security Level:** Security level specifies FAR (False Acceptance Ratio). Since FAR and FRR (False Rejection Ratio) is in inverse proportion to each other, FRR will increase with higher security levels.  
  
For regular Time-Attendance system “Normal” level can be selected. For high security areas requiring complete or maximum matching of template, “High/Highest” level must be selected. For approximate matching of template , “Low” level can be selected.
- **Sensitivity:** Specifies sensor sensitivity to detect a finger. On high sensitivity, the module will accept the finger input more easily. Level 3 has the highest sensitivity.
- Click on the **Restore Defaults** button to return the field values for this page to default values if needed.
- Click on the **Save** button.
- **Enable Scheduling:** Select this checkbox to **Enable Scheduling** to set reader mode of door as entry or exit as per user-defined schedules.
- **Reader Mode Schedule:** Select the schedule from the picklist which is to be assigned to the internal reader of Door FMX. With this the same reader can be configured to function both in Entry as well as Exit mode based on scheduled timings.
- **Advertise Bluetooth-** Select this checkbox to enable Bluetooth of the device by which the device will be visible to others. Then configure the following parameters
  - **Bluetooth Name-** By default, if the Device Name is configured then it will be displayed here along with the Mode. The prefix will be the Device Name and the suffix will be -IN or -OUT as per the set Mode.  
  
If required, you can configure the bluetooth name as per your requirement. The Bluetooth Name can be a maximum of 10 characters.
  - **Bluetooth Range-** The system supports different ranges of bluetooth using which the users can mark their attendance. You can set the desired range to control the boundary for marking the attendance.

Select the bluetooth range as — Short (1m-2m), Medium (5m-7m) or Long (>8m).

## External Readers

This option allows the configuration of the External Reader for the selected door.

- **Mode:** Select the Mode as **Entry** or **Exit** from the drop down list.
- **External Reader Type:** Select the desired type of External Reader from the drop-down list.
- **Card Format** - Select a card format to be applicable for external readers of the device. For multiple format description [See “Multiple Card Format” on page 1050.](#)
- **Exit Switch** - Select this checkbox to enable the use of **Exit Switch**.
- **User/Visitor Access Mode** - Select the access mode from the options shown below:
  - Any One
  - Card
  - Biometrics
  - Card + Biometrics
  - Biometrics then Card
  - None
- **Access Control On Exit Mode** (only for direct door) - Select this checkbox to enable access control on the exit mode.

## Access Settings

This section is available for direct doors. The **Access Settings** page appears as shown below:

The screenshot displays the 'Device Configuration' window with the 'Access Settings' tab active. On the left, a sidebar lists various configuration categories: Profile, Enrollment, Advanced, Features, Video Surveillance, Special Functions, Input/Output, Additional, Job Costing, Assign Users, and Identification Server. The main area is divided into four tabs: Basic, Readers, Access Settings (selected), and General. Under the 'Access Settings' tab, the following settings are visible:

- Universal Time Zone:** A dropdown menu set to '(GMT+05:30)Chennai, Kolkata, New Delhi, Mumbai'.
- Time Format:** A dropdown menu set to '24 Hours'.
- Auto Synchronize with NTP:** A checked checkbox.
- Preferred NTP Server:** An empty text input field.
- Working Days:** A grid of checkboxes for Sun, Mon, Tue, Wed, Thu, Fri, Sat, and Holiday, all of which are checked.
- Working Hours(HHMM):** Two text input fields showing '00:00' and '23:59'.
- Holiday Schedules:** A table with four rows, each containing a 'Holiday Schedule' number (1-4) and a corresponding 'Schedule' dropdown menu.

- **Universal Time Zone** - Select the geographic time zone in which the DOOR will operate.
- **Time Format** - Specifies the time format to be displayed on Door Controller LCD display. The formats available are:
  - 24 Hours
  - 12 HoursSelect the relevant option from the drop down list as per the site requirements.

## Auto Synchronize with NTP

If Date and time is to be automatically synchronized as per the **Preferred NTP Server** (predefined or user-defined NTP server address) selected by user, then you must enable **Auto Synchronize With NTP** checkbox.

Independent of the mode set from server as Auto or Manual, the user can change the date and time settings from device webpage, which will be reflected on device display.

- When Auto Synchronization with NTP is disabled Preferred NTP Server field will be disabled.
- When Auto Synchronization with NTP is enabled,
  1. You can specify the Preferred NTP server of your choice. In this case device will first try to get Date and Time from that server address.  
If it does not get Date and Time in three tries; device will check from pre-defined NTP servers.  
If you have entered one of the three pre-defined NTP servers(ntp1.cs.wisc.edu , time.windows.com , time.nist.gov); then device will first check that server first.  
If it receives updated Date and Time then Updated Date and Time will be reflected on device webpage and display screen.
  2. You can keep the Preferred NTP server as blank. In this case device will check for Date and Time from the first NTP server.
  3. If user has manually entered Date and Time from webpage or Device Menu then those values of Date and Time will be reflected on device webpage and display screen.

In the case of the **Manual** option the administrator can manually update the time on the Door with that of the system time as and when required. This can be accomplished from the COSEC Monitor and control application.

- **Working Days** - Specify the days on which the default working hours should be applicable. Check the relevant boxes to specify the active days.
- **Working Hours (HH:MM)** - Define the default working hours in HH:MM format.
- **Holiday Schedule** - This section allows the administrator to assign up to four holiday schedules to the device by using the Holiday Schedule picklist.



*If the same holiday schedule is configured for a user and for the door controller on which the user is assigned, then the user's attendance marking on this device, on any of the scheduled holidays will always be marked as a holiday.*

## General

The **General** page appears as follows. Enter all general details applicable to the device in this section.

Device Configuration

30 Door FMX-Dev...  
Door FMX  
0/50000  
Active

Profile  
Enrollment  
Advanced  
Features  
Video Surveillance  
Special Functions  
Input/Output  
Additional  
Job Costing  
Assign Users  
Identification Server

Basic Readers Access Settings **General**

Mute Buzzer ☐

**Allowed Acknowledgement**

Display Duration (ms) 3000  
LED - Buzzer Duration Long

**Denied Acknowledgement**

Display Duration (ms) 3000  
LED - Buzzer Duration Long

Enable Display Messages ☐

Custom Birthday Message Happy Birthday

Display Message 1 ☒  
Schedule 00:00 11:59  
Message Good Morning

Display Message 2 ☒  
Schedule 12:00 15:59  
Message Good Afternoon

Display Message 3 ☒  
Schedule 16:00 20:59  
Message Good Evening

Display Message 4 ☒  
Schedule 21:00 23:59  
Message Good Night

Multi-Language Support ☐  
Auto Hide Menu Bar ☐

- **Mute Buzzer** - User can mute or unmute the door buzzer by checking or clearing the box respectively.
- **Allowed Acknowledgment**
  - **Display Duration (ms)** - Define the time duration in between 500 to 3000ms till which the 'Acknowledgment Allowed' message will be displayed.
  - **LED - Buzzer Duration** - Select the time duration as Long, Medium or short for the LED Buzzer.
- **Denied Acknowledgment**
  - **Display Duration (ms)** - Define the time duration in between 500 to 3000ms till which the 'Acknowledgment Denied' message will be displayed.
  - **LED - Buzzer Duration** - Select the time duration as Long, Medium or short for the LED Buzzer.
- **Enable Display Messages** - This feature allows the user to enable custom birthday message and display messages to be displayed on the door device. Upto 4 display messages can be configured for a door.
- **Custom Birthday Message**- Enter the birthday message which would appear on the door when the user punches on the door on his birth date.



The valid values are

**A-Z**

**a-z**

**0-9**

`~!@#\$%^&\*()\_+~{}|\\|:;?<>.,\\''

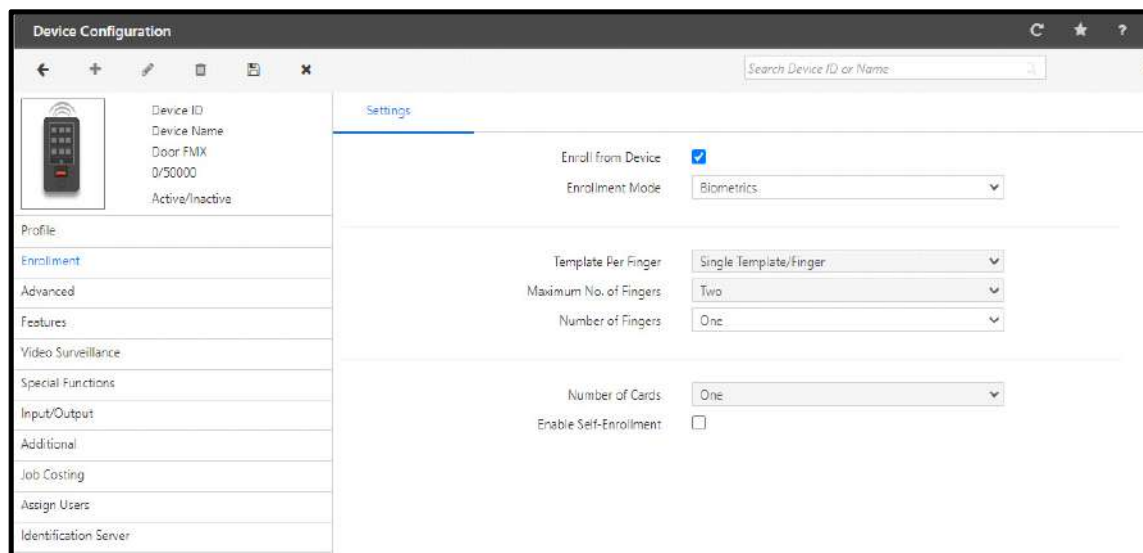
- **Display Message** - Enable each display message individually by selecting this checkbox.
- **Schedule** - For each message, the user needs to define the time period between which this message is to be displayed.
- **Message** - Enter the message to be displayed in this field. Maximum 21 characters allowed.
- **Multi-Language Support** - Select this checkbox to enable multi-language support for the selected device.

The **Display From** field shall display the reading order for the selected language.

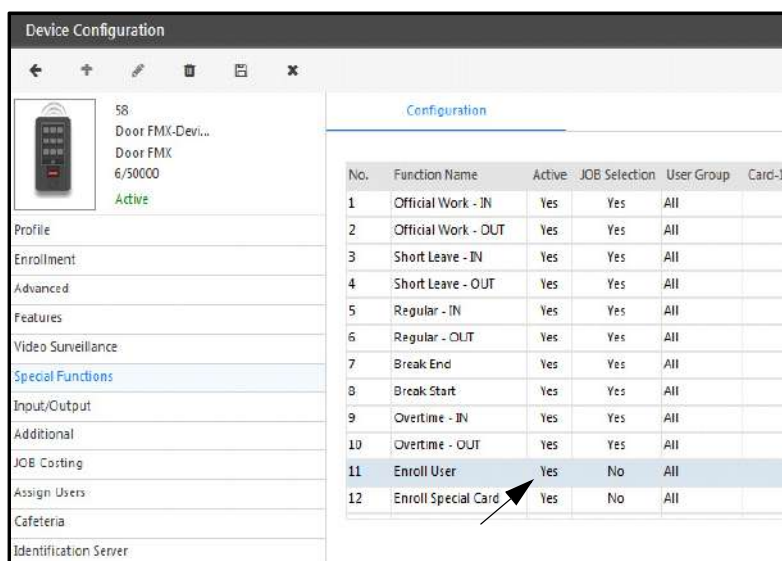
- **Auto Hide Menu Bar**- If a person touches the device screen by mistake and enter into Menu; then the finger sensor will not take the punch when he punches on device till the menu is closed or time out occurs. So in this case; enabling the **Auto hide Menu Bar** check-box will hide the menu and the user will be able to punch on the door. If you want to access the Menu then swipe upwards on the screen which will show the menu.

## Enrollment

The Enrollment page appears as shown below.



- **Enroll from Device** - Select this check-box to enable the enrollment of user from the door controller. When this check-box is enabled, 'Enroll User' special function on that device will get active as shown below.



If 'Enroll User' special function & 'Enroll From Device' check-box both are inactive in device configuration, then on activating 'Enroll User' special function, 'Enroll From Device' check-box will be enabled.

- **Enrollment Mode** - Select the desired type of credential from the dropdown list that can be enrolled using the special function at the DOOR.

The options are — ReadOnlyCard, SmartCard, Biometrics, and BiometricsThenCard

- **Enrollment Using** - Select the option **User ID** or **Reference No.** using which enrollment will be done.
- **Template Per Finger** - This parameter displays the values as configured at the global level. This field is not user editable from this page.
- **Max Number of Fingers** - This parameter displays the values of the maximum number of fingers configured at the global level. This field is not user editable from this page.
- **Number of Fingers/Cards** - Select the number of cards or fingerprints to be enrolled based on the credential option selected in the Enrollment Mode parameter.
- **Enable Self-Enrollment** - Select this checkbox to enable the self-enrollment feature on this door.

## Advanced

The Advanced tab allows the user to configure some advanced parameters such as access control settings, alarms and device timers.

To access this, After selecting the device, Select the **Advanced** tab from **Device Configuration** page. The advanced settings can be configured from following sections:

- *“Settings”*
- *“Alarms”*
- *“Timers”*
- *“Wiegand”*

## Settings

The **Advanced Settings** page for Door FMX as **Direct Door** appears on your screen as shown below:

The screenshot displays the 'Device Configuration' window with the 'Settings' tab selected. The left sidebar shows a list of configuration categories: Profile, Enrollment, Advanced (selected), Features, Video Surveillance, Special Functions, Input/Output, Additional, Job Costing, Assign Users, and Identification Server. The main area is divided into sections: Alarms, Timers, and Wiegand. The Alarms section includes checkboxes for 'Generate Exit Switch Events', 'Generate Invalid User Events', 'Generate Sequential IN-OUT Events', 'Two Credentials Required', and 'Show PIN'. The Timers section includes 'Allow Exit when Door Lock' (checked), 'Auto Relock' (unchecked), 'Auto Relock Timer (Sec)' (set to 3), 'Enable Additional Security' (disabled), 'Enable Smart Identification' (unchecked), 'Access Level' (set to 8), 'Access Mode' (set to Card), 'Auto Acknowledge Alarm' (unchecked), 'Auto Acknowledge Alarm (Sec)' (set to 10), and 'Facility Code' (set to 1). The Wiegand section includes 'Allow Access Through Mobile' (unchecked), 'Mobile Entry Access Mode' (set to Mobile Only), 'Mobile Exit Access Mode' (set to Mobile Only), 'Show Attendance Details' (unchecked), 'Sensor Type' (set to FEVCBOT), 'Sensor Interface' (set to USB), 'Emissivity' (set to 0.95), 'Calibration Parameter' (set to +), 'Approach to Sensor Wait-Time (Sec)' (set to 3.0), 'Temperature Detection Time Out (Sec)' (set to 10), 'Tolerance between Consecutive Readings' (set to 0.5), 'Consecutive Readings Count within Tolerance' (set to 5), 'Temperature Threshold (°F)' (set to 95.5), 'Minimum Temperature for Access (°F)' (set to 95.0), 'Restriction Type' (set to Soft), and 'Bypass if Sensor Disconnected' (unchecked).

The following parameters are available for configuration:

- **Generate Exit Switch Events** - Select this checkbox to enable the door to generate events everytime the exit switch is used.
- **Generate Invalid User Events** - Select this checkbox to enable the door to generate events for invalid user inputs.
- **Generate Sequential IN-OUT Events** - Select this checkbox to generate user punches on device as the sequential IN-OUT events irrespective of whichever mode in which device is functioning.
- **Two Credentials Required**- Select this checkbox to enable the feature of verifying 2 credentials mandatorily for users allowed to By-pass finger/palm.
- **Show PIN**- Select this checkbox to display the characters of PIN when the PIN is entered on device.
- **Allow Exit when Door Lock** - Select this checkbox if users are to be allowed to exit even when the Door relay is in locked condition.

- **Auto Relock** - Select this checkbox to allow the door to relock immediately when the door status changes to close after normal open irrespective of the defined pulse time. However, it is supported only if a door sense is installed and enabled.
- **Auto Relock Timer** - Specify the time in seconds for the Auto Relock operation. Valid Range: 1 to 65535.
- **Enable Additional Security** - Select this checkbox to enable additional security at the selected Door Controller.
- **Additional Security Code** - Enter a code (ranging from 1 to 65535) in the field provided. Re-enter the code to confirm.



*Changing this value can affect the SI function. Click on the **Default Code** button to reset the **Additional Security Code** to the value set in the **Global Additional Security Code** field on the Global System Policy page.*

- **Enable Smart Identification** - Select this checkbox to enable this functionality at the selected Door Controller and select the **Access Level** and the **Access Mode** from the drop down list.
- **Auto Acknowledge Alarm** - Select this checkbox to enable the auto-acknowledgement of all alarms for this device.
- **Auto Acknowledge Alarm (sec)** - Set the time in seconds for the Auto Acknowledge Timer. The wait timer will start and on expiry of the timer, the alarm buzzer will stop automatically.
- **Facility Code** - Set a value for Facility Code to be set for access modes other than “Card”, if Facility Code is expected in Wiegand Output. This will be applicable to all direct doors except Door V1 and V2.
- **Allow Access Through Mobile**- Check the box to allow the access to device using COSEC ACS App.
- **Mobile Entry/Exit Access Mode**- Select the entry and exit door access mode from the options of **Mobile Only**, **Mobile then Biometrics**, **Mobile then Card** and **Mobile then PIN**.



*If User Access Mode is selected as “None” in Zone Configuration and Mobile Access Mode is selected as “Mobile Then Biometrics” then door can be accessed through Mobile and then Biometric credential.*

- **Show Attendance Details** - Select this check-box for displaying the Attendance Details of the user on FMX door. This allows user to view his attendance details on FMX door itself and there is no need to login to ESS application to view attendance details.

The attendance details of user will be displayed for a period of 3-4 seconds after the Access Allowed screen.



*1. The user whose Attendance details are to be displayed on FMX door must be enabled for this feature. Enable the check-box **Show Attendance details on Device** from User Configuration> T&A> Attendance.*

*2. While an attendance detail of one user is being displayed on device and second user tries to access the device; new user will be processed.*

*3. Whenever both users of 2-person rule are allowed to get access on device then attendance details screen of second user will be loaded on device.*

- **Sensor Type:** Select the type of thermal sensor integrated in the device. There are three sensors: *AST*, *Web-Based* and *FEVOBOT*. Default sensor set is *FEVOBOT*.
- **Sensor Interface:** Select the interface on which device will communicate with the sensor.  
For Sensor Type: *AST*  
Sensor Interface options will be: RS-232 and USB  
For Sensor Type- *Web-based*  
Sensor Interface options will be: HTTP/S  
For Sensor Type-*FEVOBOT*  
Sensor Interface options will be: USB
- **Emissivity:** Set the emissivity parameter for Sensor. This parameter should only be visible when Sensor Type is *AST*. Default value is 0.95.  
It is used to define accuracy in sensor to detect temperature of different skin or objects.  
Not applicable for *FEVOBOT*.
- **Calibration Parameter:** Set the calibration parameter for the thermal sensor.  
On click of + the value should increase by 0.1 and on click of – it should decrease by 0.1.  
Not applicable for *FEVOBOT*.
- **Approach to Sensor Wait-Timer:** Time for which the device will wait for user to approach the device before starting Temperature Detection.
- **Temperature Detection Time-Out:** The timer till which temperature detection will be done for the user and if valid temperatures are not found till the expiry of timer then timeout will be declared.
- **Tolerance between consecutive readings:** The Tolerance range of reference temperature within which the consecutive readings are considered to be valid user temperature readings. If current temperature doesn't fall in tolerance range the reference temperature is updated with the current temperature and the process continues.  
Not applicable for *FEVOBOT*.
- **Consecutive readings count within tolerance:** The Tolerance range of reference temperature within which the consecutive readings are considered to be valid user temperature readings. If current temperature doesn't fall in tolerance range the reference temperature is updated with the current temperature and the process continues.  
Not applicable for *FEVOBOT*.
- **Minimum Temperature for Access:** The minimum temperature value that should be detected is to be considered as valid temperature.  
It should be less than threshold temperature. If user tries to enter a value equal to or greater than threshold temperature validation should be shown.  
The default value, unit and range should be updated based on the Temperature unit set on Panel.
- **Temperature Threshold:** To set the threshold value of the temperature. The default value, unit and range can be updated based on the Temperature unit set on Panel.
- **Restriction Type:** To set restriction type as soft/hard.
- **Bypass if Sensor Disconnected:** Enable this check-box to give provision of bypassing the feature if sensor connectivity is lost.

## Alarms

In Alarm tab, you can assign below list of alarms to the door.

### *For Direct Door*

Settings	Alarms	Timers
	Tamper <input type="checkbox"/>	
	Door Abnormal <input type="checkbox"/>	
	Door Force Open <input type="checkbox"/>	
	Door Fault <input type="checkbox"/>	
	Panic <input type="checkbox"/>	
	Temperature Threshold <input type="checkbox"/>	

Enable the respective check-box of alarms which is to be selected.

## Timers

This section allows the configuration of various types of pre-defined device timers which can trigger off specific responses. In COSEC, timers are often used to control door behavior and for triggering alarms. The **Timers** page appears on your screen as shown below:

The screenshot shows the 'Device Configuration' window with the 'Timers' tab selected. On the left, a sidebar lists 'Profile', 'Enrollment', 'Advanced' (highlighted), 'Features', and 'Video Surveillance'. The main area shows four timer settings:

Timer Name	Value
Inter-Digit Wait Timer (Sec) *	3
Multi-Input Wait Timer (Sec) *	5
Door Open Pulse Timer (Sec) *	5
Late-IN Early-OUT Active Timer (Min) *	60

- **Inter-Digit Wait Timer (sec)** - Specify the time period in seconds between two key inputs on the device keypad. On expiry of this timer, the system considers the user input to be complete and is ready for the next input.
- **Multi-Input Wait Timer (sec)** - Specify the time in seconds for which system needs to wait for the second credential input from the user when more than one credential is to be used to grant access.



*We recommend you to set the timer value as greater than or equal to 10 seconds to avoid access denial issues to users. This is applicable when the system reads the credentials (biometric) from the user's Smart Cards.*

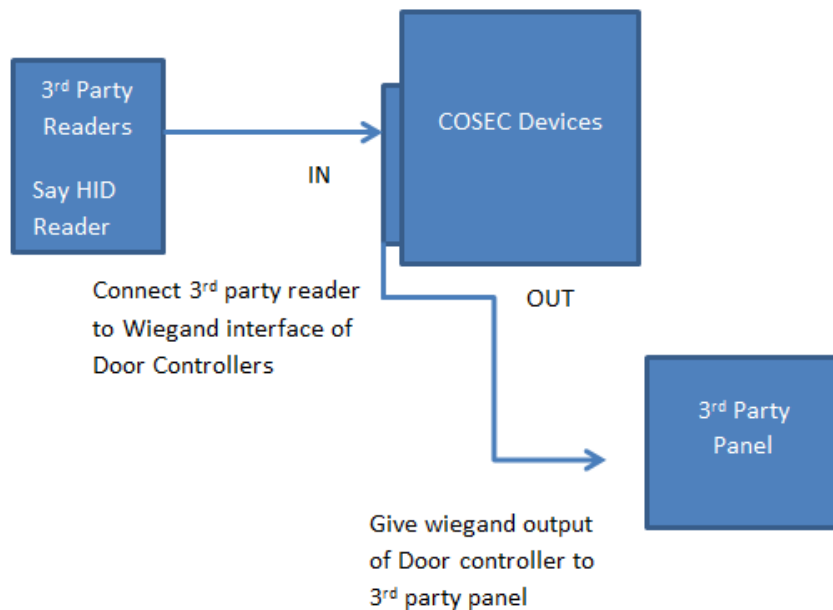
- **Door Open Pulse Timer (sec)** - Specify the time in seconds (1 to 65535) for the door to be energized for a valid credential. If the opened door does not return to a closed state before the expiry of this timer, the door will generate a "Door Abnormal" alarm.
- **Late-IN Early-OUT Active Timer (min)** - Specify the time in minutes for which the Late-IN and Early-OUT special functions will remain active after being enabled at the Door Controller.

## Wiegand

The screenshot shows the 'Device Configuration' window with the 'Wiegand' tab selected. The sidebar on the left is the same as in the Timers page. The main area shows 'Wiegand Interface' settings:

- Output Mode**: A dropdown menu.
- Output Mode Parameters**:
  - Wait For Panel Signal**: ☒
  - Signal Wait Timer (Sec)**: 2
  - Wait For User Verification**: ☒
  - Wiegand Output Format**: 26 Bit
  - Send From**: MSB Bit

- **Wiegand Interface** - The COSEC device can be connected both as input devices (e.g. to receive data from a Wiegand Reader) or output devices (e.g. to support output to third party panel) via the Wiegand interface as shown below.



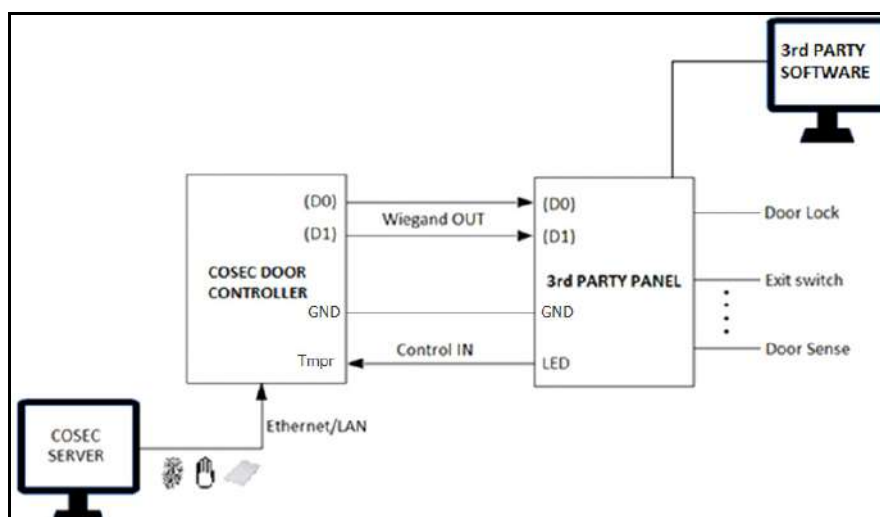
So select the interface of Door controller as **Output Mode** to work as weigand output to panel or **Reader Input** to take data from third party reader. If Reader Input option is selected, all the output mode parameters will be disabled.

If you select Output mode then configure the **Output Mode Parameters**.

- **Wait For Panel Signal** - If this option is enabled the door will wait for reply from the connected third party device before triggering any output, as per the defined **Signal Wait Timer (Sec)**.
- **Wait For User Verification** - If this option is enabled, user verification will be requested on the third party device before triggering any output.
- Specify the **Wiegand Output Format** and sending order for reader data as MSB or LSB Bit in the **Send From** field.



## Wiegand Out Interface



Also for the **Custom** format, user can configure details of fields to be sent as output from the Wiegand reader that has been added.

## Door Access using QR code

The user can access the COSEC device using COSEC APTA installed in the mobile device. If the user has rights for COSEC APTA and the access to the device is allowed for the user, then he can use his mobile device to scan the QR code which constitute the details of the COSEC door.

There is icon for QR code on COSEC APTA application. Clicking that icon will open the camera in your mobile. Now you can show the mobile camera to scan the QR code. The COSEC door will get opened after verifying the security key and access policies of the user.

## Steps to create a QR code

Step 1: Enter details in JSON format

```
{"version":"x","ip": "x.x.x.x","port":"x","pdid":"x","mode":"x"}
```

Valid values:

Field	Field range	Default Value	Remark
version	1-255	1	
ip	0.0.0.0-255.255.255.255	0.0.0.0	
port	0-65535	0	
pdid	0-255	0	If door is in direct door mode then, then PDID will be 0  If door is in panel door mode then, PDID will have values from 1-255
mode	0,1	0	0= for entry mode 1=for exit mode



**Note:**

**Step1a.** If door is in direct door mode enter IP & port of the direct door

b. If door is a panel door, then enter IP & port of the panel door and in the pdid specify the door id which is to be accessed.

**Step 2:** Encrypt the JSON string using key "matrix12" with simple DES/ECB mode.

**Step 3:** Encode the encrypted string using Base 64.

**Step 4:** Use this string to generate QR code through any third party software.

## Features

The Features tab allows the user to enable certain Access Control features for a device



*The Features tab is available only with the Access Control Module license .*

To access this, After selecting the device, Select **Device Configuration> Features**. The access control features for the device can be set from the following two sections:

- "Set1"
- "Set2"

## Set1

This page allows the configuration of three rules - **Absentee Rule**, **Occupancy Control** and **Use Count Control**. The page appears as shown below.

The screenshot shows the 'Device Configuration' window for 'Set1'. On the left is a sidebar with a list of configuration categories: Profile, Enrollment, Advanced, Features (highlighted), Video Surveillance, Special Functions, Input/Output, Additional, Job Costing, Assign Users, and Identification Server. The main panel is titled 'Set1' and contains three rule configuration sections:

- Absentee Rule:** Includes an 'Enable' checkbox which is checked.
- Occupancy Control:** Includes an 'Enable' checkbox (checked), a 'Maximum Occupancy Limit' field set to 9, a 'Minimum Occupancy Limit' field set to 1, and a 'Zero Occupancy' checkbox (checked).
- Use Count Control:** Includes an 'Enable' checkbox (checked) and a 'Use Count Limit (Per minute)' field set to 5.

- **Absentee Rule** - Select this checkbox to enable this feature at the door. This rule sets the maximum number of days for non-use of a credential. On expiration of days limit, the user will be automatically blocked.  
For configuring the rule See *Access Control> Absentee Rule*.
- **Occupancy Control** - Select this checkbox to enable the feature at the door and specify maximum number of users to be allowed within the controlled area after which a user exit is required to enable access to another user. Also specify the **Minimum Occupancy Limit** i.e. the minimum number of occupants the designated zone should have, and enable/disable the **Zero Occupancy** option to determine whether the designated zone should be allowed to be empty or not.  
For configuring the rule See *Access Control> Occupancy Control*.
- **Use Count Control** - Select this checkbox to enable the feature at the door and specify the maximum number of uses per minute.  
For configuring the rule See *Access Control> Use Count Control*.  
You can enable **Duress Detection** on the door. The default duress detection code is displayed which is used to generate the duress alarm which informs that the user is forced to open the door under threat.  
For details See *Device Configuration (Panel200)> Features> Set3> Duress Detection*.

## Set2

This page allows the configuration of three rules - **First-IN User Rule**, **Anti-Pass-Back (APB)** and **2-Person Rule**. The page appears as shown below.

The screenshot displays the 'Device Configuration' window for 'Set2'. The left sidebar lists various configuration categories. The main panel is divided into three sections for rule configuration:

- First-IN User Rule:** Includes an 'Enable' checkbox, 'Reset On' radio buttons (Day Change, Timer Expiry), 'Access Timer (Sec)' set to 3, and 'First-IN User Group' set to 1.
- Anti-Pass-Back (APB):** Includes 'On Entry' and 'On Exit' checkboxes (both checked), 'Hard/Soft' dropdown set to 'Soft', 'Forgiveness' checkbox checked, 'Reset After' radio buttons (Day Change, Timer Expiry) with 'Timer Expiry' selected, and 'Forgiveness Timer (Mins)' set to 34.
- 2-Person Rule:** Includes an 'Enable' checkbox, 'Mode' dropdown set to 'Primary Must', 'Primary Group' set to 888, and 'Secondary Group' set to None.

- **First-IN User Rule** -Select this checkbox to enable the feature at the direct door and select the First-In User group which would be valid at the door.  
For configuring the rule See *Access Control> First- In User Rule> Assignment*
- **Anti-Pass Back (APB)** - Select this checkbox to enable the feature at the direct door.
  - **On Entry:** Check this box so that the system monitors the entry reader for APB violation.
  - **On Exit:** Check this box also so that the system monitors the entry as well as the exit readers for APB violations.
  - **Hard/Soft:** Select the restriction type as Hard or Soft option from the drop down options.
    - **Hard APB:** The access will be denied if the exit is not registered first. It does not allow a second entry using the same card without an exit.
    - **Soft APB:** The access will be granted even if the exit is not registered. It allows a second entry of the same user without an exit; however, an event and a warning are generated that indicates the second entry.
- **Forgiveness:** Check this box to enable the system to reset the APB status. When forgiveness is enabled, then there will be following options to reset the pass.
  - **Reset After Day Change:** This will reset the APB status of all the users to NULL at midnight. This enables a user, who left the building in the evening without exit punch, to use his card for entry in the next morning.
  - **Reset After Timer Expiry:** This will reset the APB status of all the users after the expiry of user defined time.
  - **Forgiveness Timer (Mins):** Enter the time duration in minutes after which Anti-pass back status will get reset and the pass will be in original state.

- **2-Person Rule** - Select this checkbox to enable the feature at the door and set the **wait time** in seconds after which the second person is allowed to punch on the door.  
For configuring the rule *See Access Control> 2- Person Rule*

## Video Surveillance

The Video Surveillance tab allows the user to configure parameters for video surveillance integration with the COSEC device. It is available in Basic License.

To access this, Go to **Device Configuration > Video Surveillance**.

- [“Visual Tagging”](#)
- [“Satatya/IP Camera Integration”](#)

## Visual Tagging

The COSEC application can interface with some supported hybrid and network video recording systems as well as IP Cameras and grab images triggered by user events at the Doors. The **Visual Tagging** option enables the administrator to define the video recorder and IP Camera parameters. The **Visual Tagging** page appears as shown below.



To view the user events and related images, go to **Admin > Views/Logs > Event View**. To know more about viewing events, refer to “Event View”.

The following parameters are available for configuration:

- **Capturing Device** - Select the video recording device type from the dropdown menu as shown.

The compatible device types are:

- Matrix HVR/NVR
- Milestone
- IP Camera

### Matrix HVR/NVR

- **MAC Address** - In the event of selecting the Matrix HVR/NVR, the administrator needs to specify the MAC address of the video recorder device using “\_” (underscore) as the separator.

- **Camera ID** - Specify the camera number or camera ID for IP cameras. For analog cameras specify the camera number.
- **Storage Root Folder** - Specify the Root folder path or FTP Path where the uploaded images will be saved.

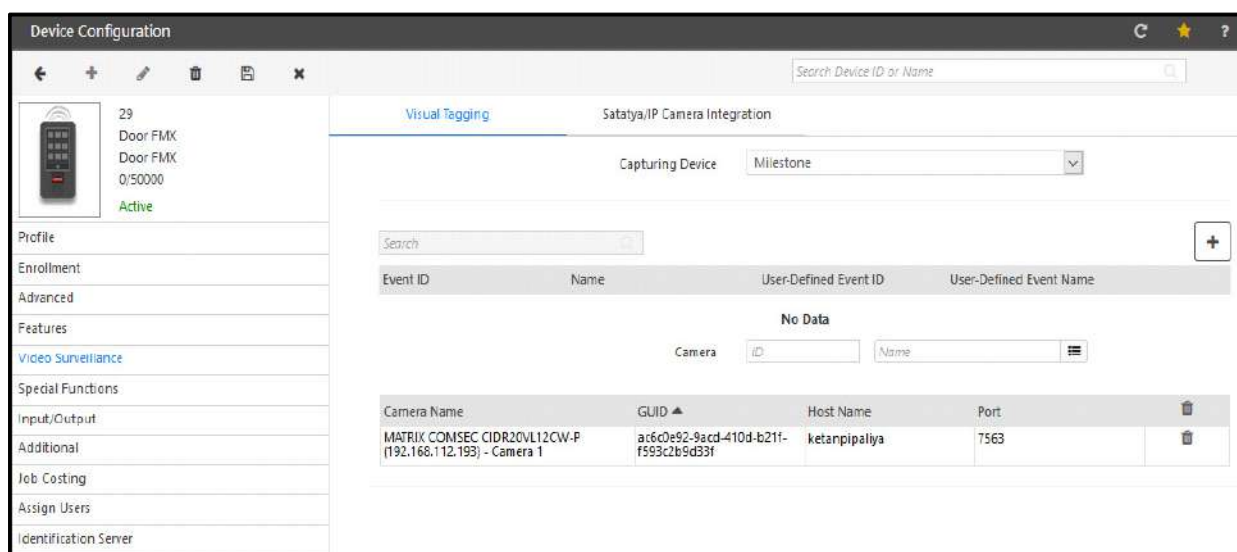


- **FTP Login Credentials** - Check this box to activate FTP login credentials for authentication.
- **Username** - Specify the FTP server username.
- **Password** - Specify the FTP server password.



*Some COSEC devices do not support all the network connection options.*

## Milestone



*For more information on integration with **Milestone** devices, refer to "[Milestone Integration](#)".*

## IP Camera

The screenshot shows the 'Device Configuration' window with a sidebar on the left containing a list of device types: Profile, Enrollment, Advanced, Features, Video Surveillance (highlighted), Special Functions, Input/Output, Additional, Job Costing, Assign Users, and Identification Server. The main area is titled 'Satatya/IP Camera Integration' and has a 'Visual Tagging' tab. Under 'Capturing Device', 'IP Camera' is selected. The 'Snapshot URL' field contains 'http://192.168.102.191/matrix-cgi/snapshot' with a note below it: 'Note: Mention the protocol http or https in URL.' The 'API Login Credentials' section has 'User Name' set to 'admin' and 'Password' set to '\*\*\*\*\*'.

- **Snapshot URL:** If Capturing device is selected as IP Camera; then enter the API URL for taking the Snapshot through IP camera. You can use any camera for taking the snapshot/photo. The API for capturing snapshot will be available in the API document of camera.
- **User Name:** Enter the Username for accessing API for taking the Snapshot through IP Camera.
- **Password:** Enter the Password for accessing API for taking the Snapshot through IP Camera.



It is the same username and password using which IP camera login is done. Eg: username admin and password admin



The allowed values for snapshot URL, User Name and Password are **A-Z, a-z, 0-9 !\"#\$%&'()\*+,- . / : ; < = > ? @ [ \ ] ^ \_ { | } ~**

## Satatya/IP Camera Integration

This functionality is available for configuration only when the Matrix HVR/NVR device type or IP Camera is selected as the **Capturing Device** (from *Visual Tagging*).

It enables the configured COSEC devices to directly send commands to the SATATYA HVR/NVR devices/ IP Camera as per the configuration on this page. The Satatya/IP Camera Integration page appears as shown below:





## SATATYA Integration

**Device Configuration**

**Satatya/IP Camera Integration**

Visual Tagging

Satatya Integration

Integration type: ☒ Network

Active: ☒

IP Address: 192.168.104.37

Port Number: 8000

Name: FMXNVR Integration

Active: ☒

Schedule: 14:00 - 19:00

Days: ☐ Sun ☒ Mon ☒ Tue ☐ Wed ☐ Thu ☐ Fri ☐ Sat ☐ Holiday

Event: Access Allowed

Mode: Entry

Action: Recording

Duration Min: 10

Camera: ☐ 1 ☒ 2 ☐ 3 ☐ 4 ☐ 5 ☐ 6 ☐ 7 ☐ 8 ☐ 9 ☐ 10 ☐ 11 ☐ 12 ☐ 13 ☐ 14 ☐ 15 ☐ 16 ☐ 17 ☐ 18 ☐ 19 ☐ 20 ☐ 21 ☐ 22 ☐ 23 ☐ 24

Add Cancel

- **Integration type-** Select the integration type from the options of Wired and Network. In wired integration, door is physically connected with Satatya Device. In Network integration, connection can be by ethernet, wireless or broadband depending upon the COSEC device support.
- **Active-** Check the box to activate the connection.
- **IP Address-** Specify the IP address of HVR/NVR.
- **Port Number-** Specify the port number of HVR/NVR.
- **Name-** Specify a user friendly name for the integration function.
- **Active-** Check the Active box to enable the SATATYA integration functionality.

- **Schedule** - Specify a schedule for the function by specifying the start and the end time (*24 Hours format*) as well as checking the boxes against the applicable **days** of the week.
- **Event**- Select a COSEC event from the drop down list for which the resultant action is to be configured.
- **Mode**- Select the event mode from the options of Entry, Exit and Both from the drop down list wherever applicable.
- **Action**-Select the action for the Satatya device from the drop down list. The options available are:
  - Recording - Specify the duration in minutes.
  - Upload Image - This will be uploaded as per the ftp settings.
  - Video Pop-up - Specify the duration in seconds. The video pop up will be generated on the local client of Satatya device on the selected camera.
  - PTZ Preset - Specify the PTZ position number as defined on the SATATYA device.
  - Mail Image - Specify the email-ID.
- **Camera**- Select the relevant camera channels depending on the action selected.
- Click the **Add** button to finish the process of linking the event to the action.

Name	Event	Action	Start Time	End Time	Active	
FMXNVR integration	Access Allowed	Recording	14:00	19:00	Yes	

- The user may now configure another event-action linkage if required.

**Example1:** For action as Video Pop up, the pop up of Camera 24 will be shown for 10 seconds.

**Example2:** For Access allowed event on COSEC Device, recording of camera channel 4,6,8 and 10 will be done for 10 seconds.

Event

Access Allowed

Mode

Both

Action

Video Pop-Up

Duration Sec. \*

10

Camera \*

☐ 1

☐ 2

☐ 3

☐ 4

☐ 5

☐ 6

☐ 7

☐ 8

☐ 9

☐ 10

☐ 11

☐ 12

☐ 13

☐ 14

☐ 15

☐ 16

☐ 17

☐ 18

☐ 19

☐ 20

☐ 21

☐ 22

☐ 23

☒ 24

Event

Access Allowed

Mode

Both

Action

Recording

Duration Min. \*

10

Camera \*

☐ 1

☐ 2

☐ 3

☒ 4

☐ 5

☒ 6

☐ 7

☒ 8

☐ 9

☒ 10

☐ 11

☐ 12

☐ 13

☐ 14

☐ 15

☐ 16

☐ 17

☐ 18

☐ 19

☐ 20

☐ 21

☐ 22

☐ 23

☐ 24

Add

Cancel

## IP Camera Integration

- **Schedule Name**-Specify a user friendly name for the schedule of Device-IP Camera integration.
- **Active**- Check the Active box to activate the schedule for IP Camera.
- **Event**- Select a COSEC event from the drop down list for which the resultant action is to be configured. The Events will appear in the list based on the availability of the license.



*At max. 20 Events or schedules are allowed for configuration for a single device.*

- **Mode**- Select the event mode from the options of Entry, Exit and Both from the drop down list.
- **Schedule Range**- Specify a schedule for the function by specifying the **start** and the **end time (24 Hours format)** as well as checking the boxes against the applicable **days** of the week.

Click **Add** button to add the configured schedule. The schedule will be listed in the grid. Then click **Save** button to save the schedule integration.

Name	Event	Mode	Start Time	End Time	
Denied User Schedule	User Denied	Both	00:00	23:59	

When user event is generated, then snapshot is taken by the configured camera. The events can be viewed in User Events (User module) page and Event view (Admin module) page.

*The capturing of Snapshot is shown in Door FMX section.*


## Special Functions

To configure *Special Functions* for COSEC doors, refer to [“Special Functions”](#).

## Input/Output

The Input/Output (I/O) configuration of a system determines how the output or response of a system is influenced by the input applied on it. In case of the COSEC Access Control System, the I/O configuration should enable the system to monitor and trigger a specific response to any changes in door state or event occurrences at the door device. This change of door state or occurrence of events may be considered as an input while the response or action that is generated by the system on detection of this input, may be defined as the output.



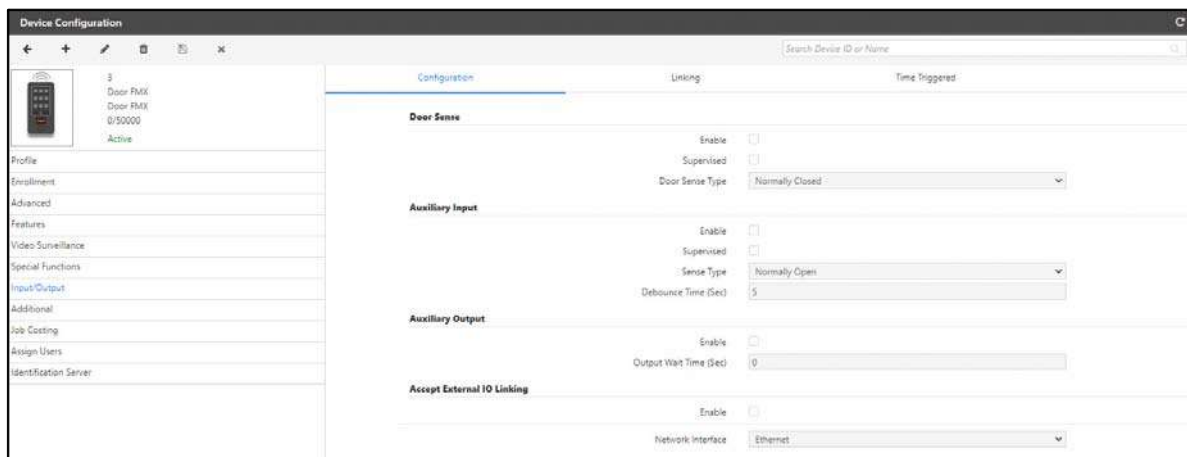
1. This functionality cannot be fully accessed in the Edit  mode for a selected device.
2. This functionality is available only with the Access Control add-on module license.

To access this, After selecting the device, Select **Device Configuration> Input Output**. The Input Output parameters can be set from the following sections:

- [“Configuration”](#)
- [“Linking”](#)
- [“Time Triggered”](#)

## Configuration

The **Configuration** section for a Door FMX appears as shown below.



The following parameters are available for configuration:

- **Door Sense** - The system by default can sense two states of a door - *Normally Open (NO)* and *Normally Closed (NC)* depending on which the output is determined. For example, any deviation of the door from its normal state may lead to the trigger of a *Door Abnormal* alarm.

Select the **Enable** checkbox to enable the system for such two-state monitoring.

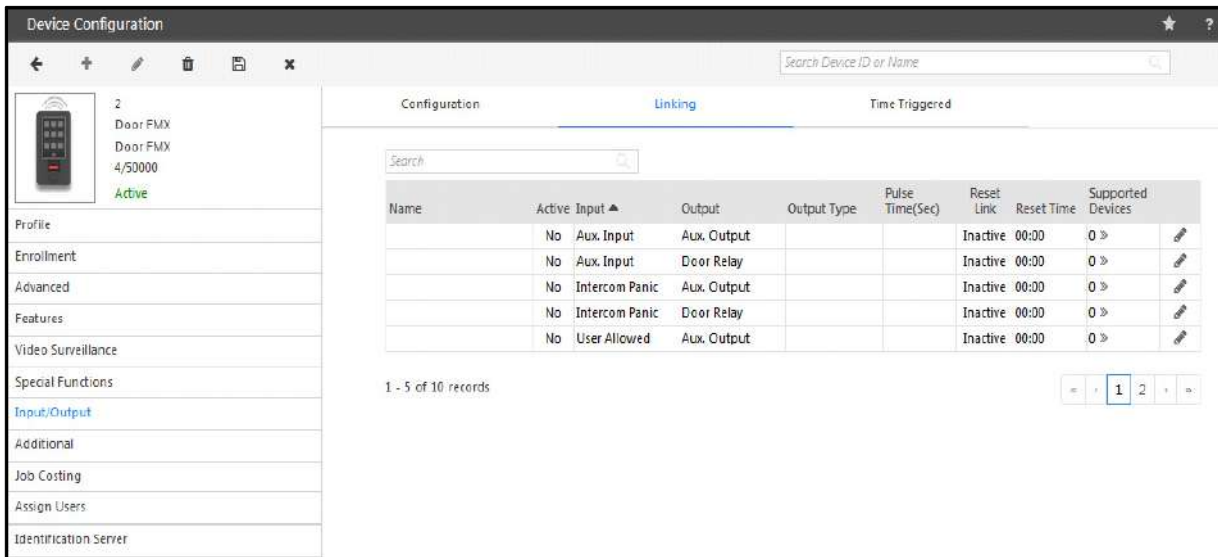
- Select the **Supervised** checkbox to enable the door for four-state monitoring where the door is also monitored for *door fault* and *door disconnection*. Specify the **Sense Type** as **Normally Open** or **Normally Closed**. (Default: Normally Closed).
- **Auxiliary Input** - Select the **Enable** checkbox option for Auxiliary Input (e.g. Smoke Detectors) depending on normal or supervised door state monitoring as described above.

**Debounce Time (Sec)** - Specify the Debounce time in seconds. Default value is 3 sec and range should be 0-99 sec. It defines the minimum time for which an input interface must be maintained in a given state before the system reports it. For example, if a Normal door state is changed to Alarm, the state must remain in Alarm for five seconds before an alarm is generated.

- **Auxiliary Output** - Select the **Enable** checkbox to enable Auxiliary Output (e.g. Fire Alarm) for the selected device. To set an additional waiting period before the Aux Output signal is sent, enter an **Output Wait Time (Sec)**.
- **Accept External IO Linking** - Select the Enable checkbox to enable device-to-device IO Linking i.e. input from one Direct Door can trigger output in another Direct Door.
- **Network Interface-** Select the interface option for IO linking with external devices. The options are
  - Ethernet
  - Wireless
  - Mobile Broadband

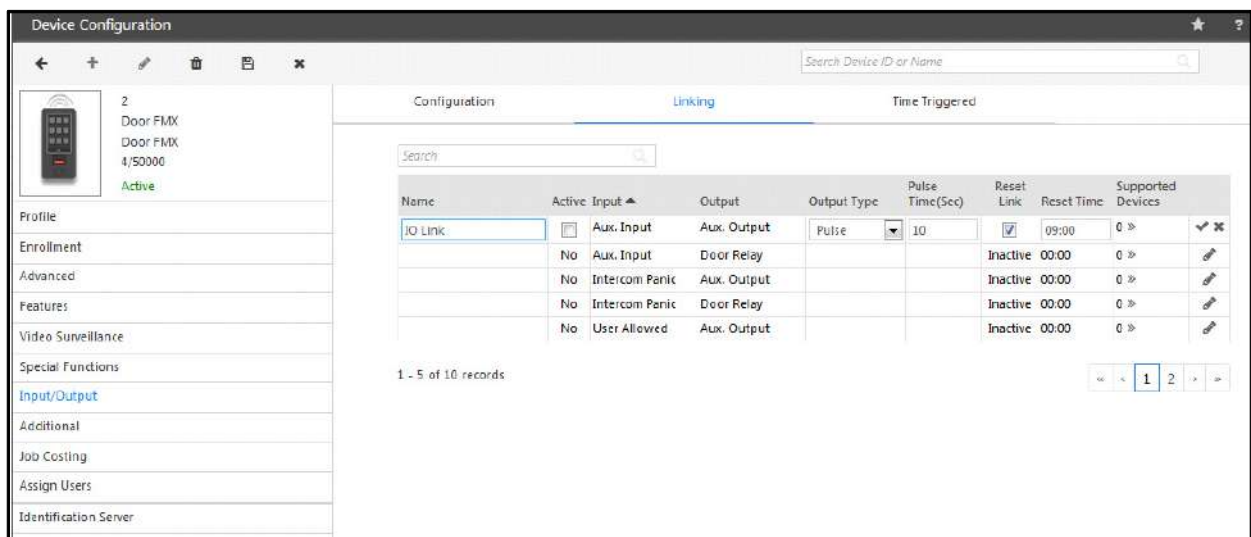
## Linking

The **Linking** section appears as shown below.




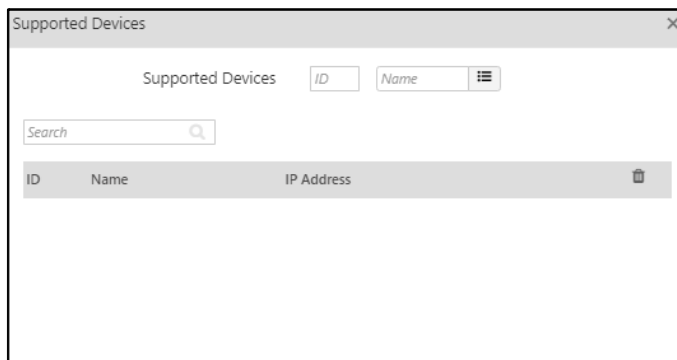
The COSEC application supports the Input/Output Linking feature to activate an output port based on a trigger received from an input port on the same Direct Door. This option enables the administrator to define how an event or events (input port) will trigger an output on the selected door.

Select a Input-Output linking row or click edit button.



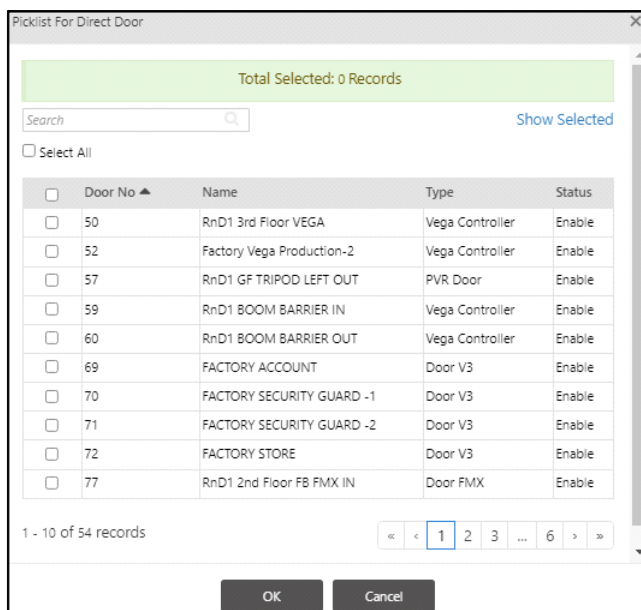
- **Name** - Specify a name for the new I/O linking program to be defined.
- **Active** - Select this checkbox to activate this linking program.
- **Output Type** - Specify the appropriate type of output from the following four options available in the drop down list:
  - Pulse: With this type of output, the user needs to define the Pulse time in seconds.
  - Interlock: With this option, the output follows the input. The relay output is triggered as long as the input is activated after which it returns to normal state.

- **Latch:** With this option, it is denoted that the relay output will be in an energized condition for infinite period and needs to be reset manually.
- **Toggle:** With this option, the output group toggles its state whenever an input group is activated.
- **Pulse Time (sec)** - For a *Pulse* output type, specify the pulse duration in seconds.
- **Reset Link-** Enable the Reset link and enter the time at which the IO link will get reset automatically.
- **Supported Devices** - All devices supported for external IO Linking will appear in this picklist for selection. Upto 255 external devices can be added by the administrator.
- Click **Supported Devices**  icon. The **Supported Devices pop-up** appears.



The 'Supported Devices' pop-up window contains a search bar, a table with columns 'ID', 'Name', and 'IP Address', and a close button in the top right corner.

- In this pop-up, click the **Supported Devices** picklist, the **Picklist For Direct Door** pop-up appears.



The 'Picklist For Direct Door' pop-up window displays a table of devices with columns: Door No, Name, Type, and Status. It includes a search bar, a 'Show Selected' button, a 'Select All' checkbox, and pagination controls at the bottom.

Door No	Name	Type	Status
50	RnD1 3rd Floor VEGA	Vega Controller	Enable
52	Factory Vega Production-2	Vega Controller	Enable
57	RnD1 GF TRIPOD LEFT OUT	PVR Door	Enable
59	RnD1 BOOM BARRIER IN	Vega Controller	Enable
60	RnD1 BOOM BARRIER OUT	Vega Controller	Enable
69	FACTORY ACCOUNT	Door V3	Enable
70	FACTORY SECURITY GUARD -1	Door V3	Enable
71	FACTORY SECURITY GUARD -2	Door V3	Enable
72	FACTORY STORE	Door V3	Enable
77	RnD1 2nd Floor FB FMX IN	Door FMX	Enable



You can either select particular devices or can select all the devices at once.


To select particular devices, click the check boxes of the desired devices.

**OR**

To select all the devices, select the **Select All** check box. The devices on all the pages will be selected.

Click **OK**. You return to the **Supported Devices pop-up** and the selected devices are displayed here.

Supported Devices			
Supported Devices			
<input type="text" value="Search"/>			
ID	Name	IP Address	
50	RnD1 3rd Floor VEGA	192.168.151.3	
52	Factory Vega Production-2	192.168.10.27	

You can also delete the desired devices. To do so, click **Delete**  of the respective device.

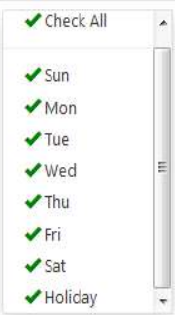
Close the pop-up the number of selected devices are displayed under **Supported Devices** in the grid.

- Click the **OK** button and **Save** the configuration.

## Time Triggered

On the **Input Output** page, select the **Time Triggered** section as shown.

Function Name	Active	Time	Duration(Sec)	Days	Output
Siren Activate	<input checked="" type="checkbox"/>	00:00	10	Select	Aux O/P



- ✓ Check All
- ✓ Sun
- ✓ Mon
- ✓ Tue
- ✓ Wed
- ✓ Thu
- ✓ Fri
- ✓ Sat
- ✓ Holiday

This functionality enables the user to control the activity of an Output without manual intervention. The time triggered functions are used for activating events like door unlock and siren activation that are set as per the start time and for the configured time duration. This functionality is designed to energize outputs for predefined periods at the configured time. The COSEC access control system supports up to 20 Time Triggered functions on a Direct Door.





settings in *24-hours* format, and specify the day of the week, date and time for the **Forward Clock** and the **Backward Clock** as shown.

This DST Setting implies that on 1st Sunday of November at 09:00 hours, the clock will be forwarded by 08:00 hours. And on 1st Sunday of January at 10:00 hours, the clock will be reversed by 08:00 hours.

- Click the **Save** button.

## Job Costing

When user punches on any device, there will be an option to select the Job Code on which the user is working. Job Costing enables the Admin to show or hide Job Code selection on device. It also enables the admin to assign default jobs on device.



Make sure the **Device Based Job Assignment** check box is enabled for the desired Users.

- **Show Job Menu:** Select the desired option— **Show List** or **Allocate Default**.

## Show List

When **Show List** is selected; then multiple jobs can be assigned to the device. The user can select the relevant Job Code while punching on the device. His/her job hours will be recorded for that Job Code.

- **Retain Job Selection:** If Retain Job Selection check box is selected, it allows the device to remember the last Job Code selected by a user and the same would be applicable for all the subsequent users until another job selection is done on the device. This is useful in environments where dynamic job selection prevails.

In this case, if the user selects a Job Code the same is saved and retained for future use by the device. If the user selects None option on the device, it ends the current job and assigns None until a new Job Code is selected by the user.

If the you clear the check box, then the device does not retain any job selection done by the user.

For example, in an educational setup, teachers may have dynamic job assignments, while students have static ones. After a teacher selects a Job Code, that code is retained by the device. Any student who punches in afterward will be assigned the teacher's Job Code until the teacher selects a new one or selects None.

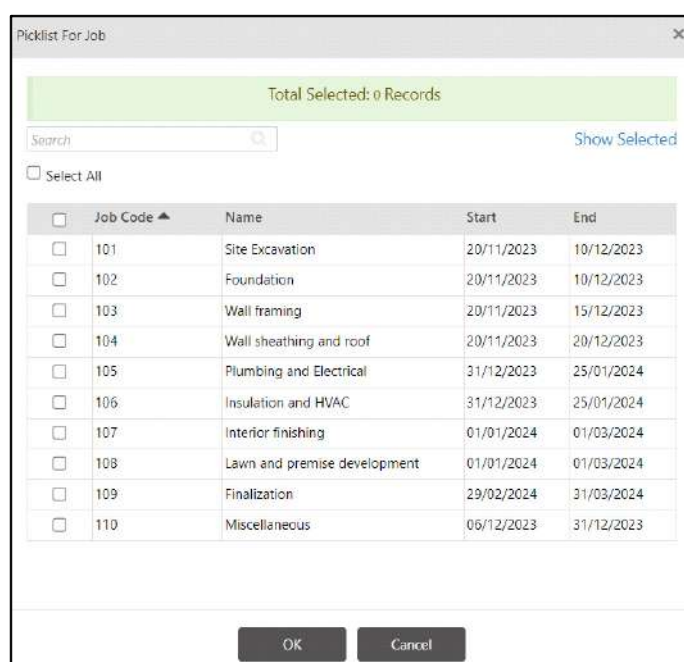
## Assign Jobs

- **Assign Jobs:** You can select Job Group as well as individual Jobs.
- To select **Job Group**, click the Job Group picklist, the **Picklist For Job Group** pop-up appears. Select the desired Job Group.

Click **Save**. The Jobs of the selected Job Group appear in the grid.


You can delete the desired Job. To do so, click **Edit**  and then click **Delete**  of the respective Job.

- To select **Jobs**, click the Jobs picklist. The **Picklist For Job** pop-up appears.



Picklist For Job

Total Selected: 0 Records

Search 

[Show Selected](#)

☐ Select All

<input type="checkbox"/>	Job Code ▲	Name	Start	End
<input type="checkbox"/>	101	Site Excavation	20/11/2023	10/12/2023
<input type="checkbox"/>	102	Foundation	20/11/2023	10/12/2023
<input type="checkbox"/>	103	Wall framing	20/11/2023	15/12/2023
<input type="checkbox"/>	104	Wall sheathing and roof	20/11/2023	20/12/2023
<input type="checkbox"/>	105	Plumbing and Electrical	31/12/2023	25/01/2024
<input type="checkbox"/>	106	Insulation and HVAC	31/12/2023	25/01/2024
<input type="checkbox"/>	107	Interior finishing	01/01/2024	01/03/2024
<input type="checkbox"/>	108	Lawn and premise development	01/01/2024	01/03/2024
<input type="checkbox"/>	109	Finalization	29/02/2024	31/03/2024
<input type="checkbox"/>	110	Miscellaneous	06/12/2023	31/12/2023

OK Cancel


You can either select particular jobs or can select all the jobs at once.

To select particular jobs, select the check boxes of the desired jobs.

**OR**

To select all the jobs, select the **Select All** check box. The jobs on all the pages will be selected.

Click **OK**.

The selected Jobs appear in the grid. You can also delete the desired Job. To do so, click **Delete**  of the respective Job.

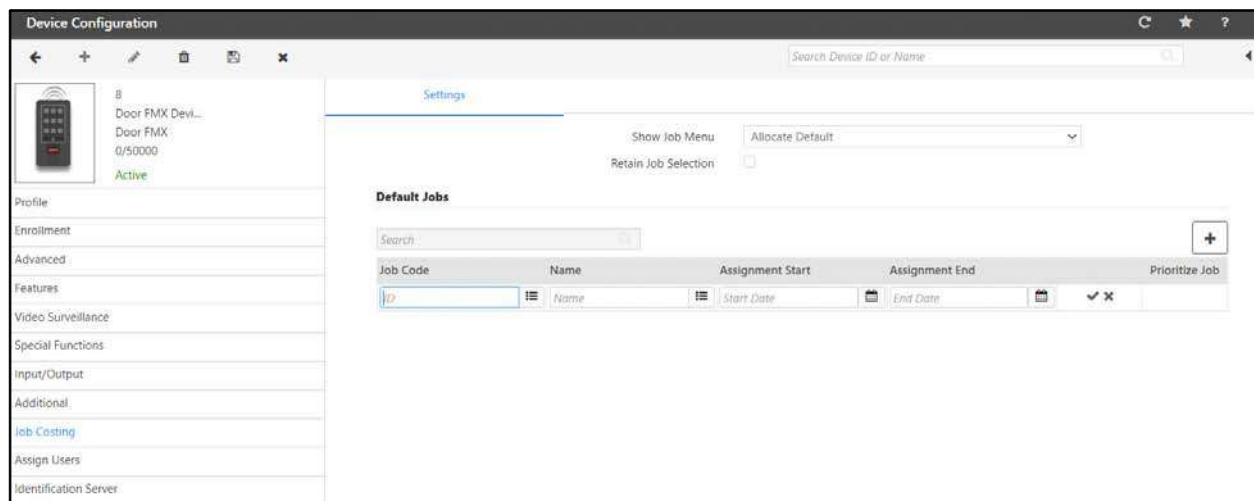
- Click **Save**.

## Allocate Default

When **Allocate Default** is selected; then default jobs for the device can be selected. The Job costing user can directly punch on this door for starting the default job.

## Default Jobs

Multiple default jobs can be assigned with overlapping Assignment Date Ranges. You can also set the priority of the assigned jobs if required. If you have jobs with overlapping dates and you have set their priority as per your requirement, then the first job will be considered as the default job.



The screenshot shows the 'Device Configuration' window. On the left is a sidebar with a device icon and a list of settings: Profile, Enrollment, Advanced, Features, Video Surveillance, Special Functions, Input/Output, Additional, Job Costing (highlighted), Assign Users, and Identification Server. The main area is titled 'Settings' and contains a 'Show Job Menu' dropdown set to 'Allocate Default' and a 'Retain Job Selection' checkbox. Below this is the 'Default Jobs' section, which includes a search bar and a table. The table has columns for Job Code, Name, Assignment Start, Assignment End, and a 'Prioritize Job' button. The first row shows a job with ID '10' and the name 'Name', with start and end dates. A '+' button is in the top right of the table area.

- Click **Add**  . Click the picklist under **Job Code/Name** to select the desired Jobs.

The **Picklist For Job** appears.

Picklist For Job

Search  Ended Days (1-999)  Active

Job Code	Name	Start	End
101	Site Excavation	20/11/2023	10/12/2023
102	Foundation	20/11/2023	10/12/2023
103	Wall framing	20/11/2023	15/12/2023
104	Wall sheathing and roof	20/11/2023	20/12/2023
105	Plumbing and Electrical	31/12/2023	25/01/2024
106	Insulation and HVAC	31/12/2023	25/01/2024
107	Interior finishing	01/01/2024	01/03/2024
108	Lawn and premise development	01/01/2024	01/03/2024
109	Finalization	29/02/2024	31/03/2024
110	Miscellaneous	06/12/2023	31/12/2023

1 - 10 of 11 records

1 2

Cancel

By default, all the **Active** jobs are displayed. Click **Active** and select the desired option — **All**, **Active**, **Expired** — to filter the jobs. The jobs appear as per the set filter.

If you select **Expired**, you can set another filter.

Configure the number of days in Ended Days (1-999). The system will display the expired jobs, derived using the following: Current Date minus Number of days configured in Ended Days.

For example:

Ended Days configured = 2

Current Date= April 25, 2024

All the jobs expired between April 23, 2024 to April 25, 2024 (midnight), will be displayed.

Click to select the desired job from the list. You can also search for the desired job using the search bar.

The selected job appears in the grid.

- **Assignment Start** and **Assignment End**: The selected Jobs Start and End dates are displayed. You can change the Assignment Start and Assignment End dates of the job if required. To do so, click the calender and select the desired start and end dates.
- Click **Save** to save the configuration.

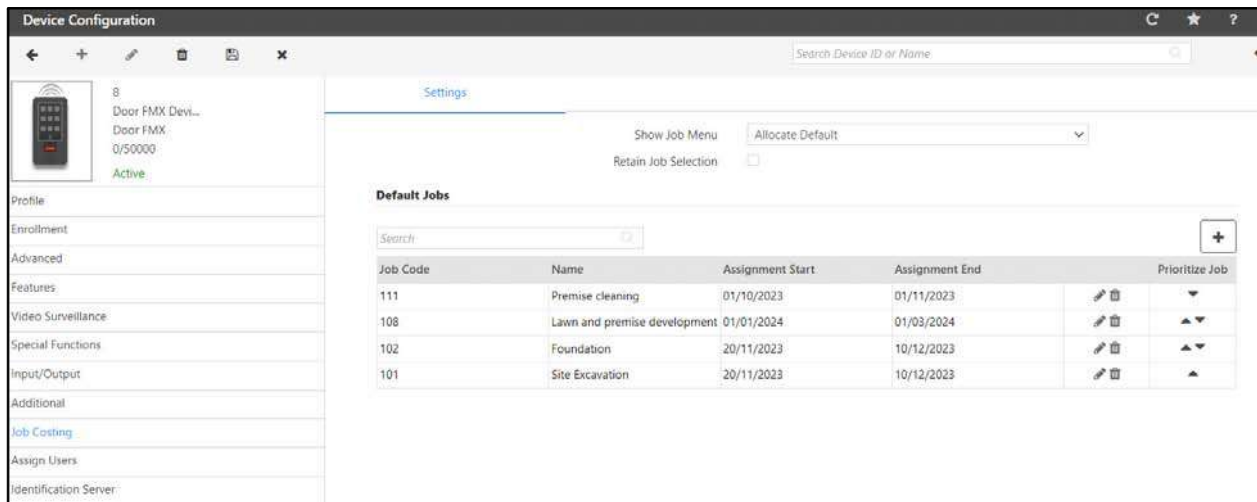
The **Default Jobs** grid will consist of all the jobs, that is expired, in-progress as well as assigned.



*It is recommended to set job priority only if overlapping dates are assigned to the jobs.*

*If a new job is assigned, by default it will appear at the highest priority. You can change the priority later, if required.*

You can set the priority of the jobs as per your requirement. To do so,



- Under **Prioritize Job**, click the **Up** arrow button to move a job upwards in the list. Similarly, click the **Down** arrow button to move a job downwards in the list.

If you have overlapping dates assigned to Jobs, in such scenarios there will be multiple Jobs in which the punches are possible.

To resolve this set the Job with highest priority at the first position, so that when the system searches for the Job as per the date, the punch will be marked in the first Job in which the date is detected.

Let us understand this with the help of an example.

#### Example:

User 1 has been assigned the following jobs:

Job Code	Job Name	Assignment Start	Assignment End	Prioritize Job
J1	Job 1	01/10/2023	10/10/2023	1
J2	Job 2	09/10/2023	15/10/2023	2
J3	Job 3	17/10/2023	25/10/2023	3
J4	Job 4	25/10/2023	31/10/2023	4

Now, User 1 changes the priority of the assigned jobs as follows:

Job Code	Job Name	Assignment Start	Assignment End	Prioritize Job
J2	Job 2	09/10/2023	15/10/2023	1
J1	Job 1	01/10/2023	10/10/2023	2
J4	Job 4	25/10/2023	31/10/2023	3
J3	Job 3	17/10/2023	25/10/2023	4

When User 1 will punch on 09/10/2023, the punch will be marked against Job 2 as it has been set at priority number 1. Similarly, when User 1 will punch on 25/10/2023, the punch will be marked against Job 4 as it is at a higher priority than Job 3.



*Make sure that the assigned jobs are prioritized correctly to ensure that the punches are in place.*

## Assign Users

To the configured device, you can select and assign the users.

Click the picklist button and select the users.

The screenshot shows the 'Device Configuration' window. On the left sidebar, the 'Assigned Users' option is selected. The main area displays a table of users assigned to the selected device. The table has columns for ID, Name, and a delete icon. The users listed are Shalini (ID 1), Khushbu (ID 101), Chirag (ID 2), and Isha (ID 3). A 'Save' button is located at the bottom right of the table.

ID	Name	
1	Shalini	
101	Khushbu	
2	Chirag	
3	Isha	

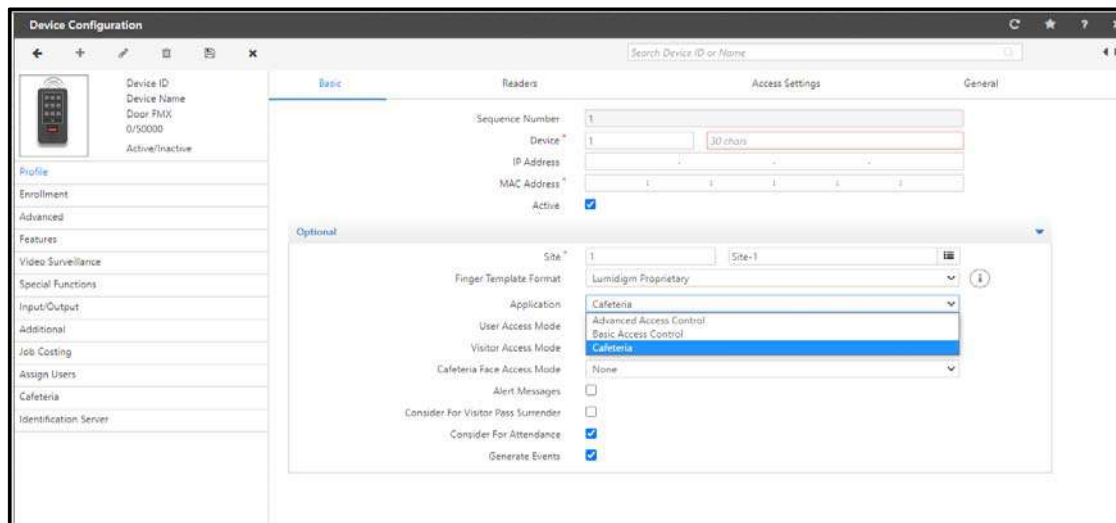
Click the **Save** button to assign all the added users to the selected door.

## Cafeteria

The COSEC system enables the you to configure devices which will be used by the Cafeteria management module.

To configure a door for Cafeteria application, make sure you have selected **Cafeteria** option in **Application**

(Device Profile > Basic > Application) as shown below.



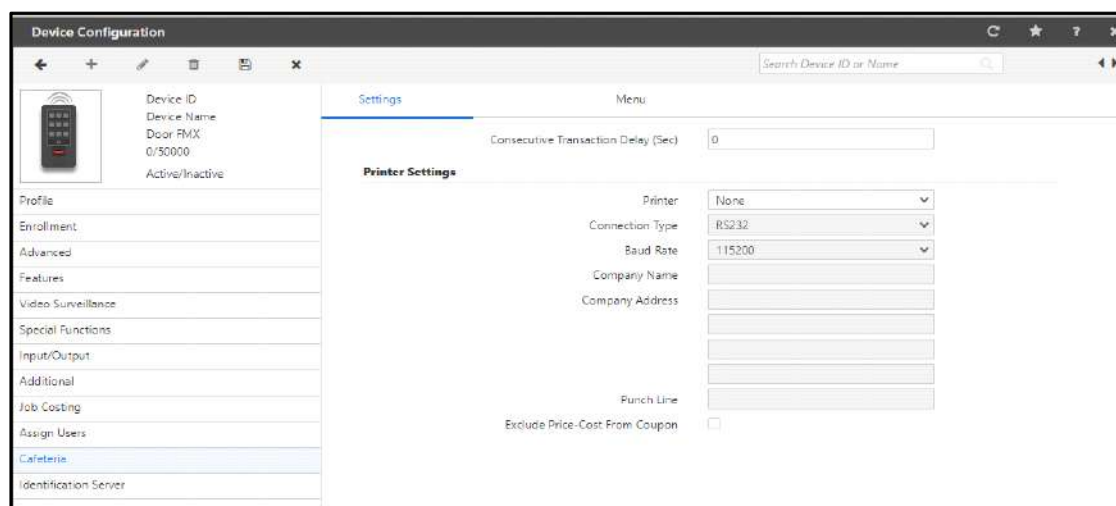
On the **Device Configuration** page, click **Cafeteria** on the left pane.

For the Cafeteria configurations, click the following links

- [“Settings”](#)
- [“Menu”](#)

## Settings

The Cafeteria configuration for Door FMX is shown as below



- **Consecutive Transaction Delay (Sec):** Enter the time interval between two transactions, wherein any user transaction would be restricted.

## Printer Settings

- **Printer:** Select the printer from the dropdown list based on the site requirements.



- **Connection Type:** Select the printer connection type from the drop down list. The options available are:
  - RS232 (serial)
  - USB
- **Baud Rate:** In the event of a serial printer, select the appropriate baud rate from the drop down list.
- Specify the **Company Name**, **Company Address** and the **Punch Line** as per the site requirements. These details will be printed on the receipt dispensed from the selected printer.
- Select the **Exclude Price-Cost From Coupon** check box if you want to exclude the price from the coupon.

## Menu

COSEC allows the administrator to assign one or more cafeteria menus (Menu 1, Menu 2, Menu 3... upto 99.) to a device. These can be configured by selecting pre-defined menus from the Menu picklist.



*The Menu is created from Cafeteria module.*

The Menu can be scheduled from Cafeteria module and is displayed in “Schedule Menus” as shown above.

If you have to assign another menu and schedule it on the door then select the Menu from the picklist. The Menu will be shown in the grid as shown below.

The screenshot displays two sections: 'Assign Menu' and 'Schedule Menu'. The 'Assign Menu' section has a search bar and a table with columns: Menu No, ID, Menu Name, and a delete icon. It contains two rows: Menu 1 (ID 1) and Menu 2 (ID 2). A 'Save' button is below the table. The 'Schedule Menu' section also has a search bar and a table with columns: Menu No, ID, Menu Name, Start Time, End Time, and Schedule Days. It contains one row: Menu 1 (ID 1) with Start Time 12:00, End Time 13:00, and Schedule Days Mo Tu We Th Fr Sa. An 'Add' button is in the bottom right corner of the 'Schedule Menu' section.

Now to schedule the menu click **Add** button as shown above.

Then select the menu to be scheduled from the **ID** picklist. Specify the **Start** and **End time** for which the Menu will be active and is available to users on the selected door. Select the **days** for which this menu will be available i.e. scheduled on the door.

Then click **OK** and **Save** the Menu schedule on the door.



*Two Menus cannot be scheduled for same timing.*

## Identification Server

This tab enables the selected device to be assigned to a pre-defined Identification Server.

Device has a limited memory capacity for storage of templates so we need Identification Server which will store the more number of templates and respond to device when asked for identification.

For more information on Identification Servers, See *Admin> System Configuration> Identification Server Configuration*.

To access these configurations,

- On the **Device Configuration** page, select the **Identification Server** tab.

## Face Recognition

The screenshot shows the 'Device Configuration' web interface. On the left is a sidebar with a device icon and a list of configuration tabs: Profile, Enrollment, Advanced, Features, Video Surveillance, Special Functions, Input/Output, Additional, Job Costing, Assign Users, and Identification Server (which is highlighted). The main area is titled 'Settings' and contains the 'Face Recognition' configuration section. This section includes the following fields and controls:

- Enable FR:** A checked checkbox.
- Face Capturing:** A dropdown menu set to 'Tap & Go'.
- Enable Time Out:** An unchecked checkbox.
- Free Scan Time Out (Sec):** A text input field containing '30'.
- IP Camera MJPEG URL:** A text input field containing 'http://192.168.1.126/matrix-cgi/mjpeg?profile-no=4'. A note below it says 'Note: Mention the protocol in URL.'
- User Name:** A text input field containing 'Username'.
- Password:** A password input field containing 'password'.
- FR Mode:** A dropdown menu set to 'Local'.
- Server Address:** A text input field containing '192.168.50.2'.
- Server Port:** A text input field containing '12000'.
- Identification Time-Out Duration (Sec):** A text input field containing '4'.

- **Enable FR:** Select the checkbox to enable the Face Recognition feature on the device.
- **Face Capturing:** Select the desired Face Capturing option — Tap & Go or Free Scan.
  - **Tap and Go:** If you select this option, user needs to tap on the device screen once. The MJPEG, that is motion recording screen appears. The device will capture and then identify the users face. If during working hours device is idle, then user needs to tap device to scan the face and gain access.
  - **Free Scan:** If you select this option, device will display the MJPEG, that is motion recording screen till the expiry of the Free Scan Time Out timer.
- **Enable Time Out:** Select this checkbox to enable the time out.
- **Free Scan Time Out (Sec):** Enter the free scan time out duration. The valid range is 1 to 999 sec.

In Free Scan method, multiple users can mark their attendance easily during peak entry hours.

For example, if the Free Scan Time Out is set as 30sec and if the user is identified in 10S then the system reloads the Free Scan Time Out timer again. Hence, device remains in the scanning mode.

- **IP Camera MJPEG URL:** Enter the URL for accessing the IP camera to receive the motion stream. For example: `http://192.168.104.48:80/matrix-cgi/mjpeg?profile-no=3`
- **User Name:** Enter the user name for accessing the IP camera. For eg: admin
- **Password:** Enter the password for accessing the camera. For eg: admin123

This will fetch the motion stream from camera to device screen. Then the users can show their face on camera. The face will be captured and after identification, the user will be allowed to access the door and punch will be marked.

- **FR Mode:** Select the FR mode as **Local** or **Server Assisted**.
  - **Local:** In this Local mode face templates will be stored in FR hardware module which can store 1 Lakh face templates. The captured face template will be verified with the templates already stored in FR module.
  - **Server Assisted:** In Server Assisted mode, the face templates will be stored directly in the server. You must first configure the Identification Server from where the face templates will be identified.
    - **Free Scan Time Out (Sec):** Enter the Free scan time out duration. The valid range is 1 to 999 sec.

When **FR Mode** is set as Local Mode, configure the following parameters:

- **Server Address/Port:** Enter the IP Address and Port number of the FR Server.
- **Identification Time-Out Duration (Sec):** Enter the identification time-out in seconds, after which the face template identification process will be timed out.

**Example:** If **Identification Time-Out Duration (Sec)** is 5 seconds, then the identification server will try to identify the face template until 5 seconds and if not found then it will show time-out to the user.

If you select FR Mode as **Server Assisted**, you must configure the following parameters

The screenshot shows the 'Face Recognition' settings page. The 'Enable FR' checkbox is checked. 'Face Capturing' is set to 'Free Scan'. 'Enable Time Out' is checked. 'Free Scan Time Out (Sec)' is set to 30. 'IP Camera MJPEG URL' is set to 'http://192.168.1.126/matrix-cgi/mjpeg?profile-no=4'. 'User Name' is set to 'Username' and 'Password' is set to '\*\*\*\*\*'. 'FR Mode' is set to 'Server Assisted'. 'Identification Server' is set to 1. 'Configure Alternate Server Address' is unchecked. 'Server Address' is set to 192.168.103.66. 'Server Port' is set to 11005. 'Identification Time-Out Duration (Sec)' is set to 4. 'Default Biometric Group No.' is set to 0.

- **Identification Server:** Select an Identification Server using the picklist button to which the device is to be assigned. The configuration of server is done from **Admin module > System Configuration > Identification Server Configuration** and the Identification Service must be started from the service tray.
- **Server Address:** It displays the IP Address of the selected Identification Server.
- **Configure Alternate Server Address:** Select this checkbox to configure external IP address of Identification Server.
- **Server Address:** Enter the external network IP address which will be used for accessing identification server.
- **Server Port:** Enter the TCP port number. The default port number is 11005.
- **Identification Time-Out Duration (Sec):** Enter the duration in seconds after which the fingerprint template identification will get time out.  
**Example:** If 5 seconds is specified, then the identification server will try to identify the template till 5 seconds and if not found then it will show time-out to the user.
- **Default Biometric Group No.:** Enter the default biometric group number to be assigned to the device. It is a number allotted to a device to be assigned to the Identification Server. This enables the Identification Server to match the template against only those devices that belong to the corresponding biometric group. This reduces the false detection as well time to search template.

# VEGA Door

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VEGA series door controllers are engineered with careful blend of aesthetics, size, connectivity, reliability, and ease of use for modern enterprises. The VEGA devices are a perfect fit for Access Control and Time-Attendance solution required by modern organizations.

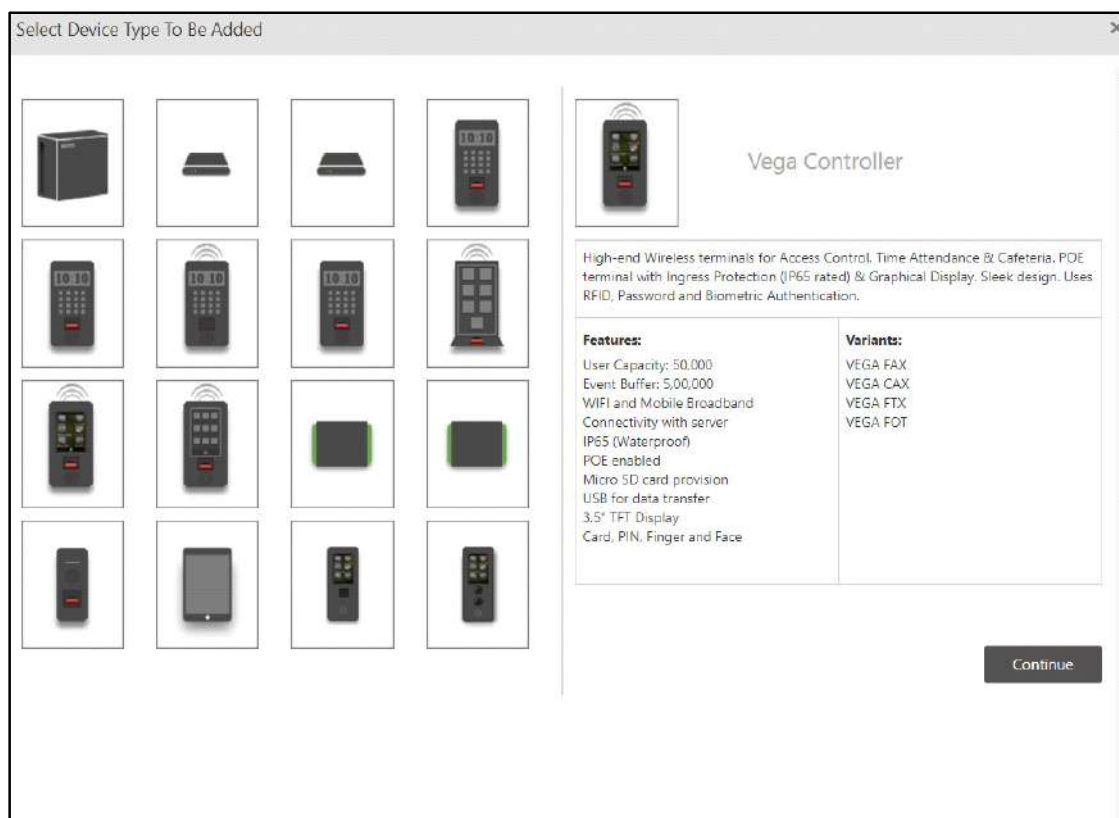


*There are various variants of VEGA— FAX, FAXQ, CAX, FOT— hence the features and functionalities supported will differ as per the variant installed.*

VEGA Door can be connected as **Direct Door** as well as **Panel Door**.

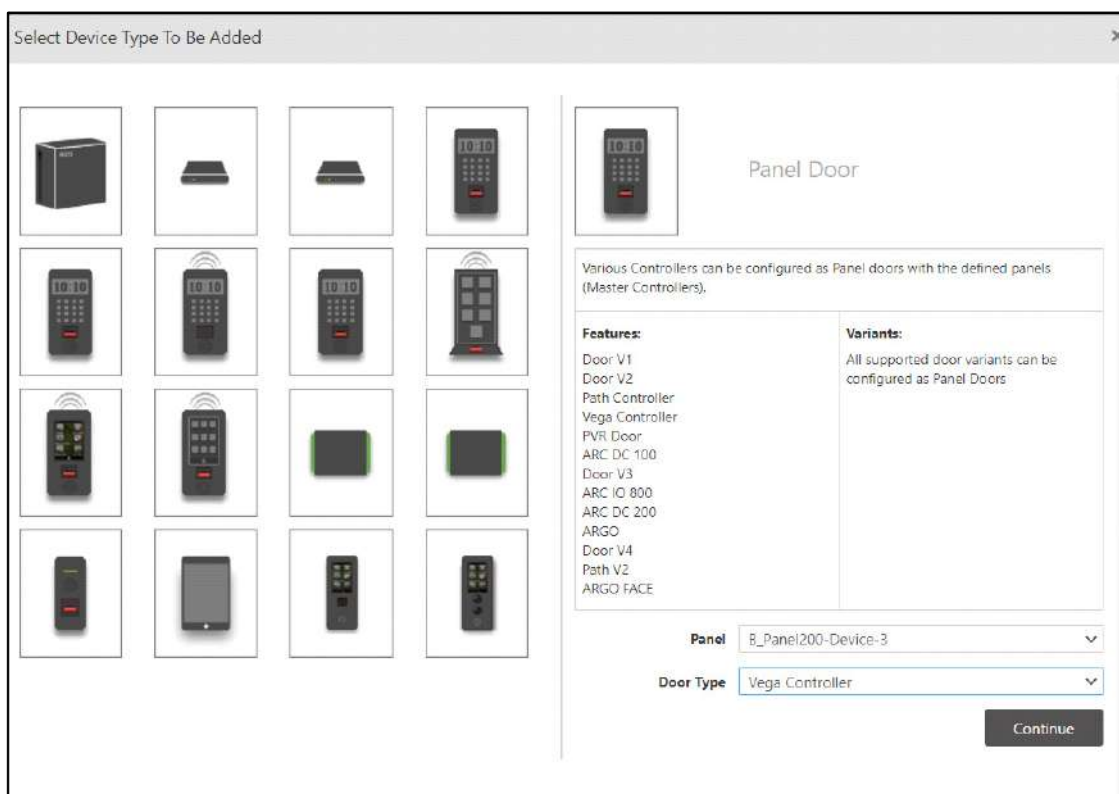


Click the Vega Controller device from the Device List to add it as a **Direct Door**.



OR

Click Panel Door to add VEGA Controller device as a **Panel Door**.



**Panel:** Select the desired Panel from the drop-down list with which you wish to connect the Door.

**Door Type:** Select **Vega Controller** from the drop-down list.

Click **Continue**.

The **Device Configuration** page for VEGA Controller appears.

If you wish to add devices automatically, click **Admin Module > System Configuration > Global Policy > Device**. Select the **Auto Add New Devices** check box. Once the device is connected in the network, it comes online in the COSEC Monitor.

The IP Address of the device will be displayed automatically in **Profile > Basic**.



*While adding devices to the COSEC Server, makes sure the Monitor Service is running.*

To configure the parameters, you can:

- copy the parameters from another device, refer to [“Copy Parameters From”](#).
- **OR**
- can click each link to configure the parameters, refer to [“Selective Configuration”](#).

## Copy Parameters From

You can also copy the parameters from another device, if required.



*The Copy Configuration From option is applicable in Add (after you have selected the desired device type) as well as Edit mode of any added device.*

*If certain parameters are configured and Copy Parameters From option is clicked, then:*

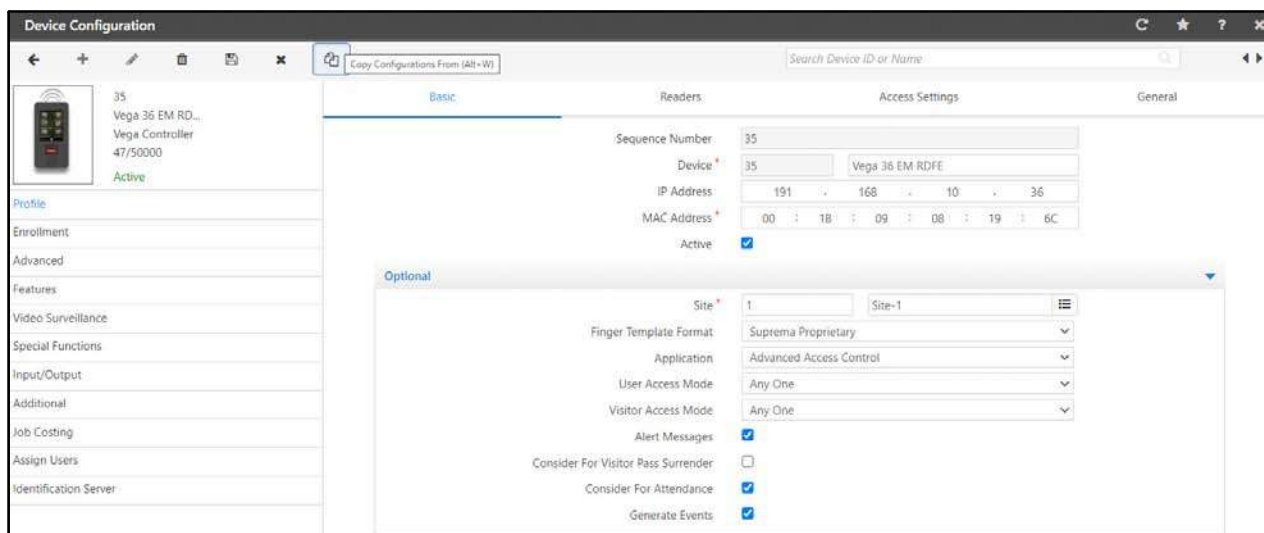
- *the value of the applicable parameters already configured will be over-written with the values as configured in the selected device.*
- *the values of other parameters that are configured will remain as they are.*

*If none of the parameters are configured and Copy Parameters From option is clicked, then*

- *all the applicable parameter values will be copied from the selected device.*
- *the values of the other parameters will be their default values.*

*To know more about the applicable parameters that will be copied, refer to [“Copy Parameter Details”](#).*

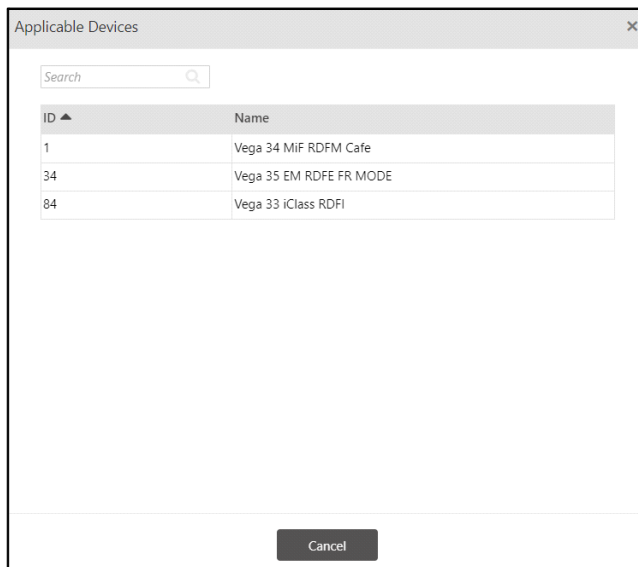
To do so, click **Copy Configuration From** .



The screenshot shows the 'Device Configuration' window. On the left, a sidebar lists various configuration categories: Profile, Enrollment, Advanced, Features, Video Surveillance, Special Functions, Input/Output, Additional, Job Costing, Assign Users, and Identification Server. The main area is divided into tabs: Basic, Readers, Access Settings, and General. The 'Basic' tab is active, showing fields for Sequence Number (35), Device (35), IP Address (191.168.10.36), and MAC Address (00:1B:09:08:19:6C). Below these, there's an 'Optional' section with fields for Site (1), Finger Template Format (Suprema Proprietary), Application (Advanced Access Control), User Access Mode (Any One), Visitor Access Mode (Any One), Alert Messages (checked), Consider For Visitor Pass Surrender (unchecked), Consider For Attendance (checked), and Generate Events (checked).



The **Applicable Devices** pop-up appears.



*The devices that appear in the Applicable Devices pop-up will be of the same family and device type. Let us understand this:*

- *In case of Direct Door, the pop-up will display other Vega Direct Doors only. For example, if you have direct door devices — ARGO1, ARGO2, Vega1 and Vega2, then this pop-up will display only Vega1 and Vega2.*
- *In case of Panel Door, the pop-up will display other Vega Panel Doors connected with the same Panel only. For example if you have two Panels — Panel1 and Panel2 connected. In Panel1 the connected Panel Doors are VegaPD1, VegaPD2, ARGOPD1, ARGOPD2. In Panel2 the Panel Doors connected are Vega PD3 and Vega PD4. Then, if you are adding the new Vega Panel Door to Panel1, then this pop-up will display VegaPD1 and VegaPD2 only.*

Select the desired device from which you wish to copy the configurations.

OR

You can also search for the desired device using the Search option and then select the device.

A Warning pop-up appears. Click **Yes** to copy all the applicable parameters. A processing screen appears.



*Only applicable parameters will be copied. For details, refer to [“Copy Parameter Details”](#).*

*If during the processing screen, you click Cancel, then the entire copy process will be aborted.*

If all applicable parameters are copied successfully, then the Applicable Configurations are Successfully Copied message will be displayed.

If all applicable parameters are not copied successfully, then the Failed to copy. Please try again message will be displayed.

## Selective Configuration

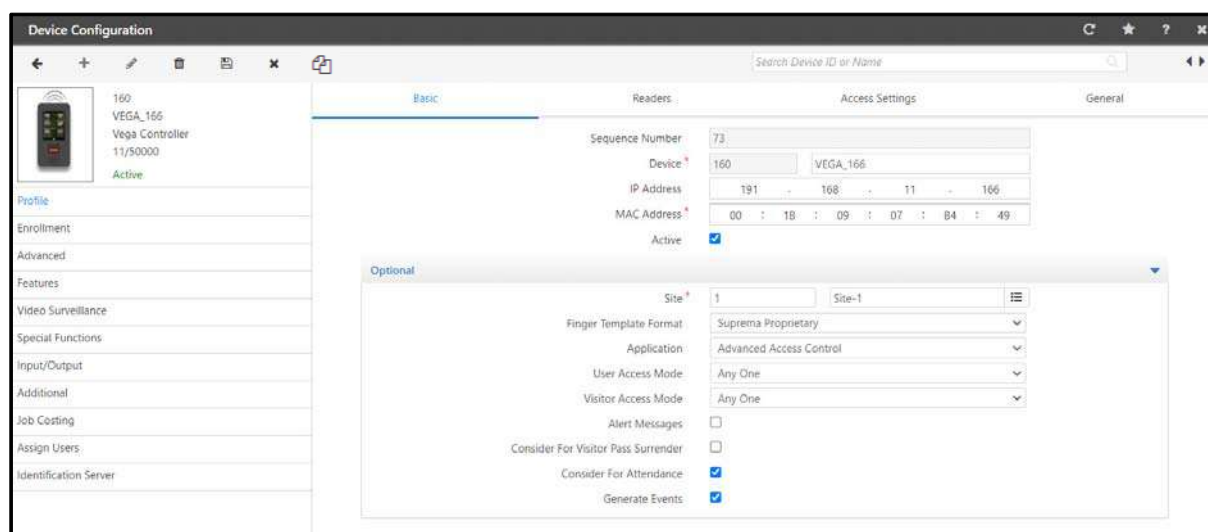
To configure the device parameters, click the following links:

- [“Profile”](#)
- [“Enrollment”](#)
- [“Advanced”](#)
- [“Features”](#)
- [“Video Surveillance”](#)
- [“Special Functions”](#)
- [“Input/Output”](#)
- [“Additional”](#)
- [“Job Costing”](#)
- [“Assign Users”](#)
- [“Cafeteria”](#)
- [“Identification Server”](#)

## Profile

Setting up a door profile involves configuring basic parameters to set up any door controller device. This section enables the user to set up the basic profile for any new device.

To do so, on the **Device Configuration** page, click the **Profile** tab in the left pane.



To configure the Profile parameters click the following links:

- [“Basic”](#)
- [“Readers”](#)
- [“Access Settings”](#)
- [“General”](#)

## Basic

Click **Basic** tab. The **Basic** page appears.



*Sequence Number, Device, IP Address, MAC Address and Active are applicable for both Direct Door and Panel Door.*

For VEGA Door as a Direct Door,

Configure the following parameters:

- **Sequence Number:** This is a system generated sequence number for each new device.
- **Device:** Specify a name that can be assigned to the door. The Door ID is auto-generated by the system.
- **IP Address:** This is the IP Address assigned to the door. Once the device connection is established with the Server, this field will automatically displays the door IP address.
- **MAC Address:** Specify the MAC Address of the door.



*MAC address of door is required while manually adding the door to the COSEC Monitor. You can note-down the MAC address from the device when it is powered on.*

- **Active:** Select this check box to activate the device in the network.



*To add the Device automatically, click **Admin Module > System Configuration > Global Policy > Device**. Select the **Auto Add New Devices** check box.*

*The device will be added automatically but make sure you enable the **Active** check box in order to connect the device to the network. Once the device is connected to the network, it will come online in COSEC Monitor.*

Click the **Optional** collapsible tab, to configure the following parameters:

The screenshot shows the 'Optional' configuration tab with the following settings:

Parameter	Value
Site	1 (Site-1)
Finger Template Format	Suprema Proprietary
Application	Cafeteria
User Access Mode	Face
Visitor Access Mode	Face
Cafeteria Face Access Mode	Item Selection
Alert Messages	None
Consider For Visitor Pass Surrender	<input checked="" type="checkbox"/>
Consider For Attendance	<input checked="" type="checkbox"/>
Generate Events	<input checked="" type="checkbox"/>

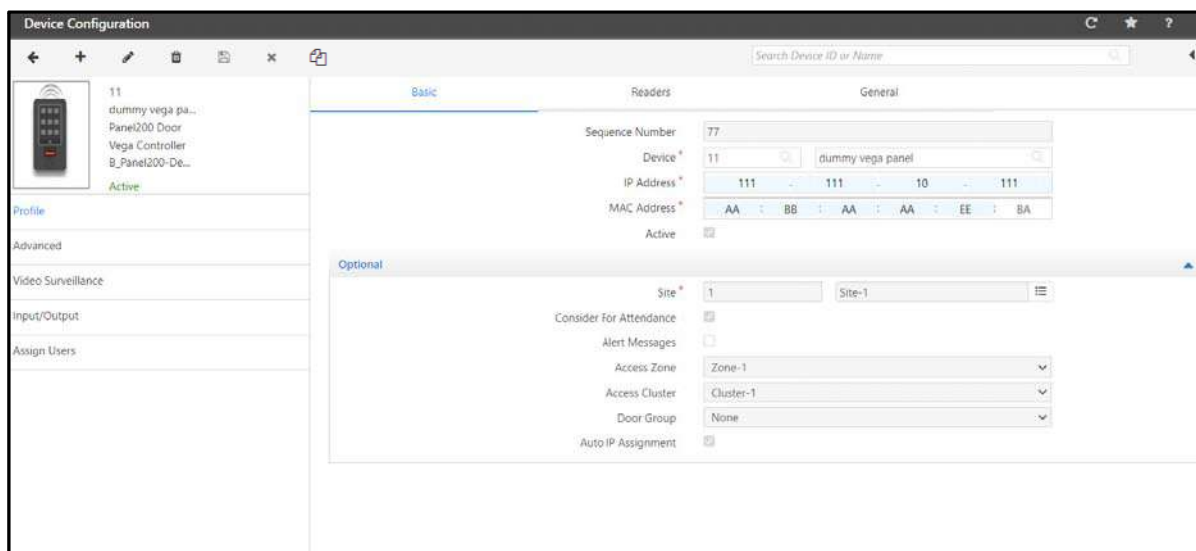
- **Site:** Click the picklist and select the site to which this door is to be assigned. Site is created from **Devices > Masters > Site**.
- **Finger Template Format:** Select the format according to which Finger Templates will be enrolled from the drop-down list— **Suprema Proprietary, Suprema ISO**. You can set the Finger Template Format globally from **System Configuration > Global Policy > Device > Suprema Finger Template Format**.
- **Application:** Select the type of application for which the device is to be used from the drop-down list— **Basic Access Control, Advanced Access Control or Cafeteria**. All devices set to **Cafeteria** will subsequently be available for Cafeteria configuration. Make sure you configure **Cafeteria Face Access Mode**.
- **User/ Visitor Access Mode:** This defines the type and combination of credentials required to identify and validate a user at the Door Controller. Select the appropriate credential combination from the drop- down list:
  - Any one
  - Card
  - Card + PIN
  - Card + Biometrics
  - Card + Biometrics + PIN
  - Biometrics
  - Biometrics + PIN
  - Biometrics + Group
  - Biometrics then Card
  - Card then Biometrics
  - None
  - Face
  - Card + Face
  - PIN + Face
  - Biometrics + Face
- **Cafeteria Face Access Mode:** If you have selected **Cafeteria** as the **Application**, select the desired **Cafeteria Face Access Mode** type from the drop-down list— **None, Default Item, Item Selection**.

Default Item mode in Cafeteria will allow users a touchless cafeteria experience. In Default Item mode only the transaction for default item is allowed. A default item is assigned in each scheduled menu.

Item Selection mode in Cafeteria will allow users to select the desired menu items and allow a transaction using Face as a credential.

- **Alert Messages:** Select this check box to enable the application to send alerts based on events from this door.
- **Consider for Visitor Pass Surrender:** Select this check box to consider the this door for Visitor Pass Surrender. The Visitors can show their credentials on this device to surrender their passes.
- **Consider for Attendance:** Select this check box if the events sent by this door are to be considered for Time and Attendance data processing. If this option is disabled, then the system would consider all events coming from the door as Access Control events.
- **Generate Events:** This check box is selected by default. Click to disable, if the server is not required to receive any events from this device.

For VEGA Door as a **Panel Door**.



Click the **Optional** collapsible panel, to configure the parameters:

- **Site:** Click the picklist and select the site to which this door is to be assigned. Site is created from **Devices > Masters > Site**.
- **Consider for Attendance:** Select this check box if the events sent by this door are to be considered for Time and Attendance data processing. If this option is disabled, then the system would consider all events coming from the door as Access Control events.
- **Alert Messages:** Select this check box to enable the application to send alerts based on events from this door.
- **Access Zone:** Select the desired Access Zone to be assigned to the door from the drop-down list.
- **Access Cluster:** Select the desired Access Cluster to be assigned to the door from the drop-down list.
- **Door Group:** The Door Group drop-down includes the list of all configured Door Groups on the corresponding Panel. By Default, None is selected.

- **Auto IP Assignment:** There is an option where the panel door can be assigned its IP from the device webpage. To enable this option, select the Auto IP Assignment check box.

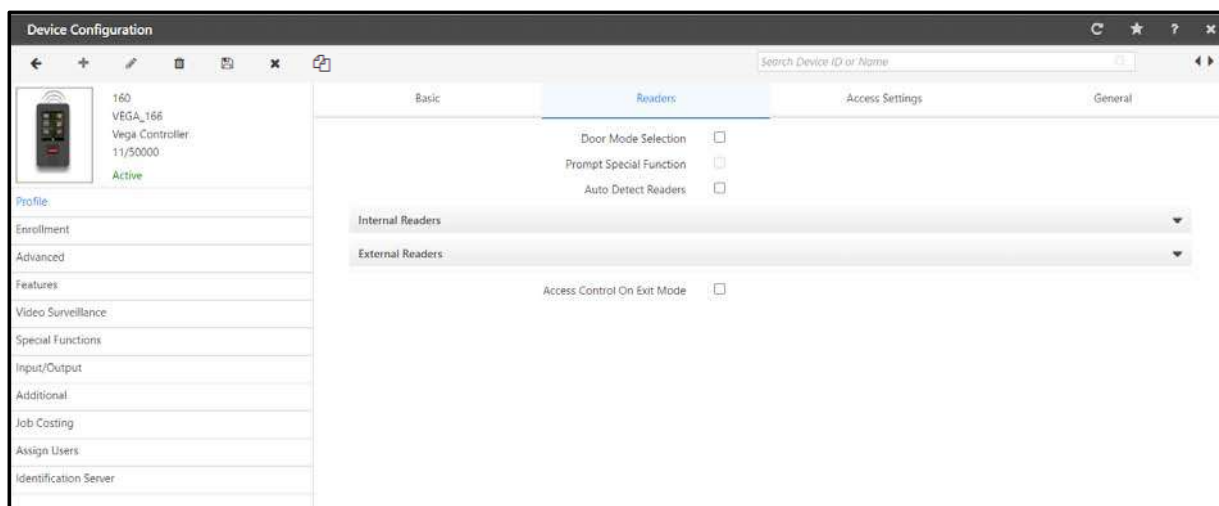


*Access Zone is configured while configuring Panel200.*

## Readers

Readers are important hardware components in a biometric door device. They may be internal or external. This section enables you to configure both internal and external readers for a door.

Click the **Readers** tab. The Readers page appears.



Configure the following parameters:



*Door Mode Selection, Prompt Special Function and Auto Detect Readers are applicable for Direct Door only.*

- **Door Mode Selection:** Select the check box, if you wish to allow the user to select the punch type — IN or OUT while punching on the device.

For example, when a door is in the Entry mode, the punches will always be in Entry side. But if you wish to mark the punch in Exit mode then you can do so if Door Mode Selection is enabled.

If Door Mode Selection is not enabled, you need to enable Scheduling to set reader mode of door as entry or exit as per user-defined schedules. For more information on creating Reader Mode Schedules, refer **Devices > Masters > Reader Mode Scheduler**.

- **Prompt Special Function:** This will provide selection of special function on device screen and based on the selection of particular type of special function. Make sure you have enabled **Door Mode Selection**.
- **Auto Detect Readers:** Select this check box to enable auto detection of Readers on a Door connected with the Server.

## Internal Readers

This option allows the configuration of the Internal Reader for the door.

Click **Internal Readers** collapsible panel.

Configure the following parameters.

- **Mode:** Select the Mode as **Entry** or **Exit** from the drop-down list.
- **Card Reader Type:** Select the desired Card Reader Type from the drop-down list — EM Prox Reader, HID Prox Reader, MiFare Reader, HID iClass-U Reader, HID iClass-W Reader.
- **Card Format:** Single or multiple card formats can be assigned to the readers of the door. A Default Format is assigned to the device. If no other card format is assigned to device; then this default format will be applied. For creating Card Formats, click **Devices > Master > Card Format**. For details refer to “[Card Formats](#)”.


#### Assigning Multiple Card Format

- Click **Add**, to assign multiple card formats to the device. Then click the picklist to select the card format and click **OK** to save the format.

Similarly, you can add maximum 5 card formats. When the card format is saved, the Configured bits of that format as configured from **Masters > Card** format are displayed here. Multiple Card format configurations will be sent to the door separated by **Format ID** that is Member No. along with all other format related parameters.



- **Finger Reader Type:** Select the **Finger Reader Type** as **Finger Reader**.

Click **FP Reader Configuration**  to set the Finger Print Module Calibration.

The **Finger Print Module Calibration** pop-up appears.

Configure the following parameters:

- **Security Level:** Select the desired Security Level to be set for the Finger Print Module Calibration from the drop-down list—Normal, Secure, Highly Secure. Security level specifies False Acceptance Ratio (FAR). Since False Acceptance Ratio (FAR) and False Rejection Ratio (FRR) is in inverse proportion to each other, FRR will increase with higher security levels. You can select **Normal** level for regular Time and Attendance system. You must select **Highly Secure** level for high security areas that require complete or maximum matching of template. You can select **Secure** level for approximate matching of template.
- **Lighting Condition:** Select the Lighting Condition to be set for the Finger Print Module Calibration from the drop-down list— **In Door**, **Out Door**. Optical sensors are sensitive to lighting condition. With this parameter, users can tune optical sensors to be adapted for their lighting environment.

- **Sensitivity:** Select the desired level of Sensor Sensitivity from the drop-down list — Level 1 to 8. This specifies sensor sensitivity to detect a finger. On high sensitivity, the module will accept the finger input more easily. Level 8 has the highest sensitivity.
- **Fast Mode:** Select the desired Fast Mode to reduce the matching time with a little degradation of authentication performance from the drop-down list — Auto, Mode 1 to 6. Fast Mode parameter can be used to reduce the matching time with a little degradation of authentication performance. In typical cases, Fast Mode 1 is 2 to 3 times faster than Normal mode while Fast Mode 5 is 6 to 7 times faster than Normal mode. You can also select the Auto mode.
- **Image Quality:** Select the Image Quality to be set for the fingerprint from the drop-down list—Weak, Moderate, Strong, Strongest. When a fingerprint is scanned, the module will check if the quality of the image is adequate for further processing. Image quality parameter specifies the strictness of this quality check. Strongest might lead to higher number of finger rejections during the enrollment process.



*Good quality of enrollment (around 70-75% quality) is recommended for proper identification of enrolled templates.*

- Click **Restore Defaults**, to set the values of the all the fields to default, if required.
- Click **Save**, to save the changes or **Close**, if you wish to discard the changes.
- **Enable Scheduling:** Select the check box to enable automated control of an Internal Reader. This will set Reader Mode of door as Entry or Exit as per user-defined schedules.
- **Reader Mode Schedule:** Click the picklist and select the schedule which is to be assigned to the internal reader of VEGA Door. With this the same reader can be configured to function both in Entry as well as Exit mode based on the scheduled timings.



*For configuring Reader Mode Schedule, refer Devices> Masters> Reader Mode Scheduler.*

- **Advertise Bluetooth:** Select this check box to enable Bluetooth of the device by which the device will be visible to others. Then configure the following parameters:
  - **Bluetooth Name:** By default, if the Device Name is configured then it will be displayed here along with the Mode. The prefix will be the Device Name and the suffix will be -IN or -OUT as per the set Mode.  
  
If required, you can configure the bluetooth name as per your requirement. The Bluetooth Name can be a maximum of 10 characters.
  - **Bluetooth Range:** The system supports different ranges of bluetooth using which the users can mark their attendance. You can set the desired range to control the boundary for marking the attendance.  
  
Select the Bluetooth Range as — **Short (1m-2m)**, **Medium (5m-7m)**, **Long (>8m)** or **Custom**.
  - **Custom Bluetooth Range (dBm):** If you select **Custom** option for Bluetooth Range, enter the Bluetooth range manually or set the range using the slider. Drag the slider towards the left to decrease the value or drag the slider to the right to increase the value.
- Click **Save** to save all the configurations.

## External Readers

This option allows you to configure the External Reader for the door.



*Mode, External Reader Type, Card Format and Exit Switch are applicable for both Panel Door and Direct Door.*

- Click **External Readers** collapsible panel and configure the following parameters:

- Mode:** Select the **Mode** from the drop-down list—**Entry, Exit**.
- External Reader Type:** Select the desired type of External Reader from the drop-down list.



*If you are using PIN-W Reader; user's will be able to change their PIN number from the devices.*

- Card Format:** Select a Card format to be applicable for external readers of the device. This is applicable for all Direct Doors and Panel Doors. For details, refer to [“Card Formats”](#).
- Exit Switch:** Select this check box to enable the use of **Exit Switch**.



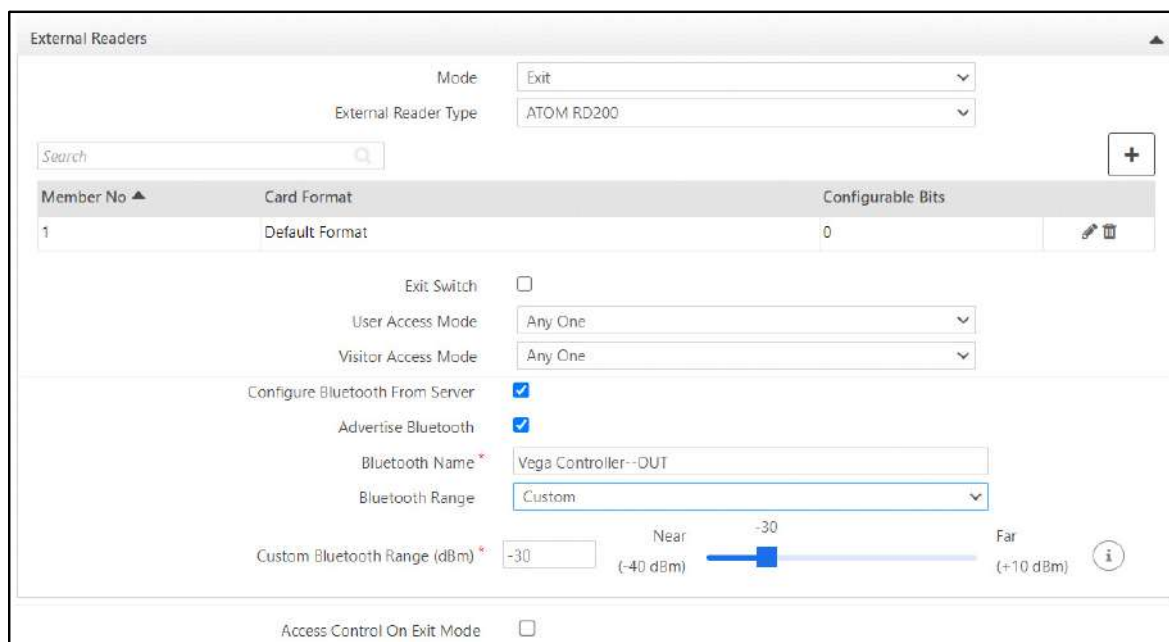
*User Access Mode, Visitor Access Mode and Access Control on Exit Mode is applicable for Direct Door only.*

- User/Visitor Access Mode:** Select the Access Mode from the drop-down list — Any One, Card, Biometrics, Card + Biometrics, Biometrics then Card, Card then Biometrics, None, BLE, Card + PIN, Biometrics + PIN, Card + Biometrics + PIN.



*Configure Bluetooth From Server, Advertise Bluetooth, Bluetooth Name and Bluetooth Range are applicable for both Direct Door and Panel Door.*

- Configure Bluetooth from Server:** When you select **External Reader Type** as — CB U Reader, ATOM RD300, ATOM RD200 or ATOM RD100, select **Configure Bluetooth from Server** check box to enable Bluetooth feature for the mentioned external readers.



Once you enable **Configure Bluetooth from Server**, configure the following Bluetooth parameters:

- **Advertise Bluetooth:** Select this check box to enable Bluetooth of the VEGA device by which the device will be visible to others. Then configure the following parameters.
- **Bluetooth Name:** By default, if the Device Name is configured then it will be displayed here along with the Mode. The prefix will be the Device Name and the suffix will be -IN or -OUT as per the set Mode.

If required, you can configure the bluetooth name as per your requirement.

The Bluetooth Name can be a maximum of 20 characters.

- **Bluetooth Range-** The system supports different ranges of bluetooth using which the users can mark their attendance. You can set the desired range to control the boundary for marking the attendance.

Select the bluetooth range as — Short (1m-2m), Medium (5m-7m), Long (>8m) or Custom. If you select the **External Reader Type** as ATOM RD200/300, you can select the **Custom** option for Bluetooth Range.

- **Custom Bluetooth Range (dBm):** If you select **Custom** option for Bluetooth Range, enter the Bluetooth range manually or set the range using the slider. Drag the slider towards the left to decrease the value or drag the slider to the right to increase the value.



*If Auto Detect Reader is enabled, then External Reader Bluetooth parameters will not be visible.*

- **Access Control On Exit Mode:** Select this check box to enable the checking of the following access control policies on the door when the External Reader is in the Exit mode.
  - User enabled
  - User validity
  - Blocked user

- Time Based Access Check
- ASC
- User Access Group

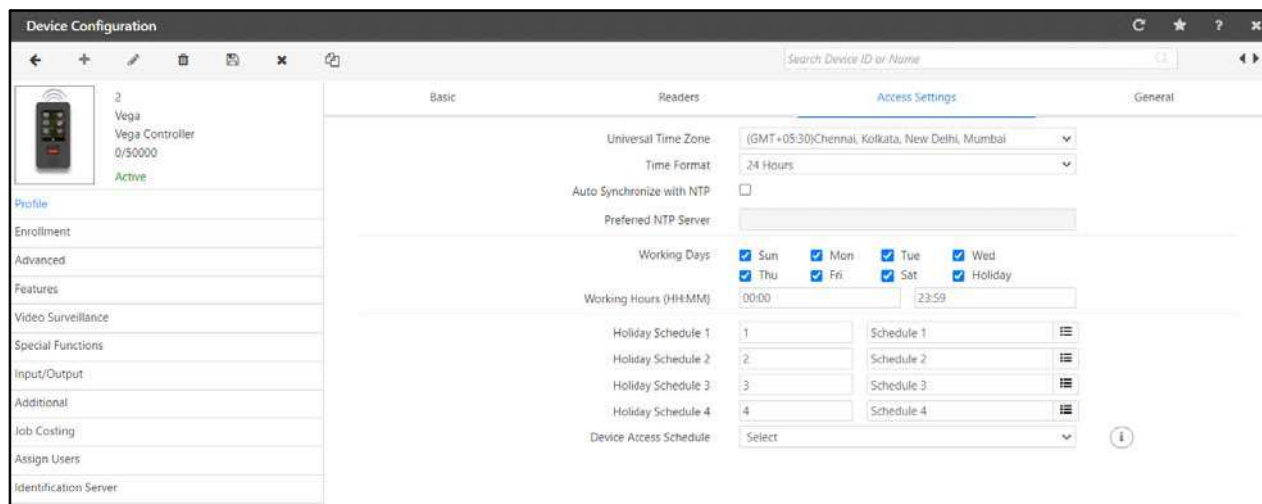
- Click **Save** to save all the configurations.

## Access Settings



*Access Settings are applicable for Direct Door only.*

- Click the **Access Settings** tab. The **Access Settings** page appears.



Configure the following parameters:

- **Universal Time Zone:** Select the desired geographic time zone in which the door will operate from the drop-down list.
- **Time Format:** Select the time format to be displayed on door's LCD display from the drop-down list — 24 Hours or 12 Hours.

**Auto Synchronize with NTP:** If Date and time is to be automatically synchronized as per the **Preferred NTP Server** (predefined or user-defined NTP server address) selected by user, then you must select the **Auto Synchronize With NTP** check box to enable.

Independent of the mode set from server as Auto or Manual, the user can change the date and time settings from device web page, which will be reflected on device display.

- When Auto Synchronization with NTP is disabled Preferred NTP Server field will be disabled.
- When Auto Synchronization with NTP is enabled,
  - You can specify the **Preferred NTP Server** of your choice. In this case device will first try to get Date and Time from that server address.

If it does not get Date and Time in three tries; device will check from pre-defined NTP servers.

If you have entered one of the three pre-defined NTP servers(ntp1.cs.wisc.edu , time.windows.com, time.nist.gov); then device will first check that server first.

If it receives updated Date and Time then Updated Date and Time will be reflected on device web page and display screen.

- You can keep the Preferred NTP Server as blank. In this case device will check for Date and Time from the first NTP server.



*If user has manually entered Date and Time from the web page or Device Menu then these values of Date and Time will be reflected on device web page and display screen.*

*If you select the **Manual** option, you can manually update the time on the door with that of the system time as and when required. This can be accomplished from the COSEC Monitor.*

- **Working Days:** Specify the days on which the default working hours are applicable. To do so, select the respective check boxes of the relevant days.
- **Working Hours (HH:MM):** Specify the default working hours in HH:MM format.
- **Holiday Schedule:** Click the picklist and select the desired Holiday Schedule. You can assign upto four Holiday Schedules to the device.



*If the same Holiday Schedule is configured for a user and on door which is assigned to the user, then the user's attendance marking on this device, on any of the scheduled holidays will always be marked as a holiday.*

- **Device Access Schedule:** All the Access Schedules created from the "[Access Schedules](#)" page appear in the drop-down list. By default, the Access Schedule, if assigned from the Access Schedule page appears here. If you wish to change the Access Schedule, select the desired Access Schedule to be assigned to the device from the list.

If an Access Schedule is selected, it will override the Working Days configuration.

If an Access Schedule is already assigned from "[Access Schedules](#)" page and a different schedule is selected here, it will override the schedule assigned from "[Access Schedules](#)" page and vice versa.

To revoke an Access Schedule, select the **Select** option from the list. The device will be removed from the Access Schedule under the "[Assign Doors](#)" section on the "[Access Schedules](#)" page.

## General

- Click the **General** tab. The General page appears.

Device Configuration

160 VEGA\_166  
Vega Controller  
11/50000  
Active

Profile  
Enrollment  
Advanced  
Features  
Video Surveillance  
Special Functions  
Input/Output  
Additional  
Job Costing  
Assign Users  
Identification Server

Basic Readers Access Settings **General**

Mute Buzzer ☐

**Allowed Acknowledgement**

Display Duration (ms) 3000  
LED - Buzzer Duration Long

**Denied Acknowledgement**

Display Duration (ms) 3000  
LED - Buzzer Duration Long

Enable Display Messages ☐

Custom Birthday Message Happy Birthday

Display Message 1 ☒  
Schedule 00:00 11:59  
Message Good Morning

Display Message 2 ☒  
Schedule 12:00 15:59  
Message Good Afternoon

Display Message 3 ☒  
Schedule 16:00 20:59  
Message Good Evening

Display Message 4 ☒  
Schedule 21:00 23:59  
Message Good Night

Multi-Language Support ☐

Auto Hide Menu Bar ☐

Configure the following parameters:



*Mute Buzzer, Allowed Acknowledgment and Denied Acknowledgment are applicable for both Direct Door and Panel Door.*

*If you have connected Readers — ATOM RD100/200/300, PATH — then the configurations for Allowed/ Denied Acknowledgment will be applicable to these readers as well.*

- Mute Buzzer:** You can mute or unmute the door buzzer. Select the check box to enable or clear the check box to disable.
- Allowed Acknowledgment**
  - Display Duration (ms):** Specify the time duration for which the *Acknowledgment Allowed* message should be displayed. Valid Range: 250 to 3000ms.
  - LED - Buzzer Duration:** Select the time duration for the LED Buzzer from the drop-down list— **Long, Medium, Short, Shortest**.
- Denied Acknowledgment**
  - Display Duration (ms):** Specify the time duration for which the *Acknowledgment Denied* message should be displayed. Valid Range: 250 to 3000ms.
  - LED - Buzzer Duration:** Select the time duration for the LED Buzzer from the drop-down list — **Long, Medium, Short, Shortest**.



*Enable Display Messages, Custom Birthday Message, Display Message 1 to 4, Schedule, Message and Multi-Language Support are applicable for Direct Door only.*

- **Enable Display Messages:** Select this check box to enable the Custom Birthday Message and the Display Messages. Upto 4 Display Messages can be configured.
- **Custom Birthday Message:** Configure the birthday message which you wish to display on the door when the user punches on the door on his/her birth date.

The valid values are

**A-Z**

**a-z**

**0-9**

**`~!@#\$%^&\*()\_+-={}|\|:;?<>.,'""**

- **Display Message 1 to Display Message 4:** Select the respective check box of the desired Display Messages from 1 to 4, to enable.
  - **Schedule:** For each **Display Message**, define the time period for which the message is to be displayed.
  - **Message:** For each **Display Message**, configure the message you wish to display on the Panel Door as per the time set in the Schedule. Maximum 21 characters allowed.
- **Multi-Language Support:** Select this check box to enable multi-language support for this door.
- **Auto Hide Menu Bar:** If any user touches the device screen by mistake and enters into the Menu, then users punch will not be accepted by the device till the Menu is closed or till time out occurs. To avoid such a scenario, select this check box. This will hide the Menu, hence users will be able to punch on the door. To access the Menu, swipe upwards on the device screen. The Menu appears.



# Enrollment

On the **Device Configuration** page, click the **Enrollment** tab in the left pane.

The screenshot shows the 'Device Configuration' window. On the left, a sidebar lists various configuration categories: Profile, Enrollment (selected), Advanced, Features, Video Surveillance, Special Functions, Input/Output, Additional, Job Costing, Assign Users, and Identification Server. The main content area is titled 'Temporary User' and contains the following settings:

- Enroll from Device:** ☐
- Enrollment Mode:** Biometrics (dropdown)
- Template Per Finger:** Single Template/Finger (dropdown)
- Maximum No. of Fingers:** Two (dropdown)
- Number of Fingers:** One (dropdown)
- Number of Cards:** One (dropdown)
- Enable Self-Enrollment:** ☐

To configure the Enrollment parameters click the following links:

- [“Settings”](#)
- [“Temporary User”](#)

## Settings



*Settings is applicable for Direct Door only.*

- Click the **Settings** tab. The **Settings** page appears.

The screenshot shows the 'Settings' tab selected in the 'Temporary User' section. The settings are identical to those shown in the previous screenshot:

- Enroll from Device:** ☐
- Enrollment Mode:** Biometrics (dropdown)
- Template Per Finger:** Single Template/Finger (dropdown)
- Maximum No. of Fingers:** Two (dropdown)
- Number of Fingers:** One (dropdown)
- Number of Cards:** One (dropdown)
- Enable Self-Enrollment:** ☐

Configure the following parameters:

- **Enroll from Device:** Select this check box to enable the enrollment of user from the door. When this check box is enabled, *Enroll User* special function on that device will be activated.



*If both Enroll User special function & Enroll From Device check box are inactive in Device Configuration, then if you enable Enroll User special function, Enroll From Device check box will also be enabled.*

- **Enrollment Mode:** Select the Credential from the drop-down list that can be enrolled using the special function at the door— **ReadOnlyCard, SmartCard, Biometric, BiometricthenCard, DuressFinger, Face**. Refer “[Enroll Credentials](#)” or “[Enrolling Users](#)” to enroll User/Worker. Refer “[Enrollment](#)” or “[Enroll Credentials](#)” to enroll Worker. Refer “[Enroll Credentials](#)” to enroll a Visitor.



*DuressFinger is applicable for User and Worker only.*

- **Template Per Finger:** This displays the values as configured in the Global Policy. This field is not editable. For details refer to “[User Policy](#)”.
- **Max Number of Fingers:** This displays the values of the Maximum Number of Fingers configured in the Global Policy. This field is not editable. For details refer to “[User Policy](#)”.
- **Number of Fingers/Cards:** Select the Number of Cards or Fingerprints to be enrolled based on the credential option selected in Enrollment Mode.
- **Enable Self-Enrollment:** Select this check box to enable the Self-Enrollment feature on this door.

## Temporary User



*Temporary User/Worker is applicable for both Direct Door and Panel Door.*

*Temporary User/Worker is not applicable for Cafeteria mode of devices.*

*For Panel Door to add Temporary User/Worker, make sure*

- *Temporary Addition of Unknown User is enabled from Panel200 > Enrollment > Temporary User.*
- *User Access Mode (Door) in Zones is — Face, Biometric or Card — as per your requirement.*

*For Direct Doors make sure the User Access Mode selected in Profile is — Face, Biometric or Card — as per your requirement.*

Click the **Temporary User** tab. The **Temporary User** page appears.

Settings

Temporary User

Temporary Addition of Unknown User

Disabled

Confirm before adding Temporary User

Auto Generate ID

ID Format

Numeric Value Length

0

Zero Padding required

Auto Generate Name

Add Name via Device

Name Format

Group

Organization	1	Organization-1	
Branch	1	Branch-1	
Department	1	Department-1	
Section	1	Section-1	
Category	1	Category-1	
Grade	1	Grade-1	
Designation	1	Designation-1	
Custom Group 1	1	Custom Group 1	
Custom Group 2	1	Custom Group 2	
Custom Group 3	1	Custom Group 3	

Configure the following parameters.

- Temporary Addition of Unknown User:** Select the option to temporarily add an unknown user from the drop-down list. The options are — Disabled, As Temporary Worker or As Temporary User. By default, **Disabled** is selected. If you select **Disabled**, all the parameters are disabled.

You can add an unknown user either as a temporary user or worker from the device at a time.

If you select As Temporary User, for details refer to. [“As Temporary User”](#).

If you select As Temporary Worker, for details refer to [“As Temporary Worker”](#).

## As Temporary User

Temporary User		
Temporary Addition of Unknown User	Disabled	
Confirm before adding Temporary User	<input type="checkbox"/>	
<b>Auto Generate ID</b>		
ID Format		
Numeric Value Length	0	
Zero Padding required	<input type="checkbox"/>	
<b>Auto Generate Name</b>		
Add Name via Device	<input type="checkbox"/>	
Name Format		
<b>Group</b>		
Organization	1	Organization-1
Branch	1	Branch-1
Department	1	Department-1
Section	1	Section-1
Category	1	Category-1
Grade	1	Grade-1
Designation	1	Designation-1
Custom Group 1	1	Custom Group 1
Custom Group 2	1	Custom Group 2
Custom Group 3	1	Custom Group 3

If you select **As Temporary User**, configure the following parameters.

- **Confirm before adding Temporary User:** Select the check box if you wish that a confirmation message should be displayed on the device display screen, to confirm a user before adding that user as a temporary user when enrolling the same from the device. . If this is not enabled, no confirmation message will be displayed and the user/worker will be enrolled automatically. You need to check the Temporary User/ Worker list to verify if the user is enrolled in the system.

### Auto Generate ID

- **ID Format:** Configure the required format of the ID as 'Numeric Value Format' and/or other Value Formats in any order as per the requirement. You can also enter the fixed value which will always be displayed along with the other components of the User ID for every user.

To select the different format for the ID, Enter the \* in **ID Format** box and the drop-down list containing different Value format list will appears. Select the required one from the drop-down list.


Click **Copy User Format from Global Policy** to copy the ID Format if you have configured the same from Global Policy. For more details, refer to ["Generate User ID"](#).

- **Numeric Value Length:** Enter the desired number of the digits from 1 to 15 till which the 'NUMVAL' will be generated. For example: 4

- **Zero Padding Required:** Select the check box to allow the addition of zeros before the 'NUMVAL' value to reach the configured Numeric value length. For example, if the Numeric value length is configured as 4 and the number assignment starts from a single digit then as explained in above example, the new user id to be generated is 'MATRIX4DOC1' if Zero Padding is enabled, it will generated as 'MATRIXDOC0001'.

## Auto Generate Name

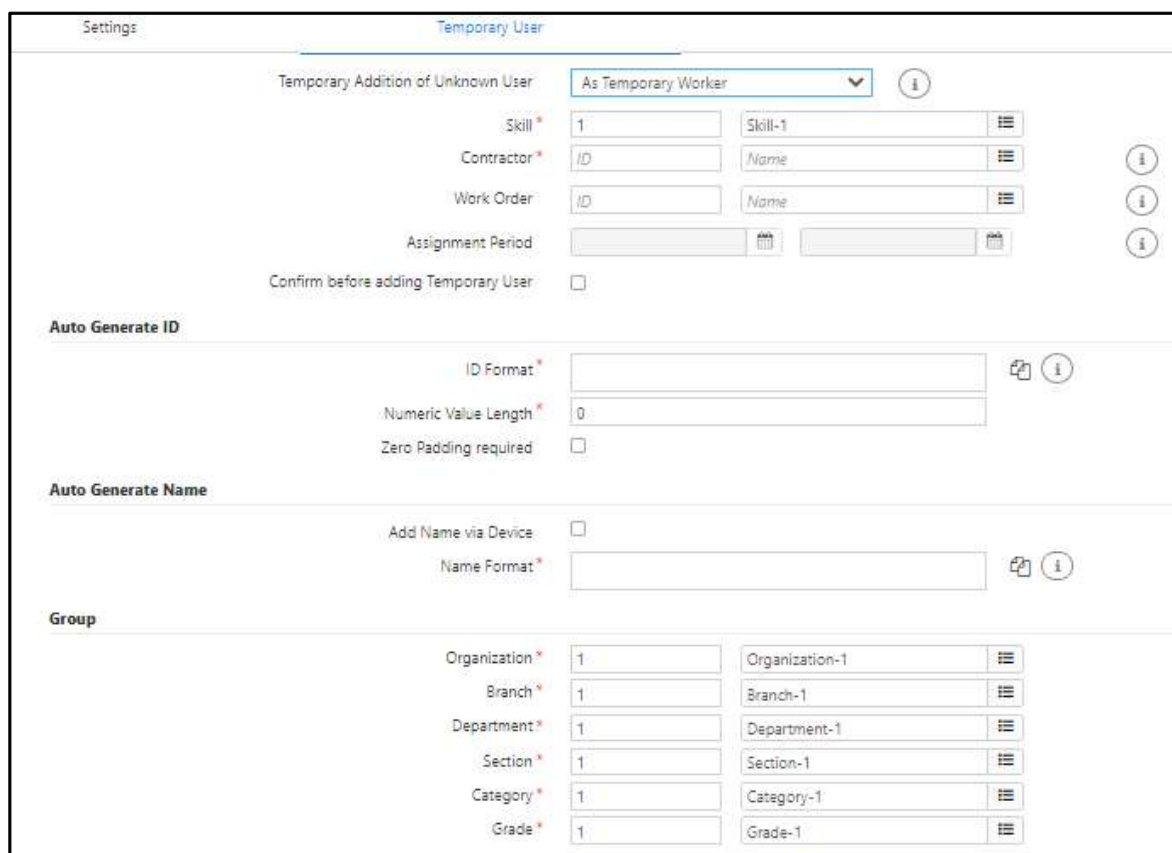
- **Add Name via Device:** Select the check box to enable adding the name of the temporary user through the device display screen while enrolling the user. If enabled, the **Name Format** parameter is disabled.
- **Name Format:** Configure the required format of the Name as 'Numeric Value Format' and/or other Value Formats in any order as per the requirement. You can also enter the fixed value which will always be displayed along with the other components of the User ID for every user. To select a different format for the ID, enter \* in **Name Format** box and select the desired format from drop-down list.

You can also copy the Name Format as configured in ID Format. To do so, click **Copy ID Format**  .

## Group

By default, groups for Organization, Branch, Department, Section, Category, Grade, Designation, Custom Group 1, 2 and 3 are assigned. If you wish to assign different groups to the temporary user, you need to create groups from the Enterprise Module. Create the desired groups and then select the group from the respective picklist. For details on creating groups, refer to ["Configuring Groups"](#).

## As Temporary Worker



Settings Temporary User

Temporary Addition of Unknown User: As Temporary Worker

Skill: 1 Skill-1



Contractor: ID Name

Work Order: ID Name

Assignment Period: [Date Picker] [Date Picker]

Confirm before adding Temporary User: ☐

**Auto Generate ID**



ID Format: [Text Box]  

Numeric Value Length: 0

Zero Padding required: ☐

**Auto Generate Name**

Add Name via Device: ☐

Name Format: [Text Box]  

**Group**

Organization: 1 Organization-1

Branch: 1 Branch-1

Department: 1 Department-1

Section: 1 Section-1

Category: 1 Category-1

Grade: 1 Grade-1

If you select **As Temporary Worker**, configure the following parameters.

- **Skill:** Select the Skill to be assigned to the temporary worker from the picklist.
- **Contractor:** Select the Contractor to be assigned to the temporary worker from the picklist.



*If the Contractor does not appear in the picklist, check the Contractor's **Validity End Date**. The Validity End Date shall not be included in the validity period of the Contractor. For details, refer to "[Contractor Profile](#)".*

- **Work Order:** Select the Work Order to be assigned to the temporary worker from the picklist.
- **Assignment Period:** The work order assignment period is auto-displayed based on the work order selected. If you wish to change the assignment period, select the start date and end date of work assignment using the calendar.

The other temporary worker parameters are similar to that of temporary user. For details, refer to "[As Temporary User](#)".

## Advanced

The Advanced tab allows the user to configure some advanced parameters such as Access Control Settings, Alarms, Device Timers as well as Wiegand.

To do so, on the **Device Configuration** page, click the **Advanced** tab in the left pane.

To configure the Advanced parameters click the following links:

- "[Settings](#)"
- "[Alarms](#)"
- "[Timers](#)"
- "[Wiegand](#)"

## Settings

The **Settings** tab differs for both Direct Door and Panel Door.

- Click **Settings** tab.

For configuring the Settings for **VEGA Controller** as a **Direct Door**, refer "[Settings - VEGA as Direct Door](#)".

For configuring the Settings for **VEGA Controller** as a **Panel Door**, refer "[Settings - VEGA as Panel Door](#)".

## Settings - VEGA as Direct Door

The **Settings** page for **VEGA Controller** as a **Direct Door** appears.

Configure the following parameters:

- **Generate Exit Switch Events:** Select this check box to enable the door to generate Events every-time the Exit Switch is used.
- **Generate Invalid User Events:** Select this check box to enable the door to generate Events for Invalid User inputs.



**Generate Invalid User Events** is applicable for all other credentials except **Face**. To generate events for **Face** credentials, make sure **Generate Unidentified Face Event** is enabled under **"Identification Server"**.

- **Generate Sequential IN-OUT Events:** Select this check box to generate user punches on device as IN-OUT sequential events irrespective of the mode in which the device is functioning.
- **Two Credentials Required:** Select this check box to enable the feature. If both, **Bypass Finger/Palm/Face For Attendance** (User Configuration > T&A > Attendance) and **Two Credentials Required** check boxes are enabled, then two credentials will be mandatory for the users and the door will verify both these credentials.
- **Show Pin:** Select this check box to display the characters of PIN when the PIN is entered on device.
- **Allow Exit when Door Lock:** Select this check box if you wish to allow the users to Exit even when the Door Relay is in locked condition.
- **Auto Re-lock:** Select this check box to allow the door to re-lock immediately when the Door Status changes to close from normal open irrespective of the defined Pulse Time. This will be supported only if a door sense is installed and enabled.

- **Auto Re-lock Timer:** Specify the time in seconds after which the door should re-lock automatically. Valid Range: 1 to 65535.
- **Enable Additional Security:** Select this check box to enable additional security at the door.
  - **Additional Security Code:** Enter a code (ranging from 1 to 65535) you wish to set as the security code.
  - **Re-enter Code:** Re-enter the security code to confirm.



*Changing this value can affect the Smart Identification (SI) function. Click **Default Code** to reset the **Additional Security Code** values as set in the **System Configuration > Global Policy > Device > Smart Identification > General Additional Security Code**.*

- **Enable Smart Identification:** Smart Identification enables the identification of a user using the Smart Card even though the user is not registered on a device. Select this check box to enable Smart Identification at the door and select the **Access Level** and the **Access Mode** from the drop-down list.
- **Auto Acknowledge Alarm:** Select this check box to enable the acknowledgment of all alarms for this device automatically.
- **Auto Acknowledge Alarm (sec):** Specify the time in seconds. When the alarm buzzer rings the timer will start and on expiry of this timer, the alarm buzzer will stop automatically.
- **Facility Code:** Specify a value for **Facility Code** to be set for access modes other than Card, if Facility Code is expected in Wiegand Output.
- **Allow Access Through Mobile:** Select this check box to allow the Access to device using COSEC ACS Application.
- **Mobile Entry/Exit Access Mode:** Select the **Entry and Exit** door **Access Mode** from the drop-down list — Mobile Only, Mobile then Biometrics, Mobile then Card and Mobile then PIN.



*If User Access Mode is selected as **None** and Mobile Access Mode is selected as **Mobile Then Biometrics** then the door can be accessed through Mobile and then Biometric credential.*

- **Show Attendance Details:** Select this check box to display the Attendance Details of the user on the door. This allows the user to view his/her Attendance Details on the door itself and there is no need to login into the ESS application to view the Attendance Details.

The attendance details of user will be displayed for a period of 3-4 seconds after the Access Allowed screen.



*The user whose Attendance Details are to be displayed on the door must be enabled for this feature. Enable the check-box **Show Attendance details on Device** from User Configuration > T&A > Attendance.*

*While an attendance detail of one user is being displayed on device and second user tries to access the device; new user will be processed.*

*Whenever both users of 2-person rule are allowed access on device then attendance details screen of second user will be displayed on the device.*

- **Duplicate Access Time Interval (Sec):** Configure the maximum duration in seconds for which the device should consider a subsequent user punch (after the first successful allowed punch) received as a duplicate punch. Valid Range: 0 to 9999 seconds. Default: 0.





The Duplicate Access Time Interval is not applicable:

- if Duress Finger is detected by the device.
- if the device is in Cafeteria mode.
- to Smart Identification users.

## Temperature Logging



To configure Temperature Logging parameters, make sure the Enable check box for **Temperature Configuration** under “[Temperature and Symptoms Configuration](#)” in “[User Policy](#)” under “[Defining Global Policies](#)” is enabled.

- **Enable:** Select this check box to enable the temperature logging feature.
- **Sensor Type:** Select the type of thermal sensor integrated in the device from the drop-down list— **ASR**, **Web-Based** or **FEVOBOT**.
- **Sensor Interface:** Select the interface on which device will communicate with the sensor from the drop-down list.
  - For Sensor Type-AST, the Sensor Interface options are: RS-232 and USB
  - For Sensor Type-Web-based, the Sensor Interface options are: HTTP/S
  - For Sensor Type-FEVOBOT, the Sensor Interface option is USB
- **Emissivity:** Specify the Emissivity for the Sensor. This parameter will be applicable when Sensor Type is AST. Default value is 0.95.
- **Calibration Parameter:** Specify the Calibration Parameter for the thermal sensor. Select **+**, if you wish the value should increase by 0.1 and select **–** if you wish that the value should decrease by 0.1. This parameter is applicable when Sensor Type is AST or Web-Based.
- **Approach to Sensor Wait-Timer:** Specify the time for which the device should wait for user to approach the device before starting Temperature Detection.
- **Temperature Detection Time-Out:** Specify the time till which temperature detection should be done for the user and if valid temperatures are not found till the expiry of timer, then timeout will be declared.

- **Tolerance between Consecutive Readings:** Specify the time within which the consecutive readings are considered to be valid user temperature readings. This parameter is applicable when Sensor Type is AST or Web-Based.
- **Consecutive Readings Count within Tolerance:** Specify the number of readings within the Tolerance time for which the consecutive readings are considered to be valid user temperature readings. This parameter is applicable when Sensor Type is AST or Web-Based. For example: if the count is set as 5, then 5 readings are taken and the reading with the highest temperature is considered.
- **Temperature Threshold:** Specify the Maximum Temperature value for user that should be detected and will be considered as valid temperature.
- **Minimum Temperature for Access:** Specify the Minimum Temperature value for Access that should be detected and will be considered as valid temperature.
- **Restriction Type:** Specify the Restriction Type from the drop-down list—**Soft, Hard**.

If **Soft** is selected the user will be allowed access but the Alert for the same will be sent if configured.

If **Hard** is selected the user will be denied access as well as the Alert for the same will be sent if configured.

- **Bypass if Sensor Disconnected:** Select this check box to allow provision of by-passing the temperature detecting feature if sensor connectivity is lost.

## Face Mask Compulsion

Face Mask Compulsion feature is used to enforce users to wear masks while they are within the premises.

After identifying the user, the Device will prompt the user to show Face with Mask when Face Mask Compulsion is enabled.

Based on identification of the Mask, the user will be allowed or denied access.

Make sure you have enabled **Enable FR** check box in **Devices> Device Configuration> Identification Server> Face Recognition> Enable FR** and configure the below mentioned parameters to avail this feature.

- **Enable:** Select this check box to enable Face Mask Compulsion feature for IDS.
- **Approach to Camera Wait-Timer (Sec):** This defines the time within which the user must approach the camera for face mask detection. Wait-Time Range: 0.0-15.0 seconds. Default: 3.0 seconds.
- **Mask Detection Time Out (Sec):** This defines the maximum time duration for which the system will try to detect the user's face mask. Detection Time out range: 0.0-15.0 seconds. Default: 4.0 seconds.

- **Restriction Type:** Select the type of restriction to be imposed when the face mask is not detected — **Soft or Hard**. Default: **Soft Restriction**.
- **Soft Restriction:** The access will be granted even if the user is identified without wearing a mask; however, an event and a warning are generated that indicates the user has been identified without wearing a mask.
- **Hard Restriction:** The access will be denied if the user is identified without wearing a mask.



Users face enrollments are dependent on the Visible Face parameter value set by you. For more details, refer to [“Face Recognition”](#).

## Settings - VEGA as Panel Door

The **Settings** page for **VEGA Controller** as a **Panel Door** appears.

The screenshot shows the 'Device Configuration' window for a VEGA Controller. The left sidebar contains a list of configuration categories: Profile, Enrollment, Advanced (selected), Video Surveillance, Input/Output, and Assign Users. The main area displays the 'Settings' tab with the following parameters:

- Auto Relock:** A checkbox that is currently unchecked.
- Auto Relock Timer (Sec):** A text input field containing the value '3'.
- Tail-Gating:** A checkbox that is currently unchecked.
- Reset Wait Timer:** A dropdown menu currently set to 'On Door Lock'.
- Man Trap Timer - Internal Reader (Sec):** A text input field containing the value '0'.
- Man Trap Timer - External Reader (Sec):** A text input field containing the value '0'.
- Enable Man Trap Door Interlocking:** A checkbox that is currently unchecked.
- Select Doors for Interlocking:** A section with two input fields labeled 'ID' and 'Name', and a list icon.
- Duplicate Access Time Interval (Sec):** A text input field containing the value '0'.

Configure the following parameters:

- **Auto Re-lock:** Select this check box to enable the door to re-lock automatically when the door status changes to close from normal open, irrespective of the defined pulse time. However, it is supported only if a door sense is installed and enabled.
- **Auto Re-lock Timer:** Specify the time in seconds after which the door should re-lock automatically. Valid Range: 1 to 65535.
- **Tail-Gating:** Tailgating refers to an access violation which occurs when more than one person tries to enter a secured area using a single person's access credentials. If this option is enabled on the Panel Door, the occupancy count of a zone should be increased or decreased considering both the punch as well as the auxiliary input of the Panel Door. Select the check box if you wish to enable this feature.
- **Reset Wait Timer:** Select when the Wait Timer should be reset for Tailgating from the drop-down list — On Door Lock or Pulse Wait Timer.
- **Man Trap Timer- Internal Reader (Sec):** Specify the Man Trap Entry Timer within which the user should enter the next sequential door of a man-trap.

- **Man Trap Timer- External Reader (Sec):** Specify the Man Trap Exit Timer within which the user should exit the panel door to enter the next sequential door of a man-trap.
- **Enable Man Trap Door Interlocking:** Select this check box to enable the Door Interlock for the door (for example: Door1). This means if the Door1 is open, other doors will remain closed.
  - **Select Doors for Interlocking:** Select the doors to be assigned for Interlocking from the picklist. You can select particular doors or all the doors at once.
  - To do so, click the **Select Doors** for Interlocking picklist. The **Picklist For Panel Door** pop-up appears.

Picklist For Panel Door

Total Selected: 0 Records

Search  [Show Selected](#)

☐ Select All


<input type="checkbox"/>	ID	Name ▲
<input type="checkbox"/>	10	ARCDC100_DD_Door
<input type="checkbox"/>	9	ARCDC100_DD_Door
<input type="checkbox"/>	8	ARCDC100_SD_Door
<input type="checkbox"/>	1	ARGO_PANEL
<input type="checkbox"/>	2	DoorV3
<input type="checkbox"/>	7	DoorV3_Door
<input type="checkbox"/>	3	DOORV4_PANEL
<input type="checkbox"/>	6	dummy
<input type="checkbox"/>	4	PATHV2_PANEL
<input type="checkbox"/>	5	VEGA_PANEL

OK Cancel

To select particular doors, click the check boxes of the desired doors.

**OR**

To select all the doors, select the **Select All** check box.

Click **OK**. Hover over the **Info**  icon. It displays the number of selected doors.

For example, if Door 2 and Door 3 are selected for interlocking with Door 1, Door 2 and Door 3 will remain locked when Door 1 is open.



*Door Interlocking feature will not work for Degraded mode.*

*For example, when a door is in abnormal state and for that door interlocking is enabled, then user access to other doors of the interlocking group is allowed.*

- **Duplicate Access Time Interval (Sec):** Configure the maximum duration in seconds for which the device should consider a subsequent user punch (after the first successful allowed punch) received as a duplicate punch. Valid Range: 0 to 9999 seconds. Default: 0.



*The Duplicate Access Time Interval is not applicable:*

- *if Duress Finger is detected by the device.*
- *when Panel200 Server mode is in Degraded mode.*
- *to Smart Identification users.*

## Alarms

In **Alarms** tab, you can assign below list of alarms to the door.

Alarms tab differs for Direct Door and Panel Door.

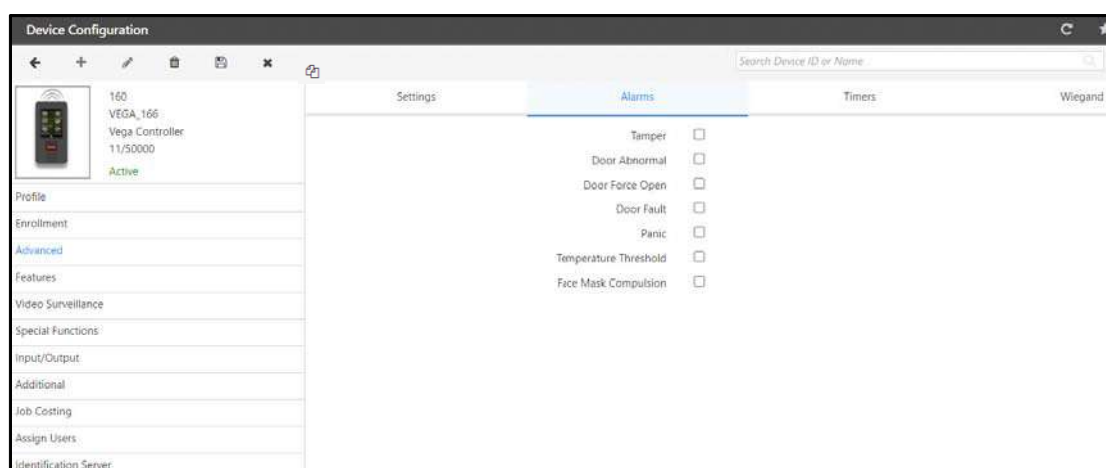
- Click **Alarms** tab.

For configuring the Alarms for **VEGA Controller** as a **Direct Door**, refer [“Alarms - VEGA as Direct Door”](#)

For configuring the Settings for **VEGA Controller** as a **Panel Door**, refer [“Alarms - VEGA as Panel Door”](#)

### Alarms - VEGA as Direct Door

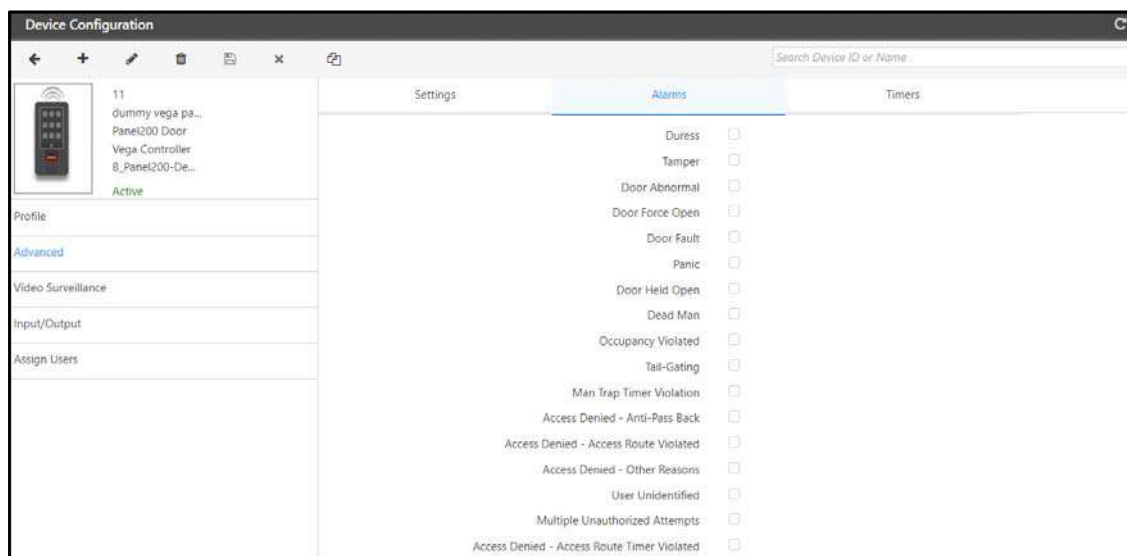
The **Alarms** page for VEGA as a Direct Door appears.



Select the check boxes of the desired alarms you wish to enable.

### Alarms - VEGA as Panel Door

The **Alarms** page for VEGA as a Panel Door appears.



Select the check boxes of the desired alarms you wish to enable.

## Timers

This section allows the configuration of various types of predefined device timers which can trigger off specific responses. In the Server, Timers are often used to control the door behavior and for triggering alarms.

The **Timers** tab differs for Direct Door and Panel Door.

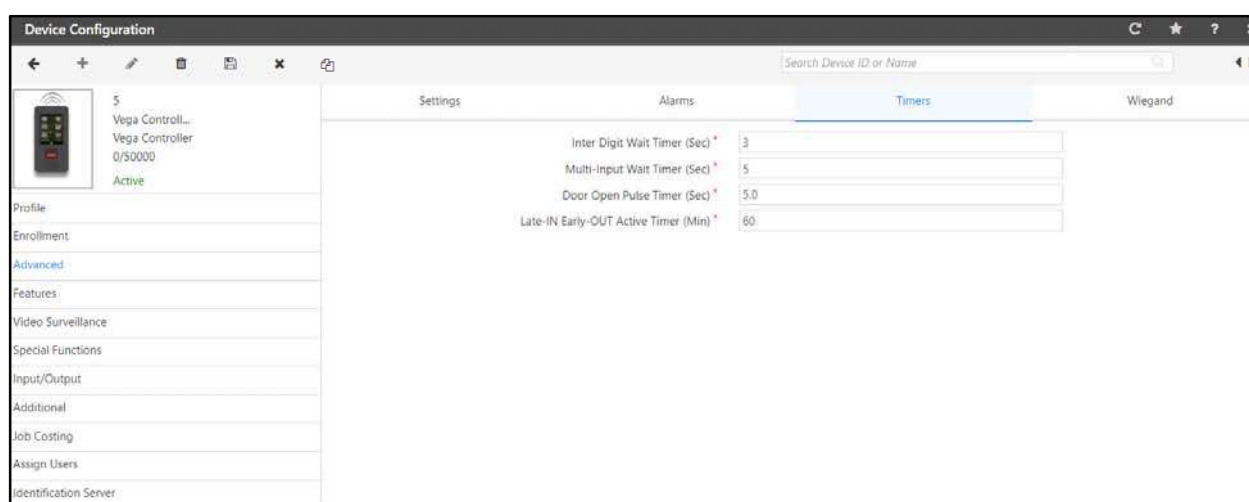
- Click **Timers** tab.

For configuring the Settings for **VEGA Controller** as a **Direct Door**, refer [“Timers - VEGA as Direct Door”](#).

For configuring the Settings for **VEGA Controller** as a **Panel Door**, refer [“Timers - VEGA as Panel Door”](#)

## Timers - VEGA as Direct Door

The **Timers** page for **VEGA** as a **Direct Door** appears.



Configure the following parameters:

- **Inter-Digit Wait Timer (sec):** Specify the time period in seconds (1 to 99) between two key inputs on the device keypad. On expiry of this timer, the system considers the user input to be complete and is ready for the next input.
- **Multi-Input Wait Timer (sec):** Specify the time in seconds (3 to 99) for which system needs to wait for the second credential input from the user when more than one credential is to be used for granting access.



*We recommend you to set the timer value as greater than or equal to 10 seconds to avoid access denial issues to users. This is applicable when the system reads the credentials (biometric) from the user's Smart Cards.*

- **Door Open Pulse Timer (sec):** Specify the time in seconds (0.1 to 65535.0) for the door to remain open for a valid credential. If the opened door does not return to a closed state before the expiry of this timer, the door will generate a **Door Abnormal** alarm.

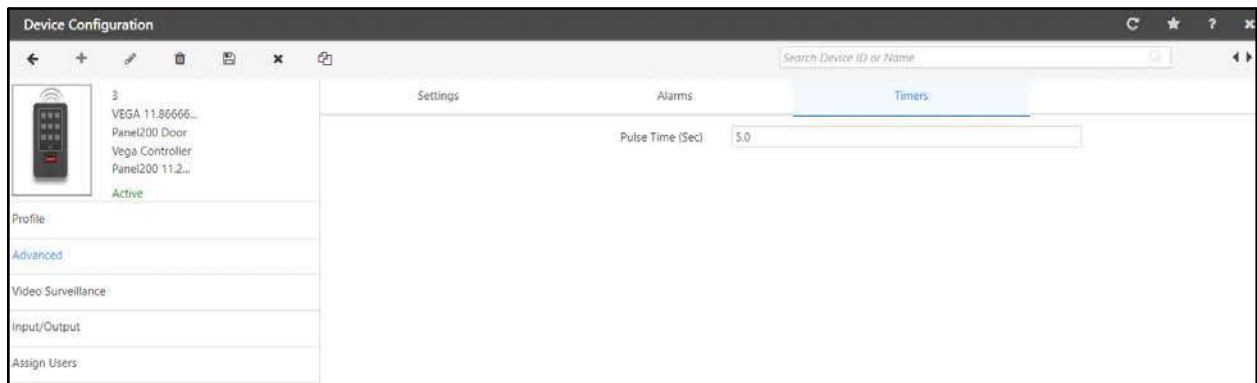


*To ensure smooth functioning of this feature, make sure the Server and Device Firmwares are upgraded to the latest version.*

- **Late-IN Early-OUT Active Timer (min):** Specify the time in minutes (1 to 99) for which the Late-IN and Early-OUT special functions will remain active after being enabled on the door.

## Timers - VEGA as Panel Door

The **Timers** page for **VEGA** as a **Panel Door** appears.



- **Pulse Time (sec):** Specify the time in seconds (0.1 to 65535.0) for the panel door to remain open for a valid credential.



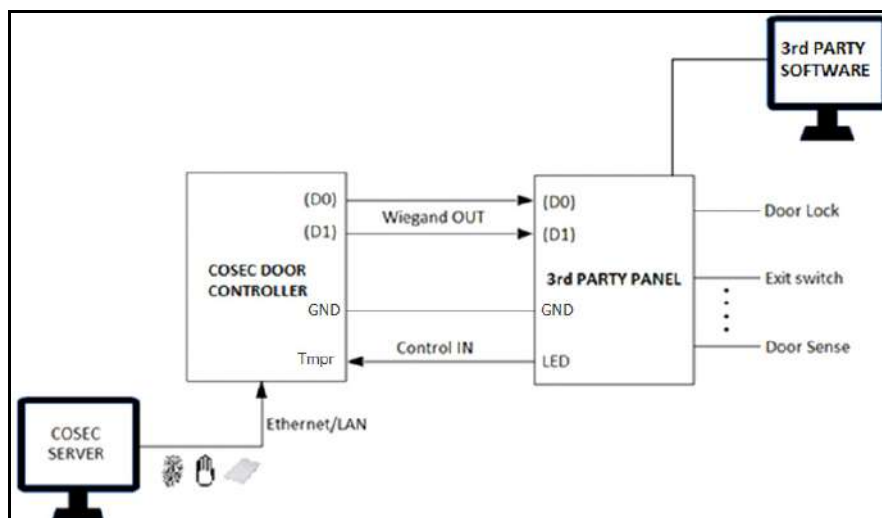
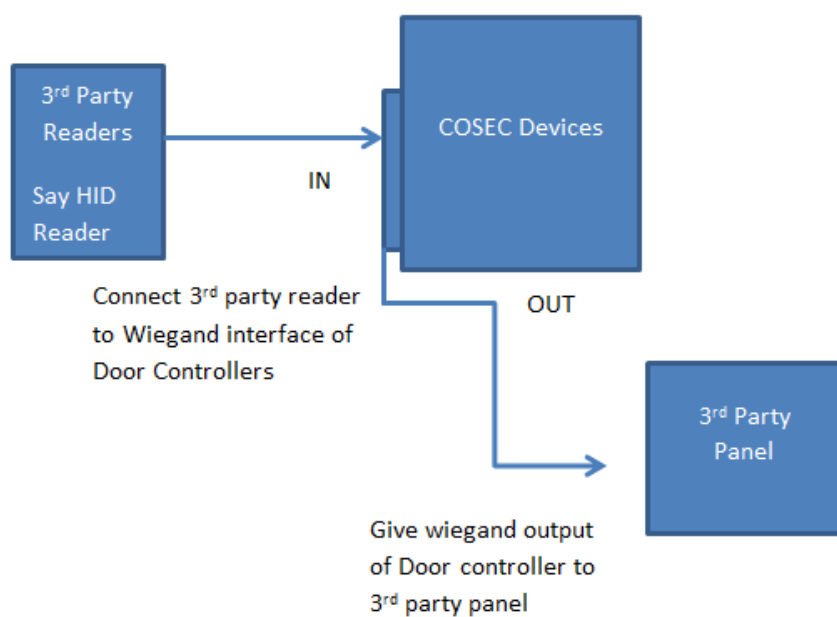
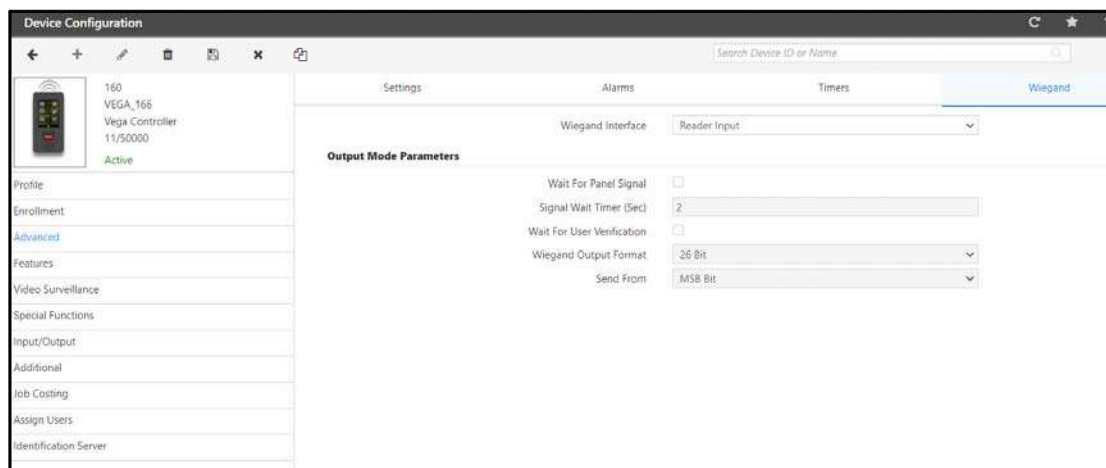
*To ensure smooth functioning of this feature, make sure the Server and Device Firmwares are upgraded to the latest version.*

## Wiegand



*Wiegand is applicable for Direct Door only.*

- Click the **Wiegand** tab. The Wiegand page appears.



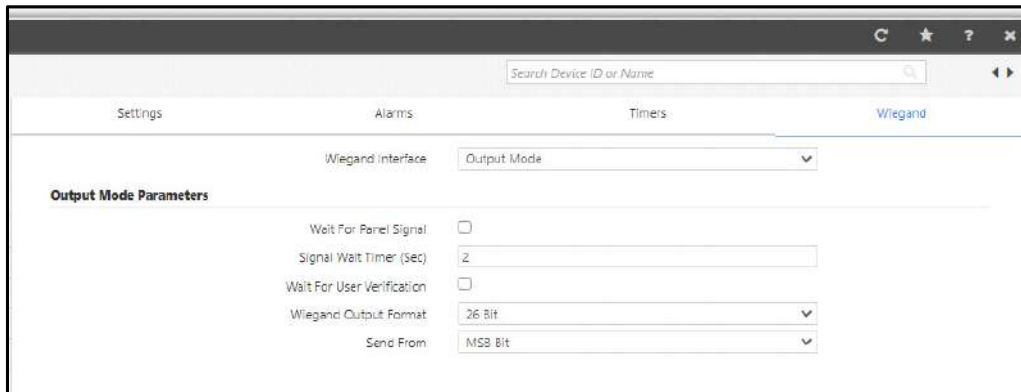


- **Wiegand Interface:** The devices can be connected both as input devices (that is, to receive data from a Wiegand Reader) or output devices (that is, to support output to third party panel) via the Wiegand interface as shown below.

So select the interface of Door controller as **Output Mode** to work as Wiegand Output to Panel or **Reader Input** to take data from third party reader. If Reader Input option is selected, all the Output Mode parameters will be disabled.

If you select Output mode then configure the **Output Mode Parameters**.

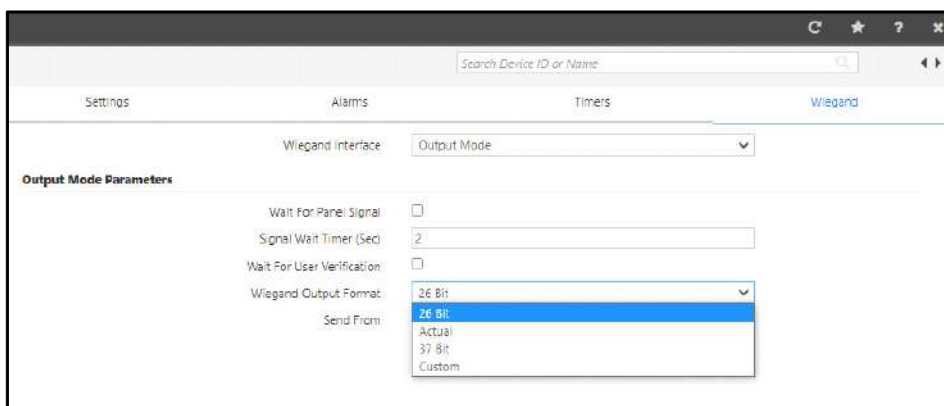
## Output Mode Parameters



The screenshot shows a software window titled 'Wiegand' with tabs for Settings, Alarms, Timers, and Wiegand. The Wiegand tab is active, and the 'Wiegand Interface' dropdown is set to 'Output Mode'. Below this, the 'Output Mode Parameters' section is visible, containing the following settings:

- Wait For Panel Signal: ☐
- Signal Wait Timer (Sec):
- Wait For User Verification: ☐
- Wiegand Output Format:
- Send From:

- **Wait For Panel Signal:** Select the check box to enable. If this option is enabled the Panel Door will wait for reply from the connected third party device before triggering any output. You need to configure the **Signal Wait Timer (Sec)**.
- **Signal Wait Timer:** Specify the time for which the Panel Door should wait for reply from the connected third party device before triggering any output.
- **Wait For User Verification:** Select the check box to enable. If this option is enabled, user verification will be requested on the third party device before triggering any output.
- **Wiegand Output Format:** Select the desired format — 26 Bit, 37 Bit, Actual or Custom.



This screenshot is similar to the previous one, but the 'Wiegand Output Format' dropdown menu is open, showing the following options: 26 Bit, Actual, 37 Bit, and Custom. The '26 Bit' option is currently selected.

If you select **Custom**, you can configure details of fields to be sent as output from the Wiegand reader that has been added.

Wiegand Format		
For Allowed Events	ID	Name
Allowed Code		
For Identified Events	ID	Name
Identified Code		
For Denied With Invalid Biometric Events	ID	Name
Invalid Biometric Code		
For Denied With Invalid Card Events	ID	Name
Invalid Card Code		
For Denied With Invalid PIN Events	ID	Name
Invalid PIN Code		
For Denied With Credential Time-Out Events	ID	Name
Credential Time-Out Code		

- For each of the listed events, click the picklist to select the desired **Wiegand Output Format**.
- Assign an Access **Code** for each communication (for example Invalid PIN Code). This will depend on the number of output bits configured for Access Code in the selected Wiegand Output Format.
- **Send From:** Select the desired sending order for reader data — MSB or LSB Bit.

## Features



*The Features are available only with the Access Control Module license and are applicable for Direct Door only.*

The Features tab enables the user to enable certain Access Control features for the device.

To do this, on the **Device Configuration** page, click the **Features** tab in the left pane.

The screenshot shows the 'Device Configuration' window. On the left, a sidebar lists various configuration categories: Profile, Enrollment, Advanced, **Features** (highlighted), Video Surveillance, Special Functions, Input/Output, Additional, Job Costing, Assign Users, Cafeteria, and Identification Server. The main area displays the 'Features' configuration for two sets, 'Set1' and 'Set2'. The 'Set1' tab is active. The configuration includes sections for 'Absentee Rule', 'Occupancy Control', 'Use Count Control', and 'Duress Detection'. Each section has an 'Enable' checkbox and specific parameter fields. For 'Occupancy Control', the 'Maximum Occupancy Limit' is set to 9, the 'Minimum Occupancy Limit' is set to 1, and 'Zero Occupancy' is checked. For 'Use Count Control', the 'Use Count Limit (Per Minute)' is set to 5. The 'Duress Detection' checkbox is unchecked.

Feature	Enable	Parameter	Value
Absentee Rule	<input type="checkbox"/>		
	<input type="checkbox"/>		
Occupancy Control	<input type="checkbox"/>	Maximum Occupancy Limit	9
		Minimum Occupancy Limit	1
		Zero Occupancy	<input checked="" type="checkbox"/>
	<input type="checkbox"/>		
Use Count Control	<input type="checkbox"/>	Use Count Limit (Per Minute)	5
	<input type="checkbox"/>		
Duress Detection	<input type="checkbox"/>		
	<input type="checkbox"/>		

To configure the Features parameters, click the following links:

- [“Set1”](#)
- [“Set2”](#)

## Set1

- Click **Set1** tab. The **Set1** page appears.

This screenshot is identical to the one above, showing the 'Device Configuration' window with the 'Features' tab selected. The 'Set1' tab is active, and the configuration parameters for 'Occupancy Control' and 'Use Count Control' are visible. The 'Set2' tab is also visible but not active.

Configure the following parameters:

#### Absentee Rule

- **Enable:** Select this check box to enable the feature on the door. This rule sets the maximum number of days for non-use of a credential. On expiration of days limit, the user will be automatically blocked.

For configuring the rule, refer to [“Absentee Rule”](#).

#### Occupancy Control

- **Enable:** Select this check box to enable the feature on the door.
- **Maximum Occupancy Limit:** Specify the maximum number of users to be allowed within the controlled area, after which a user exit is required to enable access to another user.
- **Minimum Occupancy Limit:** Specify the minimum number of occupants to be present within the controlled area.
- **Zero Occupancy:** Select the check box to enable the controlled area to be empty.

For configuring the rule, refer to [“Occupancy Control”](#).

#### Use Count Control

- **Enable:** Select this check box to enable the feature on the door.
- **Use Count Limit (Per Minute):** Specify the maximum number of times a user is allowed to access an area with valid credentials per minute.

For configuring the rule, refer to [“Use Count Control”](#).

#### Duress Detection

- **Duress Detection:** Select this check box to enable Duress Detection on the door. The default duress detection code is displayed which is used to generate the duress alarm. Specify the desired duress code. This code informs that a user is forced to open the door under threat. Once this feature is enabled the system waits for the duress code after the User PIN and the right arrow key input before enabling the duress alarm. The keys have to be pressed in the following order: (User Pin Code) → (Right Arrow Key) → (2 digit Duress Code).

## Set2

Click **Set2** tab. The **Set2** page appears.

The screenshot shows the 'Set2' configuration page with three main sections:

- First IN User Rule:**
  - Enable: ☐
  - Reset On: ☒ Day Change ☐ Timer Expiry
  - Access Timer (Sec):
  - First IN User Group:
- Anti-Pass Back (APB):**
  - On Entry: ☐
  - On Exit: ☐
  - Hard/Soft:
  - Forgiveness: ☒
  - Reset After: ☒ Day Change ☐ Timer Expiry
  - Forgiveness Timer (Min):
- 2-Person Rule:**
  - Enable: ☐
  - Mode:
  - Primary Group:
  - Secondary Group:
  - 2nd Person Wait Timer (Sec):

Configure the following parameters:

### First-IN User Rule

- **Enable:** Select this check box to enable the feature on the door.
- **Reset On:** Select when the First-IN User rule should be reset from the options — **Day Change** or **Time Expiry**.

If you select **Time Expiry**, configure the **Access Timer (Sec)**.

- **Access Timer (sec):** Specify the duration for which the rule should be applied. After the expiry of this timer, the rule will be reset for all the users.
- **First-In User Group:** Select the desired group which should be valid at the door from the picklist.

For configuring the rule, refer to [“First In User Assignment”](#).

### Anti-Pass Back (APB)

- **On Entry:** Select this check box to enable the system to monitor the entry reader for APB violation.
- **On Exit:** Select this check box to enable the system to monitor the entry as well as the exit readers for APB violations.
- **Hard/Soft:** Select the restriction type from the drop-down list options—Soft or Hard.

**Hard APB:** If you select Hard APB, access will be denied if the exit is not registered first. It does not allow a second entry using the same card without an exit.

**Soft APB:** The access will be granted even if the exit is not registered. It allows a second entry of the same user without an exit; however, an event and a warning are generated that indicates the second entry.

- **Forgiveness:** Select this check box to enable the system to reset the APB status.

If **Forgiveness** is enabled, configure the following parameters.

- **Reset After Day Change:** This will reset the APB status of all the users to NULL at midnight. This enables a user, who left the building in the evening without exit punch, to use his/her card for entry in the next morning.
- **Reset After Timer Expiry:** This will reset the APB status of all the users after the expiry of defined time.

If **Reset After Timer Expiry** is selected, configure the following parameter.

- **Forgiveness Timer (Mins):** Specify the time duration in minutes after which Anti-Pass Back status will get reset and the pass will be in original state.

## 2-Person Rule

- **Enable:** Select this check box to enable the feature on the door.
- **Mode:** Select the Mode from the drop-down list options— Primary Must or Primary & Secondary Must.
- **Primary Group:** Select the desired group from the drop-down list.
- **Secondary Group:** Select the desired group from the drop-down list.
- **2nd Person Wait Timer (sec):** Specify the wait time in seconds after which the second person is allowed to punch on the door.

For configuring the rule, refer to [“2 Person Rule Assignment”](#).

## Video Surveillance



*Video Surveillance is applicable for both Direct Door and Panel Door.*

The **Video Surveillance** tab enables the user to configure parameters for video surveillance integration with the COSEC device. It is available in Basic License.

To do this, on the **Device Configuration** page, click the **Video Surveillance** tab in the left pane.

**Device Configuration**

160  
VEGA\_166  
Vega Controller  
11/50000  
Active

Profile  
Enrollment  
Advanced  
Features  
**Video Surveillance**  
Special Functions  
Input/Output  
Additional  
Job Costing  
Assign Users  
Cafeteria  
Identification Server

**Visual Tagging**

MAC Address  
Camera ID  
Storage Root Folder

**Satatya/IP Camera Integration**

Capturing Device: None

FTP Login Credentials ☐

User Name: User Name  
Password: \*\*\*\*\*

To configure the Video Surveillance parameters, click the following links:

- [“Visual Tagging”](#)
- [“Satatya/IP Camera Integration”](#)

## Visual Tagging

The COSEC application can interface with some supported Hybrid and Network Video Recorders and grab images triggered by user events at the Doors. The **Visual Tagging** tab enables the administrator to define the video recorder parameters.

Click the **Visual Tagging** tab. The **Visual Tagging** page appears.

**Visual Tagging**

Satatya Integration

Capturing Device: Matrix HVR/NVR

MAC Address \*  
Camera ID \*  
Storage Root Folder \*

FTP Login Credentials ☐

User Name \*  
Password \*



To view the user events and related images, click **Admin > Views/Logs > Event View**. To know more about viewing events, refer to [“Event View”](#).

Configure the following parameters:

- **Capturing Device:** Select the video recording device type from the drop-down list options — Matrix HVR/NVR, Milestone or IP Camera.

If you select **Matrix HVR/NVR**, refer to [“Configuring Matrix HVR/NVR Parameters”](#).

If you select **Milestone**, refer to [“Milestone Integration”](#).

If you select **IP Camera**, refer to [“Configuring IP Camera Parameters”](#).

## Configuring Matrix HVR/NVR Parameters

If you select Matrix HVR/NVR, then configure the following parameters:

The screenshot shows a configuration window titled "Satatya Integration" with two tabs: "Visual Tagging" (selected) and "Satatya Integration". The "Capturing Device" dropdown is set to "Matrix HVR/NVR". Below this, there are three input fields: "MAC Address" (with a red asterisk), "Camera ID" (with a red asterisk), and "Storage Root Folder" (with a red asterisk). At the bottom, there is a checkbox for "FTP Login Credentials" and two input fields for "User Name" and "Password" (both with red asterisks).

- **MAC Address:** Specify the MAC address of the video recorder device using “\_” (underscore) as the separator.
- **Camera ID:** Specify the Camera number or Camera ID for IP cameras. For analog cameras, specify the camera number.
- **Storage Root Folder:** Specify the Root Folder path or FTP Path where the uploaded images are to be saved.
- **FTP Login Credentials:** Select this check box to activate the FTP login credentials for authentication.
- **User name:** Specify the FTP Server User Name.
- **Password:** Specify the FTP Server Password.



## Configuring IP Camera Parameters

If you select IP Camera, then configure the following parameters:

The screenshot shows a 'Device Configuration' window with a sidebar on the left containing a list of menu items: Profile, Enrollment, Advanced, Features, Video Surveillance (highlighted), Special Functions, Input/Output, Additional, Job Costing, Assign Users, and Identification Server. The main area is titled 'Satatya/IP Camera Integration' and contains the following fields:

- Capturing Device:** A dropdown menu with 'IP Camera' selected.
- Snapshot URL:** A text input field containing 'http://192.168.102.192'. Below it is a note: 'Note: Mention the protocol http or https in URL.'
- API Login Credentials:** A section containing two fields:
  - User Name:** A text input field with the placeholder 'User Name'.
  - Password:** A password input field with masked characters '\*\*\*\*\*'.

- **Snapshot URL:** If Capturing device is selected as IP Camera; then enter the API URL for taking the Snapshot through IP camera. You can use any camera for taking the snapshot/photo. The API for capturing snapshot will be available in the API document of camera.
- **User Name:** Enter the Username for accessing API for taking the Snapshot through IP Camera.
- **Password:** Enter the Password for accessing API for taking the Snapshot through IP Camera.



*It is the same username and password using which IP camera login is done. For example, username admin and password admin*

*The allowed values for snapshot URL, User Name and Password are **A-Z, a-z, 0-9 !\"#\$%&'()\*+,- . / ; : < = > ? @ [ \ ] ^ \_ ` { | } ~***

## Satatya/IP Camera Integration

This functionality is available for configuration only when the Matrix HVR/NVR device type or IP Camera is selected as the **Capturing Device** (from *Visual Tagging*).

It enables the configured COSEC devices to directly send commands to the SATATYA HVR/NVR devices/ IP Camera as per the configuration on this page. The Satatya/IP Camera Integration page appears as shown below:



Click **Satatya/IP Camera Integration** tab. The **Satatya/IP Camera Integration** page appears.

Configure the following parameters:

- **Integration Type:** Select the **Integration Type** from the drop-down list options—Wired or Network.

If you select **Wired Integration**, door will be physically connected with the Satatya Device.

If you select **Network Integration**, connection can be by Ethernet, Wireless or Broadband depending upon the COSEC device support.

If you select **Matrix HVR/DVR** as the **Capturing Device** in **Visual Tagging** and selected **Network** as the **Integration Type** in **Satatya/IP Camera Integration**, refer to [“Configuring Network Integration Parameters”](#).

If you select **IP Camera** as the **Capturing Device** in **Visual Tagging**, for configuring the **Satatya/IP Camera Integration** parameters refer to [“Configuring IP Integration Parameters”](#).

## Configuring Network Integration Parameters

- **Active:** Select this check box to enable the SATATYA Integration functionality.
- **IP Address:** Specify the IP Address of HVR/NVR.
- **Port Number:** Specify the Port Number of HVR/NVR.
- **Schedule Name:** Specify a user friendly Name for the Integration function.
- **Active:** Select this check box to enable the schedule.
- **Schedule:** Specify the Start Time and End Time of the Schedule in HH:MM format.
- **Days:** Select the check boxes for the desired Days on which you wish to apply the Schedule.
- **Event:** Select a COSEC Event for which the action is to be configured from the drop-down list.
- **Mode:** Select the event Mode from the drop-down list options—Entry, Exit, Both if you select the Event as Access Allowed, Access Denied or Invalid User.
- **Action:** Select the Action for the Satatya device from the drop-down list options—Recording, Image Upload, Video Pop-up, PTZ Preset, Mail Image.

If you select **Recording**, specify the **Duration Min..**

If you select **Upload Image**, Images will be uploaded as per the FTP settings.

If you select **Video Pop-up**, specify the **Duration Sec.** The video pop up will be generated on the local client of Satatya device.

If you select **PTZ Preset**, specify the desired **Position No.**

If you select **Mail Image**, specify the **Email ID.**

- **Camera:** Select the check boxes of the desired camera channels depending on the Action selected.

**Example 1:** For Action as Video Pop up and the camera channel selected is 24, then the pop-up of Camera 24 will be shown for 10 seconds.

**Example 2:** For Access Allowed event on COSEC Device and the camera channel selected are 4,6,8 and 10, then recording of these cameras will be done for 10 seconds.

- Click **Add**. All the Events and Actions configured for them appear in a list.

Visual Tagging
Satatya Integration

Integration Type
Network

Active
☒

IP Address \*
192 . 168 . 111 . 164

Port Number \*
8711

---

Schedule Name

Active
☐

Schedule Range \*
00:00
23:59

Days \*
☒ Sun
☒ Mon
☒ Tue
☒ Wed
☒ Thu
☒ Fri
☒ Sat
☒ Holiday

Event
Access Allowed

Mode
Both

Action
Recording

Duration Min. \*

Camera \*
☐ 1
☐ 2
☐ 3
☐ 4
☐ 5
☐ 6
☐ 7
☐ 8
☐ 9
☐ 10
☐ 11
☐ 12
☐ 13
☐ 14
☐ 15
☐ 16
☐ 17
☐ 18
☐ 19
☐ 20
☐ 21
☐ 22
☐ 23
☐ 24

Add
Cancel

Search

Name	Event	Action	Start Time	End Time	Active	
New Schedule	Access Allowed	Recording	00:00	23:59	Yes	

- **Active:** Select this check box to enable the SATATYA Integration functionality.
- **IP Address:** Specify the IP Address of HVR/NVR.
- **Port Number:** Specify the Port Number of HVR/NVR.
- **Schedule Name:** Specify a user friendly Name for the Integration function.
- **Active:** Select this check box to enable the schedule.
- **Schedule:** Specify the Start Time and End Time of the Schedule in HH:MM format.
- **Days:** Select the check boxes for the desired Days on which you wish to apply the Schedule.
- **Event:** Select a COSEC Event for which the action is to be configured from the drop-down list.
- **Mode:** Select the event Mode from the drop-down list options—Entry, Exit, Both if you select the Event as Access Allowed, Access Denied or Invalid User.
- **Action:** Select the Action for the Satatya device from the drop-down list options—Recording, Image Upload, Video Pop-up, PTZ Preset, Mail Image.

If you select **Recording**, specify the **Duration Min.**

If you select **Upload Image**, Images will be uploaded as per the FTP settings.

If you select **Video Pop-up**, specify the **Duration Sec.** The video pop up will be generated on the local client of Satatya device.

If you select **PTZ Preset**, specify the desired **Position No.**

If you select **Mail Image**, specify the **Email ID.**

- **Camera:** Select the check boxes of the desired camera channels depending on the Action selected.

**Example 1:** For Action as Video Pop up and the camera channel selected is 24, then the pop-up of Camera 24 will be shown for 10 seconds.

**Example 2:** For Access Allowed event on COSEC Device and the camera channel selected are 4,6,8 and 10, then recording of these cameras will be done for 10 seconds.

- Click **Add**. All the Events and Actions configured for them appear in a list.

Visual Tagging

Satatya Integration

Integration Type

Network

Active

☒

IP Address \*

192 . 168 . 111 . 164

Port Number \*

8711

---

Schedule Name

Active

☐

Schedule Range \*

00:00

23:59

Days \*

☒ Sun
 ☒ Mon
 ☒ Tue
 ☒ Wed
 ☒ Thu
 ☒ Fri
 ☒ Sat
 ☒ Holiday

Event

Access Allowed

Mode

Both

Action

Recording

Duration Min. \*

Camera \*

☐ 1
 ☐ 2
 ☐ 3
 ☐ 4
 ☐ 5
 ☐ 6
 ☐ 7
 ☐ 8
 ☐ 9
 ☐ 10
 ☐ 11
 ☐ 12
 ☐ 13
 ☐ 14
 ☐ 15
 ☐ 16
 ☐ 17
 ☐ 18
 ☐ 19
 ☐ 20
 ☐ 21
 ☐ 22
 ☐ 23
 ☐ 24

Add

Cancel

Search

## Configuring IP Integration Parameters

If you select IP Camera in Capturing Device under Visual Tagging, then configure the following parameters under IP Camera Integration.

The screenshot shows the 'Device Configuration' window with the 'Satatya/IP Camera Integration' tab selected. On the left, a sidebar lists various configuration options: Profile, Enrollment, Advanced, Features, Video Surveillance, Special Functions, Input/Output, Additional, Job Costing, Assign Users, and Identification Server. The main area contains the following fields:

- Schedule Name \***: A text input field.
- Active**: A checked checkbox.
- Event**: A dropdown menu with 'User Allowed' selected.
- Mode**: A dropdown menu with 'Both' selected.
- Schedule Range \***: Two time input fields, '00:00' and '23:59'.
- Days \***: A grid of checkboxes for days of the week and a 'Holiday' checkbox. All are checked: Sun, Mon, Tue, Wed, Thu, Fri, Sat, and Holiday.
- Add** and **Cancel** buttons.

- **Schedule Name:** Specify a user friendly Name for the Schedule for the Device-IP Camera Integration.
- **Active:** Select this check box to activate the schedule for the IP Camera.
- **Event:** Select the desired Event for which the action is to be configured from the drop-down list. The Events will appear in the list based on the availability of the license.



*You can configure a maximum 20 Events or Schedules for a single device.*

- **Mode:** Select the desired Mode from the drop-down list—Entry, Exit, Both.
- **Schedule Range:** Specify the **Start** and **End Time** for the schedule.
- **Days:** Select the check boxes of the desired days on which you wish run the schedule.

Click **Add** to add the configured schedule. The schedule will be listed in the grid. Then click **Save** to save the schedule integration.

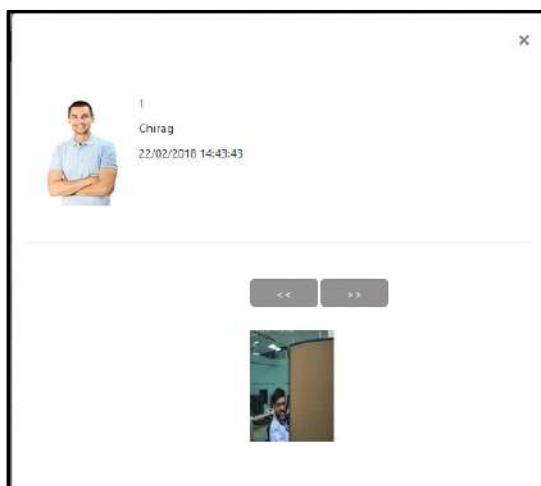
This screenshot shows the same configuration window as above, but with the 'Add' button highlighted. Below the configuration fields, there is a search bar and a table listing existing schedules.

Name	Event	Mode	Start Time	End Time	
User Allowed Schedule	User Allowed	Both	09:00	19:00	

When User Event is generated, then snapshot will be taken by the configured camera. The Events can be viewed in User Events (User Module) page and Event View (Admin Module) page. The User Events page displays the details as shown below:

User ID	User Name	Date-Time	Device Name	I/O	Access	Source	Source Details	Location Details	View Image
1	Chirag	22/02/2018 14:43	Vega Controller-Device-7	Entry	Allowed	Device			
1	Chirag	22/02/2018 14:00	Vega Controller-Device-7	Entry	Allowed	Device			
1	Chirag	22/02/2018 12:52	Vega Controller-Device-7	Entry	Allowed	Device			
1	Chirag	22/02/2018 12:45	Vega Controller-Device-7	Entry	Allowed	Device			
1	Chirag	22/02/2018 12:38	Vega Controller-Device-7	Entry	Allowed	Device			

Click **View Image**, to view the snapshot.



## Special Functions



*Special Functions is applicable for both Direct Door and Panel Door.*

On the **Device Configuration** page, click the **Special Functions** tab in the left pane.

No.	Function Name	Active	Job Selection	User Group	Card 1	Card 2	Card 3	Card 4
1	Official Work - IN	Yes	Yes	All				
2	Official Work - OUT	Yes	Yes	All				
3	Short Leave - IN	Yes	Yes	All				
4	Short Leave - OUT	Yes	Yes	All				
5	Regular - IN	Yes	Yes	All				
6	Regular - OUT	Yes	Yes	All				
7	Break End	Yes	Yes	All				
8	Break Start	Yes	Yes	All				
9	Overtime - IN	Yes	Yes	All				
10	Overtime - OUT	Yes	Yes	All				
11	Enroll User	No	No	All				

To configure *Special Functions* for COSEC doors, refer to [“Special Functions”](#).

## Input/Output



*Input/Output is applicable for both Direct Door and Panel Door.*

*The Configuration Tab is applicable for both Direct Door and Panel Door, whereas Linking and Time Triggered tab is applicable for Direct Door only.*

*This functionality is available only with the Access Control add-on module license.*

The Input/Output (I/O) configuration of a door determines how the output or response of a system is influenced by the input applied on it. In case of the COSEC Access Control System, the I/O configuration should enable the system to monitor and trigger a specific response to any changes in door state or event occurrences at the door device. This change of door state or occurrence of events may be considered as an input while the response or action that is generated by the system on detection of this input, may be defined as the output.

On the **Device Configuration** page, click the **Input/Output** tab in the left pane.



**Device Configuration**

Search Device ID or Name

Device ID: [blank]  
Device Name: Vega Controller  
ID: 50000  
Active/Inactive: [blank]

Profile  
Enrollment  
Advanced  
Features  
Video Surveillance  
Special Functions  
**Input/Output**  
Additional  
Job Costing  
Assign Users  
Identification Server

**Configuration**    Linking    Time Triggered

**Door Sense**

Enable ☐  
Supervised ☐  
Door Sense Type: Normally Open

**Auxiliary Input**

Enable ☐  
Supervised ☐  
Sense Type: Normally Closed  
Debounce Time (Sec): 5

**Auxiliary Output**

Enable ☐  
Output Wait Time (Sec): 0

**Accept External IO Linking**

Enable ☐  
Network Interface: Ethernet

To configure the Input/Output parameters, click the following links:

- [“Configuration”](#)
- [“Linking”](#)
- [“Time Triggered”](#)

## Configuration



*Configuration is applicable for both Direct Door and Panel Door.*

Configuration tab differs for Direct Door and Panel Door.

Click **Configuration** tab. The **Configuration** page appears.

For VEGA as **Direct Door**.

The screenshot shows the 'Device Configuration' window for a VEGA Controller. The sidebar on the left lists various configuration categories, with 'Input/Output' currently selected. The main panel displays the 'Configuration' tab, which is organized into four sections: 'Door Sense', 'Auxiliary Input', 'Auxiliary Output', and 'Accept External IO Linking'. Each section contains settings for enabling the feature, supervising it, and selecting a sense type (where applicable). For 'Door Sense', 'Enable' and 'Supervised' are unchecked, and 'Door Sense Type' is set to 'Normally Open'. For 'Auxiliary Input', 'Enable' and 'Supervised' are unchecked, 'Sense Type' is 'Normally Closed', and 'Debounce Time (Sec)' is 5. For 'Auxiliary Output', 'Enable' is unchecked, and 'Output Wait Time (Sec)' is 0. For 'Accept External IO Linking', 'Enable' is unchecked, and 'Network Interface' is 'Ethernet'.

Configure the following parameters:

### Door Sense

The system by default can sense two states of a door - Normally Open and Normally Closed depending on which the output is determined. For example, any deviation of the door from its normal state may lead to the trigger of a **Door Abnormal** alarm.

- **Enable:** Select the check box to enable the feature.
- **Supervised:** Select the check box to enable the door for four-state monitoring, where the door is also monitored for Door Fault and Door Disconnection.
- **Door Sense Type:** Select the Door Sense Type from the drop-down list options — Normally Open or Normally Closed.

### Auxiliary Input

- **Enable:** Select the check box to enable the feature.
- **Supervised:** Select the check box to enable the door for four-state monitoring, where the door is also monitored for Door Fault and Door Disconnection.
- **Sense Type:** Select the Sense Type from the drop-down list options — Normally Open or Normally Closed.
- **Debounce Time (Sec):** Specify the Debounce Time in seconds. It defines the minimum time for which the door should remain in a given state to enable the system to take action on it. For example, if a Normal door state is changed to Alarm, the state must remain in Alarm for five seconds before an alarm is generated.

## Auxiliary Output

- **Enable:** Select the check box to enable the feature.
- **Output Wait Time (Sec):** Specify the time in seconds that will be set as an additional waiting period before the Aux Output signal is sent.

## Accept External IO Linking

- **Enable:** Select the check box to enable device-to-device IO Linking, i.e. input from one Direct Door can trigger output in another Direct Door.
- **Network Interface:** Select the interface option for IO linking with external devices from the drop-down list options—Ethernet, Wireless or Mobile Broadband.

For VEGA as a **Panel Door**.

The screenshot shows the 'Device Configuration' window for a VEGA device. The left sidebar contains a list of configuration tabs: Profile, Advanced, Video Surveillance, Input/Output (selected), and Assign Users. The main area is titled 'Configuration' and contains four sections:

- Door Sense:** Includes checkboxes for 'Enable' and 'Supervised', and a 'Door Sense Type' dropdown menu set to 'Normally Open'.
- Auxiliary Input:** Includes checkboxes for 'Enable' and 'Supervised', a 'Sense Type' dropdown menu set to 'Normally Closed', and a 'Debounce Time (Sec)' input field set to 5.
- Auxiliary Output:** Includes an 'Enable' checkbox, an 'Output Group' dropdown set to 1, and a 'DC Aux Ports' button with a list icon.
- Relay Output:** Includes two rows of settings. The first row has 'Output Group Number (Door Unlock)' set to 2 and a 'Door Unlock' button with a list icon. The second row has 'Output Group Number (Door Lock)' set to 10 and a 'Name' button with a list icon.

Configure the following parameters:

### Door Sense

The system by default can sense two states of a door - Normally Open and Normally Closed depending on which the output is determined. For example, any deviation of the door from its normal state may lead to the trigger of a **Door Abnormal** alarm.

- **Enable:** Select the check box to enable the feature.
- **Supervised:** Select the check box to enable the door for four-state monitoring, where the door is also monitored for Door Fault and Door Disconnection.
- **Door Sense Type:** Select the Door Sense Type from the drop-down list options — Normally Open or Normally Closed.

## Auxiliary Input

- **Enable:** Select the check box to enable the feature.
- **Supervised:** Select the check box to enable the door for four-state monitoring, where the door is also monitored for Door Fault and Door Disconnection.
- **Sense Type:** Select the Sense Type from the drop-down list options — Normally Open or Normally Closed
- **Debounce Time (Sec):** Specify the Debounce Time in seconds. It defines the minimum time for which the door should remain in a given state to enable the system to take action on it. For example, if a Normal door state is changed to Alarm, the state must remain in Alarm for five seconds before an alarm is generated.

## Auxiliary Output

- **Enable:** Select the check box to enable the feature.
- **Output Wait Time (Sec):** Specify the time in seconds that will be set as an additional waiting period before the Aux Output signal is sent.

## Relay Output

- **Output Group Number (Door Unlock):** Select the Output Group Number to which the device output for Door Unlock is to be assigned from the picklist.
- **Output Group Number (Door Lock):** Select the Output Group Number to which the device output for Door Lock is to be assigned from the picklist.

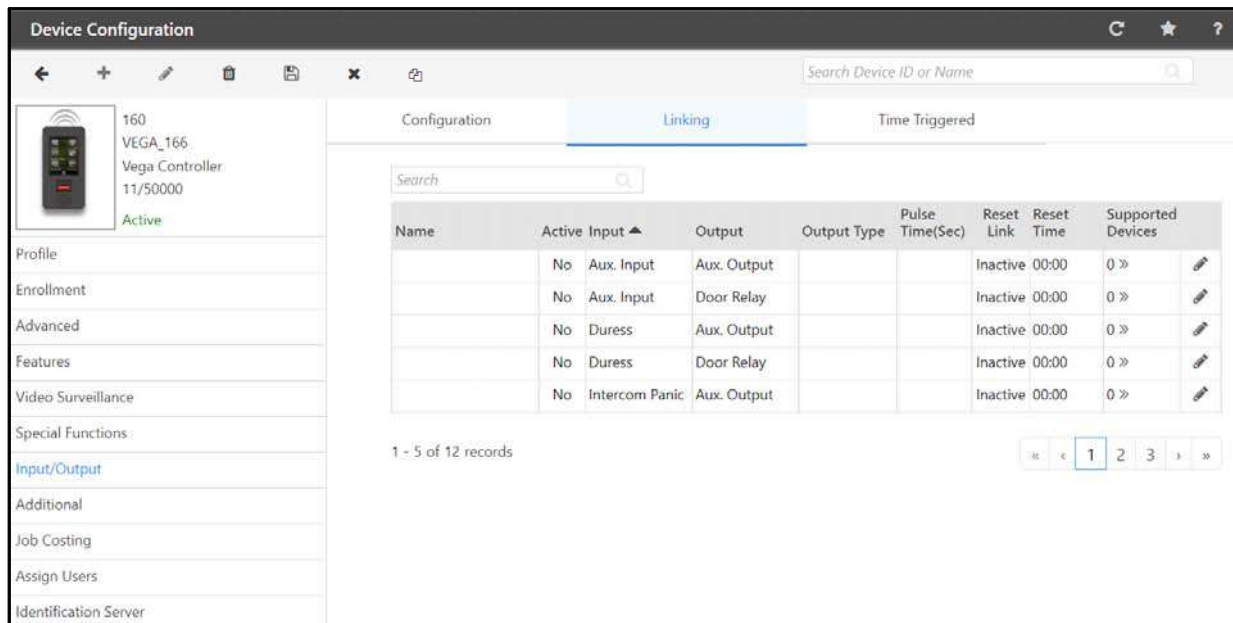
## Linking



*Linking is applicable for Direct Door only.*

The COSEC application supports the Input/Output Linking feature to activate an output port based on a trigger received from an input port on the same Direct Door. This option enables the administrator to define how an event or events (input port) will trigger an output on the door.

Click **Linking** tab. The **Linking** page appears.



Select a Input-Output linking row or click edit button.

- **Name:** Specify a Name for the new I/O linking program to be defined.
- **Active:** Select this check box to enable the IO Linking.
- **Output Type:** Specify the required type of Output from the drop-down list options—Pulse, Interlock, Latch, Toggle.


If you select **Pulse**, the output will be active for the defined pulse time, for example, 5 sec.

If you select **Interlock**, the output follows the input. The output will be active till the input is active, after which it returns to normal state.

If you select **Latch**, the relay output will be in energized condition for infinite period and needs to be reset manually. It means once the input is active, output will be active. It has to be reset manually. For example, during a Fire alarm, door should be unlocked permanently so Latch output can be used.

If you select **Toggle**, the output group toggles its state whenever an input group is activated.

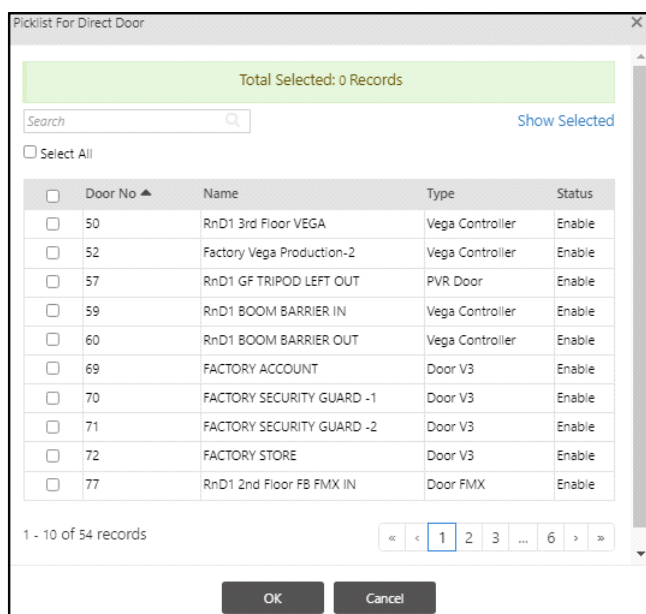
- **Pulse Time (sec):** If you select the Output Type as **Pulse**, specify the time until which the output should be active.
- **Reset Link:** Select this check box to enable the system to reset the IO link.
- **Reset Time:** Specify the time after which the IO link should be reset in HH:MM format.
- **Supported Devices:** All devices supported for external IO Linking will appear in this picklist for selection. Select the required devices from the picklist. Upto 255 external devices can be added.

- Click **Supported Devices**  icon. The **Supported Devices** pop-up appears.



The **Supported Devices** pop-up window has a title bar with a close button. Below the title bar, there is a section labeled "Supported Devices" with two input fields: "ID" and "Name", followed by a list icon. Below this is a search bar with the placeholder text "Search" and a magnifying glass icon. The main area contains a table with the following columns: "ID", "Name", "IP Address", and a trash icon. The table is currently empty.

- In this pop-up, click the **Supported Devices** picklist, the **Picklist For Direct Door** pop-up appears.



The **Picklist For Direct Door** pop-up window has a title bar with a close button. Below the title bar, there is a green bar with the text "Total Selected: 0 Records". Below this is a search bar with the placeholder text "Search" and a magnifying glass icon, and a "Show Selected" link. Below the search bar is a "Select All" checkbox. The main area contains a table with the following columns: "Door No", "Name", "Type", and "Status". The table contains 10 rows of data. Below the table is a pagination bar showing "1 - 10 of 54 records" and a set of navigation buttons: "<<", "<", "1", "2", "3", "...", "6", ">", ">>". At the bottom are "OK" and "Cancel" buttons.

Door No	Name	Type	Status
50	RnD1 3rd Floor VEGA	Vega Controller	Enable
52	Factory Vega Production-2	Vega Controller	Enable
57	RnD1 GF TRIPOD LEFT OUT	PVR Door	Enable
59	RnD1 BOOM BARRIER IN	Vega Controller	Enable
60	RnD1 BOOM BARRIER OUT	Vega Controller	Enable
69	FACTORY ACCOUNT	Door V3	Enable
70	FACTORY SECURITY GUARD -1	Door V3	Enable
71	FACTORY SECURITY GUARD -2	Door V3	Enable
72	FACTORY STORE	Door V3	Enable
77	RnD1 2nd Floor FB FMX IN	Door FMX	Enable

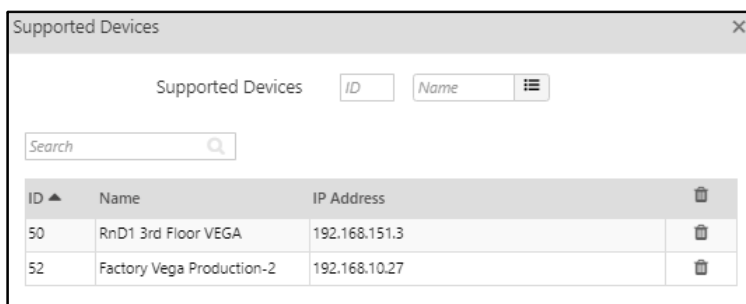
You can either select particular devices or can select all the devices at once.

To select particular devices, click the check boxes of the desired devices.



**OR**


To select all the devices, select the **Select All** check box. The devices on all the pages will be selected.

Click **OK**. You return to the **Supported Devices** pop-up and the selected devices are displayed here.



The **Supported Devices** pop-up window is shown with the selected devices. The table now contains two rows of data. The columns are "ID", "Name", "IP Address", and a trash icon.

ID	Name	IP Address	
50	RnD1 3rd Floor VEGA	192.168.151.3	
52	Factory Vega Production-2	192.168.10.27	

You can also delete the desired devices. To do so, click **Delete**  of the respective device.

Close the pop-up the number of selected devices are displayed under **Supported Devices** in the grid.

- Click the **OK** button and **Save** the configuration.

## Time Triggered

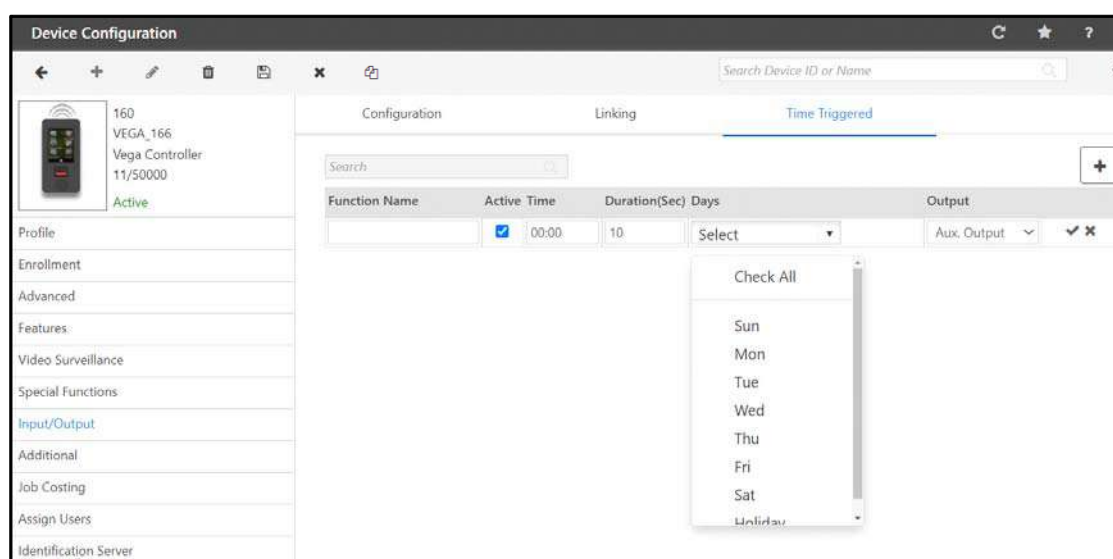


*Time Triggered is applicable for Direct Door only.*

This functionality enables the user to control the activity of an Output without manual intervention. The output gets active without the status of input, i.e. the selected output is triggered based on the configured time and not the IO link.

The time triggered functions are used for activating events like door unlock and siren activation that are set as per the start time and for the configured time duration. This functionality is designed to trigger outputs for predefined periods at the configured time. The COSEC access control system supports up to 20 Time Triggered functions on a Direct Door.

Click **Time Triggered** tab. The **Time Triggered** page appears.



This functionality enables the user to control the activity of an Output without manual intervention. The time triggered functions are used for activating events like door unlock and siren activation that are set as per the start time and for the configured time duration. This functionality is designed to energize outputs for predefined periods at the configured time. The COSEC access control system supports up to 20 Time Triggered functions on a Direct Door.

Click **Add**.

Configure the following parameters:

- **Function Name:** Specify a user friendly Function Name.
- **Active:** Select this check box to enable the Time Triggered function.

- **Time:** Specify the time when the Time Triggered function should be activated.
- **Duration:** Specify the time duration for which the Time Triggered function should be active.
- **Days:** Select the check boxes for the desired days on which you wish to apply the Time Triggered function from the drop-down list. Click **Check All**, if you wish to select all the days.
- **Output:** Select the Output on which the Time Triggered function should be applied from the drop-down list options—Aux Output or Door Relay.

Click **OK** and then **Save** to save the settings.

Function Name	Active	Time	Duration(Sec)	Days	Output
Siren Activate	Yes	00:00	10	Su Mo Tu We Th Fr Sa Ph	Aux O/P

## Additional



*Additional is applicable for Direct Door only.*

Many countries observe the convention of adjusting clocks forward and backward. Clocks are set ahead during the spring and back to standard time in the autumn. COSEC doors can be configured to be compatible with this procedure keeping the RTC of the system updated with such changes

On the **Device Configuration** page, click the **Additional** tab in the left pane.

Device Configuration

Search Device ID or Name

Daylight Saving

DST Type: Disable

Daylight Saving Time is disabled

Save



The **Daylight Saving** configuration can be done in 2 ways — Day-Month wise or Date-Month wise.

- **DST Type:** Select the **DST Type** as Day-Month wise or Date-Month wise. Select Disable, if you wish to disable the application of DST on the system time.

If you select the **Day-Month wise** option, configure the following parameters.

Daylight Saving

DST Type: Day-Month wise

Time Period: 00:00

**Forward Clock**

Month: January

Week No.: 1st

Day of Week: Sunday

Time: 00:00

**Backward Clock**

Month: January

Week No.: 1st

Day of Week: Sunday

Time: 00:00

Save

- **Time Period:** Specify the time period by which the time period will be set forward or backward to achieve Daylight Saving.

#### Forward Clock

- **Month:** Select the month when the DST starts for the Forward Clock from the drop-down list.
- **Week No.:** Select the week of the month when the DST starts for the Forward Clock from the drop-down list. For example, if DST starts from 4th week of March, select 4th.
- **Day of Week:** Select the day of the week when the DST starts for the Forward Clock from the drop-down list.
- **Time:** Specify the time when the DST starts for the Forward Clock in HH:MM format.

#### Backward Clock

- **Month:** Select the month when the DST ends for the Backward Clock from the drop-down list.
- **Week No.:** Select the week of the month when the DST ends for the Backward Clock from the drop-down list. For example, if DST starts from 4th week of March, select 4th.
- **Day of Week:** Select the day of the week when the DST ends for the Backward Clock from the drop-down list.
- **Time:** Specify the time when the DST ends for the Backward Clock in HH:MM format.

Click **Save** to save the configurations.

If you select the **Date-Month wise** option, configure the following parameters.

Daylight Saving

DST Type

Date-Month wise

Time Period

00:00

Forward Clock

Month

January

Date

1

Time

00:00

Backward Clock

Month

January

Date

1

Time

00:00

Save

- **Time Period:** Specify the time period by which the time period will be set forward or backward to achieve Daylight Saving.

#### Forward Clock

- **Month:** Select the month when the DST starts for the Forward Clock from the drop-down list.
- **Date:** Select the date of the month when the DST starts for the Forward Clock from the drop-down list.
- **Time:** Specify the time when the DST starts for the Forward Clock in HH:MM format.

#### Backward Clock

- **Month:** Select the month when the DST ends for the Backward Clock from the drop-down list.
- **Date:** Select the date of the month when the DST ends for the Backward Clock from the drop-down list.
- **Time:** Specify the time when the DST ends for the Backward Clock in HH:MM format.

Click **Save** to save the configurations.

Suppose, the DST period in a region is from Sunday, 27 March at 02:00:00 hours till Sunday, 30 October at 03:00:00. If DST is configured according to this period and the **Time Period** is specified as 1 hour, the clock will be forwarded by 01:00 hours on 27 March at 02:00:00 hours. The clock will be set back by 01:00 hours on 30 October at 03:00:00.

## Job Costing



*Job Costing is applicable for Direct Door only.*

When user punches on any device, there will be an option to select the Job Code on which the user is working. Job Costing enables the Administrator to show or hide Job Code selection on device. It also enables the Administrator to assign default jobs on device.

On the **Device Configuration** page, click **Job Costing** tab in the left pane.



*Make sure the **Device Based Job Assignment** check box is enabled for the desired Users.*

## Settings

The **Settings** page appears by default.

- **Show Job Menu:** Select the desired option— **Show List** or **Allocate Default**.

### Show List

When **Show List** is selected; then multiple jobs can be assigned to the device. The user can select the relevant Job Code while punching on the device. His/her job hours will be recorded for that Job Code.

- **Retain Job Selection:** If Retain Job Selection check box is selected, it allows the device to remember the last Job Code selected by a user and the same would be applicable for all the subsequent users until another job selection is done on the device. This is useful in environments where dynamic job selection prevails.

In this case, if the user selects a Job Code the same is saved and retained for future use by the device. If the user selects None option on the device, it ends the current job and assigns None until a new Job Code is selected by the user.

If the you clear the check box, then the device does not retain any job selection done by the user.

For example, in an educational setup, teachers may have dynamic job assignments, while students have static ones. After a teacher selects a Job Code, that code is retained by the device. Any student who

punches in afterward will be assigned the teacher's Job Code until the teacher selects a new one or selects None.

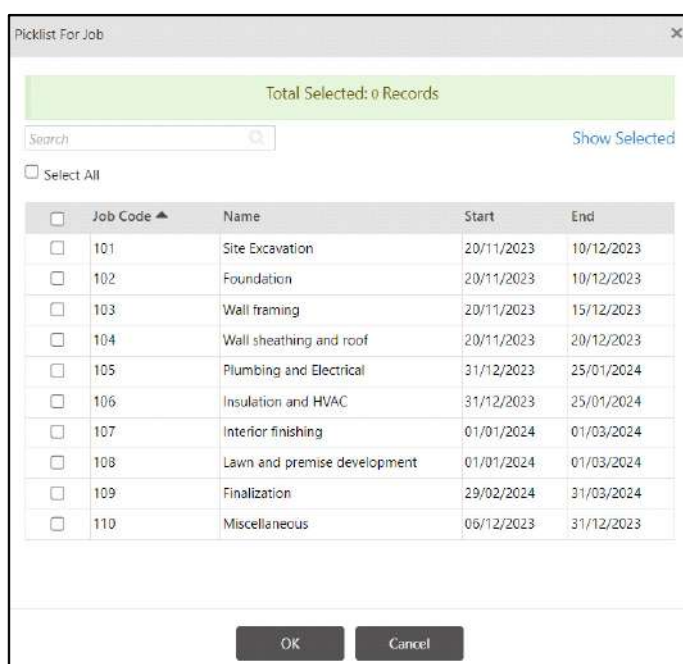
## Assign Jobs

- **Assign Jobs:** You can select Job Group as well as individual Jobs.
- To select **Job Group**, click the Job Group picklist, the **Picklist For Job Group** pop-up appears. Select the desired Job Group.

Click **Save**. The Jobs of the selected Job Group appear in the grid.

You can delete the desired Job. To do so, click **Edit**  and then click **Delete**  of the respective Job.

- To select **Jobs**, click the Jobs picklist. The **Picklist For Job** pop-up appears.



<input type="checkbox"/>	Job Code ▲	Name	Start	End
<input type="checkbox"/>	101	Site Excavation	20/11/2023	10/12/2023
<input type="checkbox"/>	102	Foundation	20/11/2023	10/12/2023
<input type="checkbox"/>	103	Wall framing	20/11/2023	15/12/2023
<input type="checkbox"/>	104	Wall sheathing and roof	20/11/2023	20/12/2023
<input type="checkbox"/>	105	Plumbing and Electrical	31/12/2023	25/01/2024
<input type="checkbox"/>	106	Insulation and HVAC	31/12/2023	25/01/2024
<input type="checkbox"/>	107	Interior finishing	01/01/2024	01/03/2024
<input type="checkbox"/>	108	Lawn and premise development	01/01/2024	01/03/2024
<input type="checkbox"/>	109	Finalization	29/02/2024	31/03/2024
<input type="checkbox"/>	110	Miscellaneous	06/12/2023	31/12/2023


You can either select particular jobs or can select all the jobs at once.

To select particular jobs, select the check boxes of the desired jobs.

**OR**

To select all the jobs, select the **Select All** check box. The jobs on all the pages will be selected.

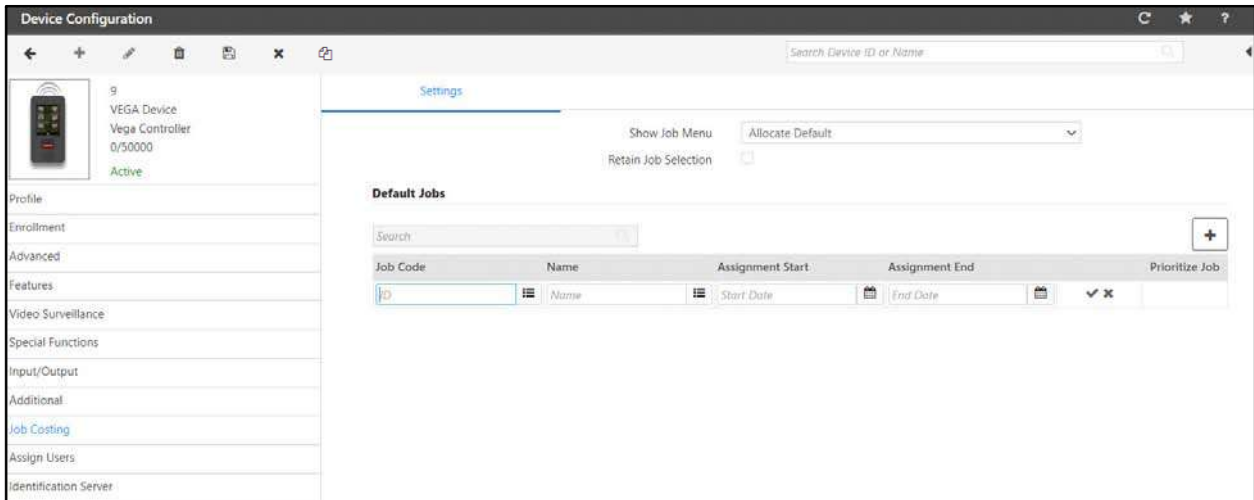
Click **OK**.

The selected Jobs appear in the grid. You can also delete the desired Job. To do so, click **Delete**  of the respective Job.

- Click **Save**.

## Allocate Default

When **Allocate Default** is selected; then default jobs for the device can be selected. The Job costing user can directly punch on this door for starting the default job.

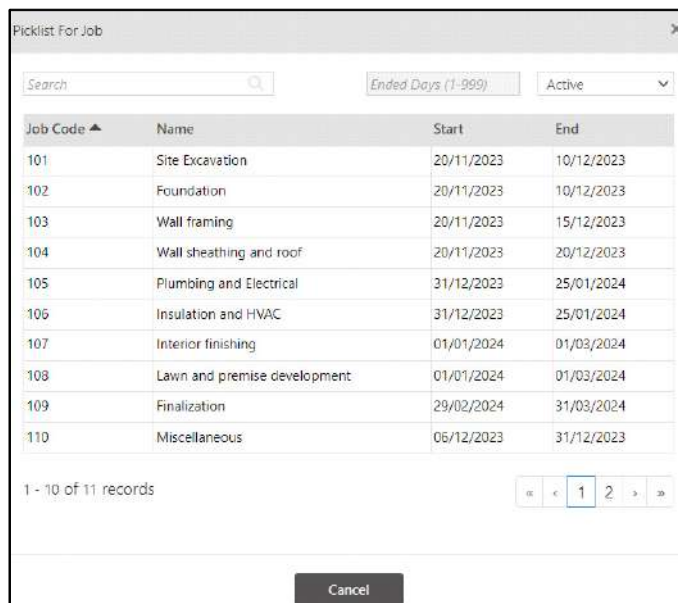


## Default Jobs

Multiple default jobs can be assigned with overlapping Assignment Date Ranges. You can also set the priority of the assigned jobs if required. If you have jobs with overlapping dates and you have set their priority as per your requirement, then the first job will be considered as the default job.

- Click **Add**  . Click the picklist under **Job Code/Name** to select the desired Jobs.

The **Picklist For Job** appears.



By default, all the **Active** jobs are displayed. Click **Active** and select the desired option — **All**, **Active**, **Expired** — to filter the jobs. The jobs appear as per the set filter.

If you select **Expired**, you can set another filter.

Configure the number of days in Ended Days (1-999). The system will display the expired jobs, derived using the following: Current Date minus Number of days configured in Ended Days.

For example:

Ended Days configured = 2

Current Date= April 25, 2024

All the jobs expired between April 23, 2024 to April 25, 2024 (midnight), will be displayed.

Click to select the desired job from the list. You can also search for the desired job using the search bar.

The selected job appears in the grid.

- **Assignment Start** and **Assignment End**: The selected Jobs Start and End dates are displayed. You can change the Assignment Start and Assignment End dates of the job if required. To do so, click the calendar and select the desired start and end dates.
- Click **Save** to save the configuration.

The **Default Jobs** grid will consist of all the jobs, that is expired, in-progress as well as assigned.



*It is recommended to set job priority only if overlapping dates are assigned to the jobs.*

*If a new job is assigned, by default it will appear at the highest priority. You can change the priority later, if required.*

You can set the priority of the jobs as per your requirement. To do so,

The screenshot shows the 'Device Configuration' window. On the left is a sidebar with a device profile for 'VEGA Device' (Vega Controller 0/50000, Active). The main area is titled 'Settings' and contains a 'Show Job Menu' dropdown set to 'Allocate Default' and a 'Retain Job Selection' checkbox. Below this is the 'Default Jobs' section, which includes a search bar and a table with the following data:

Job Code	Name	Assignment Start	Assignment End	Prioritize Job
111	Premise cleaning	01/10/2023	01/11/2023	[Up/Down arrows]
108	Lawn and premise development	01/01/2024	01/03/2024	[Up/Down arrows]
102	Foundation	20/11/2023	10/12/2023	[Up/Down arrows]
101	Site Excavation	20/11/2023	10/12/2023	[Up/Down arrows]

- Under **Prioritize Job**, click the **Up** arrow button to move a job upwards in the list. Similarly, click the **Down** arrow button to move a job downwards in the list.

If you have overlapping dates assigned to Jobs, in such scenarios there will be multiple Jobs in which the punches are possible.

To resolve this set the Job with highest priority at the first position, so that when the system searches for the Job as per the date, the punch will be marked in the first Job in which the date is detected.

Let us understand this with the help of an example.

### Example:

User 1 has been assigned the following jobs:

Job Code	Job Name	Assignment Start	Assignment End	Prioritize Job
J1	Job 1	01/10/2023	10/10/2023	1
J2	Job 2	09/10/2023	15/10/2023	2
J3	Job 3	17/10/2023	25/10/2023	3
J4	Job 4	25/10/2023	31/10/2023	4

Now, User 1 changes the priority of the assigned jobs as follows:

Job Code	Job Name	Assignment Start	Assignment End	Prioritize Job
J2	Job 2	09/10/2023	15/10/2023	1
J1	Job 1	01/10/2023	10/10/2023	2
J4	Job 4	25/10/2023	31/10/2023	3
J3	Job 3	17/10/2023	25/10/2023	4

When User 1 will punch on 09/10/2023, the punch will be marked against Job 2 as it has been set at priority number 1. Similarly, when User 1 will punch on 25/10/2023, the punch will be marked against Job 4 as it is at a higher priority than Job 3.



*Make sure that the assigned jobs are prioritized correctly to ensure that the punches are in place.*

## Assign Users

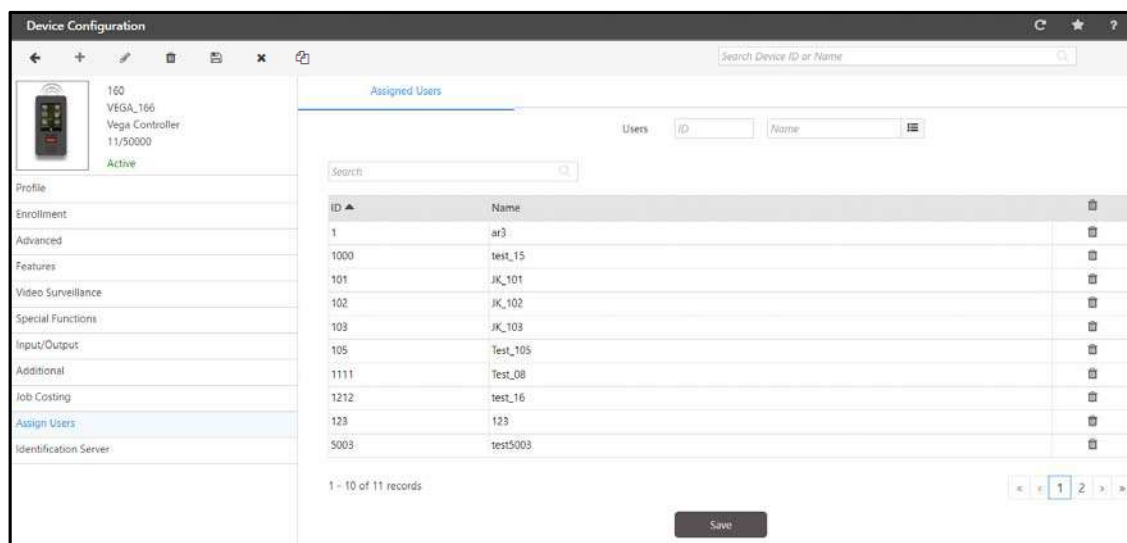


*Assign Users is applicable for both Direct Door and Panel Door.*

### For Direct Doors

You can select and assign users to the door.


On the **Device configuration** page, click **Assign Users**. The Assign Users page appears.



- **Users:** Click the picklist. The **Picklist For All Users** window appears.

Select the check boxes of the desired Users and click **OK**.

The grid displays the list of selected users.

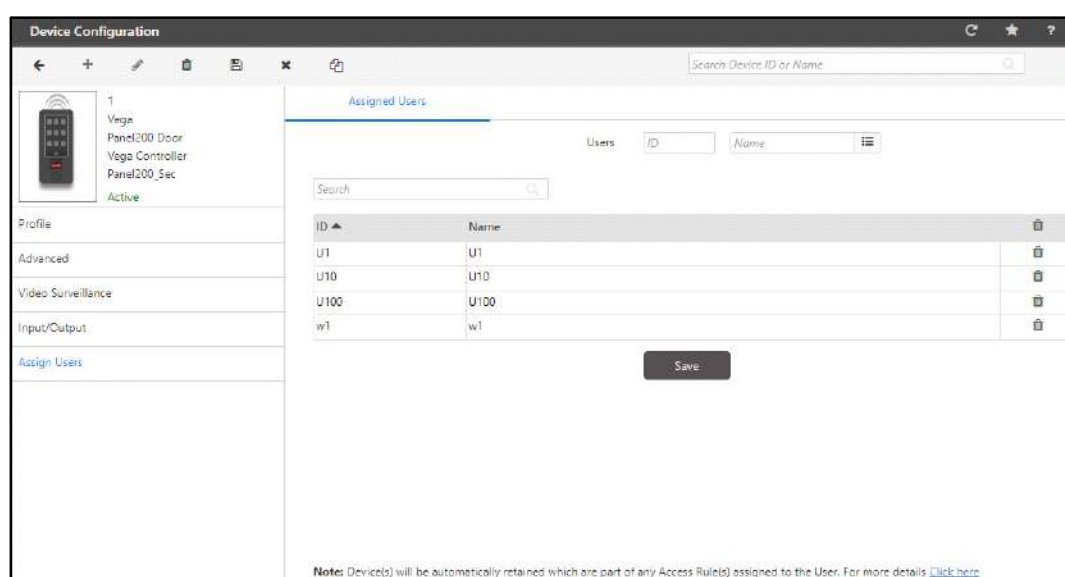
If you wish to remove any assigned user, click the respective **Delete**  icon.

- Click **Save**.

## For Panel Doors

You can select and assign users to the door.

On the **Device configuration** page, click **Assign Users**. The Assign Users page appears.




- **Users:** Click the picklist. The **Picklist For All Users** window appears.



Select the check boxes of the desired Users and click **OK**.

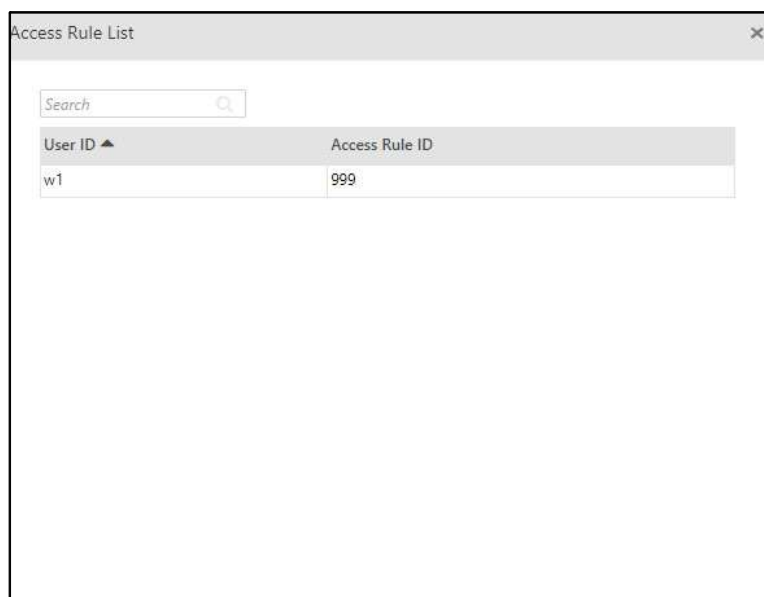
The grid displays the list of selected users.

If you wish to remove any assigned user, click the respective **Delete**  icon.



*If you wish to delete a user which is assigned to this device and it is a part of any Access Rule assigned to that user, then such user and door/s will be retained.*

- If you wish to check the users assigned against any Access Rule, click the **Click here** link at the bottom of the page. The **Access Rule List** pop-up appears.



The image shows a pop-up window titled "Access Rule List". It contains a search bar at the top with the placeholder text "Search". Below the search bar is a table with two columns: "User ID" and "Access Rule ID". The table has one row with the values "w1" and "999".

User ID	Access Rule ID
w1	999

It displays the list of User ID along with the Access Rule ID against which they are assigned.

- Click **Save** to assign all the added users to this door.

## Cafeteria



*Cafeteria is applicable for Direct Door only.*

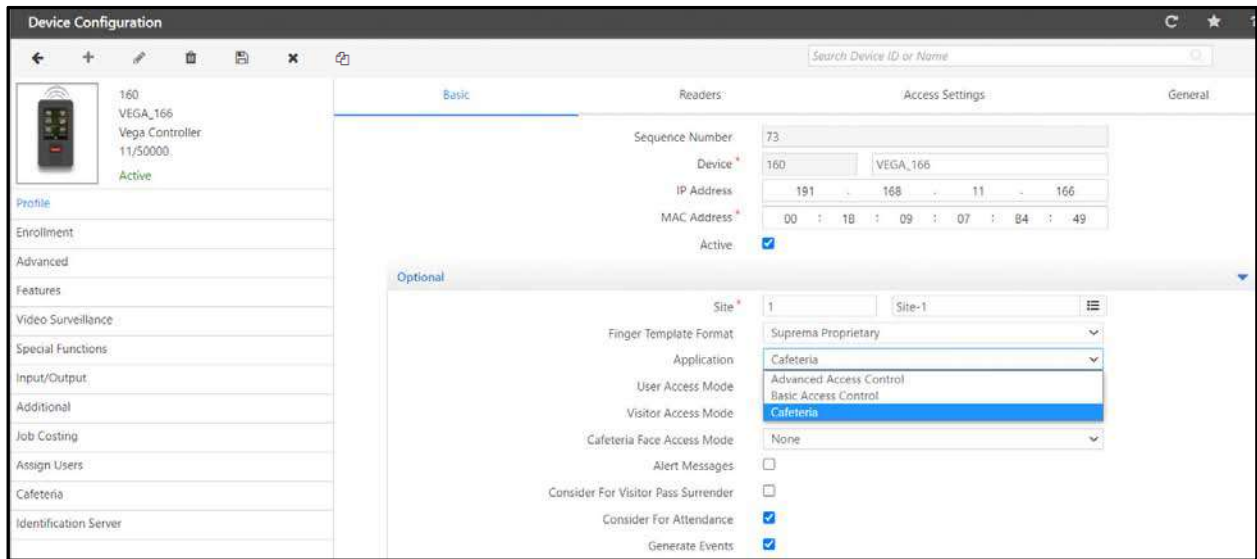
*The Cafeteria tab will be available only if you have selected the **Application** option as **Cafeteria**. For details, refer to ["Profile"](#).*

*View Cafeteria Balance from Device will be functional using Card, QR Code (if Allow Access Via QR is enabled) as well as Face (if Enable FR is enabled) credentials.*

The system enables you to configure devices which will be used for Cafeteria Management. To configure a door for Cafeteria application,

On the Device Configuration page, click **Profile**. Click **Optional** collapsible panel.

Select **Cafeteria** in **Application**.



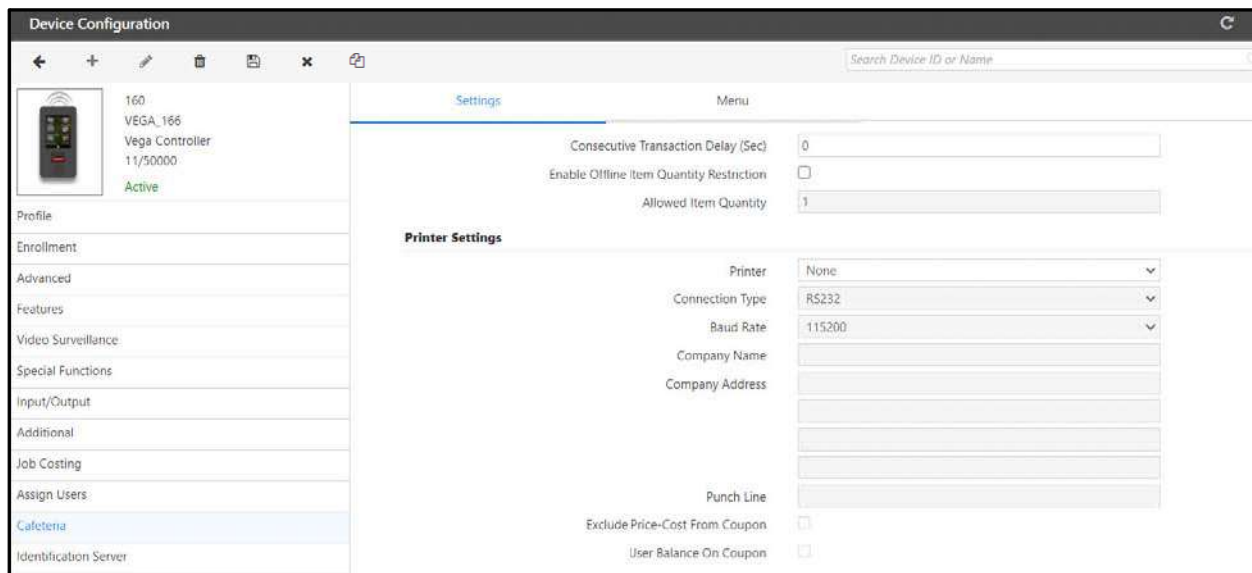
On the Device Configuration page, click the **Cafeteria** tab on the left pane.

To configure the Cafeteria parameters, click the following links:

- [“Settings”](#)
- [“Menu”](#)

## Settings

Click **Settings** tab. The **Settings** page appears.



Configure the following parameters:

- **Consecutive Transaction Delay (Sec):** Enter the time interval after which you wish to allow the second transaction from the same user.

- **Enable Offline Item Quantity Restriction:** Select the check box if you wish to restrict the transaction on exceeding the item quantity while the device is in offline mode.
- **Allowed Item Quantity:** Specify the quantity to be allowed for each item when the device is in offline mode. This will be applicable for each item present in the Menu.

For example, if the Menu has two items Tea and Poha and you have configured the **Allowed Item Quantity** as 2, and if the device is offline, the user/worker will be allowed to consume Tea twice as well as Poha twice.

## Printer Settings

- **Printer:** Select the desired **Printer** as per your site requirements from the drop-down list—EpsonTM88IV, EpsonTM88V, EpsonTMT90, WEPTM400.
- **Connection Type:** Select the Printer **Connection Type** from the drop down list—RS232 (serial), USB.
- **Baud Rate:** Select the appropriate **Baud Rate** from the drop-down list—9600, 19200, 38400, 57600, 115200.
- **Company Name:** Specify the **Company Name** as per your site requirement.
- **Company Address:** Specify the **Company Address** as per your site requirement.
- **Punch Line:** Specify the **Punch Line** as per the site requirements.

The Company Name, Company Address as well as Punch Line will be printed on the Cafeteria receipt dispensed from the selected printer.

- **Exclude Price-Cost From Coupon:** Select this check box, if you wish to exclude the price from the coupon.
- **User Balance On Coupon:** Select this check box, if you wish to print the Current Balance/Current Month Usage and Weekly Remaining Limit on the Cafeteria receipt.

For pre-paid account users, Current Balance and Weekly Remaining Limit will be printed.

For post-paid account users, Current Month Usage and Weekly Remaining Limit will be printed.

For details refer to "[Cafeteria Usage Policy](#)".

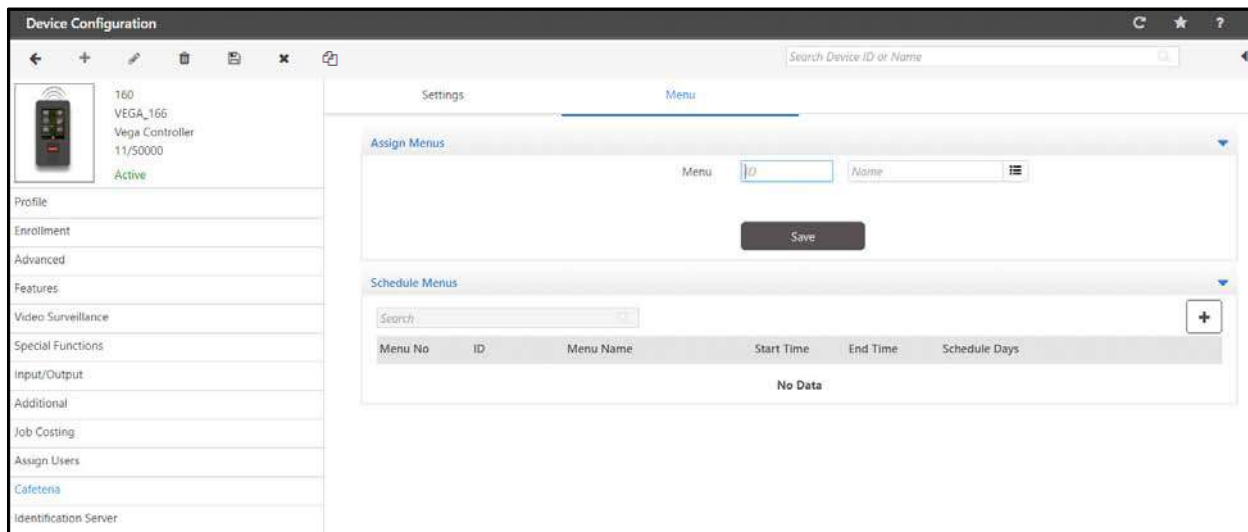
## Menu

COSEC allows the you to assign one or more Cafeteria Menus (Menu 1, Menu 2, Menu 3... upto 99.) to a device. These can be configured by selecting pre-defined menus from the Menu picklist.



To create Menu's, refer to "[Menus](#)" in the Cafeteria Module.

Click **Menu** tab. The **Menu** page appears.



Configure the following parameters:

- **Assign Menus:** Click the **Assign Menus** collapsible panel.
- **Menu:** Click the picklist and select the desired Menu or you can also enter the Menu **ID** or **Name** manually.

Click **Save**.

- **Schedule Menus:** Click the **Schedule Menus** collapsible panel.

Click Add and configure the following:

- **Menu No:** This displays the **Menu No.** after you have saved the Scheduled Menu.
- **ID:** Click the picklist and select the Menu **ID**.
- **Menu Name:** The **Menu Name** is auto-generated.
- **Start Time:** Specify the **Start Time** for which the Menu will be active and is available to users on this door.
- **End Time:** Specify the **End Time** after which the Menu will be not be active and will not be available to users on this door.



*Two Menus cannot be scheduled for the same timing.*

- **Schedule Days:** Select the desired **Days** for which this Menu will be applicable on the door or select **All**, if you wish to apply this Menu for all the days.
- Click **OK** and then click **Save**.

# Identification Server



Identification Server is applicable for Direct Door only.

This tab enables the device to be assigned to a pre-defined Identification Server.

The door has a limited memory capacity for storage of templates so, we can assign an Identification Server which will store the templates for the door and will respond to the door when asked for identification.

For more information on Identification Servers, refer to [“Identification Server”](#).

On the **Device Configuration** page, click the **Identification Server** tab in the left pane.

The screenshot shows the 'Device Configuration' interface. On the left, a sidebar lists various configuration tabs: Profile, Enrollment, Advanced, Features, Video Surveillance, Special Functions, Input/Output, Additional, Job Costing, Assign Users, Cafeteria, and Identification Server (highlighted in blue). The main area displays the 'Settings' for the 'Identification Server' tab. It includes sections for 'Face Recognition' and 'Face Enrollment'. The 'Face Recognition' section has fields for 'Enable FR' (checkbox), 'Face Capturing' (dropdown set to 'Tap & Go'), 'Enable Time Out' (checkbox), 'Free Scan Time Out (Sec)' (input field set to 30), 'IP Camera M/PEG URL' (input field), 'User Name' (input field set to 'Username'), 'Password' (input field), 'FR Mode' (dropdown set to 'Local'), 'Server Address' (input field set to '192.168.50.2'), 'Server Port' (input field set to '12000'), and 'Identification Time-Out Duration (Sec)' (input field set to 4). The 'Face Enrollment' section has a 'Conflict Check' checkbox and a 'Conflict Matching Threshold (Face)' input field set to 02.00.

The screenshot shows the 'Device Configuration' interface, specifically the 'Identification Server' tab. The left sidebar is the same as the previous screenshot. The main area displays the 'Settings' for the 'Identification Server' tab. It includes sections for 'Adaptive Face Enrollment', 'Face Anti-Spoofing', and 'Other Biometric Credentials'. The 'Adaptive Face Enrollment' section has fields for 'Adaptive Face Enrollment' (checkbox), 'Threshold Deviation (Face)' (input field set to 02.0), 'Multi-User Matching Score Deviation (Face)' (input field set to 02.0), and 'Confirm Before Adaptive Face Enrollment' (checkbox). The 'Face Anti-Spoofing' section has fields for 'Face Anti-Spoofing' (checkbox), 'Camera Mount' (dropdown set to 'Wall Mount'), 'Face Anti-Spoofing Mode' (dropdown set to 'Advance'), and 'Face Anti-Spoofing Threshold' (input field set to 62.00). The 'Other Biometric Credentials' section has fields for 'Enable Identification On Server' (checkbox), 'Identification Server' (input field set to 'ID'), 'Name' (input field set to 'Name'), 'Configure Alternate Server Address' (checkbox), 'Server Address' (input field), 'Server Port' (input field set to '11005'), 'Enable Finger Smart Identification' (checkbox), 'Identification Time-Out Duration (Sec)' (input field set to 4), 'Auto Send Enrolled Templates' (checkbox), and 'Default Biometric Group No.' (input field set to 0).

## Face Recognition



Make sure “**Enable FR**” check box is selected and **Basic Access Control** application is selected in *Devices > Device Configuration > Profile > Basic > Optional > Application* in order to edit the parameters in *Identification Server Settings*.

- **Enable FR:** Select this check box to enable the Face Recognition feature on the device.
- **Face Capturing:** Select the desired Face Capturing option — **Tap & Go**, **Free Scan**.
  - **Tap and Go:** If you select this option, user needs to tap on the device screen once. The MJPEG, that is motion recording screen appears. Device will capture and then identify the users face. If during working hours device is idle, then user needs to tap device to scan the face and gain access.
  - **Free Scan:** If you select this option, device will display the MJPEG, that is motion recording screen till the expiry of the Free Scan Time Out timer.
- **Enable Time Out:** Select this check box to enable the time out for the Free Scan Mode and set the time in Free Scan Timer Out (Sec).
- **Free Scan Time Out (Sec):** Specify the **Free Scan Time Out** duration. The valid range is 1 to 999 sec.

In Free Scan method, multiple users can mark their attendance easily during peak entry hours.

For example, if the Free Scan Time Out is set as 30 sec and if the user is identified in 10 sec then the system reloads the Free Scan Time Out timer again. Hence, device remains in the scanning mode.

- **IP Camera MJPEG URL:** Specify the URL for accessing the IP camera to receive the motion stream on the door. For example, <http://192.168.104.48:80/matrix-cgi/mjpeg?profile-no=3>.

If the device is auto-added then the default value will be <http://192.168.1.126/matrix-cgi/mjpeg?profile-no=4>.

- **User Name:** Specify the User Name for accessing the IP camera. For example, admin.
- **Password:** Specify the Password for accessing the IP camera. For example, admin123.

This will fetch the motion stream from camera to device screen. When the users show their face on camera, the face will be captured and after identification, the user will be allowed access and the punch will be marked.

- **FR Mode:** Select the desired **FR Mode** from the drop-down list—Local, Server Assisted.
  - **Local:** In this mode the face templates will be stored in the FR hardware module which can store 1 lakh face templates. The captured face template will be verified with the templates already stored in FR module.
  - **Server Assisted:** In this mode, the face templates will be stored directly in the Server. You must first configure the Identification Server from where the face templates will be matched and identified.



Card will be identified and verified locally by the device irrespective of the FR Mode. Whereas, Finger and Face will be identified and verified based on the selected FR Mode.

When FR Mode is selected as **Local** configure the following parameters:

The screenshot shows the 'Face Recognition' configuration page. The 'FR Mode' is set to 'Local'. A red box highlights the 'Local' mode settings: 'Server Address' (192.168.50.2), 'Server Port' (12000), and 'Identification Time-Out Duration (Sec)' (4). Other visible settings include 'Enable FR' (checked), 'Face Capturing' (Tap & Go), 'Free Scan Time Out (Sec)' (30), 'IP Camera MJPEG URL' (empty), 'User Name' (Username), 'Password' (\*\*\*\*\*), 'Group FR' (unchecked), 'Capture Face of Unidentified User' (unchecked), 'Show Feedback for Unidentified Face' (unchecked), and 'Generate Unidentified Face Event' (unchecked).

- **Server Address/Port:** Specify the **IP Address** and **Port** of the FR Server.
- **Identification Time-Out Duration (Sec):** Specify the **Identification Time-Out** in seconds, after which the face template identification process will stop.  
For example, if **Identification Time-Out Duration (Sec)** is 5 seconds, then the Identification Server will try to identify the face template until 5 seconds and if not found then it will stop and display time-out to the user.

When FR Mode is selected as **Server Assisted**, configure the below fields:

User can either assign a separate or a common Identification Server which is shared by other biometric credentials.

The screenshot shows the 'Face Recognition' configuration page with 'FR Mode' set to 'Server Assisted'. A red box highlights the 'Server Assisted' mode settings: 'Identification Server' (ID and Name fields), 'Configure Alternate Server Address' (unchecked), 'Server Address' (empty), 'Server Port' (11005), and 'Identification Time-Out Duration (Sec)' (4). Other visible settings include 'Enable FR' (checked), 'Face Capturing' (Tap & Go), 'Free Scan Time Out (Sec)' (30), 'IP Camera MJPEG URL' (empty), 'User Name' (Username), 'Password' (\*\*\*\*\*), 'Group FR' (unchecked), 'Capture Face of Unidentified User' (unchecked), 'Show Feedback for Unidentified Face' (unchecked), and 'Generate Unidentified Face Event' (unchecked).

- **Identification Server:** Select an Identification Server using the picklist button to which the device is to be assigned. The configuration of Identification Server is done from **Admin module > System Configuration > Identification Server Configuration** and make sure you start the Identification Service from the service tray. This IP Address of this Identification Server is displayed in **Server Address**.
- **Configure Alternate Server Address:** Select this check box to configure an external IP Address of the FR Identification Server and configure the Server Address.
  - **Server Address:** By default it displays the IP Address of the selected Identification Server. Enter the external network IP address which will be used for accessing Identification Server.
- **Server Port:** Enter the TCP Port number. Default: 11005.
- **Identification Time-Out Duration (Sec):** Specify the duration in seconds after which the face template identification should stop.

For example, if 5 seconds is specified, then the Identification Server will try to identify the template till 5 seconds and if not found then it will stop the identification process and display time-out to the user.

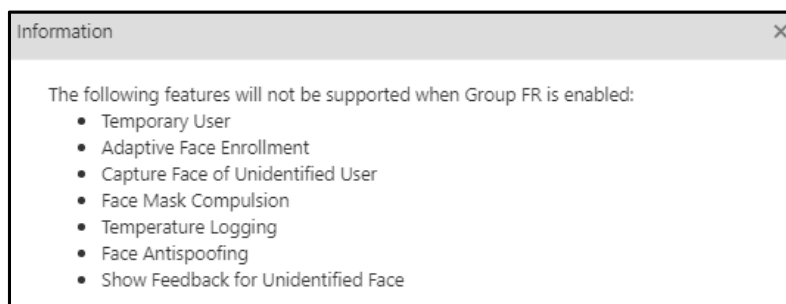
- **Group FR:** Select this check box to enable face recognition feature for multiple users and mark their attendance at the same time via this door. Group FR will be applicable only if you have selected **Free Scan** as the **Capturing Mode**.



*Group FR will work in both FR Modes — Local, Server Assisted Mode.*

*For Group FR (“Mark Group Attendance”) feature to work in Server Assisted Mode, ensure that the desired Identification Service is selected in COSEC Admin > License and Service. For more details refer, Admin Management Portal User Manual.*

Once you enable Group FR, a pop-up appears.



The features listed in the pop-up will not be functional.

- **Capture Face of Unidentified User:** Select this check box to enroll unidentified faces of users via this door.



*For Capture Face of Unidentified User feature to work, ensure that the desired Identification Service is selected in COSEC Admin > License and Service. For more details refer, Admin Management Portal User Manual.*

*If you have enabled the **Capture Face of Unidentified User** feature then make sure that you schedule a task of **Delete Unidentified Face** in Admin > System Utilities> Task Scheduler to avoid storage of excess data in the database.*



- **Show Feedback for Unidentified Face:** Select this check box, if you wish to display a message on the Device display screen to user's whose face is not identified.



*If you wish that events should be generated for Unidentified Face, enable **Generate Unidentified Face Event**.*

*If you have enabled **Group FR**, **Show Feedback for Unidentified Face** feature will not be functional.*

- **Generate Unidentified Face Event:** Select this check box, if you wish to generate events when a user's face is unidentified.

These events can be viewed from **Admin Module > View/Logs > Event View** as well as **Device Module > Reports > Invalid Events**.

If you wish to view the snapshots in the Events/Logs, make sure you have configured "[Configuring IP Camera Parameters](#)" in "[Visual Tagging](#)". Make sure you select the Event as **User Denied- User Not Identified** to view the snapshots for **User Denied- User Invalid** event.



***Generate Unidentified Face Event** is applicable for **Face** credentials only.*

*For VEGA Direct Door, to generate events for all other credentials, make sure **Generate Invalid User Events** is enabled under "[Settings - VEGA as Direct Door](#)" in "[Advanced](#)".*

*For VEGA Panel Door, to generate events for all other credentials, make sure **Generate Invalid User Events** is enabled under "[Settings](#)" tab in "[Advanced](#)" in "[Panel200](#)".*

*If you wish that a message should be displayed on the device display screen for Unidentified Face, enable **Show Feedback for Unidentified Face**.*

## Face Enrollment



*If the **FR Mode** is **Server-Assisted** and you wish to enroll faces from the device, make sure **Enable Face Recognition** is selected in **Users > User Configuration > Face Recognition** and/or **Visitor Management > Visitor Profile > Face Recognition** and/or **Contract Worker Management > Worker Profile > Face Recognition**.*

- **Conflict Check:** Select this check box for the system to check the conflict between the new face of a user and the already (existing) enrolled faces of all the users (available in the database) during the face enrollment process.
- **Conflict Matching Threshold:** Enter the desired Conflict Matching Threshold value in percentage.

The system will consider this value while comparing the face with the face templates already present in the database.

If a conflict is found, that is, if the system detects a face template in the database similar to the new face, then a conflict error will be displayed.

Make sure a higher value is set for this parameter, as it will result in less equivalent matches with the face templates available in the database.



*Make sure the **Conflict Matching Threshold** is set lower than **Matching Threshold** in **Admin module > System Configuration > Identification Server Configuration**.*

For example: Face Enrollment of Suresh

- **Conflict Check** check box is selected.
- **Conflict Matching Threshold** is set as 93%.

Now during the face enrollment of Suresh, the system will check in its database if his face matches with faces of other users available in the database.

- **Case 1:** If Suresh's face matches 92% with Ram, then the system will allow to enroll Suresh's face.
- **Case 2:** If Suresh's face matches 94% with Shyam, then the system will display the conflict error while enrolling Suresh's face.

## Adaptive Face Enrollment

- **Adaptive Face Enrollment:** Adaptive Face Enrollment provides automatic real time face enrollment whenever change is experienced in facial features. By enabling Adaptive Enrollment process parameter, an additional slot will be provided internally to store 10 more face templates of a user. IDS will learn from face recognized, adapt and would take decision of storing new template of a user database. Select this check box to enable Adaptive Face Enrollment for Identification Server.

If you enable Adaptive Face Enrollment, configure the following parameters:

- **Threshold Deviation (Face):** Specify the value of deviation from Matching Threshold in percentage. Based on the value entered for deviation, template for Adaptive Face Enrollment will be decided. Value can be set in decimal.

For example, if Deviation entered is 3% and Matching Threshold is 98% then it will classify template which has matching score between 98 - 95.

- **Multi-user Matching Score Deviation (Face):** Enter the value of deviation from matching score between 2 different users while Adaptive Face Enrollment.

Difference between matching scores of templates will be considered, when we have templates of two or more users falling under the specified deviation. Value can be set in decimal.

For example, lets consider the following parameters:

- Threshold Value = 98%
- Threshold Deviation= 3%

So, the result will display all matching templates having matching score between range 98 to 95.

- Now if you have set Multi-user Matching score deviation = 0.5%.

If 5 best templates of 2 users fall between 98 -95% range as follows.

<i>User</i>	<i>Matching Score</i>
<i>User 1</i>	<i>97.8</i>
<i>User 1</i>	<i>97.6</i>
<i>User 1</i>	<i>97.4</i>

User 2	97.25
User 2	97

As we have obtained templates of 2 users in which user 1 is having template of highest matching score, so will make a difference between lowest score template of user 1 and highest matching score template of user 2.

$97.4 - 97.25 = 0.15$ ; this is less than 0.5.

As difference is less than 0.5, user 1's template having matching score 97.8 for adaptive enrollment will not be used.

Both, Threshold Deviation and Multi-user Matching score deviation will act as two filters to fetch appropriate template for Adaptive Enrollment.



*We recommend to set the Multi-user Matching Score Deviation (Face) as a higher percentage.*

*For example, if Multi-user Matching Score Deviation (Face) is set as 2.0, it reduces the probability of enrolling a particular user's face template in some different user's enrolled faces.*

- **Confirm before Adaptive Face Enrollment:** Select this check box, if face enrolled using Adaptive Face Enrollment requires a confirmation.



*Faces enrolled under Adaptive Enrollment process will be synced automatically with the IDS, but when IDS is restarted due to any reason, the adaptive faces which are not synced will be removed by default.*

## Face Anti-Spoofing

- **Face Anti-Spoofing:** To use this feature, make sure **Enable FR** check box is selected in **Devices> Device Configuration> Identification Server > Face Recognition > Enable FR**.

Select the **Face Anti-Spoofing** check box to enable this feature and configure the following parameters:

- **Camera Mount:** Select the desired Camera Mounting option from the drop-down list — **Wall Mount** or **Ceiling Mount**.

There is an impact of Camera Mounting in face liveness detection. Default: Wall Mount.



*For Wall Mount, make sure the distance between camera and user is less than 3 feet for proper detection of face.*

- **Face Anti-Spoofing Mode:** Liveness Detection helps to limit the fierce risk of spoofing attacks by using several anti-spoofing approaches. Along with the configurations to be done for Face Anti-Spoofing, you also need to take care of the recommended settings for Liveness Verification and for Face Recognition as well as the Camera Settings, refer [“Recommendations for Liveness Verification”](#), [“Recommendations for Face Recognition”](#) and [“Recommended Camera Settings for Liveness Verification”](#).

Select the **Face Anti-Spoofing Mode** for liveness detection from the drop-down list—Basic, Moderate, Advance.



*If Ceiling Mount. is selected as the Camera Mount option, only Basic option of Face Anti-Spoofing Mode is applicable.*

**Basic:** The Basic Mode detects face as well as photos from the mobile phones. Select this option, when the distance between Camera and Face is more than 3 feet.

**Moderate:** The Moderate Mode analyzes the texture of face. Select this option, when the distance between Camera and Face is less than 2 feet.

**Advance:** The Advance Mode combines the features of **Basic Mode** and **Moderate Mode** of Face Anti-Spoofing. Select this option, when the distance between Camera and Face is more than 1 feet and less than 2 feet. Default: **Advance**.

- **Face Anti-Spoofing Threshold:** Enter the Face Anti-Spoofing Threshold value in percentage within the range from 1.00 to 99.99 to identify user's face liveness for considering him/her as genuine person. As per the Face Anti-Spoofing Mode that you have selected, the Threshold value will vary.

## Other Biometric Credentials

- **Enable Identification On Server:** Select this check box to enable identification of palm/finger templates on this device.
- **Identification Server:** Select an Identification Server using the picklist to which the device is to be assigned. The configuration of Identification Server is done from **Admin module > System Configuration > Identification Server Configuration** and make sure the Identification Service is started from the service tray. The IP Address of this Identification Server is displayed in **Server Address**.
- **Configure Alternate Server Address:** Select this checkbox to configure external IP address of Identification Server.
- **Server Address:** By default it displays the IP Address of the selected Identification Server. Enter the external network IP address which will be used for accessing identification server.
- **Server Port:** Specify the Server Port number. Default:11005.
- **Enable Finger Smart Identification:** Select this check box to enable the identification of fingerprint templates through Identification Server.
- **Identification Time-Out Duration (Sec):** Enter the duration in seconds after which the fingerprint template identification will stop and time out will be displayed to the user. For example, if 5 seconds is specified, then the identification server will try to identify the template till 5 seconds and if not found then it will stop the identification and display time out to the user.
- **Auto Send Enrolled Templates:** Select this check box to enable any enrolled templates to be saved both in the COSEC database as well as saved locally in the configured Identification Server. This enables prompt identification of user on enrollment.
- **Default Biometric Group No.:** Specify the default Biometric Group Number to be assigned to the device. It is a number allotted to a device to be assigned to the Identification Server. This enables the Identification Server to match the template against only those devices that belong to the corresponding biometric group. This reduces false detection as well time to search template.

## Accessing the Door using QR code

The user can access the COSEC device using COSEC APTA installed in the mobile device. If the user has rights for COSEC APTA and access to this device is allowed to the user, then he can use his mobile device to scan the QR code which constitute the details of the door.

There is icon for QR code on COSEC APTA application. Clicking that icon will open the camera in your mobile. Now using the mobile camera you can scan the device QR code. The COSEC door will open after verifying the security key and access policies assigned to the user.

### Steps to create a QR code

**Step 1:** Enter details in JSON format

```
{"version":"x","ip": "x.x.x.x","port":"x","pdid":"x","mode":"x"}
```

Valid values:

Field	Field range	Default Value	Remark
version	1-255	1	
ip	0.0.0.0-255.255.255.255	0.0.0.0	
port	0-65535	0	
pdid	0-255	0	If door is in direct door mode then, then PDID will be 0  If door is in panel door mode then, PDID will have values from 1-255
mode	0,1	0	0= for entry mode 1=for exit mode



#### Notes for Step1

- If door is in direct door mode enter IP and port of the direct door
- If door is a panel door, then enter IP and port of the panel door and in the pdid specify the door id which is to be accessed.

**Step 2:** Encrypt the JSON string using key "matrix12" with simple DES/ECB mode.

**Step 3:** Encode the encrypted string using Base 64.

**Step 4:** Use this string to generate QR code through any third party software.

# Wireless Door

The Device Configuration page for Wireless Door appears as shown below.

Enter the MAC address of the door. The IP address will be displayed automatically once the device comes online in Monitor.

To add Devices automatically, go to Admin Module> System Configuration> Global Policy> Device. Enable the “Auto Add New Devices” checkbox. Once the device is connected in network, it will come online in COSEC Monitor.



*The Monitor Service must be running while adding the device to COSEC.*

Once the device is configured, click the **Save** button to save the configuration.

To know more about configuring devices, click on the links for different tabs of Device configuration.

- [“Profile”](#)
- [“Enrollment”](#)
- [“Advanced”](#)
- [“Features”](#)
- [“Video Surveillance”](#)
- [“Special Functions”](#)
- [“Input/Output”](#)
- [“Additional”](#)
- [“Job Costing”](#)
- [“Assign Users”](#)

- *“Cafeteria”*
- *“Identification Server”*

## Profile

This section enables the user to set up the basic profile for any new device. Setting up a door profile involves defining basic parameters to set up any door controller device.

To do this, On the **Device Configuration** page, select the **Profile** tab. The Profile can be configured in the following sections:

- “Basic”
- “Readers”
- “Access Settings”
- “General”

## Basic

The **Basic** section for “Wireless Door as Direct door” is shown below:

Configure the following options as required:

- **Sequence Number** - This is a system generated sequence number for each new device.
- **Device**- Specify a name that can be assigned to the door. The Door ID is auto-generated by the system.
- **IP Address** - This is the IP address assigned to the door. Once the device connection is established, this field will automatically display the door IP address.
- **MAC Address** - Specify the MAC Address of the door.



*MAC address of door is required while manually adding the door to the COSEC Monitor. Note the MAC address from the device when it is powered on.*

- **Active** - Check the box to activate the device on the network.





To add the Device automatically, go to Admin Module> System Configuration> Global Policy> Device. Enable the **“Auto Add New Devices”** checkbox.

The device will be added automatically but make sure you enable the **Active** checkbox in order to connect the device to the network. Once the device is connected to the network, it will come online in COSEC Monitor.

The **Basic** page also offers an **Optional** tab which provides optional configurations as shown below:

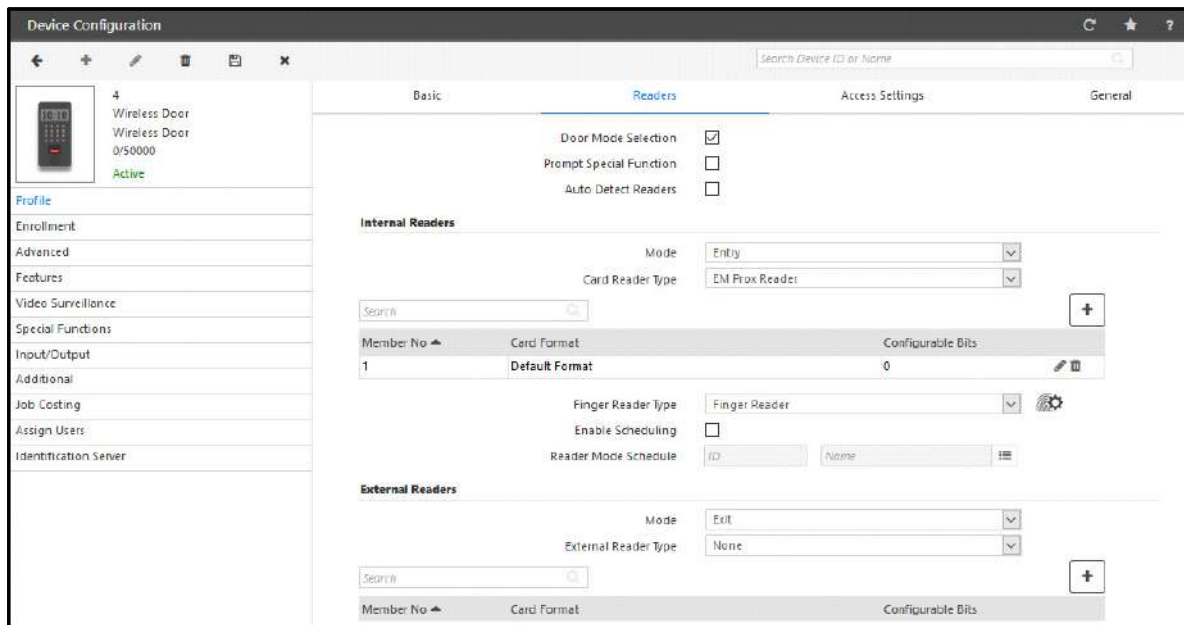
- **Site** - Select the site to which this door is to be assigned from the site picklist window. Site is created from Devices> Masters> Site.
- **Application** - Select the application type for which the device is to be used. The options are **Basic Access Control**, **Advanced Access Control** and **Cafeteria**. All devices set to **Cafeteria** will subsequently be available for Cafeteria configuration.
- **Access Mode** - Defines the type and combination of credentials required to identify and validate a user at the Door Controller. Select the appropriate credential combination from the drop down list.

The options available are:

- Any one
- Card
- Card + Biometrics
- Card + Biometrics + PIN
- Card + PIN
- Biometrics
- Biometrics + PIN
- Biometrics then Card
- Card then Biometric
- None
- **Consider for Attendance** - Select this checkbox if the events sent by this door are to be considered for Time and Attendance data processing. If this option is disabled, then the system would consider all events coming from the door as access control events.
- **Alert Messages** - Select this checkbox to enable the application to send alerts based on events from this door.

## Readers

Readers are important hardware components in a biometric door device. They may be internal or external. This section enables the administrator to configure both internal and external readers for a door as shown.



The following parameters are available for configuration:

**Door Mode Selection** - If this option is enabled, then user will be prompted to select punch type as IN or OUT while punching on the device.

Eg: When a door is in Entry mode, your punches will always be in Entry side. But if you want to mark the punch in ext mode then you can select the door mode if “Door Mode Selection” is enabled.

If not selected, user will need to enable Scheduling to set reader mode of door as entry or exit as per user-defined schedules. For information on creating Reader Mode Schedules, **see Devices > Masters > Reader Mode Scheduler**.

**Prompt Special Function**- This can be enabled only when “Door Mode Selection” is enabled. It will provide selection of special function on device screen and based on the selection of particular type of special function, job codes for JPC user will be prompted.

**Auto Detect Readers** (for direct doors only) - Select this checkbox to enable auto detection of Readers on a door controller connected to the server.

### Internal Readers

This option allows the configuration of the Internal Reader for the selected door.

- **Mode:** Select the Mode as **Entry** or **Exit** from the drop down list.
- **Card Reader Type;** Select the Card Reader Type from the following options:
  - EM Prox Reader
  - HID Prox Reader
  - MiFare Reader
  - HID iClass-U Reader
  - HID iClass-W Reader

- **Card Format:** The single or multiple card formats can be assigned to the readers of direct door. The default card format is assigned to device as shown in the grid. If no other card format is assigned to device; then this default format will be applied.



The formatting of card is described in *Devices > Master > Card Format*

### Multiple Card Format

To assign multiple card formats to device click on **Add** button. Then click the picklist to select the card format. And click **OK** to save the format.

Member No ▲	Card Format	Configurable Bits
1	Default Format	0

Member No ▲	Card Format	Configurable Bits
2	Format1	0
1	Default Format	0

Similarly you can add maximum 5 card formats. When the card format is saved, the Configurable bits of that format as configured from *Masters > Card format* will be displayed here. Multiple Card format configurations will be dispatched to door separated by '**Format ID**' that is 'Member No.' along with all other format related parameters.


Internal Readers

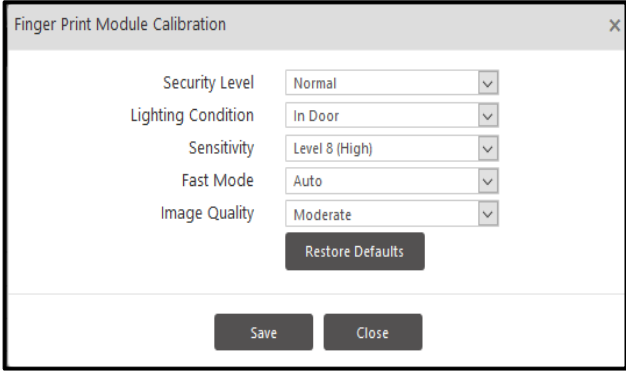
Mode: Entry

Card Reader Type: EM Prox Reader

Member No ▲	Card Format	Configurable Bits
1	Default Format	0
2	Format1	26
3	Format2	32

- Select the **Finger Reader Type** as **Finger Reader**.

Click the **FP Reader Configuration**  button to set the **Security Level**, **Lighting Condition**, **Sensitivity**, **Fast Mode**, **Image Quality** and **Restore Defaults** for the selected FP Reader as shown.



### Finger Print Module Calibration

- **Security Level:** Security level specifies FAR (False Acceptance Ratio). Since FAR and FRR (False Rejection Ratio) is in inverse proportion to each other, FRR will increase with higher security levels.  
  
For regular Time-Attendance system “**Normal**” level can be selected. For high security areas requiring complete or maximum matching of template, “**Highly Secure**” level must be selected. For approximate matching of template, “**Secure**” level can be selected.
- **Lighting Condition:** Optical sensors are sensitive to lighting condition. With this parameter, users can tune optical sensors to be adapted for their lighting environment. Select the In Door or Out Door option based on the device location.
- **Sensitivity:** Specifies sensor sensitivity to detect a finger. On high sensitivity, the module will accept the finger input more easily. Level 8 has the highest sensitivity.
- **Fast Mode:** Fast Mode parameter can be used to shorten the matching time with a little degradation of authentication performance. In typical cases, Fast Mode 1 is 2 to 3 times faster than Normal mode while Fast Mode 5 is 6 to 7 times faster than Normal mode. There is also an Auto mode.
- **Image Quality:** When a fingerprint is scanned, the module will check if the quality of the image is adequate for further processing. Image quality parameter specifies the strictness of this quality check. Strongest option might lead to higher number of finger rejections during the enrollment process.
- Click on the **Restore Defaults** button to return the field values for this page to default values if needed.
- Click on the **Save** button.
- **Enable Scheduling:** Select this checkbox to **Enable Scheduling** to set reader mode of door as entry or exit as per user-defined schedules.

## External Readers

This option allows the configuration of the External Reader for the selected door.

- **Mode:** Select the Mode as **Entry** or **Exit** from the drop down list.
- **External Reader Type:** Select the desired type of External Reader from the drop-down list.
- **Card Format** - Select a card format to be applicable for external readers of the device. This is applicable for all direct doors and all Panel doors. For multiple format description [See "Multiple Card Format" on page 1177.](#)
- **Exit Switch** - Select this checkbox to enable the use of **Exit Switch**.
- **User/Visitor Access Mode** - Select the access mode from the options shown below:
  - Any One
  - Card
  - Biometrics
  - Card + Biometrics
  - Biometrics then Card
  - None
- **Access Control On Exit Mode** (only for direct door) - Select this checkbox to enable access control on the exit mode.

## Access Settings

This section is available for direct doors. The **Access Settings** page appears as shown below:

The screenshot shows the 'Device Configuration' window with the 'Access Settings' tab selected. The left sidebar lists various configuration categories, and the main area displays settings for a 'Wireless Door' (ID 4, 4/50000, Active). The settings include:

- Universal Time Zone:** (GMT+05:30)Chennai, Kolkata, New Delhi, Mumbai
- Time Format:** 24 Hours
- Auto Synchronize with NTP:** ☒
- Preferred NTP Server:** (empty field)
- Working Days:** Sun, Mon, Tue, Wed, Thu, Fri, Sat, Holiday (all checked)
- Working Hours(HH:MM):** 00:00 to 23:59
- Holiday Schedules:** Four rows for Holiday Schedule 1 through 4, each with a number field and a schedule selection dropdown.

- **Universal Time Zone** - Select the geographic time zone in which the DOOR will operate.
- **Time Format** - Specifies the time format to be displayed on Door Controller LCD display. The formats available are:
  - 24 Hours

- 12 Hours

Select the relevant option from the drop down list as per the site requirements.

### Auto Synchronize with NTP

If Date and time is to be automatically synchronized as per the **Preferred NTP Server** (predefined or user-defined NTP server address) selected by user, then you must enable **Auto Synchronize With NTP** checkbox.

Independent of the mode set from server as Auto or Manual, the user can change the date and time settings from device webpage, which will be reflected on device display.

- When Auto Synchronization with NTP is disabled Preferred NTP Server field will be disabled.
- When Auto Synchronization with NTP is enabled,
  1. You can specify the Preferred NTP server of your choice. In this case device will first try to get Date and Time from that server address.  
If it does not get Date and Time in three tries; device will check from pre-defined NTP servers.  
If you have entered one of the three pre-defined NTP servers(ntp1.cs.wisc.edu , time.windows.com , time.nist.gov); then device will first check that server first.  
If it receives updated Date and Time then Updated Date and Time will be reflected on device webpage and display screen.
  2. You can keep the Preferred NTP server as blank. In this case device will check for Date and Time from the first NTP server.

If user has manually entered Date and Time from webpage or Device Menu then those values of Date and Time will be reflected on device webpage and display screen.

In the case of the **Manual** option the administrator can manually update the time on the Door with that of the system time as and when required. This can be accomplished from the COSEC Monitor and control application.

- **Working Days** - Specify the days on which the default working hours should be applicable. Check the relevant boxes to specify the active days.
- **Working Hours (HH:MM)** - Define the default working hours in HH:MM format.
- **Holiday Schedule** - This section allows the administrator to assign up to four holiday schedules to the device by using the Holiday Schedule picklist.



*If the same holiday schedule is configured for a user and for the door controller on which the user is assigned, then the user's attendance marking on this device, on any of the scheduled holidays will always be marked as a holiday.*

## General

The **General** page appears as follows. Enter all general details applicable to the device in this section.

Device Configuration

Device ID: Wireless Door 0/30000  
Active/Inactive

Basic Readers Access Settings **General**

Mute Buzzer ☐

**Allowed Acknowledgement**

Display Duration (ms): 3000  
LED - Buzzer Duration: Long

**Denied Acknowledgement**

Display Duration (ms): 3000  
LED - Buzzer Duration: Long

Enable Display Messages ☐

Custom Birthday Message: Happy Birthday

Display Message 1  
Schedule: 00:00 - 11:59  
Message: Good Morning

Display Message 2  
Schedule: 12:00 - 15:59  
Message: Good Afternoon

Display Message 3  
Schedule: 16:00 - 20:59  
Message: Good Evening

Display Message 4  
Schedule: 21:00 - 23:59  
Message: Good Night

Multi-Language Support ☐

- **Mute Buzzer** - User can mute or unmute the door buzzer by checking or clearing the box respectively. This is applicable for both Direct and Panel door.
- **Allowed Acknowledgment**
  - **Display Duration (ms)** - Define the time duration in between 500 to 3000ms till which the 'Acknowledgment Allowed' message will be displayed.
  - **LED - Buzzer Duration** - Select the time duration as Long, Medium or short for the LED Buzzer.
- **Denied Acknowledgment**
  - **Display Duration (ms)** - Define the time duration in between 500 to 3000ms till which the 'Acknowledgment Denied' message will be displayed.
  - **LED - Buzzer Duration** - Select the time duration as Long, Medium or short for the LED Buzzer.



The below mentioned features are available in direct door only.

- **Enable Display Messages** - This feature allows the user to enable custom birthday message and display messages to be displayed on the door device. Upto 4 display messages can be configured for a door.
- **Custom Birthday Message**- Enter the birthday message which would appear on the door when the user punches on the door on his birth date.

The valid values are

**A-Z**

**a-z**

**0-9**

**`~!@#\$%^&\*()\_+-={}|\|:;?<>.,\''**

- **Display Message** - Enable each display message individually by selecting this checkbox.
- **Schedule** - For each message, the user needs to define the time period between which this message is to be displayed.
- **Message** - Enter the message to be displayed in this field. Maximum 21 characters allowed.
- **Multi-Language Support** - Select this checkbox to enable multi-language support for the selected device.

The **Display From** field shall display the reading order for the selected language.



*However Wireless Door will support languages with english fonts (A-Z,a-z) only.*



## Enrollment



The Enrollment section is not available for panel doors.

The Enrollment page appears as shown below.

The screenshot shows the 'Device Configuration' window for a device named '3 wireless Wireless Door 11/50000' which is 'Active'. The 'Enrollment' tab is selected in the left sidebar. The main area shows the following settings:

- Enroll From Device:** ☒ (checked)
- Enrollment Mode:** ReadOnlyCard (dropdown)
- Template Per Finger:** Single Template/Finger (dropdown)
- Max Number Of Fingers:** Ten (dropdown)
- Number of Fingers:** One (dropdown)
- Number Of Cards:** One (dropdown)
- Enable Self-Enrollment:** ☐ (unchecked)

- **Enroll from Device** - Select this check-box to enable the enrollment of user from the door controller. When this check-box is enabled, 'Enroll User' special function on that device will get active as shown below.

If 'Enroll User' special function & 'Enroll From Device' check-box both are inactive in device configuration, then on activating 'Enroll User' special function, 'Enroll From Device' check-box will be enabled.

The screenshot shows the 'Device Configuration' window for the same device, but with the 'Special Functions' tab selected. It displays a table of functions:

No.	Function Name	Active	JOB Selection	User Group	Card-1
1	Official Work - IN	No	No	All	
2	Official Work - OUT	No	No	All	
3	Short Leave - IN	No	No	All	
4	Short Leave - OUT	No	No	All	
5	Regular - IN	No	No	All	
6	Regular - OUT	No	No	All	
7	Break End	No	No	All	
8	Break Start	No	No	All	
9	Overtime - IN	No	No	All	
10	Overtime - OUT	No	No	All	
11	Enroll User	Yes	No	All	
12	Enroll Special Card	No	No	All	

- **Enrollment Mode** - Select the Credential from the dropdown list that can be enrolled using the special function at the DOOR. The options are **ReadOnlyCard**, **SmartCard**, **Biometrics** and **BiometricsThenCard**.
- **Enrollment Using** - Select the option **User ID** or **Reference No.** using which enrollment will be done.

- **Template Per Finger** - This parameter displays the values as configured at the global level. This field is not user editable from this page.
- **Max Number of Fingers** - This parameter displays the values of the maximum number of fingers configured at the global level. This field is not user editable from this page.
- **Number of Fingers/Cards** - Select the number of cards or fingerprints to be enrolled based on the credential option selected in the **Enrollment Mode** parameter.
- **Enable Self-Enrollment** - Select this checkbox to enable the self-enrollment feature on this door.

## Advanced

The Advanced tab allows the user to configure some advanced parameters such as access control settings, alarms and device timers.

To access this, After selecting the device, Select the **Advanced** tab from **Device Configuration** page. The advanced settings can be configured from following sections:

- *“Settings”*
- *“Alarms”*
- *“Timers”*

## Settings

The **Advanced Settings** page for Wireless Door as a Direct Door appears on your screen as shown below:

The screenshot displays the 'Advanced' settings tab for a 'Wireless Door' device. The left sidebar lists navigation options: Profile, Enrollment, Advanced (selected), Features, Video Surveillance, Special Functions, Input/Output, Additional, Job Costing, Assign Users, and Identification Server. The main content area is divided into sections: 'Settings' (active), 'Alarms', 'Timers', and 'Wiegand'. Under 'Settings', there are checkboxes for 'Generate Exit Switch Events', 'Generate Invalid User Events', 'Generate Sequential IN-OUT Events', 'Two Credentials Required', and 'Show Pin'. Below these are 'Allow Exit When Door Lock' and 'Auto Relock' checkboxes, followed by an 'Auto Relock Timer (Sec)' input field set to 3. The 'Enable Additional Security' section is currently 'Disabled'. The 'Enable Smart Identification' section shows 'Access Level' set to 8 and 'Access Mode' set to 'Card'. The 'Auto Acknowledge Alarm' section has a checkbox and an input field set to 10 seconds. The 'Facility Code' is set to 1. Below the main settings, there is a section for mobile access: 'Allow Access Through Mobile' is checked, 'Mobile Entry Access Mode' is set to 'Mobile Only', and 'Mobile Exit Access Mode' is also set to 'Mobile Only'.

The following parameters are available for configuration:

- **Generate Exit Switch Events** - Select this checkbox to enable the door to generate events everytime the exit switch is used.
- **Generate Invalid User Events** - Select this checkbox to enable the door to generate events for invalid user inputs.
- **Generate Sequential IN-OUT Events** - Select this checkbox to generate user punches on device as the sequential IN-OUT events irrespective of whichever mode in which device is functioning.
- **Two Credentials Required**- Select this checkbox to enable the feature of verifying 2 credentials mandatorily for users allowed to By-pass finger/palm.
- **Show Pin**- Select this checkbox to display the characters of PIN when the PIN is entered on device.
- **Allow Exit when Door Lock** - Select this checkbox if users are to be allowed to exit even when the Door relay is in locked condition.
- **Auto Relock** - Select this checkbox to allow the door to relock immediately when the door status changes to close after normal open irrespective of the defined pulse time. However, it is supported only if a door sense is installed and enabled.
- **Auto Relock Timer** - Specify the time in seconds for the Auto Relock operation. Valid Range: 1 to 65535.

- **Enable Additional Security** - Select this checkbox to enable additional security at the selected Door Controller.
- **Additional Security Code** - Enter a code (ranging from 1 to 65535) in the field provided. Re-enter the code to confirm.



*Changing this value can affect the SI function. Click on the **Default Code** button to reset the **Additional Security Code** to the value set in the **Global Additional Security Code** field on the Global System Policy page.*

- **Enable Smart Identification** - Select this checkbox to enable this functionality at the selected Door Controller and select the **Access Level** and the **Access Mode** from the drop down list.
- **Auto Acknowledge Alarm** - Select this checkbox to enable the auto-acknowledgment of all alarms for this device.
- **Auto Acknowledge Alarm (sec)** - Set the time in seconds for the Auto Acknowledge Timer. The wait timer will start and on expiry of the timer, the alarm buzzer will stop automatically.
- **Facility Code** - Set a value for Facility Code to be set for access modes other than “Card”, if Facility Code is expected in Wiegand Output. This will be applicable to all direct doors except Door V1 and V2.
- **Allow Access Through Mobile**- Check the box to allow the access to device using COSEC ACS App.
- **Mobile Entry/Exit Access Mode**- Select the entry and exit door access mode from the options of **Mobile Only**, **Mobile then Biometrics** and **Mobile then Card**.



*If User Access Mode is selected as “None” in Zone Configuration and Mobile Access Mode is selected as “Mobile Then Biometrics” then door can be accessed through Mobile and then Biometric credential.*

## Temperature Logging

- **Enable:** Enable the temperature logging feature on the zone.
- **Sensor Type:** Select the type of thermal sensor integrated in the device. There are three sensors: *AST*, *Web-Based* and *FEVOBOT*. Default sensor set is *FEVOBOT*.
- **Sensor Interface:** Select the interface on which device will communicate with the sensor.  
For Sensor Type-AST  
Sensor Interface options will be: RS-232 and USB  
For Sensor Type- Web-based  
Sensor Interface options will be: HTTP/S  
For Sensor Type-FEVOBOT  
Sensor Interface options will be: USB
- **Emissivity:** Set the emissivity parameter for Sensor. This parameter should only be visible when Sensor Type is AST. Default value is 0.95.  
It is used to define accuracy in sensor to detect temperature of different skin or objects.  
Not applicable for FEVOBOT.
- **Calibration Parameter:** Set the calibration parameter for the thermal sensor.  
On click of + the value should increase by 0.1 and on click of – it should decrease by 0.1.

Not applicable for FEVOBOT.

- **Approach to Sensor Wait-Timer:** Time for which the device will wait for user to approach the device before starting Temperature Detection.
- **Temperature Detection Time-Out:** The timer till which temperature detection will be done for the user and if valid temperatures are not found till the expiry of timer then timeout will be declared.
- **Tolerance between consecutive readings:** The Tolerance range of reference temperature within which the consecutive readings are considered to be valid user temperature readings. If current temperature doesn't fall in tolerance range the reference temperature is updated with the current temperature and the process continues.  
Not applicable for FEVOBOT.
- **Consecutive readings count within tolerance:** The Tolerance range of reference temperature within which the consecutive readings are considered to be valid user temperature readings. If current temperature doesn't fall in tolerance range the reference temperature is updated with the current temperature and the process continues.  
Not applicable for FEVOBOT.
- **Minimum Temperature for Access:** The minimum temperature value that should be detected is to be considered as valid temperature.  
It should be less than threshold temperature. If user tries to enter a value equal to or greater than threshold temperature validation should be shown.  
The default value, unit and range should be updated based on the Temperature unit set on Panel.
- **Temperature Threshold:** To set the threshold value of the temperature. The default value, unit and range can be updated based on the Temperature unit set on Panel.
- **Restriction Type:** To set restriction type as soft/hard.
- **Bypass if Sensor Disconnected:** Enable this check-box to give provision of bypassing the feature if sensor connectivity is lost.

## Alarms

In Alarm tab, you can assign below list of alarms to the door.

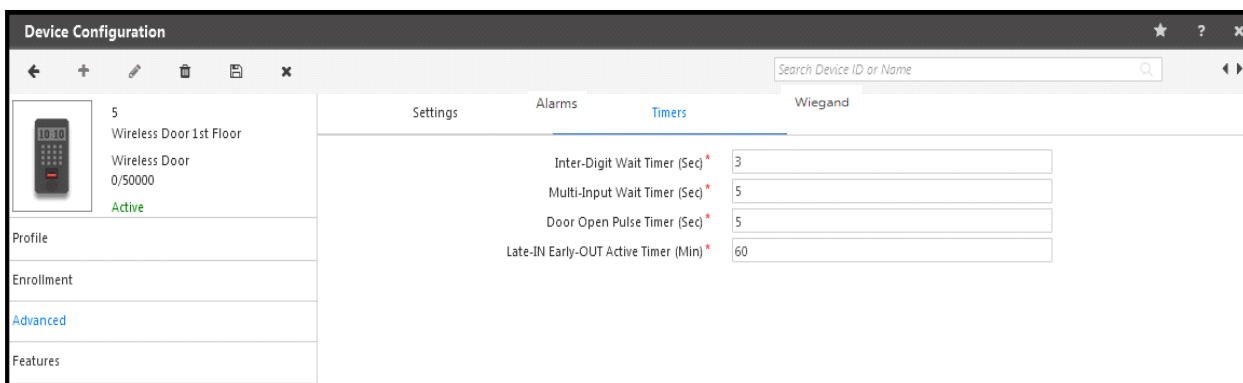
### For Direct Door

Settings	Alarms	Timers
	Tamper	<input type="checkbox"/>
	Door Abnormal	<input type="checkbox"/>
	Door Force Open	<input type="checkbox"/>
	Door Fault	<input type="checkbox"/>
	Panic	<input type="checkbox"/>
	Temperature Threshold	<input type="checkbox"/>

Enable the respective checkbox of alarms which is to be selected.

## Timers

This section allows the configuration of various types of pre-defined device timers which can trigger off specific responses. In COSEC, timers are often used to control door behavior and for triggering alarms. The **Timers** page appears on your screen as shown below:



- **Inter-Digit Wait Timer (sec)** - Specify the time period in seconds between two key inputs on the device keypad. On expiry of this timer, the system considers the user input to be complete and is ready for the next input.
- **Multi-Input Wait Timer (sec)** - Specify the time in seconds for which system needs to wait for the second credential input from the user when more than one credential is to be used to grant access.



*We recommend you to set the timer value as greater than or equal to 10 seconds to avoid access denial issues to users. This is applicable when the system reads the credentials (biometric) from the user's Smart Cards.*

- **Door Open Pulse Timer (sec)** - Specify the time in seconds (1 to 65535) for the door to be energized for a valid credential. If the opened door does not return to a closed state before the expiry of this timer, the door will generate a "Door Abnormal" alarm.
- **Late-IN Early-OUT Active Timer (min)** - Specify the time in minutes for which the Late-IN and Early-OUT special functions will remain active after being enabled at the Door Controller.

### Door Access using QR code

The user can access the COSEC device using COSEC APTA installed in the mobile device. If the user has rights for COSEC APTA and the access to the device is allowed for the user, then he can use his mobile device to scan the QR code which constitute the details of the COSEC door.

There is icon for QR code on COSEC APTA application. Clicking that icon will open the camera in your mobile. Now you can show the mobile camera to scan the QR code. The COSEC door will get opened after verifying the security key and access policies of the user.

### Steps to create a QR code

Step 1: Enter details in JSON format

```
{"version":"x","ip": "x.x.x.x","port":"x","pdid":"x","mode":"x"}
```

Valid values:

Field	Field range	Default Value	Remark
version	1-255	1	
ip	0.0.0.0-255.255.255.255	0.0.0.0	
port	0-65535	0	
pdid	0-255	0	If door is in direct door mode then, then PDID will be 0  If door is in panel door mode then, PDID will have values from 1-255
mode	0,1	0	0= for entry mode 1=for exit mode



**Note:**

**Step1a.** If door is in direct door mode enter IP & port of the direct door

b. If door is a panel door, then enter IP & port of the panel door and in the pdid specify the door id which is to be accessed.

**Step 2:** Encrypt the JSON string using key "matrix12" with simple DES/ECB mode.

**Step 3:** Encode the encrypted string using Base 64.

**Step 4:** Use this string to generate QR code through any third party software.

## Features

The Features tab allows the user to enable certain Access Control features for a device



*The Features tab is available only with the Access Control Module license.*

To access this, After selecting the device, Select **Device Configuration> Features**. The access control features for the device can be set from the following two sections:

- "Set1"
- "Set2"

## Set1

This page allows the configuration of three rules - **Absentee Rule**, **Occupancy Control** and **Use Count Control**. The page appears as shown below.

Set1	Set2
<b>Absentee Rule</b>	
Enable	<input checked="" type="checkbox"/>
<b>Occupancy Control</b>	
Enable	<input checked="" type="checkbox"/>
Maximum Occupancy Limit	9
Minimum Occupancy Limit	1
Zero Occupancy	<input checked="" type="checkbox"/>
<b>Use Count Control</b>	
Enable	<input checked="" type="checkbox"/>
Use Count Limit (Per minute)	
Duress Detection	<input checked="" type="checkbox"/> 10

- **Absentee Rule** - Select this checkbox to **enable** this feature at the door. This rule sets the maximum number of days for non-use of a credential. On expiration of days limit, the user will be automatically blocked.  
For configuring the rule *See Access Control> Absentee Rule*.
- **Occupancy Control** - Select this checkbox to **enable** the feature at the door and specify maximum number of users to be allowed within the controlled area after which a user exit is required to enable access to another user. Also specify the **Minimum Occupancy Limit** i.e. the minimum number of occupants the designated zone should have, and enable/disable the **Zero Occupancy** option to determine whether the designated zone should be allowed to be empty or not.  
For configuring the rule *See Access Control> Occupancy Control*.
- **Use Count Control** - Select this checkbox to **enable** the feature at the door and specify the maximum number of uses per minute.  
For configuring the rule *See Access Control> Use Count Control*.  
You can enable Duress Detection on the door. The default duress detection code is displayed which is used to generate the duress alarm which informs that the user is forced to open the door under threat.  
For details *See Device Configuration (Panel200)> Features> Set3> Duress Detection*

## Set2

This page allows the configuration of three rules - **First-IN User Rule**, **Anti-Pass-Back (APB)** and **2-Person Rule**. The page appears as shown below.



- **First-IN User Rule** -Select this checkbox to **enable** the feature at the direct door and select the First-In User group which would be valid at the door.  
For configuring the rule See *Access Control> First- In User Rule> Assignment*
- **Anti-Pass Back (APB)** - Select this checkbox to enable the feature at the direct door.
  - **On Entry:** Check this box so that the system monitors the entry reader for APB violation.
  - **On Exit:** Check this box also so that the system monitors the entry as well as the exit readers for APB violations.
  - **Hard/Soft:** Select the restriction type as Hard or Soft option from the drop down options.  
**Hard APB:** The access will be denied if the exit is not registered first. It does not allow a second entry using the same card without an exit.  
**Soft APB:** The access will be granted even if the exit is not registered. It allows a second entry of the same user without an exit; however, an event and a warning are generated that indicates the second entry.
  - **Forgiveness:** Check this box to enable the system to reset the APB status. When forgiveness is enabled, then there will be following options to reset the pass.
  - **Reset After Day Change:** This will reset the APB status of all the users to NULL at midnight. This enables a user, who left the building in the evening without exit punch, to use his card for entry in the next morning.
  - **Reset After Timer Expiry:** This will reset the APB status of all the users after the expiry of user defined time.
  - **Forgiveness Timer (Mins):** Enter the time duration in minutes after which Anti-pass back status will get reset and the pass will be in original state.
- **2-Person Rule** - Select this checkbox to enable the feature at the door and set the **wait time** in seconds after which the second person is allowed to punch on the door.  
For configuring the rule See *Access Control> 2- Person Rule*

## Video Surveillance

The Video Surveillance tab allows the user to configure parameters for video surveillance integration with the COSEC device. It is available in Basic License.

To access this, Go to **Device Configuration > Video Surveillance**.

- [“Visual Tagging”](#)
- [“Satatya Integration”](#)

## Visual Tagging

The COSEC application can interface with some supported hybrid and network video recording systems and grab images triggered by user events at the Doors. The **Visual Tagging** option enables the administrator to define the video recorder parameters. The **Visual Tagging** page appears as shown below.

The screenshot shows the 'Device Configuration' window with the 'Visual Tagging' tab selected. The left sidebar lists various configuration categories, with 'Video Surveillance' highlighted. The main content area is divided into two sections: 'Visual Tagging' and 'Satatya Integration'. Under 'Visual Tagging', there is a 'Capturing Device' dropdown menu set to 'Matrix HVR/NVR'. Below this are input fields for 'MAC Address' (00\_18\_09\_03\_C5\_4A), 'Camera ID' (6), and 'Storage Root Folder' (ftp://192.168.104.23/clip/). There is also a checkbox for 'FTP Login Credentials' which is checked, followed by 'User Name' (admin) and 'Password' (masked with asterisks).



To view the user events and related images, go to **Admin > Views/Logs > Event View**. To know more about viewing events, refer to “Event View”.

The following parameters are available for configuration:

- **Capturing Device** - Select the video recording device type from the dropdown menu as shown. The compatible device types are:
  - Matrix HVR/NVR
  - Milestone

### Matrix HVR/NVR

- **MAC Address** - In the event of selecting the Matrix HVR/NVR, the administrator needs to specify the MAC address of the video recorder device using “\_” (underscore) as the separator.
- **Camera ID** - Specify the camera number or camera ID for IP cameras. For analog cameras specify the camera number.

- **Storage Root Folder** - Specify the Root folder path or FTP Path where the uploaded images will be saved.
- **FTP Login Credentials** - Check this box to activate FTP login credentials for authentication.
- **Username** - Specify the FTP server Username.
- **Password** -Specify the FTP server password.



*Some COSEC devices do not support all the network connection options.*

## Milestone

Event ID	Name	User-Defined Event ID	User-Defined Event Name
No Data			

Camera Name	GUID	Host Name	Port
MATRIX COMSEC C1DR20V112CW-P (192.168.112.192) - Camera 1	ac6c0e92-9acd-410d-b21f-f593c2b5d33f	ketanpaliya	7563



*For more information on integration with **Milestone** devices, refer to [“Milestone Integration”](#).*

## Satatya Integration

This functionality is available for configuration only when the Matrix HVR/NVR device type is selected as the **Capturing Device** (from *Visual Tagging*). It enables the configured COSEC devices to directly send commands to the SATATYA HVR/NVR devices as per the configuration on this page. The Satatya configuration page appears as shown below

- **Integration type-** Select the integration type from the options of Wired and Network.  
In wired integration, door is physically connected with Satatya Device. In Network integration, connection can be by Ethernet, wireless or broadband depending upon the COSEC device support.
- **Active-** Check the box to activate the connection.
- **IP Address-** Specify the IP address of HVR/NVR.
- **Port Number-** Specify the port number of HVR/NVR.
- **Name-**Specify a user friendly name for the integration function.
- **Active-** Check the Active box to enable the SATATYA integration functionality.
- **Schedule -** Specify a schedule for the function by specifying the start and the end time (*24 Hours format*) as well as checking the boxes against the applicable **days** of the week.
- **Event-** Select a COSEC event from the drop down list for which the resultant action is to be configured.
- **Mode-** Select the event mode from the options of Entry, Exit and Both from the drop down list wherever applicable.
- **Action-**Select the action for the Satatya device from the drop down list. The options available are:
  - Recording - Specify the duration in minutes.
  - Upload Image - This will be uploaded as per the ftp settings.
  - Video Pop-up - Specify the duration in seconds. The video pop up will be generated on the local client of Satatya device on the selected camera.
  - PTZ Preset - Specify the PTZ position number as defined on the SATATYA device.
  - Mail Image - Specify the Email-ID.
- **Camera-** Select the relevant camera channels depending on the action selected.

- Click the **Add** button to finish the process of linking the event to the action.

Name	Event	Action	Start Time	End Time	Active	
WirelessNVR	Access Allowed	Mail Image	09:00	14:00	Yes	

- The user may now configure another event-action linkage if required.

**Example1:** For action as Video Pop up, the pop up of Camera 24 will be shown for 10 seconds.

**Example2:** For Access allowed event on COSEC Device, recording of camera channel 4,6,8 and 10 will be done for 10 seconds.

## Special Functions

To configure *Special Functions* for COSEC doors, refer to [“Special Functions”](#).

## Input/Output

The Input/Output (I/O) configuration of a system determines how the output or response of a system is influenced by the input applied on it. In case of the COSEC Access Control System, the I/O configuration should enable the system to monitor and trigger a specific response to any changes in door state or event occurrences at the door device. This change of door state or occurrence of events may be considered as an input while the response or action that is generated by the system on detection of this input, may be defined as the output.



- This functionality cannot be fully accessed in the Edit mode for a selected device.
- This functionality is available only with the Access Control add-on module license.

To access this, After selecting the device, Select **Device Configuration> Input Output**. The Input Output parameters can be set from the following sections:

- [“Configuration”](#)
- [“Linking”](#)
- [“Time Triggered”](#)

## Configuration

The **Configuration** section for a Direct Wireless Door appears as shown below.

Device Configuration

Device ID  
Device Name  
Wireless Door  
0/50000  
Active/Inactive

Profile  
Enrollment  
Advanced  
Features  
Video Surveillance  
Special Functions  
Input/Output  
Additional  
Job Costing  
Assign Users  
Identification Server

Configuration Linking Time Triggered

**Door Sense**

Enable ☐  
Supervised ☐  
Door Sense Type: Normally Open

**Auxiliary Input**

Enable ☐  
Supervised ☐  
Sense Type: Normally Closed  
Debounce Time (Sec): 5

**Auxiliary Output**

Enable ☐  
Output Wait Time (Sec): 0

**Accept External IO Linking**

Enable ☐  
Network Interface: Ethernet

The following parameters are available for configuration:

- **Door Sense** - The system by default can sense two states of a door - *Normally Open (NO)* and *Normally Closed (NC)* depending on which the output is determined. For example, any deviation of the door from its normal state may lead to the trigger of a *Door Abnormal* alarm.

Select the **Enable** checkbox to enable the system for such two-state monitoring.

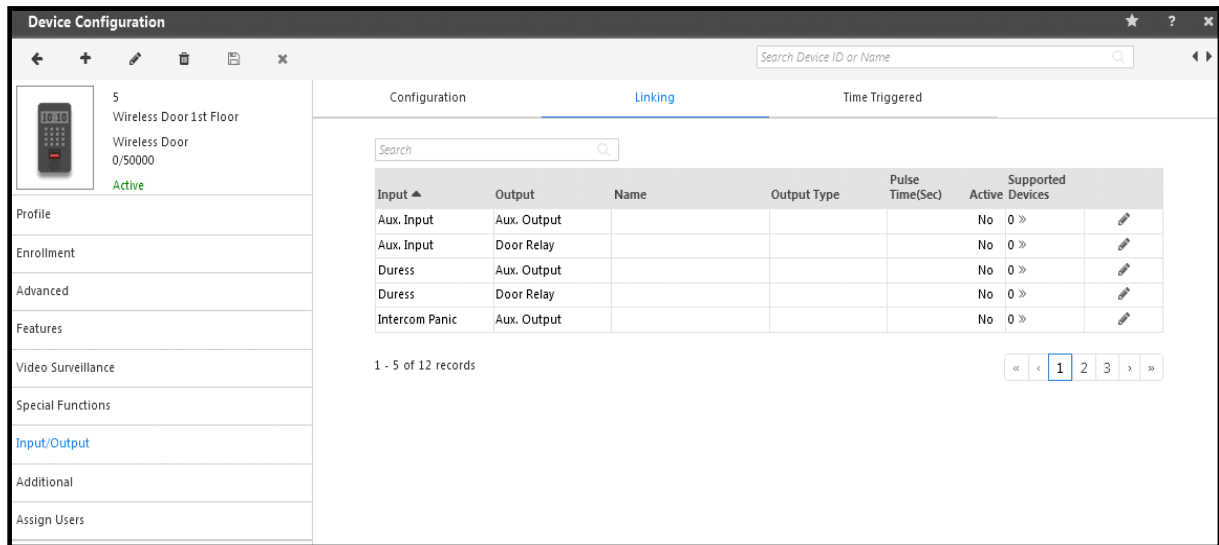
- Select the **Supervised** checkbox to enable the door for four-state monitoring where the door is also monitored for *door fault* and *door disconnection*. Specify the **Sense Type** as Normally Open or Normally Closed.
- **Auxiliary Input** - Select the **Enable** checkbox option for Auxiliary Input (e.g. Smoke Detectors) depending on normal or supervised door state monitoring as described above.

**Debounce Time (Sec)** - Specify the Debounce time in seconds. Default value is 3 sec and range should be 0-99 sec. It defines the minimum time for which an input interface must be maintained in a given state before the system reports it. For example, if a Normal door state is changed to Alarm, the state must remain in Alarm for five seconds before an alarm is generated.

- **Auxiliary Output** - Select the **Enable** checkbox to enable Auxiliary Output (e.g. Fire Alarm) for the selected device. To set an additional waiting period before the Aux Output signal is sent, enter an **Output Wait Time (Sec)**.
- **Accept External IO Linking** - Select the Enable checkbox to enable device-to-device IO Linking i.e. input from one Direct Door can trigger output in another Direct Door.
- **Network Interface**: Select the interface option for IO linking with external devices from the drop-down list options—Ethernet, Wireless or Mobile Broadband.

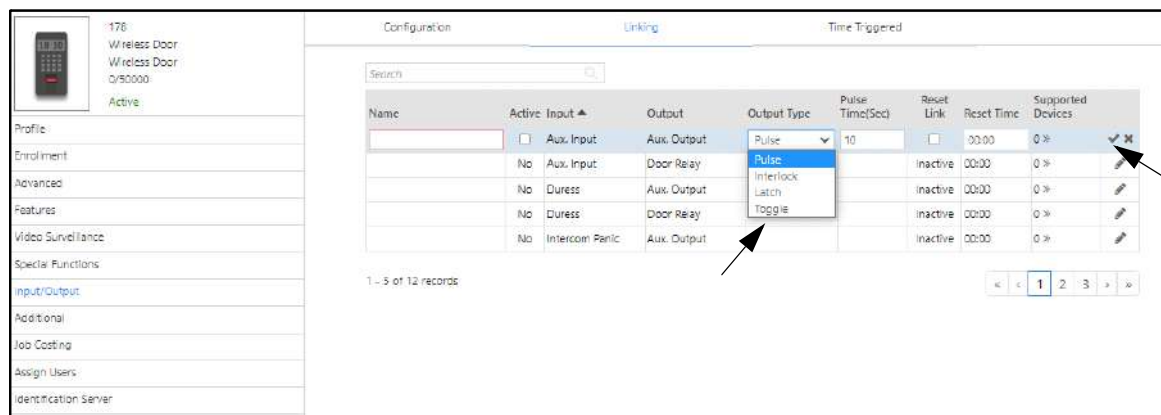
## Linking

The **Linking** section appears as shown below.




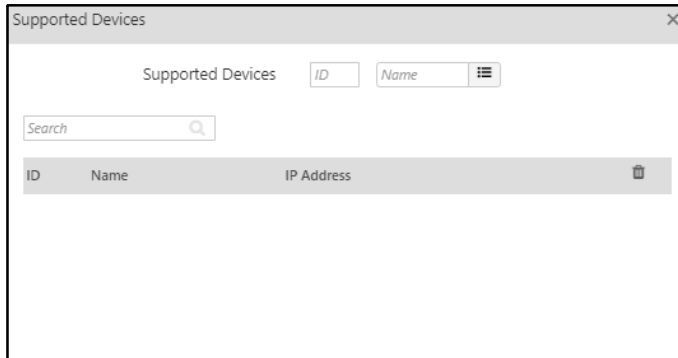
The COSEC application supports the Input/Output Linking feature to activate an output port based on a trigger received from an input port on the same Direct Door. This option enables the administrator to define how an event or events (input port) will trigger an output on the selected door.

Select a Input-Output linking row or click edit button shown with arrow.



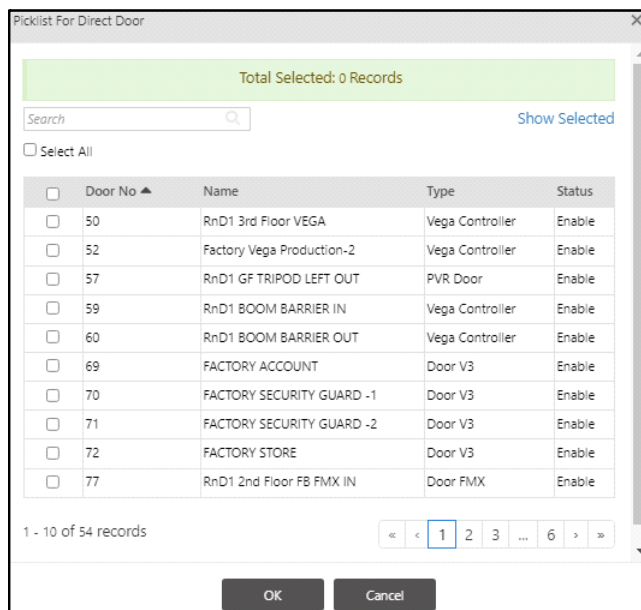
- **Name** - Specify a name for the new I/O linking program to be defined.
- **Active** - Select this check box to activate this linking program.
- **Output Type** - Specify the appropriate type of output from the following four options available in the drop down list shown with the arrow above:
  - **Pulse**: With this type of output, the user needs to define the Pulse time in seconds.
  - **Interlock**: With this option, the output follows the input. The relay output is triggered as long as the input is activated after which it returns to normal state.
  - **Latch**: With this option, it is denoted that the relay output will be in an energized condition for infinite period and needs to be reset manually.
  - **Toggle**: With this option, the output group toggles its state whenever an input group is activated.

- **Pulse Duration (sec)** - For a *Pulse* output type, specify the pulse duration in seconds.
- **Reset Link:** Select this check box to enable the system to reset the IO link.
- **Reset Time:** Specify the time after which the IO link should be reset in HH:MM format.
- **Supported Devices:** All devices supported for external IO Linking will appear in this picklist for selection. Select the required devices from the picklist. Upto 255 external devices can be added.
- Click **Supported Devices**  icon. The **Supported Devices** pop-up appears.



The 'Supported Devices' pop-up window has a title bar with a close button. Below the title bar, there are two input fields labeled 'ID' and 'Name', followed by a list icon. A search bar with a magnifying glass icon is positioned below these fields. The main area of the window contains a table with three columns: 'ID', 'Name', and 'IP Address'. A trash can icon is located at the top right of the table area.

- In this pop-up, click the **Supported Devices** picklist. The **Picklist For Direct Door** pop-up appears.



The 'Picklist For Direct Door' pop-up window has a title bar with a close button. Below the title bar, there is a green banner that says 'Total Selected: 0 Records'. A search bar with a magnifying glass icon is located below the banner. To the right of the search bar is a 'Show Selected' link. Below the search bar is a 'Select All' checkbox. The main area of the window contains a table with five columns: 'Door No', 'Name', 'Type', and 'Status'. The table lists 10 records. At the bottom of the table, there is a pagination bar showing '1 - 10 of 54 records' and a set of navigation buttons. At the very bottom of the window are 'OK' and 'Cancel' buttons.

Door No	Name	Type	Status
50	RnD1 3rd Floor VEGA	Vega Controller	Enable
52	Factory Vega Production-2	Vega Controller	Enable
57	RnD1 GF TRIPOD LEFT OUT	PVR Door	Enable
59	RnD1 BOOM BARRIER IN	Vega Controller	Enable
60	RnD1 BOOM BARRIER OUT	Vega Controller	Enable
69	FACTORY ACCOUNT	Door V3	Enable
70	FACTORY SECURITY GUARD -1	Door V3	Enable
71	FACTORY SECURITY GUARD -2	Door V3	Enable
72	FACTORY STORE	Door V3	Enable
77	RnD1 2nd Floor FB FMX IN	Door FMX	Enable

You can either select particular devices or all the devices at once.

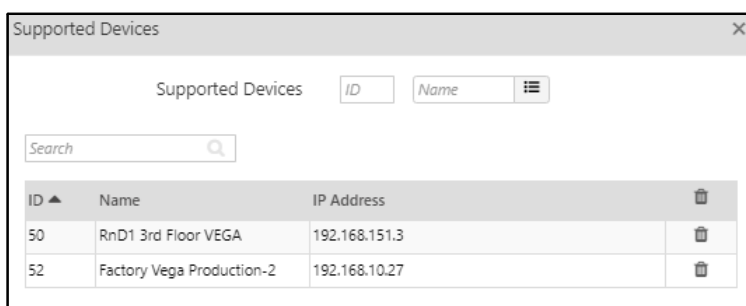
To select particular devices, click the check boxes of the desired devices.

**OR**

To select all the devices, select the **Select All** check box. The devices on all the pages will be selected.




Click **OK**. You return to the **Supported Devices pop-up** and the selected devices are displayed here.



The 'Supported Devices' pop-up window displays a table of supported devices. It includes a search bar and a table with columns for ID, Name, and IP Address. Each row has a delete icon (trash can) next to it.

ID	Name	IP Address
50	RnD1 3rd Floor VEGA	192.168.151.3
52	Factory Vega Production-2	192.168.10.27

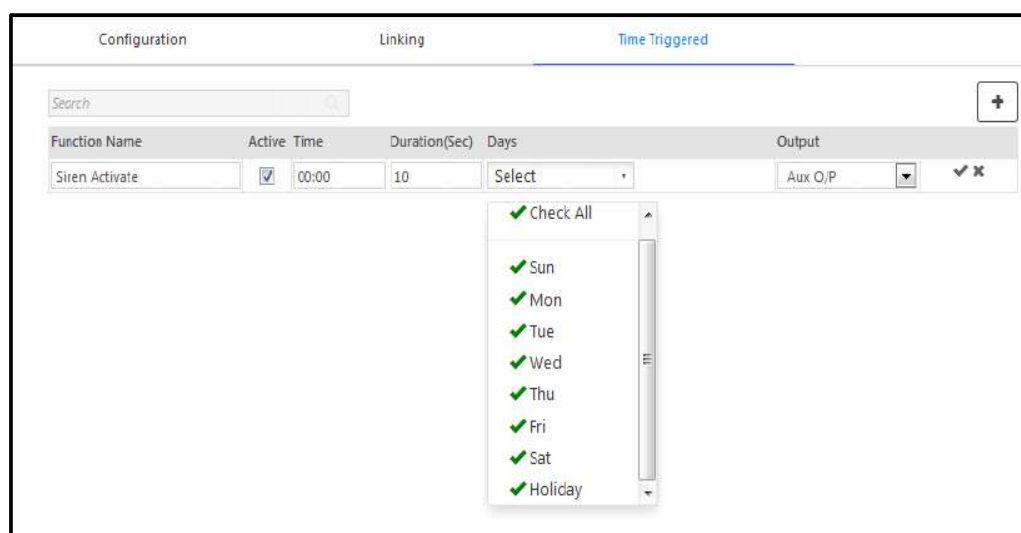
You can also delete the desired devices. To do so, click **Delete**  of the respective device.

Close the pop-up the number of selected devices are displayed under **Supported Devices** in the grid.

- Click the **OK** button and **Save** the configuration.

## Time Triggered

On the **Input Output** page, select the **Time Triggered** section as shown.



The 'Time Triggered' configuration window shows a table for setting up time-triggered functions. The table has columns for Function Name, Active, Time, Duration(Sec), Days, and Output. A dropdown menu is open for the 'Days' column, showing options for all days of the week and holidays, each with a green checkmark.

Function Name	Active	Time	Duration(Sec)	Days	Output
Siren Activate	<input checked="" type="checkbox"/>	00:00	10	Select	Aux O/P

This functionality enables the user to control the activity of an Output without manual intervention. The time triggered functions are used for activating events like door unlock and siren activation that are set as per the start time and for the configured time duration. This functionality is designed to energize outputs for predefined periods at the configured time. The COSEC access control system supports up to 20 Time Triggered functions on a Direct Door.

Search Device ID or Name

ConfigurationLinkingTime Triggered

Search

+

Function Name	Active	Time	Duration(Sec)	Days	Output	
Siren Activate	Yes	00:00	10	Su Mo Tu We Th Fr Sa Ph	AUX O/P	 

## Additional

This section lists some additional configurations that can be enabled for door controllers.

To access these configurations, Go to **Device Configuration > Additional > Daylight Saving**

Many countries observe the convention of adjusting clocks forward and backward. Clocks are set ahead during the spring and back to standard time in the autumn. COSEC doors can be configured to be compatible with this procedure keeping the RTC of the system updated with such changes.

The **Daylight Saving** configuration can be done in 2 ways i.e. Day-Month wise or Date-Month wise.

- Select the **DST Type** as Day-Month wise or Date-Month wise. The **Disable** option when selected, disables the application of DST on the system time.
- On selection of the **Day-Month wise** option, the DST is set by the day of the month on which clock needs to be forwarded and reverted back to normal. Set the **Month**, **Week No.**, **Day of Week**, and **Time** for both the **Forward Clock** and **Backward Clock** as shown.

Device Configuration

5 Wireless Door 1st Floor

Wireless Door

0/50000

Active

Profile

Enrollment

Advanced

Features

Video Surveillance

Special Functions

Input/Output

Additional

Assign Users

Daylight Saving

DST Type

Day-Month wise

Time Period

00:00

Forward Clock

Month

January

Week No.

1st

Day of Week

Sunday

Time

00:00

Backward Clock

Month

January

Week No.

1st

Day of Week

Sunday

Time

00:00

Save

- On selection of the **Date-Month wise** option, the DST is set by date of the month on which clock needs to be forwarded and reverted back to normal. Define the **Time Period** for the date-month wise DST settings in **24-hours** format, and specify **Month**, **Date** and **Time** for the **Forward Clock** and the **Backward Clock** as shown.

This DST Setting implies that on 1st Sunday of November at 09:00 hours, the clock will be forwarded by 08:00 hours. And on 1st Sunday of January at 10:00 hours, the clock will be reversed or backwarded by 08:00 hours.

The screenshot shows a web-based configuration interface titled "Device Configuration". On the left is a sidebar with a list of configuration categories: Profile, Enrollment, Advanced, Features, Video Surveillance, Special Functions, Input/Output, Additional (highlighted in blue), and Assign Users. The main area displays the "Daylight Saving" settings for a device named "5 Wireless Door 1st Floor" with ID "0/50000" and status "Active". The settings include: "DST Type" set to "Date-Month wise", "Time Period" set to "00:00", "Forward Clock" settings (Month: January, Date: 1, Time: 00:00), and "Backward Clock" settings (Month: January, Date: 1, Time: 00:00). A "Save" button is located at the bottom right of the settings area.

Category	Value
DST Type	Date-Month wise
Time Period	00:00
Forward Clock Month	January
Forward Clock Date	1
Forward Clock Time	00:00
Backward Clock Month	January
Backward Clock Date	1
Backward Clock Time	00:00

- Click the **Save** button.

## Job Costing

When user punches on any device, there will be an option to select the Job Code on which the user is working. Job Costing enables the Admin to show or hide Job Code selection on device. It also enables the admin to assign default jobs on device.

The screenshot shows the 'Device Configuration' window for a device named '10 Wireless Door' with ID '0/50000'. The 'Job Costing' option is highlighted in the left sidebar. In the main settings area, 'Show Job Menu' is set to 'Show List' and 'Retain Job Selection' is checked. Below these, there are fields for 'Job Group' and 'Job', each with 'ID' and 'Name' picklists. A search bar is also present. At the bottom, a table header is visible with columns: 'Job Code', 'Name', 'Assignment Start', 'Assignment End', and a delete icon. The table currently displays 'No Data'.



Make sure the **Device Based Job Assignment** check box is enabled for the desired Users.

- **Show Job Menu:** Select the desired option— **Show List** or **Allocate Default**.

## Show List

When **Show List** is selected; then multiple jobs can be assigned to the device. The user can select the relevant Job Code while punching on the device. His/her job hours will be recorded for that Job Code.

- **Retain Job Selection:** If Retain Job Selection check box is selected, it allows the device to remember the last Job Code selected by a user and the same would be applicable for all the subsequent users until another job selection is done on the device. This is useful in environments where dynamic job selection prevails.

In this case, if the user selects a Job Code the same is saved and retained for future use by the device. If the user selects None option on the device, it ends the current job and assigns None until a new Job Code is selected by the user.

If the you clear the check box, then the device does not retain any job selection done by the user.

For example, in an educational setup, teachers may have dynamic job assignments, while students have static ones. After a teacher selects a Job Code, that code is retained by the device. Any student who punches in afterward will be assigned the teacher's Job Code until the teacher selects a new one or selects None.

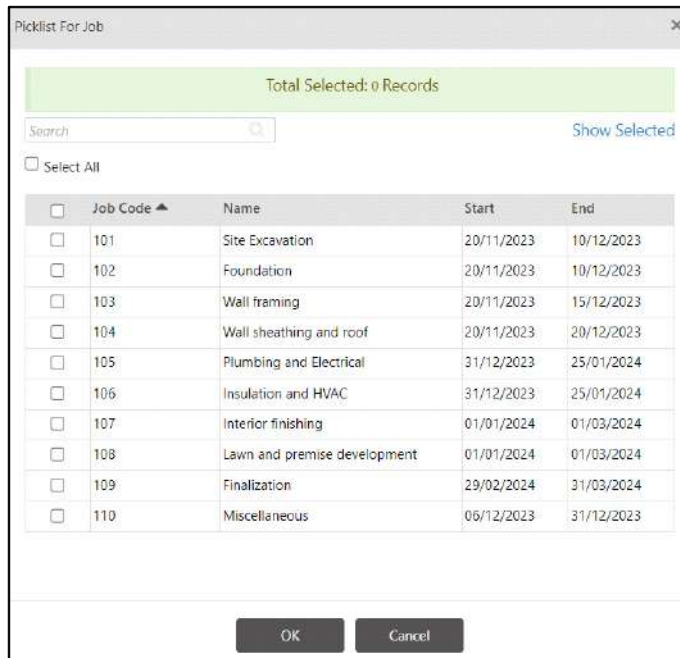
## Assign Jobs

- **Assign Jobs:** You can select Job Group as well as individual Jobs.
- To select **Job Group**, click the Job Group picklist, the **Picklist For Job Group** pop-up appears. Select the desired Job Group.

Click **Save**. The Jobs of the selected Job Group appear in the grid.


You can delete the desired Job. To do so, click **Edit**  and then click **Delete**  of the respective Job.

- To select **Jobs**, click the Jobs picklist. The **Picklist For Job** pop-up appears.



Picklist For Job

Total Selected: 0 Records

Search 

☐ Select All

<input type="checkbox"/>	Job Code ▲	Name	Start	End
<input type="checkbox"/>	101	Site Excavation	20/11/2023	10/12/2023
<input type="checkbox"/>	102	Foundation	20/11/2023	10/12/2023
<input type="checkbox"/>	103	Wall framing	20/11/2023	15/12/2023
<input type="checkbox"/>	104	Wall sheathing and roof	20/11/2023	20/12/2023
<input type="checkbox"/>	105	Plumbing and Electrical	31/12/2023	25/01/2024
<input type="checkbox"/>	106	Insulation and HVAC	31/12/2023	25/01/2024
<input type="checkbox"/>	107	Interior finishing	01/01/2024	01/03/2024
<input type="checkbox"/>	108	Lawn and premise development	01/01/2024	01/03/2024
<input type="checkbox"/>	109	Finalization	29/02/2024	31/03/2024
<input type="checkbox"/>	110	Miscellaneous	06/12/2023	31/12/2023

OK Cancel


You can either select particular jobs or can select all the jobs at once.

To select particular jobs, select the check boxes of the desired jobs.

**OR**

To select all the jobs, select the **Select All** check box. The jobs on all the pages will be selected.

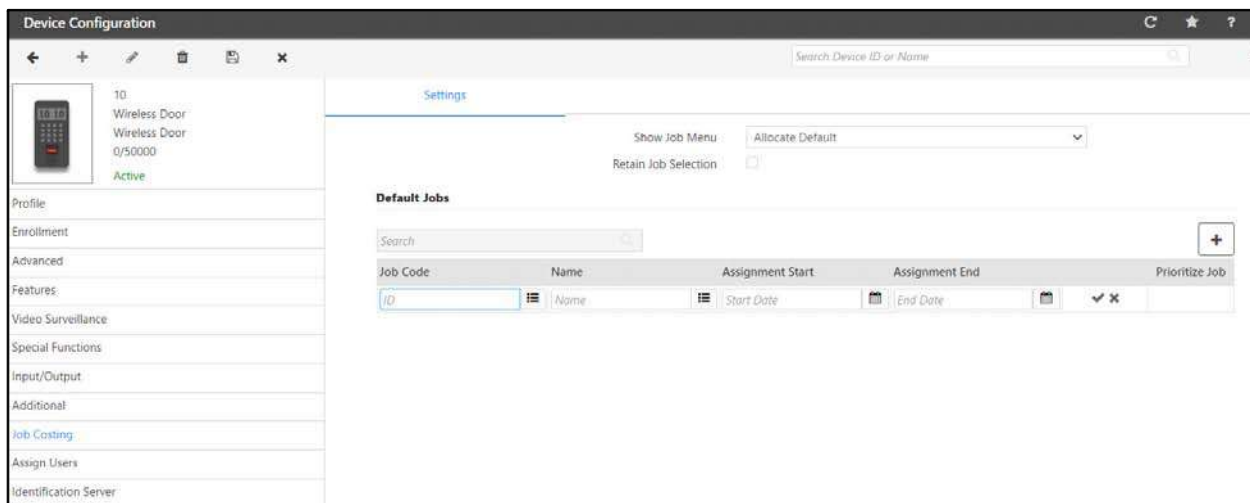
Click **OK**.

The selected Jobs appear in the grid. You can also delete the desired Job. To do so, click **Delete**  of the respective Job.

- Click **Save**.

## Allocate Default

When **Allocate Default** is selected; then default jobs for the device can be selected. The Job costing user can directly punch on this door for starting the default job.

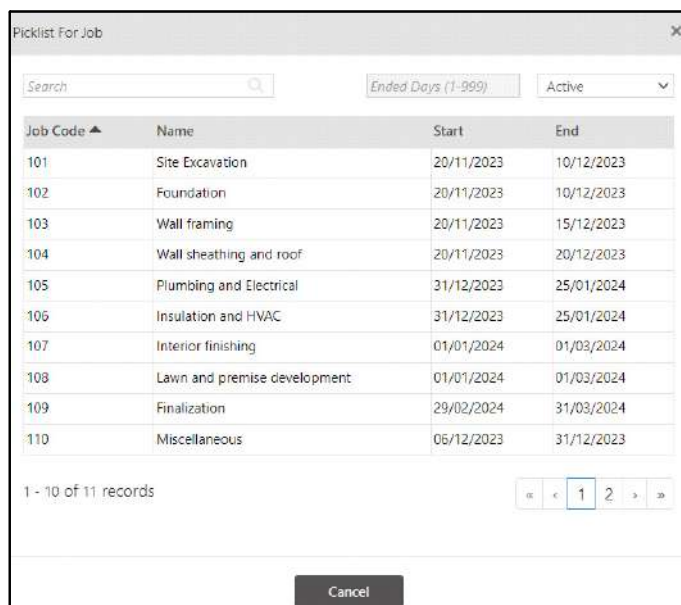


## Default Jobs

Multiple default jobs can be assigned with overlapping Assignment Date Ranges. You can also set the priority of the assigned jobs if required. If you have jobs with overlapping dates and you have set their priority as per your requirement, then the first job will be considered as the default job.

- Click **Add** . Click the picklist under **Job Code/Name** to select the desired Jobs.

The **Picklist For Job** appears.



By default, all the **Active** jobs are displayed. Click **Active** and select the desired option — **All**, **Active**, **Expired** — to filter the jobs. The jobs appear as per the set filter.

If you select **Expired**, you can set another filter.

Configure the number of days in Ended Days (1-999). The system will display the expired jobs, derived using the following: Current Date minus Number of days configured in Ended Days.

For example:

Ended Days configured = 2

Current Date= April 25, 2024

All the jobs expired between April 23, 2024 to April 25, 2024 (midnight), will be displayed.

Click to select the desired job from the list. You can also search for the desired job using the search bar.

The selected job appears in the grid.

- **Assignment Start and Assignment End:** The selected Jobs Start and End dates are displayed. You can change the Assignment Start and Assignment End dates of the job if required. To do so, click the calendar and select the desired start and end dates.
- Click **Save** to save the configuration.

The **Default Jobs** grid will consist of all the jobs, that is expired, in-progress as well as assigned.



*It is recommended to set job priority only if overlapping dates are assigned to the jobs.*

*If a new job is assigned, by default it will appear at the highest priority. You can change the priority later, if required.*

You can set the priority of the jobs as per your requirement. To do so,

The screenshot shows the 'Device Configuration' window. On the left is a sidebar with a device icon and a list of configuration options: Profile, Enrollment, Advanced, Features, Video Surveillance, Special Functions, Input/Output, Additional, Job Costing, Assign Users, and Identification Server. The main area is titled 'Settings' and contains a 'Show Job Menu' dropdown set to 'Allocate Default' and a 'Retain Job Selection' checkbox. Below this is the 'Default Jobs' section, which includes a search bar and a table with the following data:

Job Code	Name	Assignment Start	Assignment End	Prioritize Job
111	Premise cleaning	01/10/2023	01/11/2023	[Up Arrow]
108	Lawn and premise development	01/01/2024	01/03/2024	[Up Arrow]
102	Foundation	20/11/2023	10/12/2023	[Up Arrow]
101	Site Excavation	20/11/2023	10/12/2023	[Up Arrow]

- Under **Prioritize Job**, click the **Up** arrow button to move a job upwards in the list. Similarly, click the **Down** arrow button to move a job downwards in the list.

If you have overlapping dates assigned to Jobs, in such scenarios there will be multiple Jobs in which the punches are possible.

To resolve this set the Job with highest priority at the first position, so that when the system searches for the Job as per the date, the punch will be marked in the first Job in which the date is detected.

Let us understand this with the help of an example.

### Example:

User 1 has been assigned the following jobs:

Job Code	Job Name	Assignment Start	Assignment End	Prioritize Job
J1	Job 1	01/10/2023	10/10/2023	1
J2	Job 2	09/10/2023	15/10/2023	2
J3	Job 3	17/10/2023	25/10/2023	3
J4	Job 4	25/10/2023	31/10/2023	4

Now, User 1 changes the priority of the assigned jobs as follows:

Job Code	Job Name	Assignment Start	Assignment End	Prioritize Job
J2	Job 2	09/10/2023	15/10/2023	1
J1	Job 1	01/10/2023	10/10/2023	2
J4	Job 4	25/10/2023	31/10/2023	3
J3	Job 3	17/10/2023	25/10/2023	4

When User 1 will punch on 09/10/2023, the punch will be marked against Job 2 as it has been set at priority number 1. Similarly, when User 1 will punch on 25/10/2023, the punch will be marked against Job 4 as it is at a higher priority than Job 3.

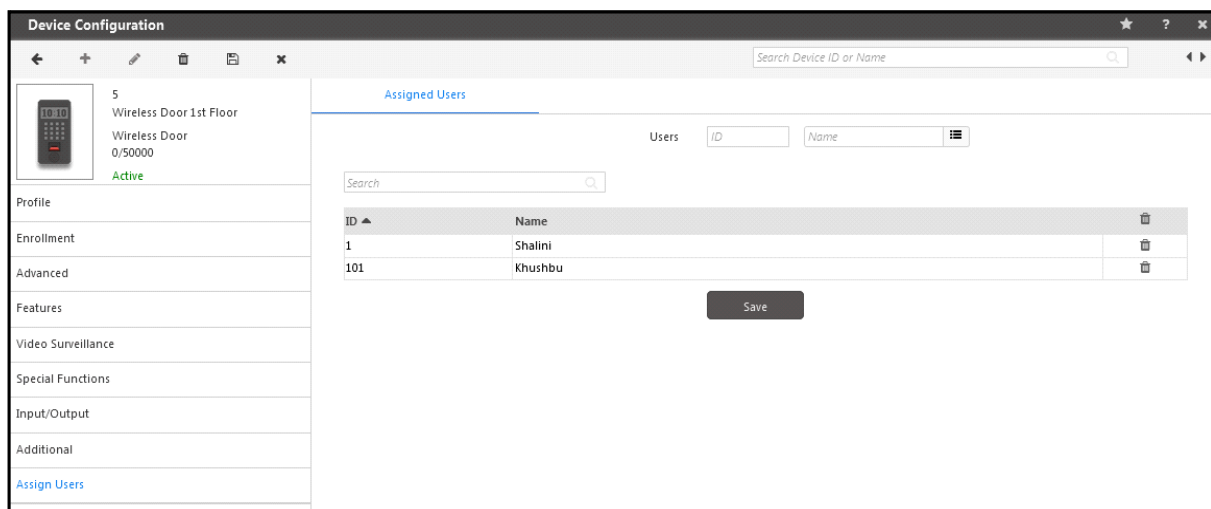


*Make sure that the assigned jobs are prioritized correctly to ensure that the punches are in place.*

## Assign Users

To the configured device, you can select and assign the users.

Click the picklist button and select the users.



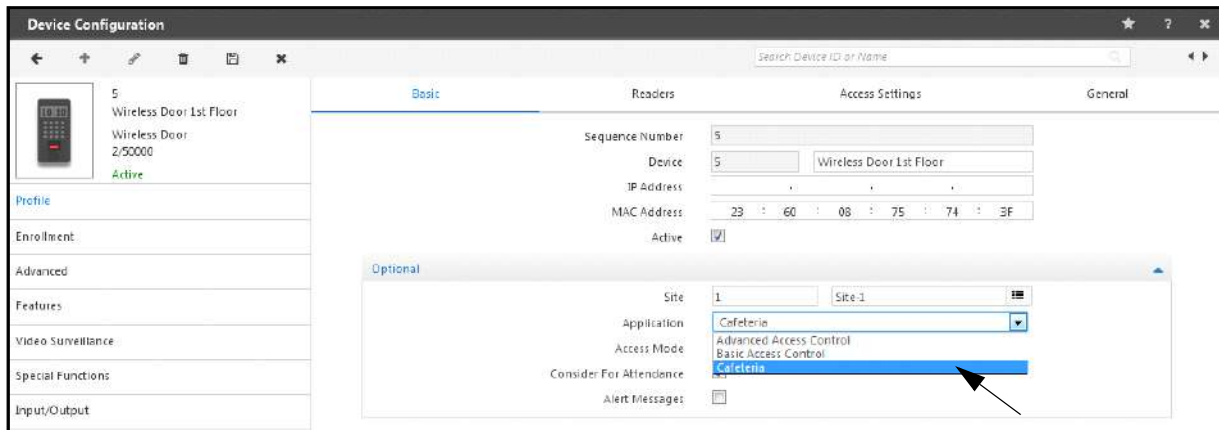


- Click the **Save** button to assign all the added users to the selected door.

## Cafeteria

The COSEC system enables the user to configure devices which will be used by the Cafeteria management module.

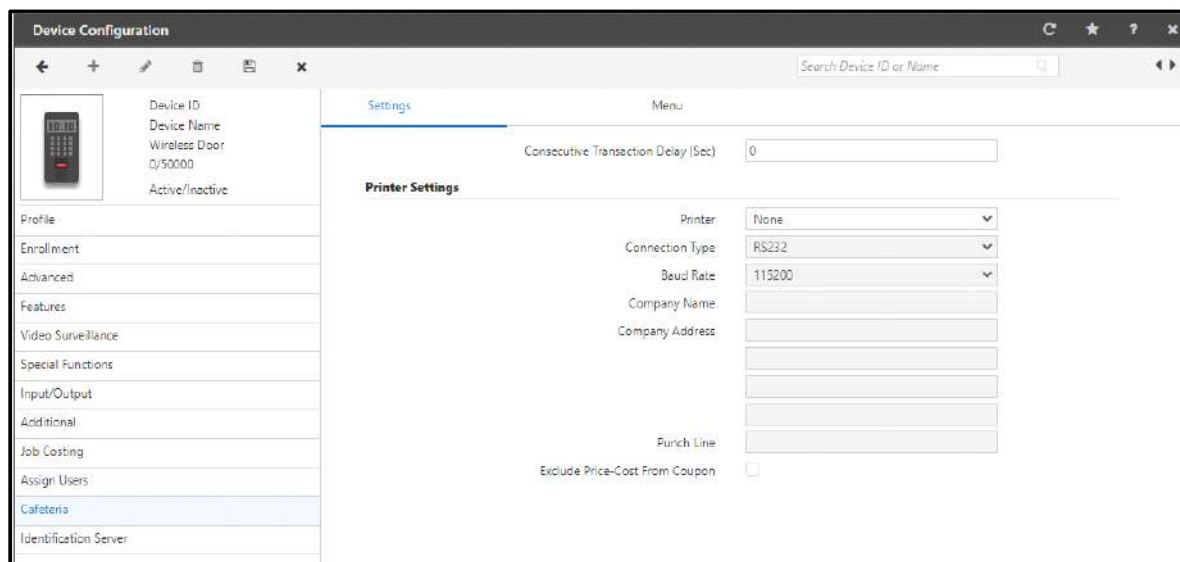
To configure a door for Cafeteria application, select **Cafeteria** option in Device Profile> Basic> Application as shown below with arrow.



The Cafeteria tab will appear in Device Configuration page. Select **Device Configuration> Cafeteria> Settings**

## Settings

The Cafeteria configuration for Wireless Door is shown as below.



- Consecutive Transaction Delay (Sec):** Enter the time interval between two transactions, wherein any user transaction would be restricted.

## Printer Settings

- **Printer:** Select the printer from the dropdown list based on the site requirements.
- **Connection Type:** Select the printer connection type from the drop down list. The options available are:
  - RS232 (serial)
  - USB
- **Baud Rate:** In the event of a serial printer, select the appropriate baud rate from the drop down list.
- Specify the **Company Name**, **Company Address** and the **Punch Line** as per the site requirements. These details will be printed on the receipt dispensed from the selected printer.
- Select the **Exclude Price-Cost From Coupon** check box if you want to exclude the price from the coupon.

## Menu

COSEC allows the administrator to assign one or more cafeteria menus (Menu 1, Menu 2, Menu 3... upto 99.) to a device. These can be configured by selecting pre-defined menus from the Menu picklist.



*The Menu is created from Cafeteria module.*

The screenshot shows the 'Device Configuration' window with the 'Menu' tab selected. The left sidebar lists various settings, and the main area is titled 'Menu'. It contains two sections: 'Assign Menu' and 'Schedule Menu'. The 'Assign Menu' section has fields for 'Menu ID' and 'Menu Name' and a 'Save' button. The 'Schedule Menu' section has a search bar and a table with columns for 'Menu No', 'ID', 'Menu Name', 'Start Time', 'End Time', and 'Schedule Days'. The table is currently empty, showing 'No Data'.

The Menu can be scheduled from Cafeteria module and is displayed in “Schedule Menus” as shown above.

If you have to assign another menu and schedule it on the door then select the Menu from the picklist. The Menu will be shown in the grid as shown below.

The screenshot shows the 'Menu' settings window. The 'Assign Menu' section has a search bar and a table with two rows: Menu No 1 with ID 2 (Breakfast) and Menu No 2 with ID 1 (Lunch). A 'Save' button is below. The 'Schedule Menu' section has a search bar, a table with columns Menu No, ID, Menu Name, Start Time, End Time, and Schedule Days. It shows two rows: Menu No 1 with ID 2 (Breakfast) from 08:45 to 09:00, and Menu No 2 with ID 1 (Lunch) from 12:30 to 14:00. A '+' button is in the top right corner of the 'Schedule Menu' section, indicated by an arrow.

Now to schedule the menu click **Add** button as shown above.

Then select the menu to be scheduled from the **ID** picklist. Specify the **Start** and **End time** for which the Menu will be active and is available to users on the selected door. Select the **days** for which this menu will be available i.e. scheduled on the door.

Then click **OK** and **Save** the Menu schedule on the door.

The screenshot shows the 'Device Configuration' window. On the left is a sidebar with a list of devices, including '5 Wireless Door 1st Floor' which is 'Active'. The main area shows the 'Menu' settings for this device. It includes the same 'Assign Menu' and 'Schedule Menu' sections as the previous screenshot. The 'Schedule Menu' table shows two rows: Menu No 1 with ID 2 (Breakfast) from 08:45 to 09:00, and Menu No 2 with ID 1 (Lunch) from 12:30 to 14:00. A '+' button is in the top right corner of the 'Schedule Menu' section, indicated by an arrow.



*Two Menus cannot be scheduled for same timing.*

## Identification Server

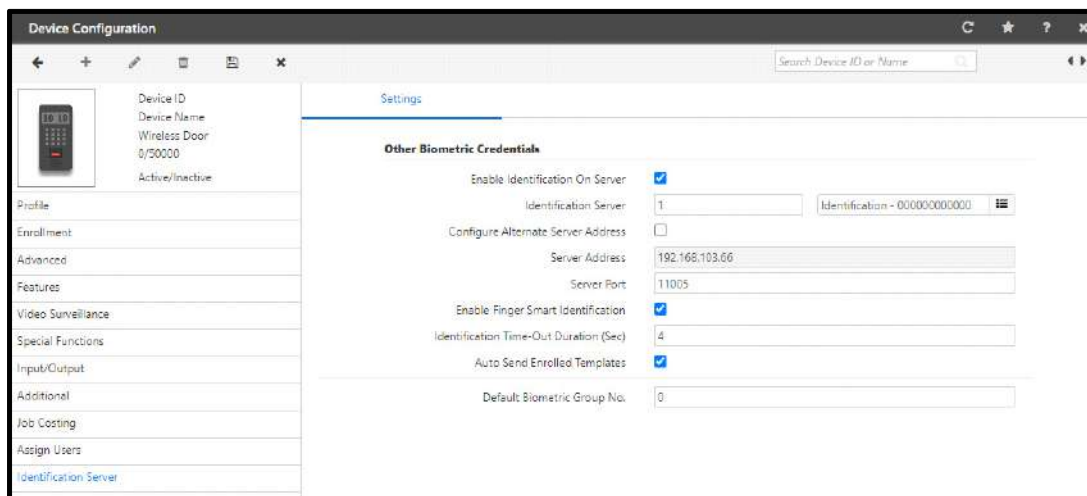
This tab enables the selected device to be assigned to a pre-defined Identification Server.

Device has a limited memory capacity for storage of templates so we need Identification Server which will store the more number of templates and respond to device when asked for identification.

For more information on Identification Servers, See *Admin> System Configuration> Identification Server Configuration*.

To access these configurations,

- On the **Device Configuration** page, select the **Identification Server** tab.



## Other Biometric Credentials

- **Enable Identification On Server:** Select the checkbox to enable the identification of palm/finger templates on this device.
- **Identification Server:** Select an Identification Server using the picklist button to which the device is to be assigned. The configuration of server is done from **Admin module > System Configuration > Identification Server Configuration** and the Identification Service must be started from the service tray.
- **Server Address:** It displays the IP Address of the selected Identification Server.
- **Configure Alternate Server Address:** Enable this check-box to configure external IP address of Identification Server.
- **Server Address:** Enter the external network IP address which will be used for accessing identification server.

Enable Identification On Server	<input checked="" type="checkbox"/>
Identification Server	1 <span>Identification - 000000000000</span>
Configure Alternate Server Address	<input type="checkbox"/>
Server Address	192.168.103.66
Server Port	11005
Enable Finger Smart Identification	<input checked="" type="checkbox"/>
Identification Time-Out Duration (Sec)	4
Auto Send Enrolled Templates	<input checked="" type="checkbox"/>
Default Biometric Group No.	0

- **Server Port:** Enter the server port number. The default port number is 11005.
- **Enable Finger Smart Identification:** For all other supported doors, select the checkbox to enable fingerprint templates identification through Identification Server.
- **Identification Time-Out Duration (Sec):** Specify the duration in seconds after which the fingerprint template identification will get time out.  
**Example:** If 5 seconds is specified, then the identification server will try to identify the template till 5 seconds and if not found then it will show time-out to the user.
- **Auto Send Enrolled Templates:** Select the checkbox to enable any enrolled templates to be saved both on the COSEC database as well as saved locally on the configured Identification Server. This enables prompt identification of user on enrollment.
- **Default Biometric Group No.:** Specify the default biometric group number to be assigned to the device. It is a number allotted to a device to be assigned to the Identification Server. This enables the Identification Server to match the template against only those devices that belong to the corresponding biometric group. This reduces the false detection as well time to search template.

# ARGO Door

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COSEC ARGO series door controllers are performance and engineering wonders with emphasis on productivity and security for modern organizations. COSEC ARGO devices are the next generation door controllers for serious deployments of Access Control and Time and Attendance applications. The intelligent workhorse is designed to meet aesthetics, technology and harsh environmental requirements of the organization. It consists of POE terminal with Ingress Protection (IP65 rated) with Graphical Display.

There are in total 6 variants of ARGO door. They are:

Variants	Reader Supported
COSEC ARGO FOE212	EM Prox
COSEC ARGO FOM212	MiFare
COSEC ARGO FOI212	HID iClass
COSEC ARGO CAE200	EM Prox
COSEC ARGO CAM200	MiFare
COSEC ARGO CAI200	HID iClass



*COSEC ARGO CAE200/CAM200/CAI200 do not support Fingerprint Module.*

*The features and functionalities supported will differ as per the variant installed.*

ARGO Door can be connected as **Direct Door** as well as **Panel Door**.



Click the ARGO device from the Device List to add it as a **Direct Door**.

Select Device Type To Be Added

ARGO

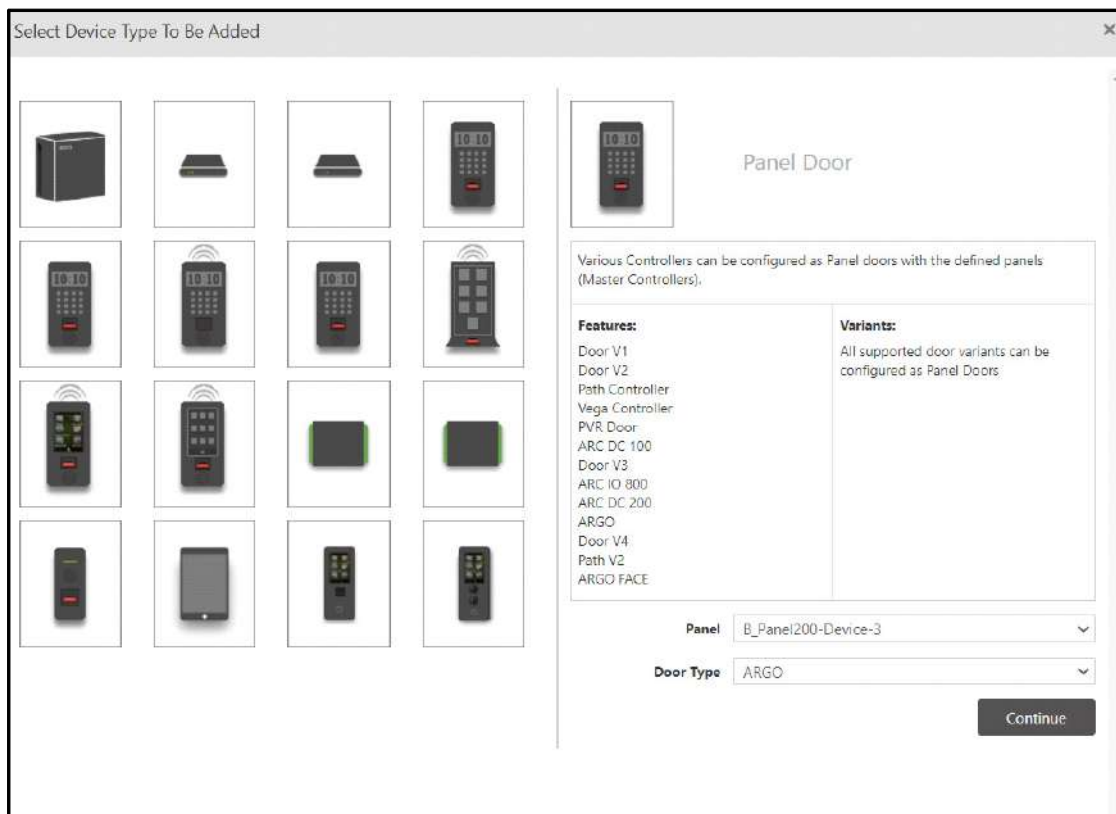
High-end Wireless terminals for Access Control, Time Attendance & Cafeteria. POE terminal with Ingress Protection (IP65 rated) & Graphical Display. Elegant design. Uses RFID, Password and Biometric Authentication.

<b>Features:</b> User Capacity: 50,000 Event Buffer: 5,000,000 3.5" TFT Display POE Enabled Wi-Fi and Mobile Broadband Connectivity with Server, Inbuilt Bluetooth Card, Pin, Finger and Face	<b>Variants:</b> FOE212 FOM212 FOI212 CAE200 CAM200 CAI200
--	--

Continue

OR

Click Panel Door to add ARGO device as a **Panel Door**.

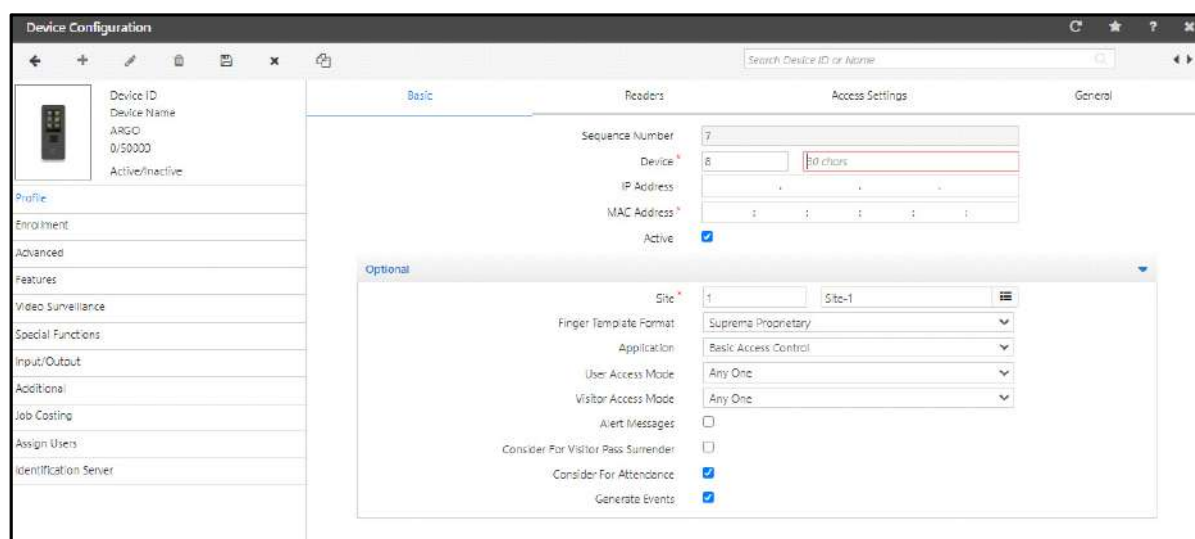


**Panel:** Select the desired Panel from the drop-down list with which you wish to connect the Door.

**Door Type:** Select **ARGO** from the drop-down list.

Click **Continue**.

The **Device Configuration** page for ARGO Door appears.





If you wish to add Devices automatically, click **Admin Module> System Configuration> Global Policy> Device**. Select the **Auto Add New Devices** check-box. Once the device is connected in network, it comes online in COSEC Monitor.

The IP Address of the device will be displayed automatically in **Profile > Basic**.



*The Monitor Service must be running while adding the device to COSEC.*

To configure the parameters, you can:

- copy the parameters from another device, refer to [“Copy Parameters From”](#).
- OR
- can click each link to configure the parameters, refer to [“Selective Configuration”](#).

## Copy Parameters From

You can also copy the parameters from another device, if required.



*The Copy Configuration From option is applicable in Add (after you have selected the desired device type) as well as Edit mode of any added device.*

*If certain parameters are configured and Copy Parameters From option is clicked, then:*

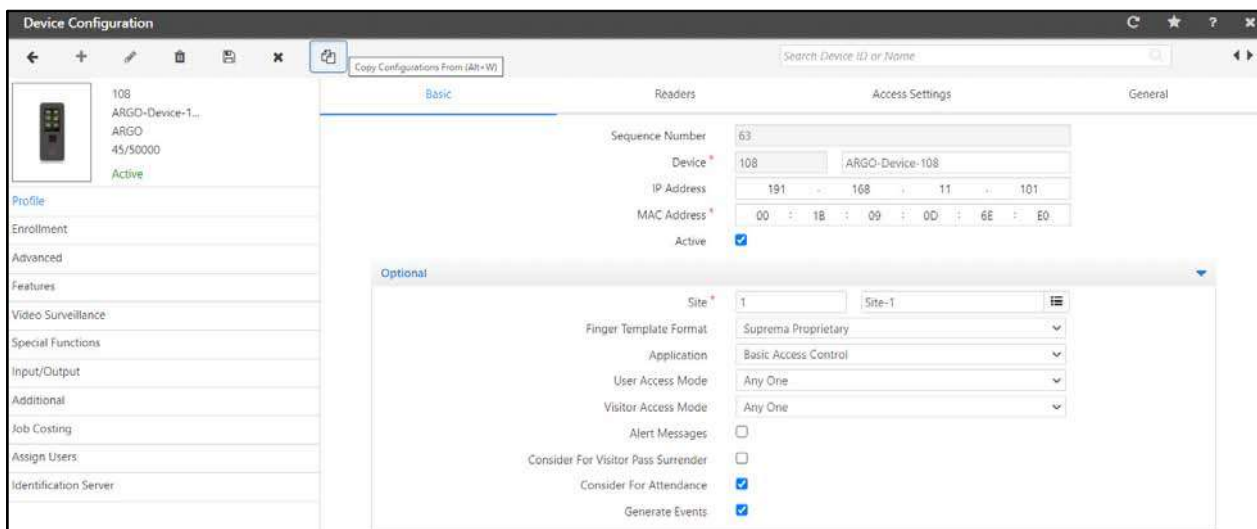
- the value of the applicable parameters already configured will be over-written with the values as configured in the selected device.
- the values of other parameters that are configured will remain as they are.

*If none of the parameters are configured and Copy Parameters From option is clicked, then*

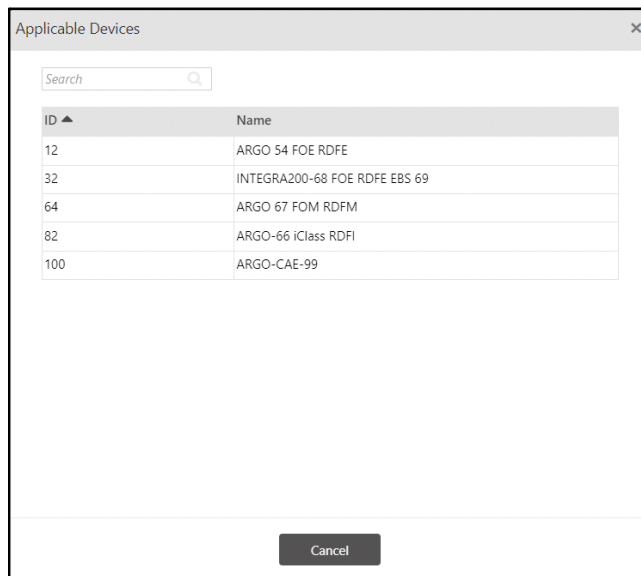
- all the applicable parameter values will be copied from the selected device.
- the values of the other parameters will be their default values.

*To know more about the applicable parameters that will be copied, refer to [“Copy Parameter Details”](#)*

To do so, click **Copy Configuration From** .



The **Applicable Devices** pop-up appears.



*The devices that appear in the Applicable Devices pop-up will be of the same family and device type. Let us understand this:*

- *In case of Direct Door, the pop-up will display other ARGO Direct Doors only. For example, if you have direct door devices — ARGO1, ARGO2, Vega1 and Vega2, then this pop-up will display only ARGO1 and ARGO2.*
- *In case of Panel Door, the pop-up will display other Vega Panel Doors connected with the same Panel only. For example if you have two Panels — Panel1 and Panel2 connected. In Panel1 the connected Panel Doors are VegaPD1, VegaPD2, ARGOPD1, ARGOPD2. In Panel2 the Panel Doors connected are ARGOPD3 and ARGOPD4. Then, if you are adding the new ARGO Panel Door to Panel1, then this pop-up will display ARGOPD1 and ARGOPD2 only.*

Select the desired device from which you wish to copy the configurations.

OR

You can also search for the desired device using the Search option and then select the device.

A Warning pop-up appears. Click **Yes** to copy all the applicable parameters. A processing screen appears.



*Only applicable parameters will be copied. For details, refer to [“Copy Parameter Details”](#).*

*If during the processing screen, you click Cancel, then the entire copy process will be aborted.*

If all applicable parameters are copied successfully, then the Applicable Configurations are Successfully Copied message will be displayed.

If all applicable parameters are not copied successfully, then the Failed to copy. Please try again message will be displayed.

## Selective Configuration

To configure the device parameters, click the following links:

- [“Profile”](#)
- [“Enrollment”](#)
- [“Advanced”](#)
- [“Features”](#)
- [“Video Surveillance”](#)
- [“Special Functions”](#)
- [“Input/Output”](#)
- [“Additional”](#)
- [“Job Costing”](#)
- [“Assign Users”](#)
- [“Cafeteria”](#)
- [“Identification Server”](#)

## Profile

Setting up a door profile involves configuring basic parameters to set up any door controller device. This section enables the user to set up the basic profile for any new device.

To do so, on the **Device Configuration** page, click the **Profile** tab in the left pane.

The screenshot shows the 'Device Configuration' window with the 'Profile' tab selected in the left sidebar. The main area is divided into 'Basic' and 'Optional' sections. The 'Basic' section includes fields for 'Sequence Number' (24), 'Device' (163), 'IP Address' (192.168.103.127), 'MAC Address' (00:1B:09:41:7F), and 'Active' (checked). The 'Optional' section includes 'Site' (1), 'Finger Template Format' (Suprema Proprietary), 'Application' (Basic Access Control), 'User Access Mode' (Any One), 'Visitor Access Mode' (Any One), 'Alert Messages' (unchecked), 'Consider For Visitor Pass Surrender' (unchecked), 'Consider For Attendance' (checked), and 'Generate Events' (checked).

To configure the Profile parameters click the following links:

- “Basic”
- “Readers”
- “Access Settings”
- “General”

## Basic

Click **Basic** tab. The **Basic** page appears.



*Sequence Number, Device, IP Address, MAC Address and Active are applicable for both Direct Door and Panel Door.*

For ARGO Door as a Direct Door,

Configure the following parameters:

- **Sequence Number:** This is a system generated sequence number for each new device.
- **Device:** Specify a name that can be assigned to the door. The Door ID is auto-generated by the system.
- **IP Address:** This is the IP address assigned to the door. Once the device connection is established, this field will automatically display the door IP address.
- **MAC Address:** Specify the MAC Address of the door.



*MAC address of door is required while manually adding the door to the COSEC Monitor. Note the MAC address from the device when it is powered on.*

- **Active:** Check the box to activate the device on the network.



*To add the Device automatically, go to Admin Module> System Configuration> Global Policy> Device. Enable the “**Auto Add New Devices**” checkbox.*

*The device will be added automatically but make sure you enable the **Active** checkbox in order to connect the device to the network. Once the device is connected to the network, it will come online in COSEC Monitor.*

Click the **Optional** collapsible tab, to configure the following parameters:

- **Site:** Select the site to which this door is to be assigned from the site pick list window. Site is created from Devices> Masters> Site.
- **Finger Template Format:** Select the format as Suprema Proprietary or Suprema ISO according to which the templates will be enrolled. For globally setting the template format, you can set from Global policy.
- **Application:** Select the application type for which the device is to be used. The options are **Basic Access Control**, **Advanced Access Control** and **Cafeteria**. All devices set to **Cafeteria** will subsequently be available for Cafeteria configuration.
- **User/Visitor Access Mode:** Defines the type and combination of credentials required to identify and validate a user at the Door Controller. Select the appropriate credential combination from the drop down list. The options available are:
  - Any one
  - Card
  - Card + Biometrics
  - Card + Biometrics + PIN
  - Card + PIN
  - Biometrics
  - Biometrics + PIN
  - Biometrics then Card
  - None
  - Face
  - Card+ Face
  - PIN + Face
  - Biometrics+ Face
  - Card then Biometric
- **Cafeteria Face Access Mode:** When Application is set as '*Cafeteria*', only then this configuration is available to the Admin and to add provision of using face as a credential to make transactions on cafeteria devices.
  - Select the mode type from the drop down to allow a user to choose multiple menu items and upon checkout do transaction using face as credential.
  - The options available are **None**, **Default Item** and **Item Selection**.

Optional

Site \* 1 Site-1

Finger Template Format Suprema Proprietary

Application Cafeteria

User Access Mode Any One

Visitor Access Mode Any One

Cafeteria Face Access Mode None

Consider For Attendance
 

- None
- Default Item
- Item Selection

Alert Messages ☒

Consider For Visitor Pass Surrender ☐

Generate Events ☒

- Default Item mode in cafeteria will allow users a touch less cafeteria experience. In Default Item mode only the transaction for default item is allowed. A default item is assigned in each scheduled menu.
- Item Selection mode in cafeteria will allow users to select the desired menu items and make a transaction using Face as a credential.
- **Consider for Attendance:** Select this check box if the events sent by this door are to be considered for Time and Attendance data processing. If this option is disabled, then the system would consider all events coming from the door as access control events.
- **Alert Messages:** Select this check box to enable the application to send alerts based on events from this door.
- **Consider for Visitor Pass Surrender:** Check the box to consider the selected device for visitor pass surrender. The Visitor can show his credential on this device to surrender the pass.
- **Generate Events:** This check-box is enabled by default. You can disable the check-box if the server is not required to receive any events from the respective devices.

For ARGO Door as a **Panel Door**,

Device Configuration

13 dummy ARGO pa...  
Panel200 Door  
ARGO  
B\_Panel200-De...  
Active

Profile

Advanced

Video Surveillance

Input/Output

Assign Users

Basic

Sequence Number 79

Device 13 dummy ARGO panel

IP Address .101 .111 .222 .111

MAC Address AA : AA : AA : BB : BB : BA

Active ☒

Optional

Site \* 1 Site-1

Consider For Attendance ☒

Alert Messages ☒

Access Zone Zone-1

Access Cluster Cluster-1

Door Group None

Auto IP Assignment ☒

Click the **Optional** collapsible panel, to configure the parameters:

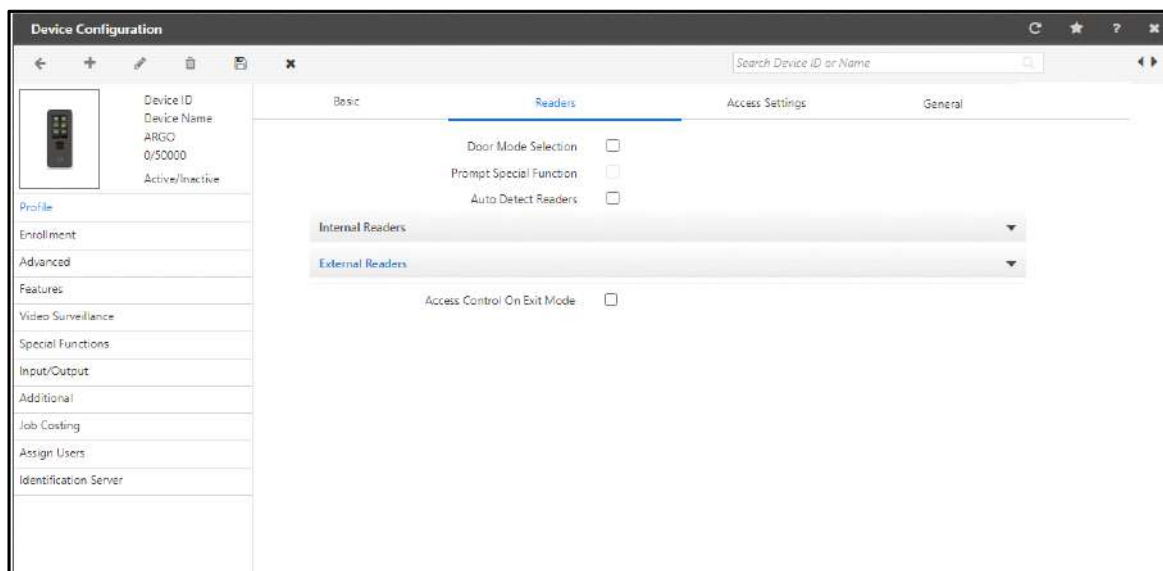
- **Site:** Click the picklist and select the site to which this door is to be assigned. Site is created from **Devices > Masters > Site**.
- **Consider for Attendance:** Select this check box if the events sent by this door are to be considered for Time and Attendance data processing. If this option is disabled, then the system would consider all events coming from the door as Access Control events.
- **Alert Messages:** Select this check box to enable the application to send alerts based on events from this door.
- **Access Zone** (only for panel doors) - Assign an access zone to the door by selecting from the drop down menu.
- **Access Cluster** (only for panel doors) - Assign an access cluster to the door by selecting from the drop down menu.
- **Door Group:** Door Group drop down includes list of all configured Door groups on corresponding panel. An additional option as 'None' is available and selected by default.
- **Auto IP Assignment:** There is option where panel door can be assigned its IP from device webpage. To enable this check the Auto IP Assignment box.



*Access Zone is configured while configuring Panel200.*

## Readers

Readers are important hardware components in a biometric door device. They may be internal or external. This section enables the administrator to configure both internal and external readers for a door as shown.



The following parameters are available for configuration:



*Door Mode Selection, Prompt Special Function and Auto Detect Readers are applicable for Direct Door only.*

- **Door Mode Selection:** If this option is enabled, then user will be prompted to select punch type as IN or OUT while punching on the device.

E.g: When a door is in Entry mode, your punches will always be in Entry side. But if you want to mark the punch in ext mode then you can select the door mode if “Door Mode Selection” is enabled.

If not selected, user will need to enable Scheduling to set reader mode of door as entry or exit as per user-defined schedules. For information on creating Reader Mode Schedules, **see Devices > Masters > Reader Mode Scheduler.**

- **Prompt Special Function:** This will provide selection of special function on device screen and based on the selection of particular type of special function, job codes for JPC user will be prompted. This can be enabled only when “Door Mode Selection” is enabled.
- **Auto Detect Readers** (for direct doors only): Select this checkbox to enable auto detection of Readers on a door controller connected to the server.

## Internal Readers

This option allows the configuration of the Internal Reader for the selected door.

The screenshot displays the 'Internal Readers' configuration window. At the top, there are dropdown menus for 'Mode' (set to 'Entry') and 'Card Reader Type' (set to 'MiFare Reader'). Below these is a search bar and a table with the following data:

Member No	Card Format	Configurable Bits
1	Default Format	0

Below the table, there are several configuration options: 'Finger Reader Type' (Finger Reader), 'Enable Scheduling' (checkbox), 'Reader Mode Schedule' (ID and Name fields), 'Advertise Bluetooth' (checkbox, checked), 'Bluetooth Name' (ARGO-De-IN), 'Bluetooth Range' (Custom), and a 'Custom Bluetooth Range (dBm)' slider ranging from -30 to +10 dBm.



*Mode, Card Reader Type and Card Format are applicable for both Direct Door and Panel Door.*

- **Mode:** Select the Mode as **Entry** or **Exit** from the drop down list.
- **Card Reader Type:** Select the Card Reader Type from the following options:
  - EM Prox Reader
  - HID Prox Reader
  - MiFare Reader
  - HID iClass-U Reader
  - HID iClass-W Reader
- **Card Format:** The single or multiple card formats can be assigned to the readers of both direct and panel doors. The default card format is assigned to device as shown in the grid. If no other card format is



assigned to device; then this default format will be applied. To know more about Card Formatting, refer ["Card Formats"](#).

## Multiple Card Format

To assign multiple card formats to device click on **Add** button. Then click the picklist to select the card format. And click **OK** to save the format.


This screenshot shows the top part of the card format configuration window. It includes a search bar, a table with columns 'Member No.', 'Card Format', and 'Configurable Bits', and an 'Add' button. The table currently has one entry: Member No. 1, Card Format 'Default Format', and Configurable Bits 0.

This screenshot shows the same interface as the previous one, but with the second row selected. The 'Card Format' picklist is open, showing 'Format1' as the selected option. The 'OK' button is visible at the bottom right.

Similarly you can add maximum 5 card formats. When the card format is saved, the Configurable bits of that format as configured from Masters> Card format will be displayed here. Multiple Card format configurations will be dispatched to door separated by 'Format ID' that is 'Member No.' along with all other format related parameters.

This screenshot shows the 'Internal Readers' configuration window. It has dropdowns for 'Mode' (set to 'Entry') and 'Card Reader Type' (set to 'EM Prox Reader'). Below these is a search bar and a table with columns 'Member No.', 'Card Format', and 'Configurable Bits'. The table contains three entries: Member No. 1 with 'Default Format' and 0 bits; Member No. 2 with 'Format1' and 26 bits; and Member No. 3 with 'Format2' and 32 bits. Each row has edit and delete icons.

- Select the **Finger Reader Type** as **Finger Reader**.

Click the **FP Reader Configuration**  button to set the **Security Level**, **Lighting Condition**, **Sensitivity**, **Fast Mode**, **Image Quality** and **Restore Defaults** for the selected FP Reader as shown.

This screenshot shows the 'Finger Print Module Calibration' dialog box. It contains five settings, each with a dropdown menu: 'Security Level' (Normal), 'Lighting Condition' (In Door), 'Sensitivity' (Level 8 (High)), 'Fast Mode' (Auto), and 'Image Quality' (Moderate). There is a 'Restore Defaults' button below these settings. At the bottom are 'Save' and 'Close' buttons.

## Finger Print Module Calibration

- **Security Level:** Security level specifies FAR (False Acceptance Ratio). Since FAR and FRR (False Rejection Ratio) is in inverse proportion to each other, FRR will increase with higher security levels. For regular Time-Attendance system “**Normal**” level can be selected. For high security areas requiring complete or maximum matching of template, “**Highly Secure**” level must be selected. For approximate matching of template, “**Secure**” level can be selected.
- **Lighting Condition:** Optical sensors are sensitive to lighting condition. With this parameter, users can tune optical sensors to be adapted for their lighting environment. Select the In Door or Out Door option based on the device location.
- **Sensitivity:** Specifies sensor sensitivity to detect a finger. On high sensitivity, the module will accept the finger input more easily. Level 8 has the highest sensitivity.
- **Fast Mode:** Fast Mode parameter can be used to shorten the matching time with a little degradation of authentication performance. In typical cases, Fast Mode 1 is 2 to 3 times faster than Normal mode while Fast Mode 5 is 6 to 7 times faster than Normal mode. There is also an Auto mode.
- **Image Quality:** When a fingerprint is scanned, the module will check if the quality of the image is adequate for further processing. Image quality parameter specifies the strictness of this quality check. Strongest option might lead to higher number of finger rejections during the enrollment process.



*Good quality of enrollment (around 70-75% quality) is recommended for proper identification of enrolled templates.*

- Click on the **Restore Defaults** button to return the field values for this page to default values if needed.
- **Enable Scheduling:** Check the box to enable automated control for the mode of an Internal Reader. This will set reader mode of door as entry or exit as per user-defined schedules.
- **Reader Mode Schedule:** Select the schedule from the picklist which is to be assigned to the internal reader of ARGO door. With this the same reader can be configured to function both in Entry as well as Exit mode based on scheduled timings.



*For configuring Reader Mode schedule See Devices> Masters> Reader Mode Scheduler.*



*Advertise Bluetooth, Bluetooth Name and Bluetooth Range are applicable for both Direct Door and Panel Door.*

- **Advertise Bluetooth:** Select this checkbox to enable Bluetooth of the device by which the device will be visible to others. Then configure the following parameters.
- **Bluetooth Name:** By default, if the Device Name is configured then it will be displayed here along with the Mode. The prefix will be the Device Name and the suffix will be -IN or -OUT as per the set Mode.

If required, you can configure the bluetooth name as per your requirement. The Bluetooth Name can be a maximum of 10 characters.

- **Bluetooth Range:** The system supports different ranges of bluetooth using which the users can mark their attendance. You can set the desired range to control the boundary for marking the attendance.

Select the Bluetooth Range as — Short (1m-2m), Medium (5m-7m), Long (>8m) or Custom.

- **Custom Bluetooth Range (dBm):** If you select **Custom** option for Bluetooth Range, enter the Bluetooth range manually or set the range using the slider. Drag the slider towards the left to decrease the value or drag the slider to the right to increase the value.

Click on the **Save** button.

## External Readers

This option allows the configuration of the External Reader for the selected door.



*Mode, External Reader Type, Card Format and Exit Switch are applicable for both Panel Door and Direct Door.*

- **Mode:** Select the Mode as **Entry** or **Exit** from the drop down list.
- **External Reader Type:** Select the desired type of External Reader from the drop-down list.



*Using PIN-W Reader; user can change their PIN number through devices.*

- **Card Format:** Select a card format to be applicable for external readers of the device. This is applicable for all direct doors and all Panel doors. For multiple format description, refer to [“Multiple Card Format”](#)
- **Exit Switch:** Select this checkbox to enable the use of **Exit Switch**.



*User Access Mode, Visitor Access Mode and Access Control on Exit Mode is applicable for Direct Door only.*

- **User/ Visitor Access Mode:** Select the desired access mode for User/Visitor.



*Configure Bluetooth From Server, Advertise Bluetooth, Bluetooth Name and Bluetooth Range are applicable for both Direct Door and Panel Door.*

- **Configure Bluetooth from Server:** When you select **External Reader Type** as — CB U Reader, ATOM RD300, ATOM RD200 or ATOM RD100, select **Configure Bluetooth from Server** checkbox to enable Bluetooth feature for the mentioned external readers.

Once you enable **Configure Bluetooth from Server**, configure the following Bluetooth parameters:

- **Advertise Bluetooth:** Select this checkbox to enable Bluetooth of the ARGO device by which the device will be visible to others. Then configure the following parameters
- **Bluetooth Name:** By default, if the Device Name is configured then it will be displayed here along with the Mode. The prefix will be the Device Name and the suffix will be -IN or -OUT as per the set Mode.

If required, you can configure the bluetooth name as per your requirement.

The Bluetooth Name can be a maximum of 20 characters.

- **Bluetooth Range:** The system supports different ranges of bluetooth using which the users can mark their attendance. You can set the desired range to control the boundary for marking the attendance.

Select the Bluetooth Range as — Short (1m-2m), Medium (5m-7m), Long (>8m) or Custom. If you select the **External Reader Type** option as ATOM RD200/300, then only you can select the **Custom** option for Bluetooth Range.

- **Custom Bluetooth Range (dBm):** If you select **Custom** option for Bluetooth Range, enter the Bluetooth range manually or set the range using the slider. Drag the slider towards the left to decrease the value or drag the slider to the right to increase the value.



*If Auto Detect Reader is enabled, then External Reader Bluetooth parameters will not be visible.*

- **Access Control On Exit Mode** (only for direct door): Select this check box to enable the checking of the following access control policies on door when the external reader is in the 'exit' mode.
  - User enabled
  - User validity
  - Blocked user
  - Time Based Access Check

- ASC
- User Access Group

Click **Save** to save all the configurations.

## Access Settings

This section is available for direct doors. The **Access Settings** page appears as shown below:

- **Universal Time Zone** - Select the geographic time zone in which the DOOR will operate.
- **Time Format** - Specifies the time format to be displayed on Door Controller LCD display. The formats available are:
  - 24 Hours
  - 12 Hours

Select the relevant option from the drop down list as per the site requirements.

### Auto Synchronize with NTP

If Date and time is to be automatically synchronized as per the **Preferred NTP Server** (predefined or user-defined NTP server address) selected by user, then you must enable **Auto Synchronize With NTP** checkbox.

Independent of the mode set from server as Auto or Manual, the user can change the date and time settings from device webpage, which will be reflected on device display.

- When Auto Synchronization with NTP is disabled Preferred NTP Server field will be disabled.
- When Auto Synchronization with NTP is enabled,
  1. You can specify the Preferred NTP server of your choice. In this case device will first try to get Date and Time from that server address.  
If it does not get Date and Time in three tries; device will check from pre-defined NTP servers.  
If you have entered one of the three pre-defined NTP servers(ntp1.cs.wisc.edu , time.windows.com , time.nist.gov); then device will first check that server first.  
If it receives updated Date and Time then Updated Date and Time will be reflected on device webpage and display screen.

2. You can keep the Preferred NTP server as blank. In this case device will check for Date and Time from the first NTP server.
3. If user has manually entered Date and Time from webpage or Device Menu then those values of Date and Time will be reflected on device webpage and display screen.

In the case of the **Manual** option the administrator can manually update the time on the Door with that of the system time as and when required. This can be accomplished from the COSEC Monitor and control application.

- **Working Days** - Specify the days on which the default working hours should be applicable. Check the relevant boxes to specify the active days.
- **Working Hours (HH:MM)** - Define the default working hours in HH:MM format.
- **Holiday Schedule** - This section allows the administrator to assign up to four holiday schedules to the device by using the Holiday Schedule picklist.



*If the same holiday schedule is configured for a user and for the door controller on which the user is assigned, then the user's attendance marking on this device, on any of the scheduled holidays will always be marked as a holiday.*

- **Device Access Schedule:** All the Access Schedules created from the "[Access Schedules](#)" page appear in the drop-down list. By default, the Access Schedule, if assigned from the Access Schedule page appears here. If you wish to change the Access Schedule, select the desired Access Schedule to be assigned to the device from the drop-down list.

If an Access Schedule is selected, it will override the Working Days configuration.

If an Access Schedule is already assigned from "[Access Schedules](#)" page and a different schedule is selected here, it will override the schedule assigned from "[Access Schedules](#)" page and vice versa.

To revoke an Access Schedule, select the **Select** option from the list. The device will be removed from the Access Schedule under the "[Assign Doors](#)" section on the "[Access Schedules](#)" page.

## General

The **General** page appears as follows. Enter all general details applicable to the device in this section.

The screenshot shows the 'Device Configuration' window for device 26 (IJ-ARGO). The 'General' tab is selected. The left sidebar lists various configuration categories. The main area contains the following settings:

- Mute Buzzer:** ☐
- Allowed Acknowledgement:**
  - Display Duration (ms): 500
  - LED - Buzzer Duration: Short
- Denied Acknowledgement:**
  - Display Duration (ms): 3000
  - LED - Buzzer Duration: Long
- Enable Display Messages:** ☐
- Custom Birthday Message:** Happy Birthday
- Display Message 1:** ☒
  - Schedule: 00:00 to 11:59
  - Message: Good Morning
- Display Message 2:** ☒
  - Schedule: 12:00 to 15:59
  - Message: Good Afternoon
- Display Message 3:** ☒
  - Schedule: 16:00 to 20:59
  - Message: Good Evening
- Display Message 4:** ☒
  - Schedule: 21:00 to 23:59
  - Message: Good Night
- Multi-Language Support:** ☐
- Auto Hide Menu Bar:** ☐



*Mute Buzzer, Allowed Acknowledgment, Denied Acknowledgment and Auto Hide Menu Bar are applicable for both Direct Door and Panel Door.*

*If you have connected Readers — ATOM RD100/200/300, PATH — then the configurations for Allowed/ Denied Acknowledgment will be applicable to these readers as well.*

- **Mute Buzzer** - User can mute or unmute the door buzzer by checking or clearing the box respectively. This is applicable for both Direct and Panel door.
- **Allowed Acknowledgment**
  - **Display Duration (ms)** - Define the time duration in between 250 to 3000ms till which the 'Acknowledgment Allowed' message will be displayed.
  - **LED - Buzzer Duration** - Select the time duration as Long, Medium, Short or Shortest for the LED Buzzer.
- **Denied Acknowledgment**
  - **Display Duration (ms)** - Define the time duration in between 250 to 3000ms till which the 'Acknowledgment Denied' message will be displayed.

- **LED - Buzzer Duration** - Select the time duration as Long, Medium, Short or Shortest for the LED Buzzer.
- **Auto Hide Menu Bar**- If a person touches the device screen by mistake and enter into Menu; then the finger sensor will not take the punch when he punches on device till the menu is closed or time out occurs. So in this case; enabling the **Auto hide Menu Bar** check-box will hide the menu and the user will be able to punch on the door. If you want to access the Menu then swipe upwards on the screen which will show the menu.



*Enable Display Messages, Custom Birthday Message, Display Message 1 to 4, Schedule, Message and Multi-Language Support are applicable for Direct Door only.*

- **Enable Display Messages** - This feature allows the user to enable custom birthday message and display messages to be displayed on the door device. Upto 4 display messages can be configured for a door.
- **Custom Birthday Message**- Enter the birthday message which would appear on the door when the user punches on the door on his birth date.

The valid values are

**A-Z**

**a-z**

**0-9**

**`~!@#\$%^&\*()\_+~{}|\\|:;?<>,.\\''**

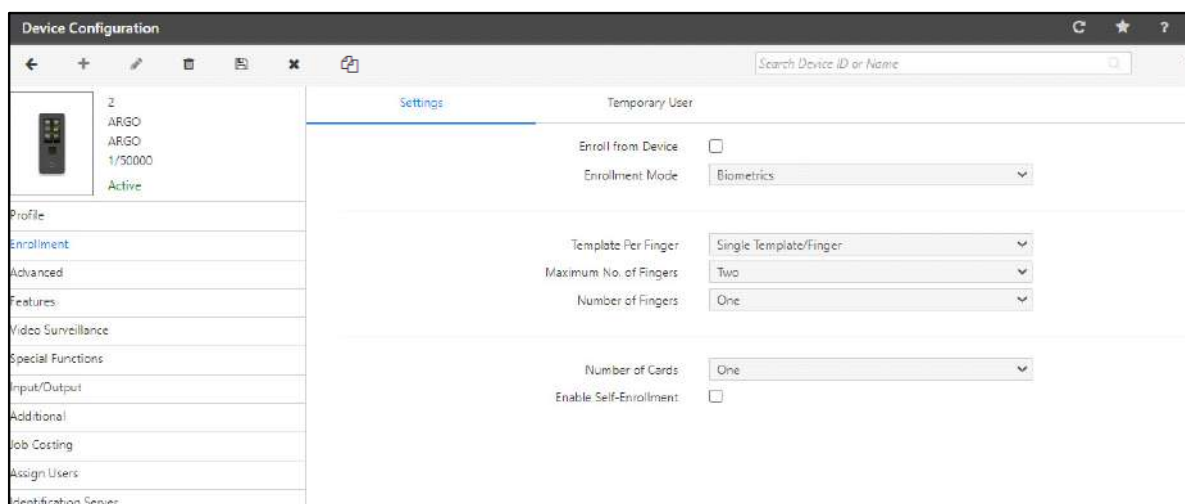
- **Display Message** - Enable each display message individually by selecting this checkbox.
- **Schedule** - For each message, the user needs to define the time period between which this message is to be displayed.
- **Message** - Enter the message to be displayed in this field. Maximum 21 characters allowed.
- **Multi-Language Support** - Select this checkbox to enable multi-language support for the selected device.

The **Display From** field shall display the reading order for the selected language.



# Enrollment

On the **Device Configuration** page, click the **Enrollment** tab in the left pane.



The screenshot shows the 'Device Configuration' window. On the left, a sidebar lists various configuration options: Profile, Enrollment (selected), Advanced, Features, Video Surveillance, Special Functions, Input/Output, Additional, Job Costing, Assign Users, and Identification Server. The main area is titled 'Settings' and 'Temporary User'. It contains several configuration options: 'Enroll from Device' (checkbox, unchecked), 'Enrollment Mode' (dropdown menu, 'Biometrics' selected), 'Template Per Finger' (dropdown menu, 'Single Template/Finger' selected), 'Maximum No. of Fingers' (dropdown menu, 'Two' selected), 'Number of Fingers' (dropdown menu, 'One' selected), 'Number of Cards' (dropdown menu, 'One' selected), and 'Enable Self-Enrollment' (checkbox, unchecked).

To configure the Enrollment parameters click the following links:

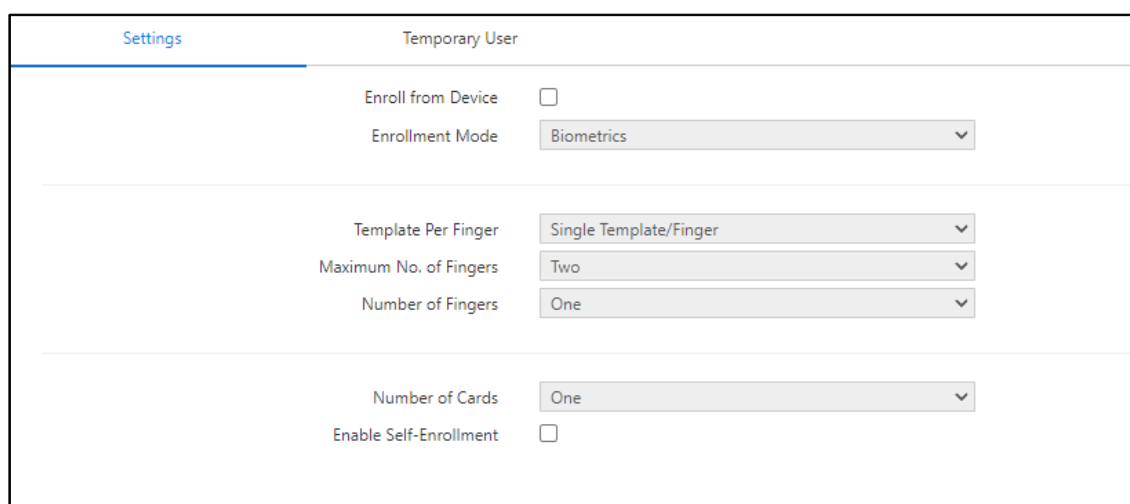
- [“Settings”](#)
- [“Temporary User”](#)

## Settings



*Settings is applicable for Direct Door only.*

Click the **Settings** tab. The **Settings** page appears.



The screenshot shows the 'Settings' page for 'Temporary User'. It contains the same configuration options as the previous screenshot: 'Enroll from Device' (checkbox, unchecked), 'Enrollment Mode' (dropdown menu, 'Biometrics' selected), 'Template Per Finger' (dropdown menu, 'Single Template/Finger' selected), 'Maximum No. of Fingers' (dropdown menu, 'Two' selected), 'Number of Fingers' (dropdown menu, 'One' selected), 'Number of Cards' (dropdown menu, 'One' selected), and 'Enable Self-Enrollment' (checkbox, unchecked).

Configure the following parameters.

- **Enroll from Device** - Select this check-box to enable the enrollment of user from the door controller. When this check-box is enabled, **Enroll User** special function on that device will be activated.



*If both Enroll User special function & Enroll From Device check box are inactive in Device Configuration, then if you enable Enroll User special function, Enroll From Device check box will also be enabled.*

- **Enrollment Mode** - Select the Credential from the drop-down list that can be enrolled using the special function at the DOOR. The options are **ReadOnlyCard**, **SmartCard**, **Biometric** and **BiometricthenCard**, and **DuressFinger**. Refer [“Enroll Credentials”](#) or [“Enrolling Users”](#) to enroll User/Worker. Refer [“Enrollment”](#) or [“Enroll Credentials”](#) to enroll Worker. Refer [“Enroll Credentials”](#) to enroll a Visitor.



*DuressFinger is applicable for User and Worker only.*

- **Template Per Finger:** This displays the values as configured in the Global Policy. This field is not editable. For details refer to [“User Policy”](#).
- **Max Number of Fingers:** This displays the values of the Maximum Number of Fingers configured in the Global Policy. This field is not editable. For details refer to [“User Policy”](#).
- **Number of Fingers/Cards:** Select the Number of Cards or Fingerprints to be enrolled based on the credential option selected in Enrollment Mode.
- **Enable Self-Enrollment:** Select this check box to enable the Self-Enrollment feature on this door.

## Temporary User



*Temporary User/Worker is applicable for both Direct Door and Panel Door.*

*Temporary User/Worker is not applicable for Cafeteria mode of devices.*

*For Panel Door to add Temporary User/Worker, make sure*

- *Temporary Addition of Unknown User is enabled from Panel200 > Enrollment > Temporary User.*
- *User Access Mode (Door) in Zones is — Face, Biometric or Card — as per your requirement.*

*For Direct Doors make sure the User Access Mode selected in Profile is — Face, Biometric or Card — as per your requirement.*

Click the **Temporary User** tab. The **Temporary User** page appears.

Settings Temporary User

Temporary Addition of Unknown User: Disabled (dropdown menu with info icon)

Confirm before adding Temporary User: ☐

**Auto Generate ID**

ID Format:

Numeric Value Length: 0

Zero Padding required: ☐

**Auto Generate Name**

Add Name via Device: ☐

Name Format:

**Group**

Organization	1	Organization-1	≡
Branch	1	Branch-1	≡
Department	1	Department-1	≡
Section	1	Section-1	≡
Category	1	Category-1	≡
Grade	1	Grade-1	≡
Designation	1	Designation-1	≡
Custom Group 1	1	Custom Group 1	≡
Custom Group 2	1	Custom Group 2	≡
Custom Group 3	1	Custom Group 3	≡

Configure the following parameters.

- **Temporary Addition of Unknown User:** Select the desired option to temporarily add an unknown user from the drop-down list. The options are — Disabled, As Temporary Worker or As Temporary User. By default, **Disabled** is selected. If you select **Disabled**, all the parameters are disabled.

You can add an unknown user either as a temporary user or worker from the device at a time.

If you select As Temporary User, for details refer to [“As Temporary User”](#).

If you select As Temporary Worker, for details refer to [“As Temporary Worker”](#).

## As Temporary User

Temporary User Settings		
Temporary Addition of Unknown User	Disabled	
Confirm before adding Temporary User	<input type="checkbox"/>	
<b>Auto Generate ID</b>		
ID Format		
Numeric Value Length	0	
Zero Padding required	<input type="checkbox"/>	
<b>Auto Generate Name</b>		
Add Name via Device	<input type="checkbox"/>	
Name Format		
<b>Group</b>		
Organization	1	Organization-1
Branch	1	Branch-1
Department	1	Department-1
Section	1	Section-1
Category	1	Category-1
Grade	1	Grade-1
Designation	1	Designation-1
Custom Group 1	1	Custom Group 1
Custom Group 2	1	Custom Group 2
Custom Group 3	1	Custom Group 3


If you select **As Temporary User**, configure the following parameters:

- **Confirm before adding Temporary User:** Select the check box if you wish that a confirmation message should be displayed on the device display screen, to confirm a user before adding that user as a temporary user when enrolling the same from the device. If this is not enabled, no confirmation message will be displayed and the user/worker will be enrolled automatically. You need to check the Temporary User/ Worker list to verify if the user is enrolled in the system.

### Auto Generate ID

- **ID Format:** Configure the required format of the ID as 'Numeric Value Format' and/or other Value Formats in any order as per the requirement. You can also enter the fixed value which will always be displayed along with the other components of the User ID for every user.

To select the different format for the ID, enter \* in **ID Format** box and the drop-down list containing different Value formats appears. Select the desired format from the drop-down list.

Click **Copy User Format from Global Policy** , if you wish to copy the ID Format as configured in the Global Policy. For more details, refer to ["Generate User ID"](#).

- **Numeric Value Length:** Enter the desired number of digits from 1 to 15 till which the 'NUMVAL' must be generated. For example: 4.

- **Zero Padding Required:** Select the check box to allow the addition of zeros before the 'NUMVAL' value to reach the configured Numeric value length. For example, if the Numeric value length is configured as 4 and the number assignment starts from a single digit then as explained in above example, the new User ID to be generated is 'MATRIX4DOC1' if Zero Padding is enabled, it will be generated as 'MATRIXDOC0001'.

## Auto Generate Name

- **Add Name via Device:** Select this check box to enable adding the name of the temporary user through the device display screen while enrolling the user. If enabled, the **Name Format** parameter is disabled.
- **Name Format:** Make sure the Add Name via Device is disabled to configure this parameter. Configure the required format of the Name as 'Numeric Value Format' and/or other Value Formats in any order as per the requirement. You can also enter the fixed value which will always be displayed along with the other components of the User ID for every user. To select the different format for the ID, enter \* in **Name Format** box and the drop-down list containing different Value formats appears. Select the desired format from the drop-down list.

Click **Copy ID Format**  , if you wish the Name Format to be the same as the ID Format.

## Group

By default, Groups for Organization, Branch, Department, Section, Category, Grade, Designation, Custom Group 1, 2 and 3 are assigned. If you wish to assign different groups to the temporary user, you need to create groups from the Enterprise Module. Create the desired groups and then select the desired group from the respective picklist. For details on creating groups, refer to ["Configuring Groups"](#).

## As Temporary Worker

Settings

Temporary User

Temporary Addition of Unknown User: As Temporary Worker ⓘ

Skill \*  Skill-1 ⓘ

Contractor \*  Name ⓘ

Work Order  Name ⓘ

Assignment Period  ⓘ  ⓘ

Confirm before adding Temporary User: ☐

**Auto Generate ID**

ID Format \*  ⓘ

Numeric Value Length \*

Zero Padding required ☐

**Auto Generate Name**

Add Name via Device: ☐

Name Format \*  ⓘ

**Group**

Organization \*  Organization-1 ⓘ

Branch \*  Branch-1 ⓘ

Department \*  Department-1 ⓘ

Section \*  Section-1 ⓘ

Category \*  Category-1 ⓘ

Grade \*  Grade-1 ⓘ

If you select **As Temporary Worker**, configure the following parameters:

- **Skill:** Select the Skill to be assigned to the temporary worker from the picklist.
- **Contractor:** Select the Contractor to be assigned to the temporary worker from the picklist.



*If the Contractor does not appear in the picklist, check the Contractor's **Validity End Date**. The Validity End Date shall not be included in the validity period of the Contractor. For details, refer to "[Contractor Profile](#)".*

- **Work Order:** Select the Work Order to be assigned to the temporary worker from the picklist.
- **Assignment Period:** The work order assignment period is auto-displayed based on the work order selected. If you wish to change the assignment period, select the start date and end date of work assignment using the calendar.

If you wish to create Skills, Contractors or Work Orders, refer to "[Contract Worker Management](#)".

The other temporary worker parameters are similar to that of temporary user. For details, refer to "[As Temporary User](#)".

## Advanced

The Advanced tab allows the user to configure some advanced parameters such as access control settings, alarms and device timers.

To access this, After selecting the device, Select the **Advanced** tab from **Device Configuration** page. The advanced settings can be configured from following sections:

- "[Settings](#)"
- "[Alarms](#)"
- "[Timers](#)"
- "[Wiegand](#)"


## Settings

The Advanced Settings page for **ARGO** as a **Direct Door** appears on your screen as shown below:

The screenshot shows the 'Device Configuration' window with the 'Advanced' tab selected. The left sidebar lists various configuration categories, and the main area displays settings for the 'ARGO' device (ID: 0/50000, Active/Inactive). The settings include checkboxes for event generation, credential requirements, and PIN display, as well as dropdowns for access level and mode, and input fields for timers and facility codes.

Setting	Value
Generate Exit Switch Events	<input type="checkbox"/>
Generate Invalid User Events	<input type="checkbox"/>
Generate Sequential IN-OUT Events	<input type="checkbox"/>
Two Credentials Required	<input type="checkbox"/>
Show PIN	<input type="checkbox"/>
Allow Exit when Door Lock	<input checked="" type="checkbox"/>
Auto Relock	<input type="checkbox"/>
Auto Relock Timer (Sec)	3
Enable Additional Security	<input type="checkbox"/> Disabled
Enable Smart Identification	<input type="checkbox"/>
Access Level	8
Access Mode	Card
Auto Acknowledge Alarm	<input type="checkbox"/>
Auto Acknowledge Alarm (Sec)	10
Facility Code	1
Allow Access Through Mobile	<input type="checkbox"/>
Mobile Entry Access Mode	Mobile Only
Mobile Exit Access Mode	Mobile Only
Show Attendance Details	<input type="checkbox"/>
Duplicate Access Time Interval (Sec) *	0

The following parameters are available for configuration:

- **Generate Exit Switch Events** - Select this checkbox to enable the door to generate events everytime the exit switch is used.
- **Generate Invalid User Events** - Select this checkbox to enable the door to generate events for invalid user inputs.  
 **Generate Invalid User Events** is applicable for all other credentials except **Face**. To generate events for **Face** credentials, make sure **Generate Unidentified Face Event** is enabled under "[Identification Server](#)".
- **Generate Sequential IN-OUT Events** - Select this checkbox to generate user punches on device as the sequential IN-OUT events irrespective of whichever mode in which device is functioning.
- **Two Credentials Required**- Select this checkbox to enable the feature of verifying 2 credentials mandatorily for users allowed to By-pass finger/palm.
- **Show PIN**- Select this checkbox to display the characters of PIN when the PIN is entered on device.
- **Allow Exit when Door Lock** - Select this checkbox if users are to be allowed to exit even when the Door relay is in locked condition.

- **Auto Relock** - Select this checkbox to allow the door to relock immediately when the door status changes to close after normal open irrespective of the defined pulse time. However, it is supported only if a door sense is installed and enabled.
- **Auto Relock Timer** - Specify the time in seconds for the Auto Relock operation. Valid Range: 1 to 65535.
- **Enable Additional Security**- Select this checkbox to enable additional security at the selected Door Controller.
- **Additional Security Code** - Enter a code (ranging from 1 to 65535) in the field provided. Re-enter the code to confirm.



*Changing this value can affect the SI function. Click on the **Default Code** button to reset the **Additional Security Code** to the value set in the **Global Additional Security Code** field on the Global System Policy page.*

- **Enable Smart Identification** - Select this checkbox to enable this functionality at the selected Door Controller and select the **Access Level** and the **Access Mode** from the drop down list.
- **Auto Acknowledge Alarm** - Select this checkbox to enable the auto-acknowledgement of all alarms for this device.
- **Auto Acknowledge Alarm (sec)** - Set the time in seconds for the Auto Acknowledge Timer. The wait timer will start and on expiry of the timer, the alarm buzzer will stop automatically.
- **Facility Code** - Set a value for Facility Code to be set for access modes other than “Card”, if Facility Code is expected in Wiegand Output. This will be applicable to all direct doors except Door V1 and V2.
- **Allow Access Through Mobile**- Check the box to allow the access to device using COSEC ACS App.
- **Mobile Entry/Exit Access Mode**- Select the entry and exit door access mode from the options of **Mobile Only**, **Mobile then Biometrics**, **Mobile then Card** and **Mobile then PIN**.



*If User Access Mode is selected as “None” and Mobile Access Mode is selected as “Mobile Then Biometrics” then door can be accessed through Mobile and then Biometric credential.*

- **Show Attendance Details** - Select this check-box for displaying the Attendance Details of the user on ARGO door. This allows user to view his attendance details on ARGO door itself and there is no need to login to ESS application to view attendance details.

The attendance details of user will be displayed for a period of 3-4 seconds after the Access Allowed screen.



*1. The user whose Attendance details are to be displayed on ARGO door must be enabled for this feature. Enable the check-box **Show Attendance details on Device** from User Configuration> T&A> Attendance.*

*2. While an attendance detail of one user is being displayed on device and second user tries to access the device; new user will be processed.*

*3. Whenever both users of 2-person rule are allowed to get access on device then attendance details screen of second user will be loaded on device.*



- **Duplicate Access Time Interval (Sec):** Configure the maximum duration in seconds for which the device should consider a subsequent user punch (after the first successful allowed punch) received as a duplicate punch. Valid Range: 0 to 9999 seconds. Default: 0.



*The Duplicate Access Time Interval is not applicable:*

- if Duress Finger is detected by the device.
- if the device is in Cafeteria mode.
- to Smart Identification users.

## Temperature Logging



To configure Temperature Logging parameters, make sure the Enable check box for **Temperature Configuration** under “[Temperature and Symptoms Configuration](#)” in “[User Policy](#)” under “[Defining Global Policies](#)” is enabled.

Temperature Logging	
Enable	<input type="checkbox"/>
Sensor Type	FEVOBOT
Sensor Interface	USB
Emissivity	0.95
Calibration Parameter	+ 0.0
Approach to Sensor Wait-Timer (Sec)	3.0
Temperature Detection Time Out (Sec)	10
Tolerance between Consecutive Readings	0.5
Consecutive Readings Count within Tolerance	5
Temperature Threshold (°F)	99.5
Minimum Temperature for Access (°F)	95.0
Restriction Type	Soft
Bypass If Sensor Disconnected	<input type="checkbox"/>

- **Sensor Type:** Select the type of thermal sensor integrated in the device. There are three sensors: *AST*, *Web-Based* and *FEVOBOT*. Default sensor set is *FEVOBOT*.
- **Sensor Interface:** Select the interface on which device will communicate with the sensor.  
For Sensor Type-*AST*.  
Sensor Interface options will be: RS-232 and USB  
For Sensor Type- *Web-based*  
Sensor Interface options will be: HTTP/S  
For Sensor Type-*FEVOBOT*  
Sensor Interface options will be: USB
- **Emissivity:** Set the emissivity parameter for Sensor. This parameter should only be visible when Sensor Type is *AST*. Default value is 0.95.  
It is used to define accuracy in sensor to detect temperature of different skin or objects.  
Not applicable for *FEVOBOT*.
- **Calibration Parameter:** Set the calibration parameter for the thermal sensor.  
On click of + the value should increase by 0.1 and on click of – it should decrease by 0.1.  
Not applicable for *FEVOBOT*.
- **Approach to Sensor Wait-Timer:** Time for which the device will wait for user to approach the device before starting Temperature Detection.

- **Temperature Detection Time-Out:** The timer till which temperature detection will be done for the user and if valid temperatures are not found till the expiry of timer then timeout will be declared.
- **Tolerance between consecutive readings:** The Tolerance range of reference temperature within which the consecutive readings are considered to be valid user temperature readings. If current temperature doesn't fall in tolerance range the reference temperature is updated with the current temperature and the process continues.  
Not applicable for FEVOBOT.
- **Consecutive readings count within tolerance:** The Tolerance range of reference temperature within which the consecutive readings are considered to be valid user temperature readings. If current temperature doesn't fall in tolerance range the reference temperature is updated with the current temperature and the process continues.  
Not applicable for FEVOBOT.
- **Minimum Temperature for Access:** The minimum temperature value that should be detected is to be considered as valid temperature.  
It should be less than threshold temperature. If user tries to enter a value equal to or greater than threshold temperature validation should be shown.  
The default value, unit and range should be updated based on the Temperature unit set on Panel.
- **Temperature Threshold:** To set the threshold value of the temperature. The default value, unit and range can be updated based on the Temperature unit set on Panel.
- **Restriction Type:** To set restriction type as soft/hard.
- **Bypass if Sensor Disconnected:** Enable this check-box to give provision of bypassing the feature if sensor connectivity is lost.

## Face Mask Compulsion

Face Mask Compulsion feature is used to enforce users to wear masks while they are within the premises.

After identifying the user, Device will prompt the user to show Face with Mask when "Face Mask Compulsion" is enabled.

Based on identification of Mask, user will be allowed or denied access.

Make sure you have enabled **Enable FR** checkbox in **Devices > Device Configuration > Identification Server > Face Recognition > Enable FR** and configure the below mentioned parameters to avail this feature.

The screenshot shows a configuration window titled "Face Mask Compulsion". At the top right, there is an "Enable" checkbox that is currently unchecked, followed by an information icon. Below this, there are three settings:

- "Approach to Camera Wait-Timer (Sec)" is set to "3.0".
- "Mask Detection Time Out (Sec)" is set to "4".
- "Restriction Type" is a dropdown menu currently showing "Soft".

- **Enable:** Select this checkbox to enable Face Mask Compulsion feature for IDS.

- **Approach to Camera Wait-Timer (Sec):** This parameter defines the time within which the user must approach the camera for face mask detection.
  - You must enter the Wait-Time between 0.0-15.0 seconds.
  - By default, it is 3.0 seconds.
- **Mask Detection Time Out (Sec):** This parameter defines the maximum time duration for user's face mask detection.
  - You must enter the detection time out between 0.0-15.0 seconds.
  - By default, it is 4.0 seconds.
- **Restriction Type:** Select the type of restriction to be imposed when the configured policy is violated. Select the desired option - Soft or Hard.
  - **Soft Restriction:** The access will be granted even if the user is identified without wearing a mask; however, an event and a warning are generated that indicates the user has been identified without wearing a mask.
  - **Hard Restriction:** The access will be denied if the user is identified without wearing a mask.

By default it is **Soft Restriction**.



Users face enrollments are dependent on the *Visible Face* parameter value set by you. To know more, refer [“Face Recognition”](#).

The **Advanced Settings** for ARGO as **Panel Door** is shown below:

1. **Tail-Gating** - Tail-gating refers to an access violation which occurs when more than one person tries to enter a secured area using a single person's access credentials. If this option is enabled on the panel door, the occupancy count of a zone should be incremented or decremented considering both the punch as well as the auxiliary input port of the panel door (say, input from a beam-counter). Set the wait timer for resetting the tailgating count (**Reset Wait Timer**) based on the door lock status or the door pulse wait timer (as configured).
2. **Man Trap Entry Timer (Sec)** - This check-box enables an alarm wait timer on the panel door to ensure that the user enters the next sequential door of a man-trap within a specific time-frame.

3. **Man Trap Exit Timer (Sec)** - This check-box enables an alarm wait timer on the panel door to ensure that the user exits the panel door to enter the next sequential door of a man-trap within a specific time-frame.
  4. **Enable Man Trap Door Interlocking:** Select this check-box to activate the Door Interlock for the selected door (say Door1). This means if the Door1 is open then other doors will remain close.
  5. **Select Doors for Interlocking:** Select the doors to be assigned for Interlocking from the picklist. You can select particular doors or all the doors at once.
- To do so, click the **Select Doors** for Interlocking picklist. The **Picklist For Panel Door** pop-up appears.

Picklist For Panel Door

Total Selected: 0 Records

Search  [Show Selected](#)

☐ Select All

<input type="checkbox"/>	ID	Name ▲
<input type="checkbox"/>	10	ARCDC100_DD_Door
<input type="checkbox"/>	9	ARCDC100_DD_Door
<input type="checkbox"/>	8	ARCDC100_SD_Door
<input type="checkbox"/>	1	ARGO_PANEL
<input type="checkbox"/>	2	DoorV3
<input type="checkbox"/>	7	DoorV3_Door
<input type="checkbox"/>	3	DOORV4_PANEL
<input type="checkbox"/>	6	dummy
<input type="checkbox"/>	4	PATHV2_PANEL
<input type="checkbox"/>	5	VEGA_PANEL


OK Cancel

You can either select particular door or can select all the doors at once.

To select particular doors, click the check boxes of the desired doors.

**OR**

To select all the doors, select the **Select All** check box. The doors on all the pages will be selected.

Click **OK**. Hover over the **Info**  icon. It displays the number of selected doors.

Suppose Door2 and Door3 are selected for Interlock with Door1. So When Door1 opens; Door2 and Door3 will remain close.



*For Degrade mode Door Interlocking feature will not work.*

*Whenever a door is in abnormal state and for that door interlocking is enabled then user access in other doors of the interlocking group is allowed.*

- **Duplicate Access Time Interval (Sec):** Configure the maximum duration in seconds for which the device should consider a subsequent user punch (after the first successful allowed punch) received as a duplicate punch. Valid Range: 0 to 9999 seconds. Default: 0.



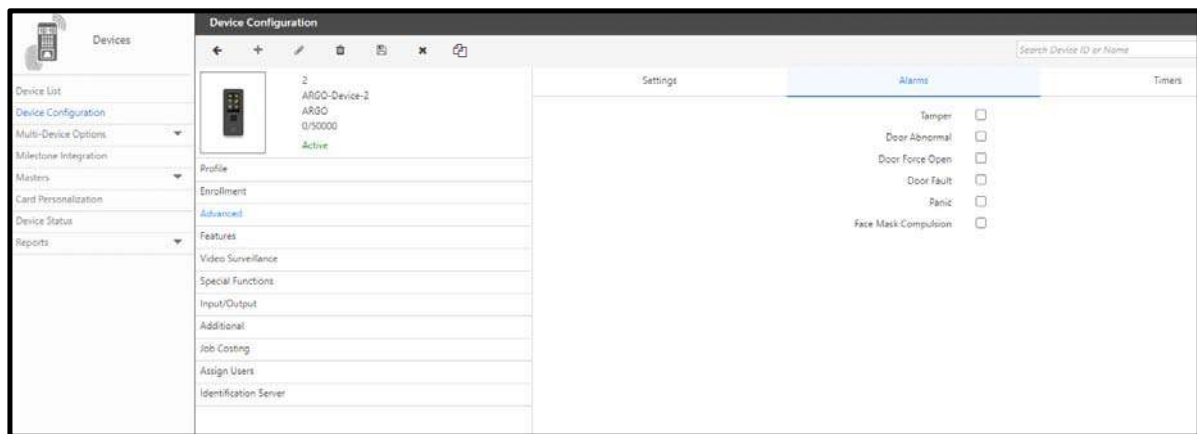
*The Duplicate Access Time Interval is not applicable:*

- if Duress Finger is detected by the device.
- when Panel200 Server mode is in Degraded mode.
- to Smart Identification users.

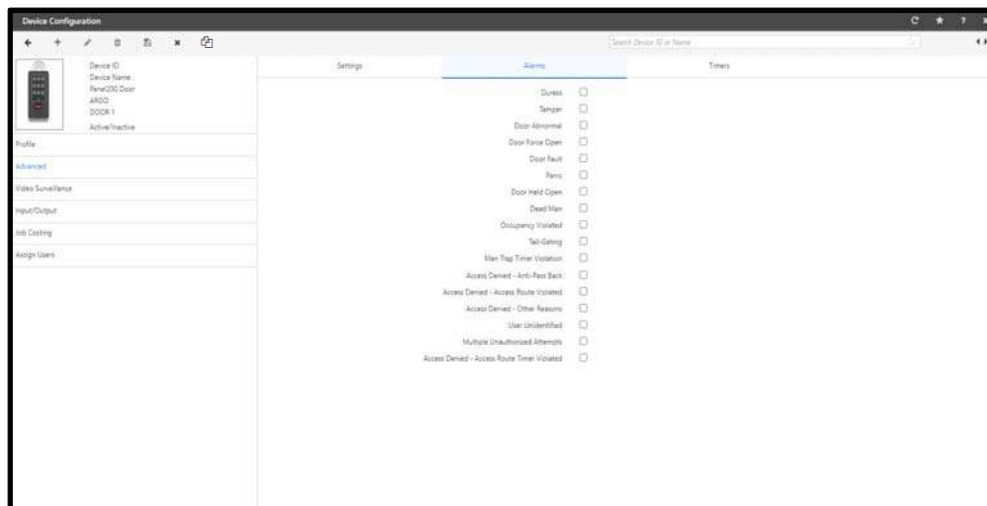
## Alarms

In Alarm tab, you can assign below list of alarms to the door.

### For Direct Door



### For Panel Door



Select the respective checkbox of alarms which you want to enable.

## Timers

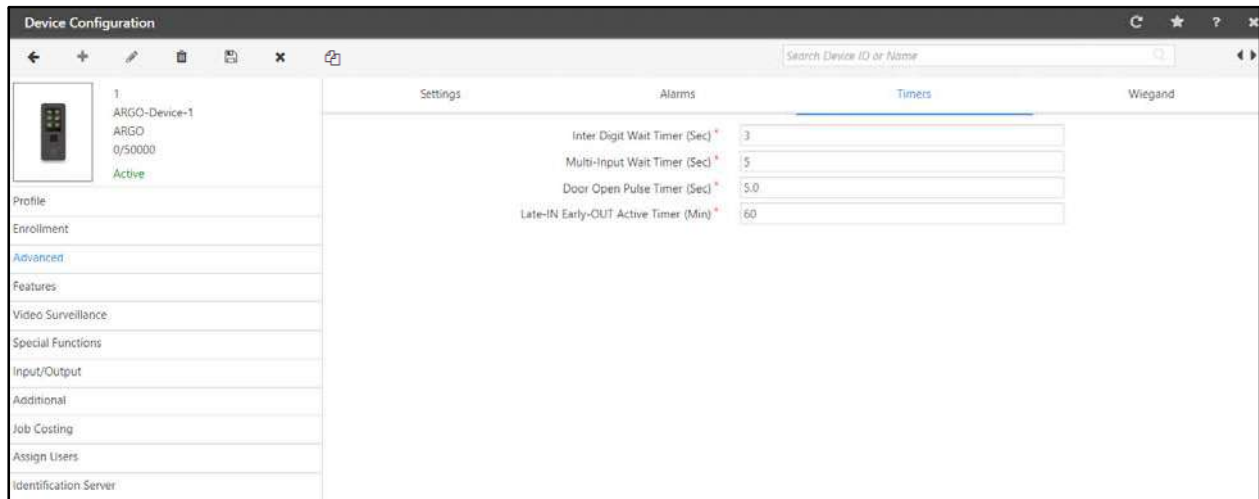
This section allows the configuration of various types of pre-defined device timers which can trigger off specific responses. In COSEC, timers are often used to control door behavior and for triggering alarms.

The Timers parameters differ for ARGO as Direct Door and Panel Door.

### Timers - Direct Door

Click the **Timers** tab. The **Timers** page for **ARGO** as a **Direct Door** appears.

:



Configure the following parameters:

- **Inter-Digit Wait Timer (sec)** - Specify the time period in seconds (1 to 99) between two key inputs on the device keypad. On expiry of this timer, the system considers the user input to be complete and is ready for the next input.
- **Multi-Input Wait Timer (sec)** - Specify the time in seconds (3 to 99) for which system needs to wait for the second credential input from the user when more than one credential is to be used to grant access.



*We recommend you to set the timer value as greater than or equal to 10 seconds to avoid access denial issues to users. This is applicable when the system reads the credentials (biometric) from the user's Smart Cards.*

- **Door Open Pulse Timer (sec)** - Specify the time in seconds (0.1 to 65535.0) for the door to be energized for a valid credential. If the opened door does not return to a closed state before the expiry of this timer, the door will generate a "Door Abnormal" alarm.

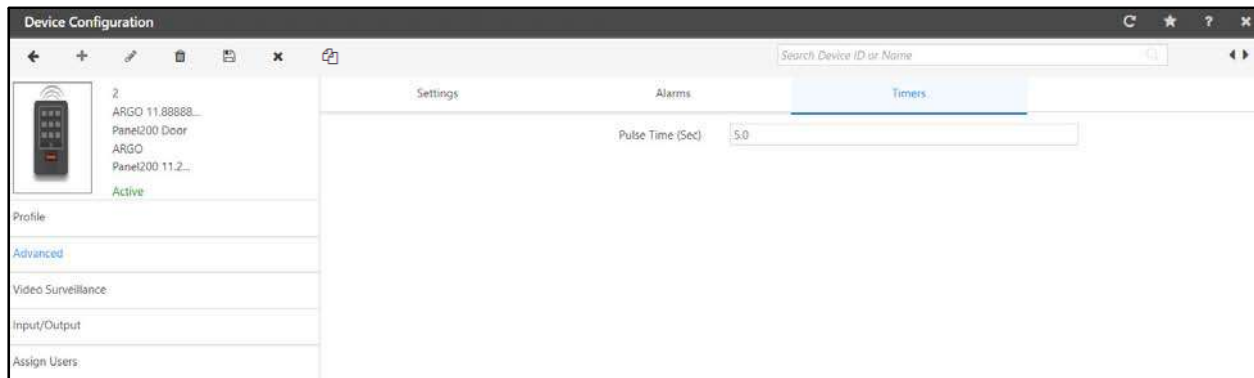


*To ensure smooth functioning of this feature, make sure the Server and Device Firmwares are upgraded to the latest version.*

- **Late-IN Early-OUT Active Timer (min)** - Specify the time in minutes (1 to 99) for which the Late-IN and Early-OUT special functions will remain active after being enabled at the Door Controller.

## Timers - Panel Door

Click the **Timers** tab. The **Timers** page for **ARGO** as a **Panel Door** appears.



- **Pulse Time (sec)** - Specify the time in seconds (0.1 to 65535.0) for the panel door to be energized for a valid credential.



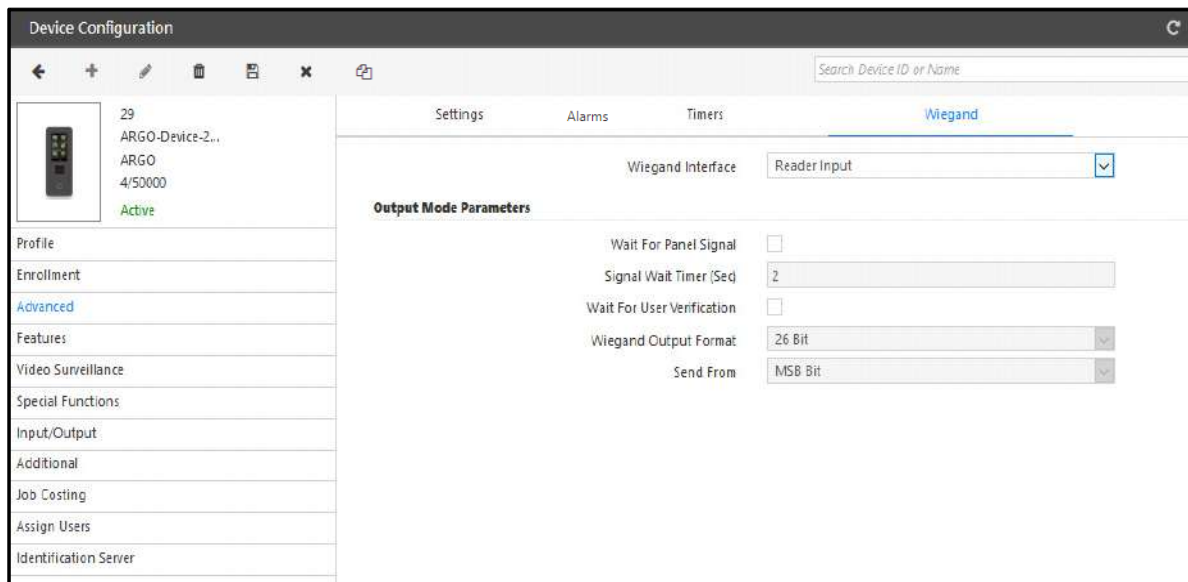
To ensure smooth functioning of this feature, make sure the Server and Device Firmwares are upgraded to the latest version.

## Wiegand

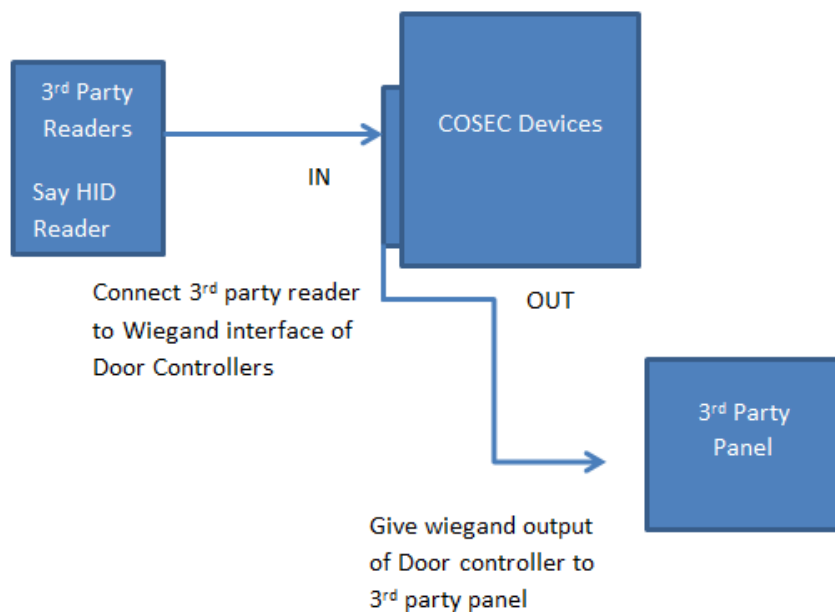


Wiegand is applicable for Direct Door only.

Click the **Wiegand** tab. The **Wiegand** page appears.



- **Wiegand Interface** - The COSEC device can be connected both as input devices (e.g. to receive data from a Wiegand Reader) or output devices (e.g. to support output to third party panel) via the Wiegand interface as shown below.

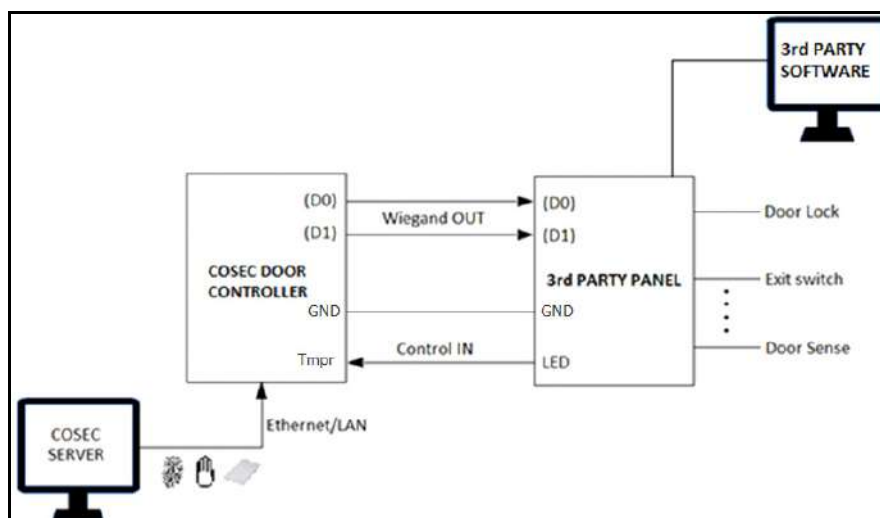


So select the interface of Door controller as **Output Mode** to work as Wiegand output to panel or **Reader Input** to take data from third party reader. If Reader Input option is selected, all the output mode parameters will be disabled.

If you select Output mode then configure the **Output Mode Parameters**.

- **Wait For Panel Signal** - If this option is enabled the door will wait for reply from the connected third party device before triggering any output, as per the defined **Signal Wait Timer (Sec)**.
- **Wait For User Verification** - If this option is enabled, user verification will be requested on the third party device before triggering any output.
- Specify the **Wiegand Output Format** and sending order for reader data as MSB or LSB Bit in the **Send From** field.

### Wiegand Out Interface





Also for the **Custom** format, user can configure details of fields to be sent as output from the Wiegand reader that has been added.

### Door Access using QR code

The user can access the COSEC device using COSEC APTA installed in the mobile device. If the user has rights for COSEC APTA and the access to the device is allowed for the user, then he can use his mobile device to scan the QR code which constitute the details of the COSEC door.

There is icon for QR code on COSEC APTA application. Clicking that icon will open the camera in your mobile. Now you can show the mobile camera to scan the QR code. The COSEC door will get opened after verifying the security key and access policies of the user.

### Steps to create a QR code

Step 1: Enter details in JSON format

```
{"version":"x","ip": "x.x.x.x","port":"x","pdid":"x","mode":"x"}
```

Valid values:

Field	Field range	Default Value	Remark
version	1-255	1	
ip	0.0.0.0-255.255.255.255	0.0.0.0	
port	0-65535	0	
pdid	0-255	0	If door is in direct door mode then, then PDID will be 0  If door is in panel door mode then, PDID will have values from 1-255
mode	0,1	0	0= for entry mode 1=for exit mode



**Note:**

**Step1a.** If door is in direct door mode enter IP & port of the direct door

b. If door is a panel door, then enter IP & port of the panel door and in the pdid specify the door id which is to be accessed.

**Step 2:** Encrypt the JSON string using key "matrix12" with simple DES/ECB mode.

**Step 3:** Encode the encrypted string using Base 64.

**Step 4:** Use this string to generate QR code through any third party software.

## Features

The Features tab allows the user to enable certain Access Control features for a device



*The Features tab is available only with the Access Control Module license and is applicable only for direct doors.*

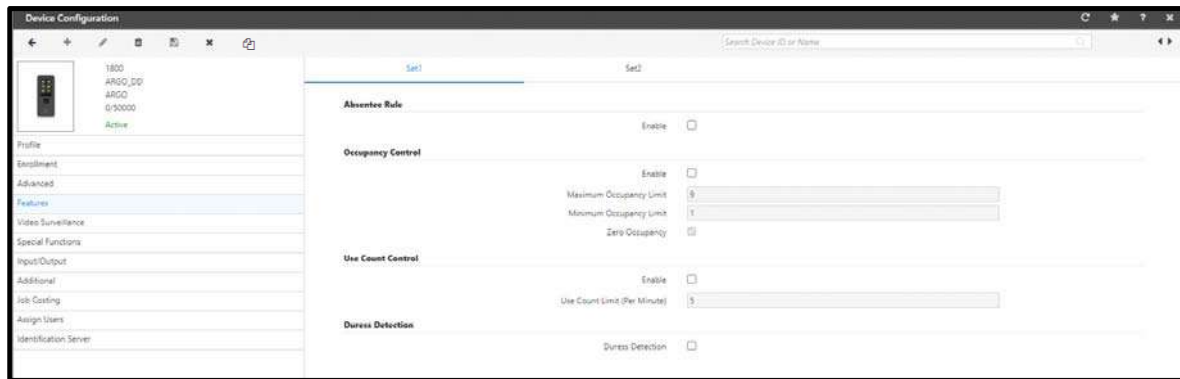
To access this, After selecting the device, Select **Device Configuration> Features**. The access control features for the device can be set from the following two sections:

- “Set1”
- “Set2”

## Set1

This page allows the configuration of three rules - **Absentee Rule**, **Occupancy Control** and **Use Count Control**.

The page appears as shown below.



- **Absentee Rule** - Select this checkbox to enable this feature at the door. This rule sets the maximum number of days for non-use of a credential. On expiration of days limit, the user will be automatically blocked.

For configuring the rule See *Access Control> Absentee Rule*.

- **Occupancy Control** - Select this checkbox to enable the feature at the door and specify maximum number of users to be allowed within the controlled area after which a user exit is required to enable access to another user. Also specify the **Minimum Occupancy Limit** i.e. the minimum number of occupants the designated zone should have, and enable/disable the **Zero Occupancy** option to determine whether the designated zone should be allowed to be empty or not.  
For configuring the rule See *Access Control> Occupancy Control*.

- **Use Count Control** - Select this checkbox to enable the feature at the door and specify the maximum number of uses per minute.  
For configuring the rule See *Access Control> Use Count Control*.

- **Duress Detection** - Select the checkbox to enable the feature. Duress Detection is used to generate the duress alarm which informs that the user is forced to open the door under threat.

## Set2

This page allows the configuration of three rules - **First-IN User Rule**, **Anti-Pass-Back (APB)** and **2-Person Rule**. The page appears as shown below.

The screenshot shows the 'Device Configuration' window. On the left is a sidebar with a list of configuration categories: Profile, Enrollment, Advanced, Features, Video Surveillance, Special Functions, Input/Output, Additional, Job Costing, Assign Users, and Identification Server. The 'Features' category is selected. The main area displays settings for 'Set1' and 'Set2'. Under 'Set1', the 'First-IN User Rule' is enabled with 'Reset On' set to 'Day Change', 'Access Timer (Sec)' set to 3, and 'First-IN User Group' set to '1'. The 'Anti-Pass-Back (APB)' rule is also enabled, with 'On Entry' checked, 'On Exit' unchecked, 'Hard/Soft' set to 'Hard', 'Forgiveness' checked, 'Reset After' set to 'Day Change', and 'Forgiveness Timer (Mins)' set to 1. The '2-Person Rule' is enabled with 'Mode' set to 'Primary Must', 'Primary Group' set to 'g1', and 'Secondary Group' set to 'None'.

- **First-IN User Rule** -Select this checkbox to enable the feature at the direct door and select the First-In User group which would be valid at the door. For configuring the rule *See Access Control> First- In User Rule> Assignment*
- **Anti-Pass Back (APB)** - Select the checkbox to enable the feature at the direct door.
  - **On Entry:** Check this box so that the system monitors the entry reader for APB violation.
  - **On Exit:** Check this box also so that the system monitors the entry as well as the exit readers for APB violations.
  - **Hard/Soft:** Select the restriction type as Hard or Soft option from the drop down options.
    - **Hard APB:** The access will be denied if the exit is not registered first. It does not allow a second entry using the same card without an exit.
    - **Soft APB:** The access will be granted even if the exit is not registered. It allows a second entry of the same user without an exit; however, an event and a warning are generated that indicates the second entry.
  - **Forgiveness:** Check this box to enable the system to reset the APB status. When forgiveness is enabled, then there will be following options to reset the pass.
    - **Reset After Day Change:** This will reset the APB status of all the users to NULL at midnight. This enables a user, who left the building in the evening without exit punch, to use his card for entry in the next morning.
    - **Reset After Timer Expiry:** This will reset the APB status of all the users after the expiry of user defined time.
    - **Forgiveness Timer (Mins):** Enter the time duration in minutes after which Anti-pass back status will get reset and the pass will be in original state.

- **2-Person Rule** - Select this checkbox to enable the feature at the door and set the **wait time** in seconds after which the second person is allowed to punch on the door. For configuring the rule See *Access Control> 2- Person Rule*.

## Video Surveillance

The Video Surveillance tab allows the user to configure parameters for video surveillance integration with the COSEC device. It is available in Basic License.

To access this, Go to **Device Configuration> Video Surveillance**.

- [“Visual Tagging”](#)
- [“Satatya/IP Camera Integration”](#)

## Visual Tagging

The COSEC application can interface with some supported hybrid and network video recording systems as well as IP Cameras and grab images triggered by user events at the Doors. The **Visual Tagging** option enables the administrator to define the video recorder and IP Camera parameters. The **Visual Tagging** page appears as shown below.

The screenshot displays the 'Device Configuration' window. On the left, a sidebar shows a list of devices, with the selected device '29 ARGO-Device-2...' having a status of 'Active'. The main panel is titled 'Visual Tagging' and contains configuration options. The 'Capturing Device' is set to 'Matrix HVR/NVR'. Below this, the 'MAC Address' is '00\_1b\_09\_01\_5c\_25', the 'Camera ID' is '2', and the 'Storage Root Folder' is 'abc'. At the bottom, there is a checkbox for 'FTP Login Credentials' which is currently unchecked, followed by fields for 'User Name' and 'Password'.



To view the user events and related images, go to **Admin > Views/Logs > Event View**. To know more about viewing events, refer to [“Event View”](#).

The following parameters are available for configuration:

- **Capturing Device** - Select the video recording type of device or IP Camera from the drop-down menu as shown.

The compatible device types are:

- Matrix HVR/NVR
- Milestone
- IP Camera

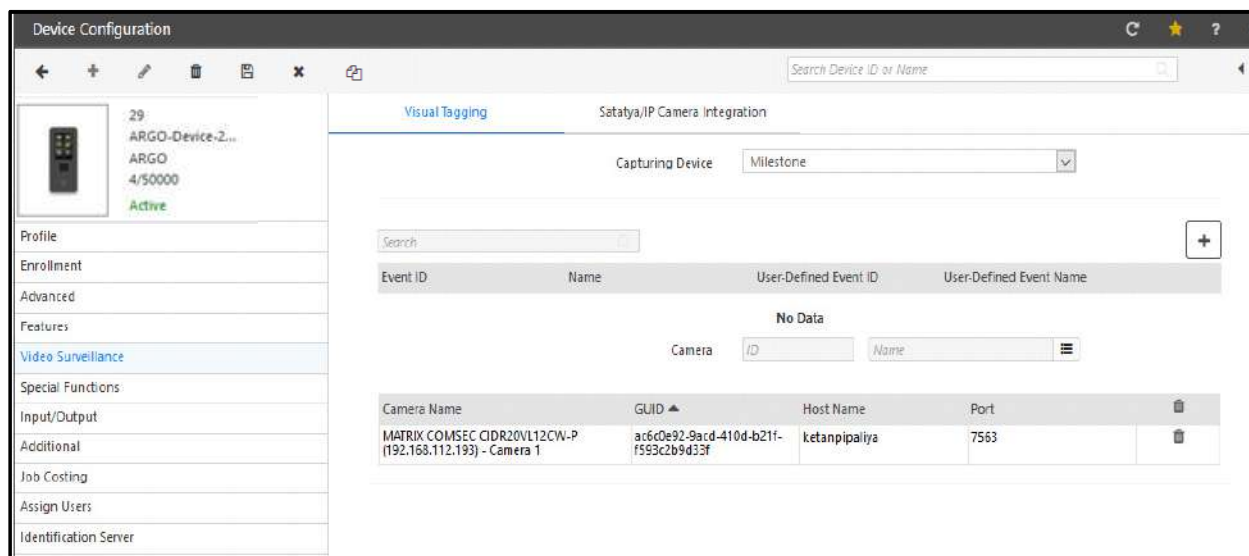
## Matrix HVR/NVR

- **MAC Address** - In the event of selecting the Matrix HVR/NVR, the administrator needs to specify the MAC address of the video recorder device using “\_” (underscore) as the separator.
- **Camera ID** - Specify the camera number or camera ID for IP cameras. For analog cameras specify the camera number.
- **Storage Root Folder** - Specify the Root folder path or FTP Path where the uploaded images will be saved.
- **FTP Login Credentials** - Check this box to activate FTP login credentials for authentication.
- **Username** - Specify the FTP server username.
- **Password** - Specify the FTP server password.



*Some COSEC devices do not support all the network connection options.*

## Milestone



*For more information on integration with **Milestone** devices, refer to [“Milestone Integration”](#).*

## IP Camera

- **Snapshot URL:** If Capturing device is selected as IP Camera; then enter the API URL for taking the Snapshot through IP camera. You can use any camera for taking the snapshot/photo. The API for capturing snapshot will be available in the API document of camera.
- **User Name:** Enter the Username for accessing API for taking the Snapshot through IP Camera.
- **Password:** Enter the Password for accessing API for taking the Snapshot through IP Camera.



It is the same username and password using which IP camera login is done. Eg: username: admin and password: admin.

The allowed values for snapshot URL, User Name and Password are **A-Z, a-z, 0-9 !"#\$%&'()\*+,-./ :;<=>?@[\\]^\_`{|}~**

The screenshot shows the 'Device Configuration' window for a device named '29 ARGO-Device-2...'. The left sidebar lists various configuration categories, with 'Video Surveillance' highlighted. The main panel is titled 'Satatya/IP Camera Integration' and contains the following fields:

- Capturing Device:** A dropdown menu set to 'IP Camera'.
- Snapshot URL:** A text field containing 'http://192.168.102.191/matrix-cgi/snapshot'. A note below states: 'Note: Mention the protocol http or https in URL.'
- API Login Credentials:**
  - User Name:** A text field containing 'admin'.
  - Password:** A text field containing '\*\*\*\*\*'.

## Satatya/IP Camera Integration

This functionality is available for configuration only when the Matrix HVR/NVR device type or IP Camera is selected as the **Capturing Device** (from *Visual Tagging*).

It enables the configured COSEC devices to directly send commands to the SATATYA HVR/NVR devices/ IP Camera as per the configuration on this page. The Satatya/IP Camera Integration page appears as shown below:



## SATATYA Integration

The screenshot shows the 'Device Configuration' window with the 'Satatya/IP Camera Integration' tab selected. The left sidebar lists various configuration options, with 'Video Surveillance' highlighted. The main configuration area includes fields for Integration Type (Network), Active status (checked), IP Address (192.168.104.37), Port Number (8000), Name (VegaNVR Integration), Active status (checked), Schedule (13:00 to 20:00), Days (Mon, Tue, Wed, Thu, Fri), Event (Invalid User), Mode (Entry), Action (Video Pop-Up), Duration Sec. (10), and a grid of 24 camera checkboxes (1-24) with camera 2 selected. Add and Cancel buttons are at the bottom right.

- **Integration type-** Select the integration type from the options of Wired and Network. In wired integration, door is physically connected with Satatya Device. In Network integration, connection can be by Ethernet, wireless or broadband depending upon the COSEC device support.
- **Active-** Check the box to activate the connection.
- **IP Address-** Specify the IP address of HVR/NVR.
- **Port Number-** Specify the port number of HVR/NVR.
- **Name-**Specify a user friendly name for the integration function.
- **Active-** Check the Active box to enable the SATATYA integration functionality.
- **Schedule** - Specify a schedule for the function by specifying the start and the end time (*24 Hours format*) as well as checking the boxes against the applicable **days** of the week.
- **Event-** Select a COSEC event from the drop down list for which the resultant action is to be configured.
- **Mode-** Select the event mode from the options of Entry, Exit and Both from the drop down list wherever applicable.
- **Action-**Select the action for the Satatya device from the drop down list. The options available are:
  - Recording - Specify the duration in minutes.
  - Upload Image - This will be uploaded as per the ftp settings.
  - Video Pop-up - Specify the duration in seconds. The video pop up will be generated on the local client of Satatya device on the selected camera.
  - PTZ Preset - Specify the PTZ position number as defined on the SATATYA device.
  - Mail Image - Specify the email-ID.

- **Camera-** Select the relevant camera channels depending on the action selected.
- Click the **Add** button to finish the process of linking the event to the action.

Search						
Name	Event	Action	Start Time	End Time	Active	
VegaNVR Integration	Invalid User	Video Pop-Up	13:00	20:00	Yes	

The user may now configure another event-action linkage if required.

**Example1:** For action as Upload Image, the image of Camera 13 will be upload at path defined in Visual Tagging.

Event	Access Allowed
Mode	Both
Action	Upload Image
Camera *	<div> <input type="checkbox"/> 1           <input type="checkbox"/> 2           <input type="checkbox"/> 3           <input type="checkbox"/> 4           <input type="checkbox"/> 5         </div> <div> <input type="checkbox"/> 6           <input type="checkbox"/> 7           <input type="checkbox"/> 8           <input type="checkbox"/> 9           <input type="checkbox"/> 10         </div> <div> <input type="checkbox"/> 11           <input type="checkbox"/> 12           <input checked="" type="checkbox"/> 13           <input type="checkbox"/> 14           <input type="checkbox"/> 15         </div> <div> <input type="checkbox"/> 16           <input type="checkbox"/> 17           <input type="checkbox"/> 18           <input type="checkbox"/> 19           <input type="checkbox"/> 20         </div> <div> <input type="checkbox"/> 21           <input type="checkbox"/> 22           <input type="checkbox"/> 23           <input type="checkbox"/> 24         </div>
	<div>Add</div> <div>Cancel</div>

## IP Camera Integration

Device Configuration

29  
ARGO-Device-2...  
ARGO  
4/50000  
Active

Profile  
Enrollment  
Advanced  
Features  
Video Surveillance  
Special Functions  
Input/Output  
Additional  
Job Costing  
Assign Users  
Identification Server

Visual Tagging

Satadya/IP Camera Integration

Schedule Name \*

User Allowed Schedule

Active

☒

Event

User Allowed

Mode

Both

Schedule Range \*

09:00

19:00

Days \*

☐ Sun
 ☒ Mon
 ☒ Tue
 ☒ Wed
 ☒ Thu
 ☒ Fri
 ☐ Sat
 ☐ Holiday

Add

Cancel

- **Schedule Name-**Specify a user friendly name for the schedule of Device-IP Camera integration.
- **Active-** Check the Active box to activate the schedule for IP Camera.
- **Event-** Select a COSEC event from the drop down list for which the resultant action is to be configured. The Events will appear in the list based on the availability of the license.



*At max. 20 Events or schedules are allowed for configuration for a single device.*

- **Mode-** Select the event mode from the options of Entry, Exit and Both from the drop down list.



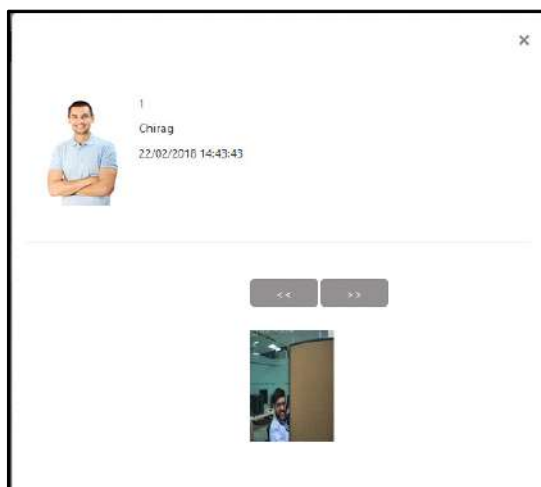
- **Schedule Range-** Specify a schedule for the function by specifying the start and the end time (*24 Hours format*) as well as checking the boxes against the applicable days of the week.

Click **Add** button to add the configured schedule. The schedule will be listed in the grid. Then click **Save** button to save the schedule integration.

Name	Event	Mode	Start Time	End Time
User Allowed Schedule	User Allowed	Both	09:00	19:00

When user event is generated, then snapshot is taken by the configured camera. The events can be viewed in User Events (User module) page and Event view (Admin module) page.

The snapshot can be viewed by clicking on View Image button.



## Special Functions

To configure *Special Functions* for COSEC doors, refer to [“Special Functions”](#).

## Input/Output

The Input/Output (I/O) configuration of a system determines how the output or response of a system is influenced by the input applied on it. In case of the COSEC Access Control System, the I/O configuration should enable the system to monitor and trigger a specific response to any changes in door state or event occurrences at the door

device. This change of door state or occurrence of events may be considered as an input while the response or action that is generated by the system on detection of this input, may be defined as the output.



1. This functionality cannot be fully accessed in the Edit mode for a selected device.
2. This functionality is available only with the Access Control add-on module license.

To access this, After selecting the device, Select **Device Configuration> Input Output**. The Input Output parameters can be set from the following sections:

- “Configuration”
- “Linking”
- “Time Triggered”

## Configuration

The **Configuration** section for a ARGO Door as **Direct Door** appears as shown below.

- **Door Sense** - The system by default can sense two states of a door - *Normally Open (NO)* and *Normally Closed (NC)* depending on which the output is determined. For example, any deviation of the door from its normal state may lead to the trigger of a *Door Abnormal* alarm.
- Select the **Enable** checkbox to enable the system for such two-state monitoring.
- Select the **Supervised** checkbox to enable the door for four-state monitoring where the door is also monitored for *door fault* and *door disconnection*. Specify the **Sense Type** as Normally Open or Normally Closed.
- **Accept External IO Linking** - Select the Enable checkbox to enable device-to-device IO Linking i.e. input from one Direct Door can trigger output in another Direct Door.
- **Network Interface**- Select the interface option for IO linking with external devices. The options are
  - Ethernet
  - Wireless
  - Mobile Broadband

The **Configuration** section for a ARGO Door as Panel Door appears as shown below.

Device Configuration

Search Device ID or Name

Device ID  
Device Name  
Panel200 Door  
ARGO:  
Panel 1  
Active/Inactive

Profile

Advanced

Video Surveillance

Input/Output

Assign Users

Configuration

**Door Sense**

Enable ☐

Supervised ☐

Door Sense Type: Normally Open

**Relay Output**

Output Group Number (Door Unlock): 2 Door Unlock

Output Group Number (Door Lock): ID Name

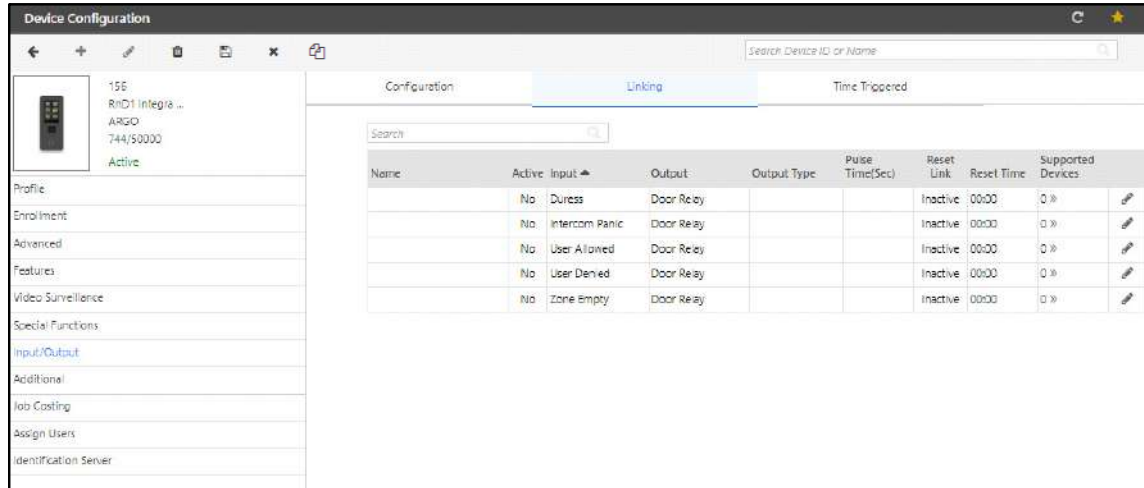
- **Door Sense** - The system by default can sense two states of a door - *Normally Open (NO)* and *Normally Closed (NC)* depending on which the output is determined. For example, any deviation of the door from its normal state may lead to the trigger of a *Door Abnormal* alarm.
  - Select the **Enable** checkbox to enable the system for such two-state monitoring.
  - Select the **Supervised** checkbox to enable the door for four-state monitoring where the door is also monitored for *door fault* and *door disconnection*. Specify the **Sense Type** as Normally Open or Normally Closed.
- **Relay Output:** This indicates the physical output which is received for opening and closing of the door.
  - **Group Number (Door Unlock):** Select the Output Group Number to which the device output for Door Unlock is to be assigned from the picklist.
  - **Group Number (Door Lock):** Select the Output Group Number to which the device output for Door Lock is to be assigned from the picklist.

## Linking



Linking is applicable for Direct Door only.


The **Linking** section appears as shown below.

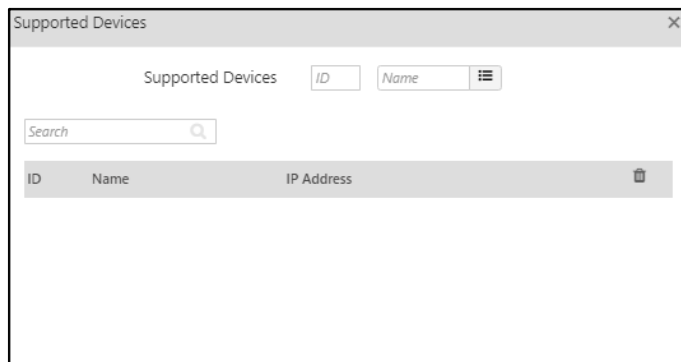


The COSEC application supports the Input/Output Linking feature to activate an output port based on a trigger received from an input port on the same Direct Door. This option enables the administrator to define how an event or events (input port) will trigger an output on the selected door.

Select a Input-Output linking row or click edit button.

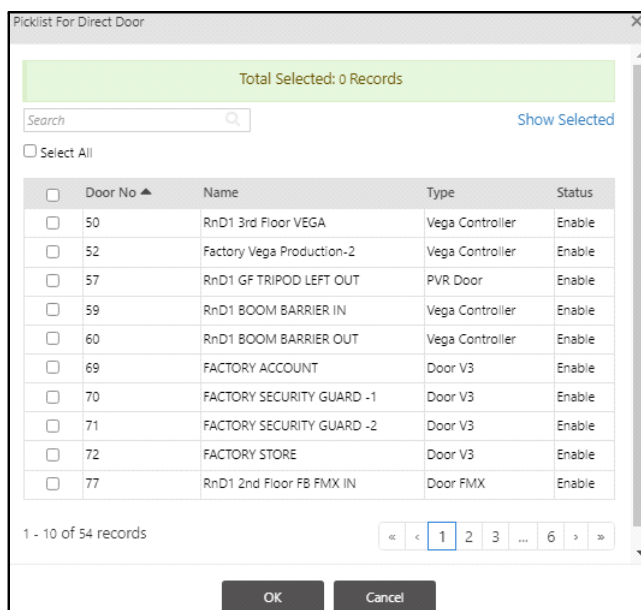
- **Name** - Specify a name for the new I/O linking program to be defined.
- **Active** - Select this check box to activate this linking program.
- **Output Type** - Specify the appropriate type of output from the following four options available in the drop down list:
  - **Pulse**: With this type of output, the user needs to define the Pulse time in seconds.
  - **Interlock**: With this option, the output follows the input. The relay output is triggered as long as the input is activated after which it returns to normal state.
  - **Latch**: With this option, it is denoted that the relay output will be in an energized condition for infinite period and needs to be reset manually.
  - **Toggle**: With this option, the output group toggles its state whenever an input group is activated.
- **Pulse Duration (sec)** - For a *Pulse* output type, specify the pulse duration in seconds.
- **Reset Link**: Select this check box to enable the system to reset the IO link.
- **Reset Time**: Specify the time after which the IO link should be reset in HH:MM format.
- **Supported Devices**: All devices supported for external IO Linking will appear in this picklist for selection. Select the required devices from the picklist. Upto 255 external devices can be added.

- Click **Supported Devices**  icon. The **Supported Devices** pop-up appears.



The 'Supported Devices' pop-up window has a title bar with a close button. Below the title bar, there is a section labeled 'Supported Devices' with two input fields: 'ID' and 'Name', followed by a list icon. A search bar with a magnifying glass icon is located below this section. The main area contains a table with the following columns: 'ID', 'Name', 'IP Address', and a trash icon. The table is currently empty.

- In this pop-up, click the **Supported Devices** picklist. The **Picklist For Direct Door** pop-up appears.



The 'Picklist For Direct Door' pop-up window has a title bar with a close button. Below the title bar, there is a green bar with the text 'Total Selected: 0 Records'. A search bar with a magnifying glass icon is located below this bar. To the right of the search bar is a 'Show Selected' button. Below the search bar is a 'Select All' checkbox. The main area contains a table with the following columns: 'Door No', 'Name', 'Type', and 'Status'. The table lists 10 records. At the bottom, there is a pagination bar showing '1 - 10 of 54 records' and a set of navigation buttons. At the very bottom are 'OK' and 'Cancel' buttons.

Door No	Name	Type	Status
50	RnD1 3rd Floor VEGA	Vega Controller	Enable
52	Factory Vega Production-2	Vega Controller	Enable
57	RnD1 GF TRIPOD LEFT OUT	PVR Door	Enable
59	RnD1 BOOM BARRIER IN	Vega Controller	Enable
60	RnD1 BOOM BARRIER OUT	Vega Controller	Enable
69	FACTORY ACCOUNT	Door V3	Enable
70	FACTORY SECURITY GUARD -1	Door V3	Enable
71	FACTORY SECURITY GUARD -2	Door V3	Enable
72	FACTORY STORE	Door V3	Enable
77	RnD1 2nd Floor FB FMX IN	Door FMX	Enable

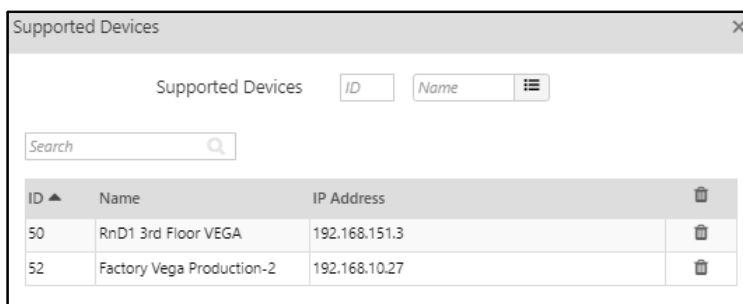
You can either select particular devices or can select all the devices at once.

To select particular devices, click the check boxes of the desired devices.



**OR**


To select all the devices, select the **Select All** check box. The devices on all the pages will be selected.

Click **OK**. You return to the **Supported Devices** pop-up and the selected devices are displayed here.



The 'Supported Devices' pop-up window is shown again, but now the table contains two rows of data, representing the devices selected in the previous step. The columns are 'ID', 'Name', 'IP Address', and a trash icon.

ID	Name	IP Address	
50	RnD1 3rd Floor VEGA	192.168.151.3	
52	Factory Vega Production-2	192.168.10.27	

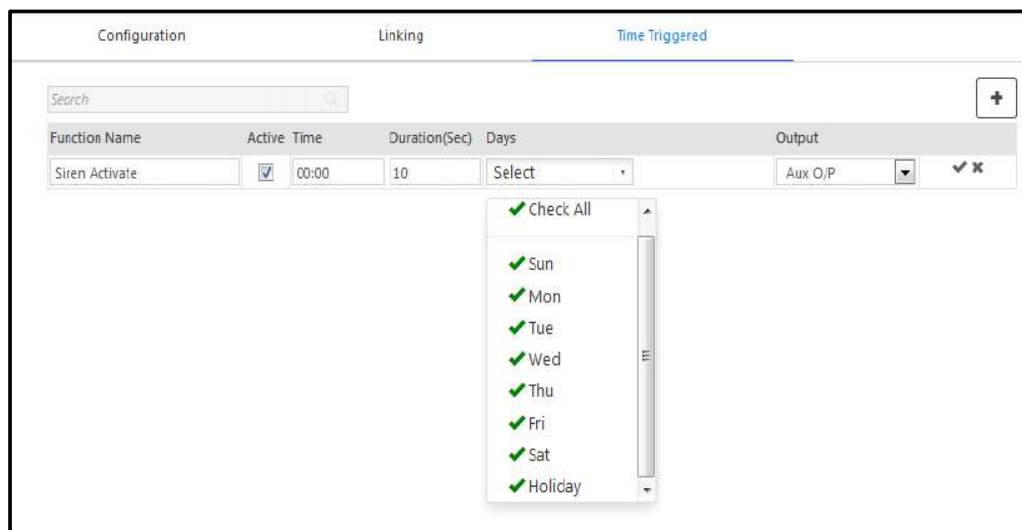
You can also delete the desired devices. To do so, click **Delete**  of the respective device.

Close the pop-up the number of selected devices are displayed under **Supported Devices** in the grid.

- Click the **OK** button and **Save** the configuration.

## Time Triggered

On the **Input Output** page, select the **Time Triggered** section as shown.



This functionality enables the user to control the activity of an Output without manual intervention. The time triggered functions are used for activating events like door unlock and siren activation that are set as per the start time and for the configured time duration. This functionality is designed to energize outputs for predefined periods at the configured time. The COSEC access control system supports up to 20 Time Triggered functions on a Direct Door.



## Additional

This section lists some additional configurations that can be enabled for door controllers.

To access these configurations, Go to **Device Configuration > Additional > Daylight Saving**



*This section is available only for Direct Doors.*

Many countries observe the convention of adjusting clocks forward and backward. Clocks are set ahead during the spring and back to standard time in the autumn. COSEC doors can be configured to be compatible with this procedure keeping the RTC of the system updated with such changes.

The **Daylight Saving** configuration can be done in 2 ways i.e. Day-Month wise or Date-Month wise.

- Select the **DST Type** as Day-Month wise or Date-Month wise. The **Disable** option when selected, disables the application of DST on the system time.
- On selection of the **Day-Month wise** option, the DST is set by the day of the month on which clock needs to be forwarded and reverted back to normal. Set the month, week number, day of the week, and time for both the **Forward Clock** and **Backward Clock** as shown.

The screenshot shows the 'Device Configuration' window for a device named '29: ARGO-Device-2...'. The 'Daylight Saving' tab is selected. The 'DST Type' is set to 'Day-Month wise'. The 'Time Period' is set to '08:00'. Under 'Forward Clock', the 'Month' is 'January', 'Week No.' is '1st', 'Day of Week' is 'Sunday', and 'Time' is '09:00'. Under 'Backward Clock', the 'Month' is 'January', 'Week No.' is '1st', 'Day of Week' is 'Sunday', and 'Time' is '10:00'. A 'Save' button is at the bottom right.

- On selection of the **Date-Month wise** option, the DST is set by date of the month on which clock needs to be forwarded and reverted back to normal. Define the **Time Period** for the date-month wise DST settings in **24-hours** format, and specify the day of the week, date and time for the **Forward Clock** and the **Backward Clock** as shown.

This DST Setting implies that on 1st Sunday of November at 09:00 hours, the clock will be forwarded by 08:00 hours. And on 1st Sunday of January at 10:00 hours, the clock will be reversed or set backwards by 08:00 hours.

The screenshot shows the 'Device Configuration' window for device 29 (ARGO-Device-29). The left sidebar lists various configuration categories: Profile, Enrollment, Advanced, Features, Video Surveillance, Special Functions, Input/Output, Additional (highlighted), and Assign Users. The main area is titled 'Daylight Saving' and contains the following fields:

- DST Type:** A dropdown menu set to 'Date-Month wise'.
- Time Period:** A text field containing '08:00'.
- Forward Clock:**
  - Month:** A dropdown menu set to 'January'.
  - Date:** A dropdown menu set to '1'.
  - Time:** A text field containing '09:00'.
- Backward Clock:**
  - Month:** A dropdown menu set to 'January'.
  - Date:** A dropdown menu set to '1'.
  - Time:** A text field containing '10:00'.
- Save:** A button at the bottom right of the configuration area.

- Click the **Save** button.

## Job Costing



*Job Costing is applicable for Direct Door only.*

When user punches on any device, there will be an option to select the Job Code on which the user is working. Job Costing enables the Admin to show or hide Job Code selection on device. It also enables the admin to assign default jobs on device.

The screenshot shows the 'Device Configuration' window for device 11 (ARGO Door). The left sidebar lists various configuration categories: Profile, Enrollment, Advanced, Features, Video Surveillance, Special Functions, Input/Output, Additional, Job Costing (highlighted), Assign Users, and Identification Server. The main area is titled 'Settings' and contains the following fields:

- Show Job Menu:** A dropdown menu set to 'Show List'.
- Retain Job Selection:** A checkbox that is checked.
- Assign Jobs:**
  - Job Group:** Fields for ID and Name.
  - Job:** Fields for ID and Name.
  - Search:** A text field.
- Table:** A table with columns: Job Code, Name, Assignment Start, Assignment End, and a delete icon. The table is currently empty, with 'No Data' displayed below it.



*Make sure the **Device Based Job Assignment** check box is enabled for the desired Users.*

- **Show Job Menu:** Select the desired option— **Show List** or **Allocate Default**.



## Show List

When **Show List** is selected; then multiple jobs can be assigned to the device. The user can select the relevant Job Code while punching on the device. His/her job hours will be recorded for that Job Code.

- **Retain Job Selection:** If Retain Job Selection check box is selected, it allows the device to remember the last Job Code selected by a user and the same would be applicable for all the subsequent users until another job selection is done on the device. This is useful in environments where dynamic job selection prevails.

In this case, if the user selects a Job Code the same is saved and retained for future use by the device. If the user selects None option on the device, it ends the current job and assigns None until a new Job Code is selected by the user.

If the you clear the check box, then the device does not retain any job selection done by the user.

For example, in an educational setup, teachers may have dynamic job assignments, while students have static ones. After a teacher selects a Job Code, that code is retained by the device. Any student who punches in afterward will be assigned the teacher's Job Code until the teacher selects a new one or selects None.

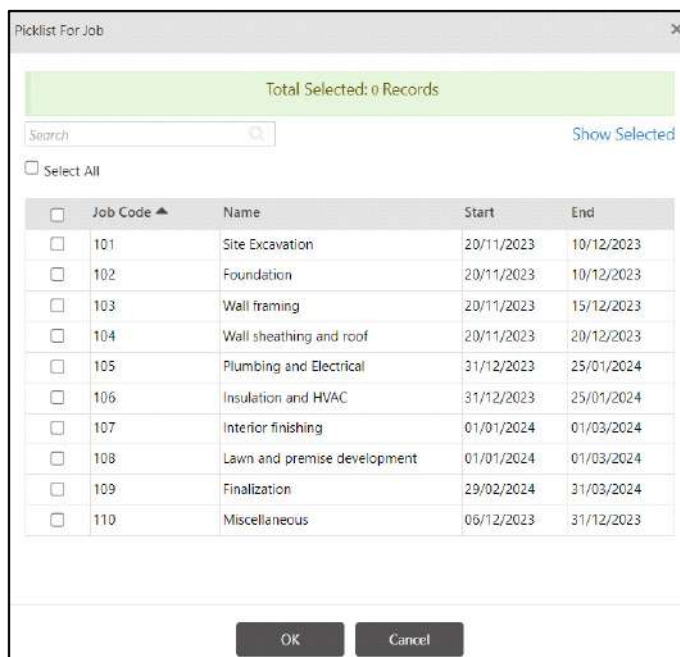
## Assign Jobs

- **Assign Jobs:** You can select Job Group as well as individual Jobs.
- To select **Job Group**, click the Job Group picklist, the **Picklist For Job Group** pop-up appears. Select the desired Job Group.

Click **Save**. The Jobs of the selected Job Group appear in the grid.


You can delete the desired Job. To do so, click **Edit**  and then click **Delete**  of the respective Job.

- To select **Jobs**, click the Jobs picklist. The **Picklist For Job** pop-up appears.



Picklist For Job

Total Selected: 0 Records

Search 

[Show Selected](#)

☐ Select All

<input type="checkbox"/>	Job Code ▲	Name	Start	End
<input type="checkbox"/>	101	Site Excavation	20/11/2023	10/12/2023
<input type="checkbox"/>	102	Foundation	20/11/2023	10/12/2023
<input type="checkbox"/>	103	Wall framing	20/11/2023	15/12/2023
<input type="checkbox"/>	104	Wall sheathing and roof	20/11/2023	20/12/2023
<input type="checkbox"/>	105	Plumbing and Electrical	31/12/2023	25/01/2024
<input type="checkbox"/>	106	Insulation and HVAC	31/12/2023	25/01/2024
<input type="checkbox"/>	107	Interior finishing	01/01/2024	01/03/2024
<input type="checkbox"/>	108	Lawn and premise development	01/01/2024	01/03/2024
<input type="checkbox"/>	109	Finalization	29/02/2024	31/03/2024
<input type="checkbox"/>	110	Miscellaneous	06/12/2023	31/12/2023

OK Cancel


You can either select particular jobs or can select all the jobs at once.

To select particular jobs, select the check boxes of the desired jobs.

**OR**

To select all the jobs, select the **Select All** check box. The jobs on all the pages will be selected.

Click **OK**.

The selected Jobs appear in the grid. You can also delete the desired Job. To do so, click **Delete**  of the respective Job.

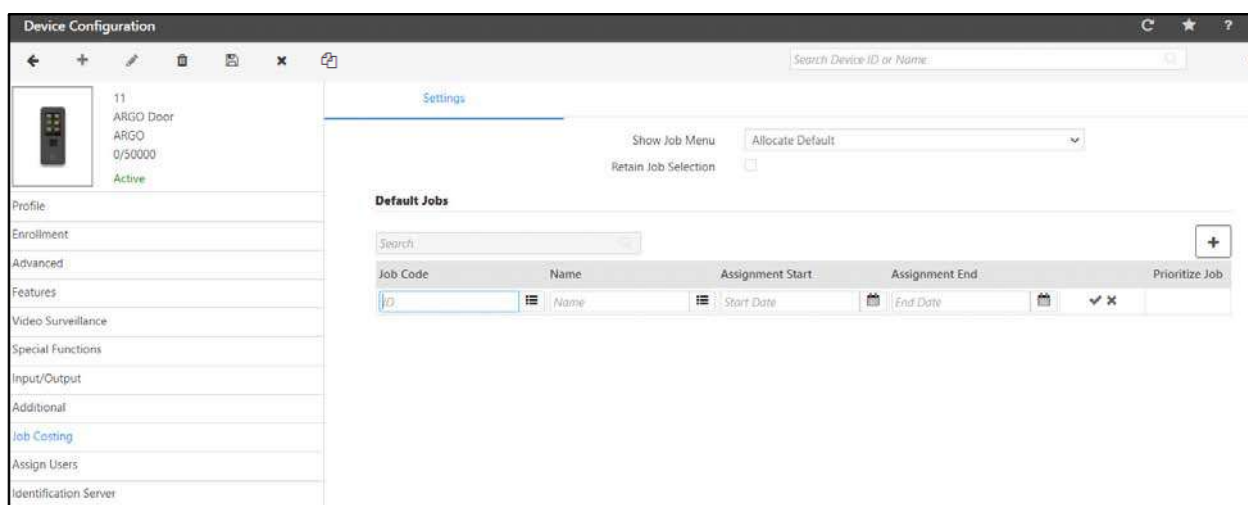
- Click **Save**.

## Allocate Default

When **Allocate Default** is selected; then default jobs for the device can be selected. The Job costing user can directly punch on this door for starting the default job.

## Default Jobs

Multiple default jobs can be assigned with overlapping Assignment Date Ranges. You can also set the priority of the assigned jobs if required. If you have jobs with overlapping dates and you have set their priority as per your requirement, then the first job will be considered as the default job.



- Click **Add**  . Click the picklist under **Job Code/Name** to select the desired Jobs.

The **Picklist For Job** appears.

Picklist For Job

Search  Ended Days (1-999) Active

Job Code	Name	Start	End
101	Site Excavation	20/11/2023	10/12/2023
102	Foundation	20/11/2023	10/12/2023
103	Wall framing	20/11/2023	15/12/2023
104	Wall sheathing and roof	20/11/2023	20/12/2023
105	Plumbing and Electrical	31/12/2023	25/01/2024
106	Insulation and HVAC	31/12/2023	25/01/2024
107	Interior finishing	01/01/2024	01/03/2024
108	Lawn and premise development	01/01/2024	01/03/2024
109	Finalization	29/02/2024	31/03/2024
110	Miscellaneous	06/12/2023	31/12/2023

1 - 10 of 11 records

1 2

Cancel

By default, all the **Active** jobs are displayed. Click **Active** and select the desired option — **All**, **Active**, **Expired** — to filter the jobs. The jobs appear as per the set filter.

If you select **Expired**, you can set another filter.

Configure the number of days in Ended Days (1-999). The system will display the expired jobs, derived using the following: Current Date minus Number of days configured in Ended Days.

For example:

Ended Days configured = 2

Current Date= April 25, 2024

All the jobs expired between April 23, 2024 to April 25, 2024 (midnight), will be displayed.

Click to select the desired job from the list. You can also search for the desired job using the search bar.

The selected job appears in the grid.

- **Assignment Start** and **Assignment End**: The selected Jobs Start and End dates are displayed. You can change the Assignment Start and Assignment End dates of the job if required. To do so, click the calender and select the desired start and end dates.
- Click **Save** to save the configuration.

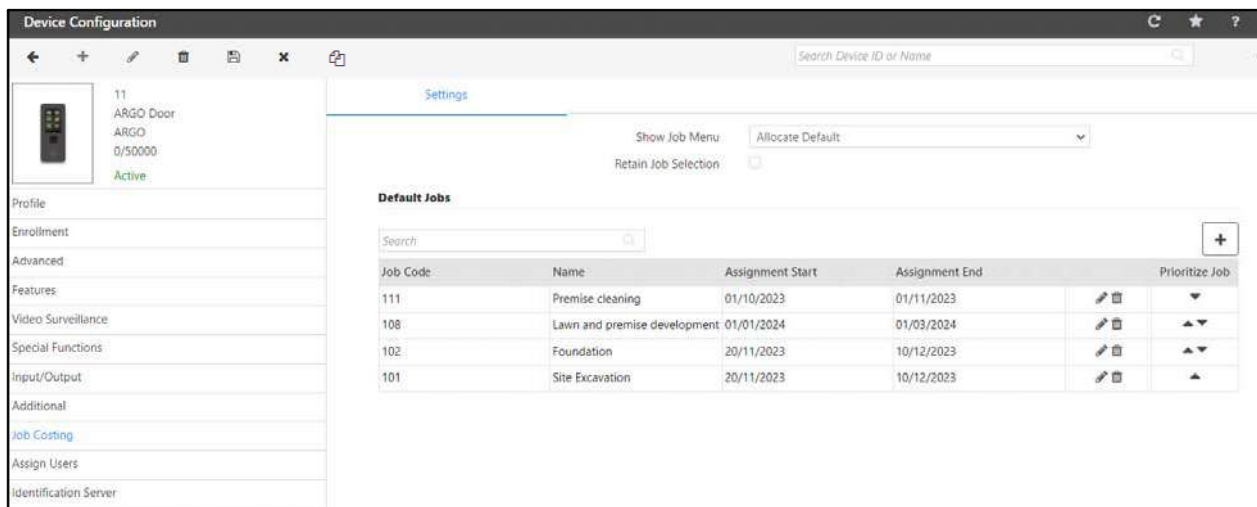
The **Default Jobs** grid will consist of all the jobs, that is expired, in-progress as well as assigned.



*It is recommended to set job priority only if overlapping dates are assigned to the jobs.*

*If a new job is assigned, by default it will appear at the highest priority. You can change the priority later, if required.*

You can set the priority of the jobs as per your requirement. To do so,



- Under **Prioritize Job**, click the **Up** arrow button to move a job upwards in the list. Similarly, click the **Down** arrow button to move a job downwards in the list.

If you have overlapping dates assigned to Jobs, in such scenarios there will be multiple Jobs in which the punches are possible.

To resolve this set the Job with highest priority at the first position, so that when the system searches for the Job as per the date, the punch will be marked in the first Job in which the date is detected.

Let us understand this with the help of an example.

#### Example:

User 1 has been assigned the following jobs:

Job Code	Job Name	Assignment Start	Assignment End	Prioritize Job
J1	Job 1	01/10/2023	10/10/2023	1
J2	Job 2	09/10/2023	15/10/2023	2
J3	Job 3	17/10/2023	25/10/2023	3
J4	Job 4	25/10/2023	31/10/2023	4

Now, User 1 changes the priority of the assigned jobs as follows:

Job Code	Job Name	Assignment Start	Assignment End	Prioritize Job
J2	Job 2	09/10/2023	15/10/2023	1
J1	Job 1	01/10/2023	10/10/2023	2
J4	Job 4	25/10/2023	31/10/2023	3
J3	Job 3	17/10/2023	25/10/2023	4

When User 1 will punch on 09/10/2023, the punch will be marked against Job 2 as it has been set at priority number 1. Similarly, when User 1 will punch on 25/10/2023, the punch will be marked against Job 4 as it is at a higher priority than Job 3.



*Make sure that the assigned jobs are prioritized correctly to ensure that the punches are in place.*

## Assign Users

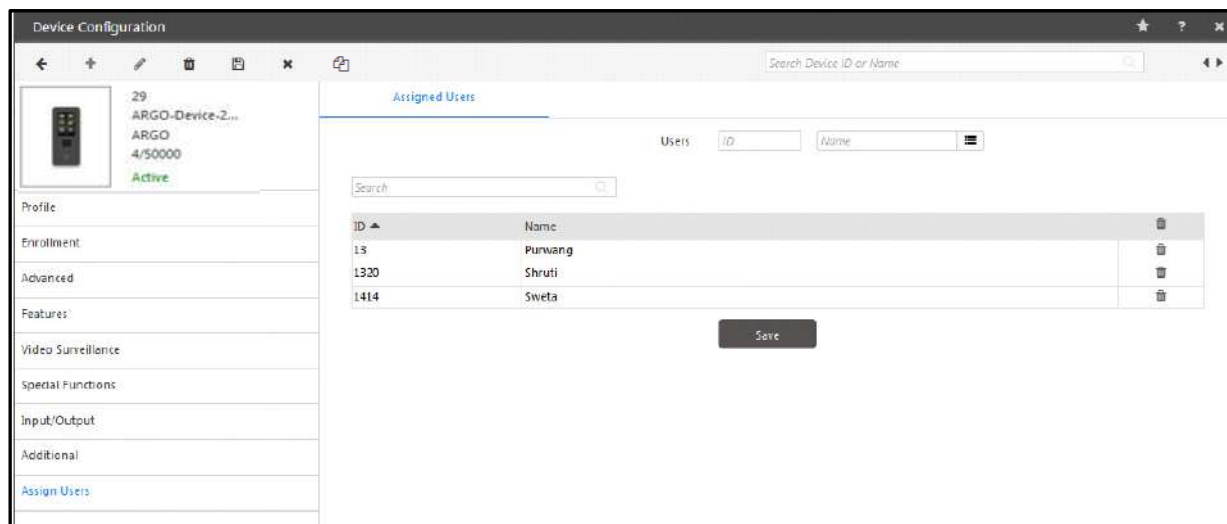


*Assign Users is applicable for both Direct Door and Panel Door.*

### For Direct Doors

You can select and assign users to the door.


On the **Device configuration** page, click **Assign Users**. The Assign Users page appears.



- **Users:** Click the picklist. The **Picklist For All Users** window appears.

Select the check boxes of the desired Users and click **OK**.

The grid displays the list of selected users.

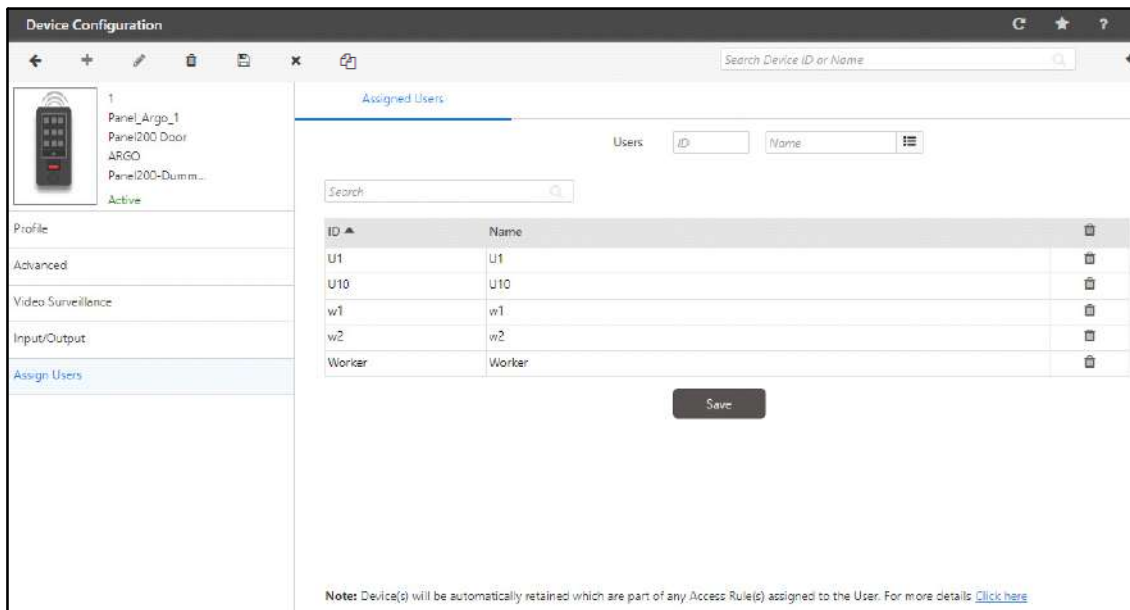
If you wish to remove any assigned user, click the respective **Delete**  icon.

- Click **Save**.

### For Panel Doors

You can select and assign users to the door.

- On the **Device configuration** page, click **Assign Users**. The Assign Users page appears.



The screenshot shows the 'Device Configuration' window with the 'Assigned Users' tab selected. On the left, a sidebar lists various device components like 'Panel\_Argo\_1', 'Panel200 Door', 'ARGO', and 'Panel200-Dumm...'. The main area displays a table of assigned users:


ID	Name
U1	U1
U10	U10
w1	w1
w2	w2
Worker	Worker

Below the table is a 'Save' button. At the bottom, a note states: 'Note: Device(s) will be automatically retained which are part of any Access Rule(s) assigned to the User. For more details [Click here](#)'.

- Users:** Click the picklist. The **Picklist For All Users** window appears.

Select the check boxes of the desired Users and click **OK**.

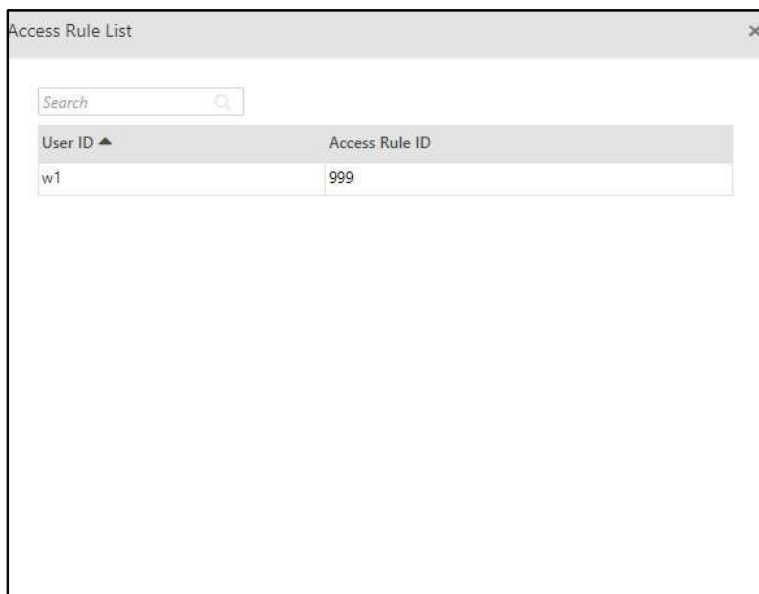
The grid displays the list of selected users.

If you wish to remove any assigned user, click the respective **Delete**  icon.



*If you wish to delete a user which is assigned to this device and it is a part of any Access Rule assigned to that user, then such user and door/s will be retained.*

- If you wish to check the users assigned against any Access Rule, click the **Click here** link at the bottom of the page. The **Access Rule List** pop-up appears.



The 'Access Rule List' window features a search bar at the top. Below it is a table with the following data:

User ID	Access Rule ID
w1	999

It displays the list of User ID along with the Access Rule ID against which they are assigned.

- Click **Save** to assign all the added users to this door.

## Cafeteria

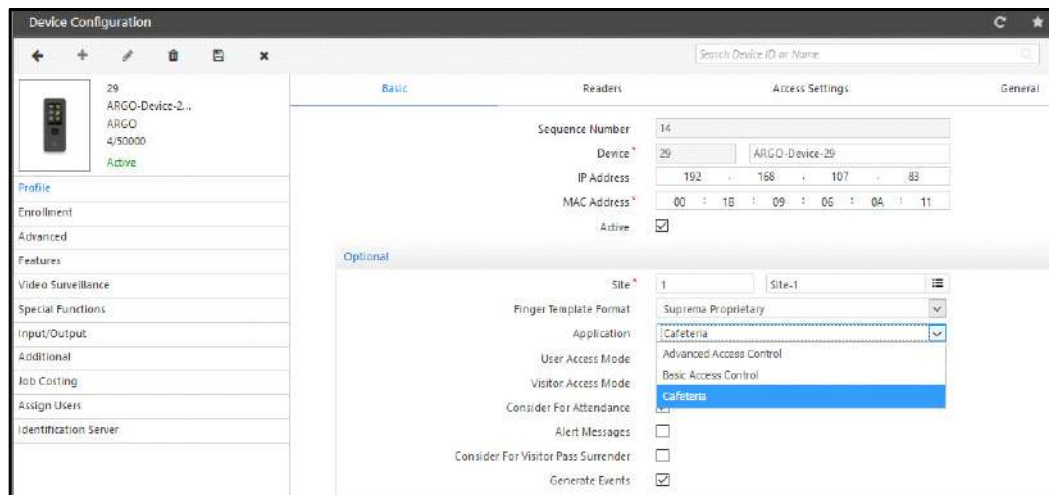


*Cafeteria is applicable for Direct Door only.*

*View Cafeteria Balance from Device will be functional using Card, QR Code (if Allow Access Via QR is enabled) as well as Face (if Enable FR is enabled) credentials.*

The COSEC system enables the user to configure devices which will be used by the Cafeteria management module.

To configure a door for Cafeteria application, select **Cafeteria** option in Device Profile> Basic> Application as shown below.



The Cafeteria tab will appear in Device Configuration page.

Select **Device Configuration> Cafeteria> Settings**

## Settings

The Cafeteria configuration for ARGO Door is shown as below.

- **Consecutive Transaction Delay (Sec):** Enter the time interval after which you wish to allow the second transaction from the same user.
- **Enable Offline Item Quantity Restriction:** Select the checkbox if you desire restricting transaction on exceeding the item quantity while the device is in offline mode.
- **Allowed Item Quantity:** Specify the number of item quantity to be allowed when the device is in offline mode. This will be applicable for each item present in the Menu.

For example, if the Menu has two items Tea and Poha and you have configured the **Allowed Item Quantity** as 2, then when the device is offline, the user/worker will be allowed to consume Tea twice as well as Poha twice.

## Printer Settings

- **Printer:** Select the printer from the dropdown list based on the site requirements.
- **Connection Type:** Select the printer connection type from the drop down list. The options available are:
  - RS232 (serial)
  - USB
- **Baud Rate:** In the event of a serial printer, select the appropriate baud rate from the drop down list.
- Specify the **Company Name**, **Company Address** and the **Punch Line** as per the site requirements. These details will be printed on the receipt dispensed from the selected printer.
- Select the **Exclude Price-Cost From Coupon** check box if you want to exclude the price from the coupon.
- Select the **User Balance On Coupon** check box, if you want Current Balance/ Current Month Usage and Weekly Remaining Limit to be printed on the Cafeteria receipt.



For pre-paid account users, Current Balance and Weekly Remaining Limit will be printed.

For post-paid account users, Current Month Usage and Weekly Remaining Limit will be printed.

For details refer to [“Cafeteria Usage Policy”](#).

## Menu

COSEC allows the administrator to assign one or more cafeteria menus (Menu 1, Menu 2, Menu 3... upto 99.) to a device. These can be configured by selecting pre-defined menus from the Menu picklist.



*The Menu is created from Cafeteria module.*

Menu No	ID	Menu Name	Start Time	End Time	Schedule Days
No Data					

The Menu can also be scheduled from Cafeteria module which will be displayed in “Schedule Menus” in above screen.

If you have to assign menu and schedule it on the door from Device Configuration page, then select the Menu from the picklist. The Menu will be shown in the grid as shown below.

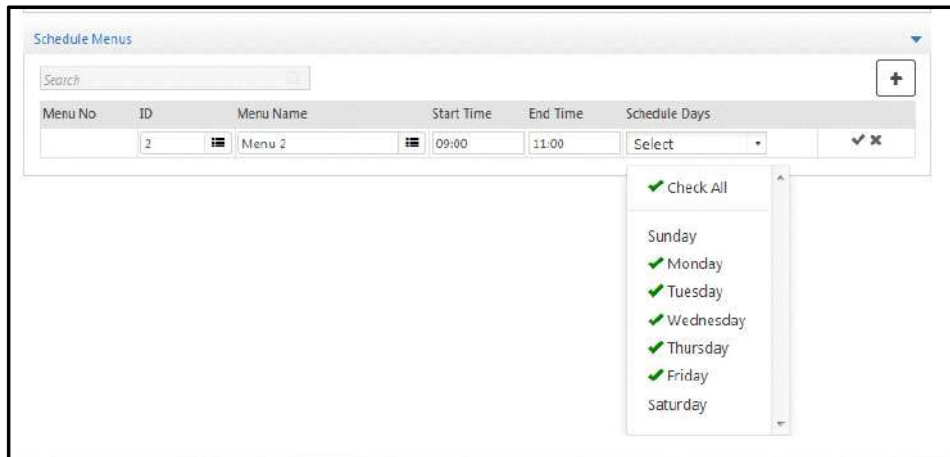
Menu No	ID	Menu Name
1	2	Menu 2

Menu No	ID	Menu Name	Start Time	End Time	Schedule Days
	ID	Name	HH:MM	HH:MM	Select

Now to schedule the menu click **Add** button as shown above.

Then select the menu to be scheduled from the **ID** picklist. Specify the **Start** and **End time** for which the Menu will be active and is available to users on the selected door. Select the **days** for which this menu will be available i.e. scheduled on the door.

Then click **OK** and **Save** the Menu schedule on the door.



Menu No	ID	Menu Name	Start Time	End Time	Schedule Days
2	2	Menu 2	09:00	11:00	Select

- ✓ Check All
- Sunday
- ✓ Monday
- ✓ Tuesday
- ✓ Wednesday
- ✓ Thursday
- ✓ Friday
- Saturday



*Two Menus cannot be scheduled for same timing.*

## Identification Server



*Identification Server is applicable for Direct Door only.*

This tab enables the selected device to be assigned to a pre-defined Identification Server.

Device has a limited memory capacity for storage of templates so we need Identification Server which will store the more number of templates and respond to device when asked for identification.

For more information on Identification Servers, See *Admin> System Configuration> Identification Server Configuration*.

To access these configurations, select the **Identification Server** tab.

Settings

### Face Recognition

Enable FR ☐

Face Capturing Tap & Go

Enable Time Out ☐

Free Scan Time Out (Sec) 30

IP Camera M/PEG URL

Note: Mention the protocol in URL.

User Name Username

Password

FR Mode Local

Server Address \* 192.168.50.2

Server Port \* 12000

Identification Time-Out Duration (Sec) 4

Group FR ☐

Capture Face of Unidentified User ☐

Show Feedback for Unidentified Face ☐

Generate Unidentified Face Event ☐

### Face Enrollment

Conflict Check ☒

Conflict Matching Threshold (Face) \* 93.00 %

Settings

### Adaptive Face Enrollment

Adaptive Face Enrollment ☐

Threshold Deviation (Face) 02.0 %

Multi-User Matching Score Deviation (Face) 02.0 %

Confirm Before Adaptive Face Enrollment ☐

### Face Antispoofing

Face Anti-Spoofing ☐

Camera Mount Wall Mount

Face Anti-Spoofing Mode Advance

Face Anti-Spoofing Threshold 62.00 %

### Other Biometric Credentials

Enable Identification On Server ☐

Identification Server ID Name

Configure Alternate Server Address ☐

Server Address

Server Port 11005

Enable Finger Smart Identification ☐

Identification Time-Out Duration (Sec) 4

Auto Send Enrolled Templates ☒

Default Biometric Group No. 0

## Face Recognition

- **Enable FR:** Select the checkbox to enable the Face Recognition feature on the device.



Make sure “**Enable FR**” flag is enabled and “**Basic Access Control**” application is selected in Devices > Device Configuration > Profile > Basic > Optional > Application in order to edit the parameters in Identification Server Settings.

- **Face Capturing:** Select the desired Face Capturing option — Tap & Go or Free Scan.
  - **Tap and Go:** If you select this option, user needs to tap on the device screen once. The MJPEG, that is motion recording screen appears. The device will capture and then identify the users face. If during working hours device is idle, then user needs to tap device to scan the face and gain access.
  - **Free Scan:** If you select this option, device will display the MJPEG, that is motion recording screen till the expiry of the Free Scan Time Out timer.
    - **Enable Time Out:** Select this checkbox to enable the time out.
    - **Free Scan Time Out (Sec):** Enter the free scan time out duration. The valid range is 1 to 999 sec.

In Free Scan method, multiple users can mark their attendance easily during peak entry hours.

For example, if the Free Scan Time Out is set as 30sec and if the user is identified in 10S then the system reloads the Free Scan Time Out timer again. Hence, device remains in the scanning mode.

- **IP Camera MJPEG URL:** Enter the URL for accessing the IP camera to receive the motion stream. For example: <http://192.168.104.48:80/matrix-cgi/mjpeg?profile-no=3>.

If the device is auto-added then the default value will be <http://192.168.1.126/matrix-cgi/mjpeg?profile-no=4>.

- **User Name:** Enter the user name for accessing the IP camera. For eg: admin
- **Password:** Enter the password for accessing the camera. For eg: admin123

This will fetch the motion stream from camera to device screen. Then the users can show their face on camera. The face will be captured and after identification, the user will be allowed to access the door and punch will be marked.

- **FR Mode:** Select the FR mode as **Local** or **Server Assisted**.
  - **Local:** In this Local mode face templates will be stored in FR hardware module which can store 1 Lakh face templates. The captured face template will be verified with the templates already stored in FR module.
  - **Server Assisted:** In Server Assisted mode, the face templates will be stored directly in the server. You must first configure the Identification Server from where the face templates will be identified.



Card will be identified and verified locally by the device irrespective of the FR Mode. Whereas, Finger and Face will be identified and verified based on the selected FR Mode.

When FR Mode is selected as **Local** below mentioned parameters are to be configured:

**Face Recognition**

Enable FR ☒

Face Capturing Tap & Go

Enable Time Out ☐

Free Scan Time Out (Sec) 30

IP Camera MJPEG URL \* http://192.168.1.126/matrix-cgi/mjpeg?profile-no=4  
Note: Mention the protocol in URL.

User Name \* Username

Password \* \*\*\*\*\*

FR Mode Local

Server Address \* 192.168.50.2

Server Port \* 12000

Identification Time-Out Duration (Sec) 4

Group FR ☐

Capture Face of Unidentified User ☐

Show Feedback for Unidentified Face ☐

Generate Unidentified Face Event ☐

- **Server Address/Port:** Enter the IP Address and Port of the FR Server.
- **Identification Time-Out Duration (Sec):** Enter the identification time-out in seconds, after which the face template identification process will be timed out.

**Example:** If **Identification Time-Out Duration (Sec)** is 5 seconds, then the identification server will try to identify the face template until 5 seconds and if not found then it will show time-out to the user.

When FR Mode is selected as **Server Assisted**, configure the below fields:

User can either assign a separate or a common Identification Server which is shared by other biometric credentials.

**Face Recognition**

Enable FR ☒

Face Capturing Tap & Go

Enable Time Out ☐

Free Scan Time Out (Sec) 30

IP Camera MJPEG URL \* http://192.168.1.126/matrix-cgi/mjpeg?profile-no=4

Note: Mention the protocol in URL.

User Name \* Username

Password \* \*\*\*\*\*

FR Mode Server Assisted

Identification Server ID Name ⋮

Configure Alternate Server Address ☐

Server Address

Server Port 11005

Identification Time-Out Duration (Sec) 4

Group FR ☐

Capture Face of Unidentified User ☐

Show Feedback for Unidentified Face ☐

- **Identification Server:** Select the Identification Server from the picklist button to which the device is to be assigned to save the records.
- **Configure Alternate Server Address:** Select this checkbox to configure external IP address of FR Identification Server.
- **Server Address:** By default, this will display the configured Identification Server for FR. This field allows user to enter the Alternate IP Address for FR if **Configure Alternate Server Address** is enabled.
- **Server Port:** Enter the TCP port number. The default port number is 11005.
- **Identification Time-Out Duration (Sec):** Enter the duration in seconds after which the face template identification will get time out.

**Example:** If 5 seconds is specified, then the identification server will try to identify the template till 5 seconds and if not found then it will show time-out to the user.

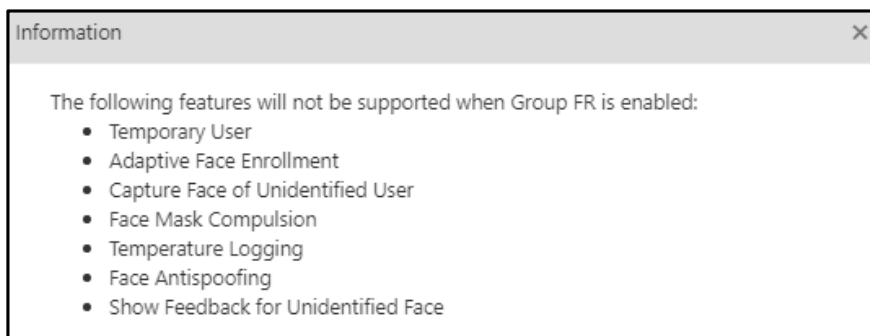
- **Group FR:** Select this checkbox to enable face recognition feature for multiple users and mark their attendance at the same time via this door. Group FR will be applicable only if you have selected **Free Scan** as the **Capturing Mode**.



Group FR will work in both FR Modes — Local, Server Assisted Mode.

For Group FR ([“Mark Group Attendance”](#)) feature to work in Server Assisted Mode, ensure that the desired Identification Service is selected in COSEC Admin > License and Service. For more details refer Admin Management Portal User Manual.

Once you enable Group FR, a pop-up will be displayed as shown below:



The features listed in the pop-up will not be functional.

- **Capture Face of Unidentified User:** Select this checkbox to enroll unidentified faces of users via this door.



For Capture Face of Unidentified User feature to work, ensure that the desired Identification Service is selected in COSEC Admin > License and Service. For more details refer Admin Management Portal User Manual.

If you have enabled the **Capture Face of Unidentified User** feature then make sure that you schedule a task of **Delete Unidentified Face** in Admin > System Utilities> Task Scheduler to avoid storage of excess data in the database.

- **Show Feedback for Unidentified Face:** Select this check box, if you wish to display a message on the device display screen to user's whose face is not identified.



If you wish that events should be generated for Unidentified Face, enable **Generate Unidentified Face Event**.

If you have enabled **Group FR**, **Show Feedback for Unidentified Face** feature will not be functional.

- **Generate Unidentified Face Event:** Select this check box, if you wish to generate events when a user's face is not identified.

These events can be viewed from **Admin Module > View/Logs > Event View** as well as **Device Module > Reports > Invalid Events**.

If you wish to view the snapshots in the Events/Logs, make sure you have configured [“Satatya/IP Camera Integration”](#) in [“Visual Tagging”](#). Make sure you select the Event as **User Denied- User Not Identified** to view the snapshots for **User Denied- User Invalid** event.



**Generate Unidentified Face Event** is applicable for **Face** credentials only.

For ARGO Direct Door, to generate events for all other credentials, make sure **Generate Invalid User Events** is enabled under “[Settings](#)” in “[Advanced](#)”.

For ARGO Panel Door, to generate events for all other credentials, make sure **Generate Invalid User Events** is enabled under “[Settings](#)” tab in “[Advanced](#)” in “[Panel200](#)”.

If you wish that a message should be displayed on the device display screen for Unidentified Face, enable **Show Feedback for Unidentified Face**.

## Face Enrollment



If the **FR Mode** is **Server-Assisted** and you wish to enroll faces from the device, make sure **Enable Face Recognition** is selected in **Users > User Configuration > Face Recognition and/or Visitor Management > Visitor Profile > Face Recognition and/or Contract Worker Management > Worker Profile > Face Recognition**.

- **Conflict Check:** Select the checkbox for the system to check the conflict between the new face of a user and the already (existing) enrolled faces of all the users (available in the database) during the face enrollment process.
- **Conflict Matching Threshold:** Enter the desired Conflict Matching Threshold value in percentage.

The system will consider this value while comparing the face with the face templates already present in the database.

If a conflict is found, that is, if the system detects a face template in the database similar to the new face, then a conflict error will be displayed.

Make sure a higher value is set for this parameter, as it will result in less equivalent matches with the face templates available in the database.



Make sure the **Conflict Matching Threshold** is set lower than **Matching Threshold** in **Admin module > System Configuration > Identification Server Configuration**.

### Example: Face Enrollment of Suresh

- **Conflict Check** checkbox is selected.
- **Conflict Matching Threshold** is set as 93%.

Now during the face enrollment of Suresh, the system will check in its database if his face matches with faces of other users available in the database.

- **Case 1:** If Suresh's face matches 92% with Ram, then the system will allow to enroll Suresh's face.
- **Case 2:** If Suresh's face matches 94% with Shyam, then the system will display the conflict error while enrolling Suresh's face.

## Adaptive Face Enrollment

- **Adaptive Face Enrollment:** Enable adaptive face enrollment for identification server.



- Adaptive face enrollment provides automatic real time face enrollment whenever change is experienced in facial features.
- Enabling adaptive enrollment process parameter, an additional slot will be provided internally to store 10 more face templates of a user.
- IDS will learn from face recognized, adapt and would take decision of storing new template of a user database.

By enabling the adaptive face enrollment parameter will allow to specify following configurations:

- **Threshold Deviation (Face):** Enter the value of deviation from matching threshold in percentage. Based on the value entered for deviation, template for Adaptive Face Enrollment will be decided.

*Example: If deviation entered is 3% and matching threshold is 98% then it will classify template which has matching score between 98 - 95 and one lower than this will be classified below margin.*

- **Multi-user Matching Score Deviation (Face):** Enter the value of deviation from matching score between 2 different users while Adaptive Face Enrollment.
- Difference between matching scores of templates will be done, when we have templates of two or more users falling under above specified deviation.

*E.g. Assume the following parameters:*

- *Threshold value = 98%*
- *Threshold Deviation= 3%*

So, Result will display all matching templates having matching score between range 98 to 95

- *Multi-user Matching score deviation = 0.5%*

*Suppose, 5 best templates of 2 users fall between 98 -95% range*

<b>User</b>	<b>Matching Score</b>
User 1	97.8
User 1	97.6
User 1	97.4
User 2	97.25
User 2	97

*As we have obtained templates of 2 users in which user 1 is having template of highest matching score, so will make a difference between lowest score template of user 1 and highest matching score template of user 2.*

*97.4 - 97.25 = 0.15; this is less than 0.5*

*As difference is less than 0.5, user 1's template having matching score 97.8 for adaptive enrollment will not be used.*

- Threshold Deviation and Multi-user Matching score deviation will act as two filters to fetch appropriate template for adaptive enrollment.
- Value can be added in decimal.



We recommend to set the multi-user matching score deviation higher always e.g.2.0 to reduce the probability of enrolling a particular user's face template in some different user's enrolled faces.

- **Confirm before Adaptive Face Enrollment:** Select this checkbox if face enrolled using Adaptive face enrollment requires confirmation from user.



Faces enrolled under Adaptive enrollment process will be synced automatically, but when IDS is restarted due to any reason, the adaptive faces which are not synced will be removed by default.

## Face Anti-Spoofing

- **Face Anti-Spoofing:** To use this feature, make sure **Enable FR** checkbox is selected in **Devices> Device Configuration> Identification Server> Face Recognition> Enable FR**.

Then, select the **Face Anti-Spoofing** checkbox to enable this feature and configure the following parameters:

- **Camera Mount:** Select the desired Camera Mounting option - **Wall Mount** or **Ceiling Mount**.

There is an impact of Camera Mounting in face liveness detection.

By default, it is "Wall Mount".



For Wall Mount, make sure the distance between camera and user is less than 3 feet for proper detection of face.

- **Face Anti-Spoofing Mode:** Liveness Detection helps to limit the fierce risk of spoofing attacks by using several anti-spoofing approaches. Along with the configurations to be done for Face Anti-Spoofing you also need to take care of the recommended settings for liveness verification and for face recognition as well as the Camera Settings, refer "[Recommendations for Liveness Verification](#)", "[Recommendations for Face Recognition](#)" and "[Recommended Camera Settings for Liveness Verification](#)".

Select the Face Anti-Spoofing Mode for liveness detection from the following:

1. **Basic:** This mode detects face as well as photos from the mobile phones.  
Select this option when the distance between Camera and Face is more than 3 feet
2. **Moderate:** This mode analyzes the texture of face.  
Select this option when the distance between Camera and Face is less than 2 feet
3. **Advance:** This mode combines the features of **Basic Mode** and **Moderate Mode** of Face Anti-Spoofing.  
Select this option when the distance between Camera and Face is more than 1 feet and less than 2 feet.  
By default, Face Anti-Spoofing Mode will be **Advance**.



Only Basic option of Face Anti- Spoofing Mode will be applicable when the Camera Mount option is Ceiling Mount.

- **Face Anti-Spoofing Threshold:** Enter the Face Anti-Spoofing threshold value in percentage within the range from 1.00 to 99.99 to identify user's face liveness for considering him/her as genuine person. This Threshold value will vary as per **Face Anti-Spoofing Mode** selected by you.

## Other Biometric Credentials

- **Enable Identification On Server:** Select the checkbox to enable the identification of palm/finger templates on this device.

- **Identification Server:** Select an Identification Server using the picklist button to which the device is to be assigned. The configuration of server is done from **Admin module > System Configuration > Identification Server Configuration** and the Identification Service must be started from the service tray. The IP Address of this server is displayed in **Server Address**.
- **Configure Alternate Server Address:** Select this checkbox to configure external IP address of Identification Server.
  - **Server Address:** By default it displays the IP Address of the selected Identification Server. Enter the external network IP address which will be used for accessing identification server.
- **Server Port:** Enter the TCP port number. The default port number is 11005.
- **Enable Finger Smart Identification:** For all other supported doors, select the checkbox to enable fingerprint templates identification through Identification Server.
- **Identification Time-Out Duration (Sec):** Enter the duration in seconds after which the fingerprint template identification will get time out.
 

**Example:** If 5 seconds is specified, then the identification server will try to identify the template till 5 seconds and if not found then it will show time-out to the user.
- **Auto Send Enrolled Templates:** Select the checkbox to enable any enrolled templates to be saved both on the COSEC database as well as saved locally on the configured Identification Server. This enables prompt identification of user on enrollment.
- **Default Biometric Group No.:** Enter the default biometric group number to be assigned to the device. It is a number allotted to a device to be assigned to the Identification Server. This enables the Identification Server to match the template against only those devices that belong to the corresponding biometric group. This reduces the false detection as well time to search template.

Click **Save**.

# Panel200

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Panel200 functions in two modes — Standalone or Server.

For details of Panel200 as a Standalone Server, please refer to the **COSEC Panel200 System Manual**.

When Panel200 is set to function in the Server mode, then the Panel200 manages multiple controllers (Panel Doors) and acts as a bridge between the controllers and the central COSEC server. It is responsible for synchronizing all door controllers and implementing advanced access control features.



The SDK Version for the Panel will be displayed after you have added the Panel to COSEC along with the name assigned to the device. You can also view the SDK Version from [“Device Status”](#).

If your Panel200 is working on SDK1, certain features are not supported in the same. For detailed list of features, refer to [“Features Not Supported in Panel SDK1”](#).

New features for Panel/Panel Doors are applicable for Panel200 (SDK2) only, except where mentioned explicitly for SDK1.

The Device Configuration option in COSEC enables the system administrator to add Panel200 in the COSEC network by setting the configurations through the COSEC application.

It is necessary to configure a Panel200 before starting the configuration of its slave controllers (Panel Doors).

You can connect the following devices as Panel Doors — Door V1, Door V2, Door V3, Door V4, Path Controller, Vega Controller, PVR Door, ARC DC 100, ARC IO 800, ARC DC 200, ARGO, Path V2, ARGO FACE.

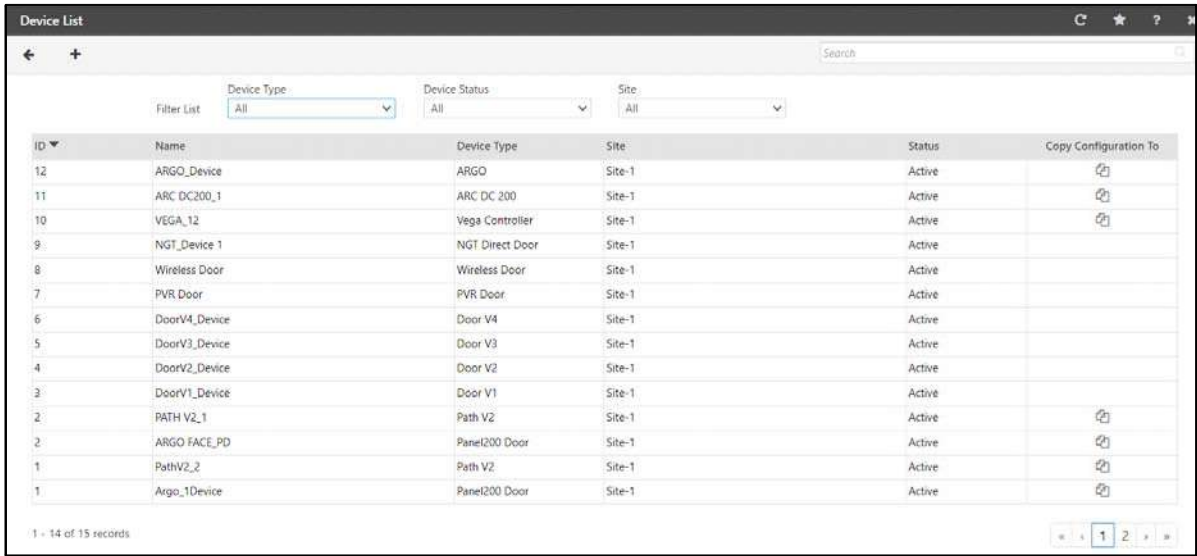
The Panel200 configuration are explained for the Panel set in the Server Mode.



*The Configuration of Panel and Panel Lite is similar to Panel200. In this manual, the configuration of Panel200 is explained for reference.*

*The basic difference between Panel, Panel lite and Panel200 is the support of user capacity and event buffer.*

To configure a new Panel200 device, click **Devices Module > Device List** menu and the page appears as shown below.

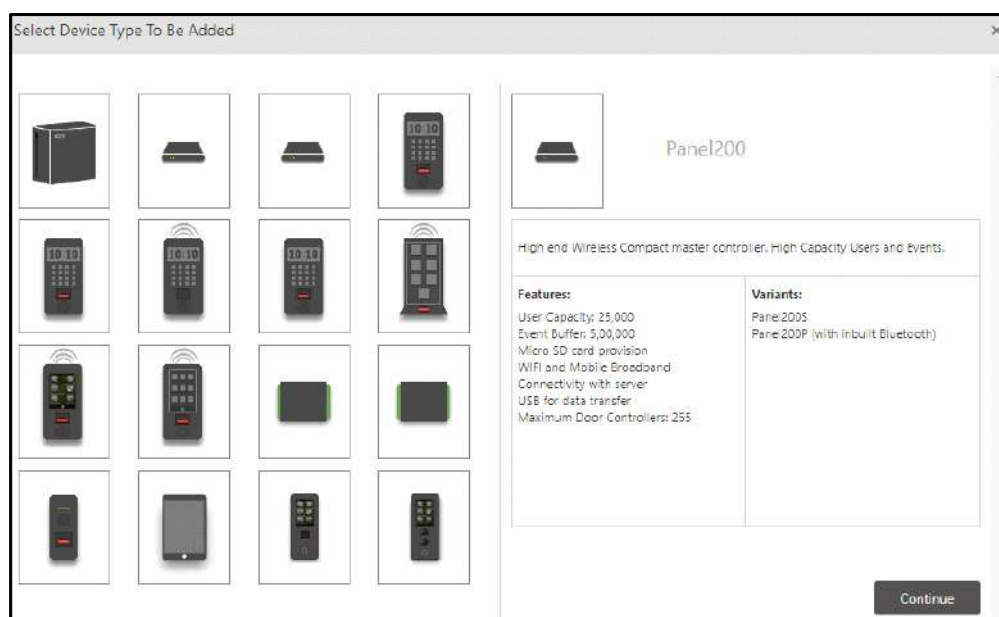


The screenshot shows the 'Device List' window with a search bar and filter options. The table below lists the devices:

ID	Name	Device Type	Site	Status	Copy Configuration To
12	ARGO_Device	ARGO	Site-1	Active	
11	ARC DC200_1	ARC DC 200	Site-1	Active	
10	VEGA_12	Vega Controller	Site-1	Active	
9	NGT_Device 1	NGT Direct Door	Site-1	Active	
8	Wireless Door	Wireless Door	Site-1	Active	
7	PVR Door	PVR Door	Site-1	Active	
6	DoorV4_Device	Door V4	Site-1	Active	
5	DoorV3_Device	Door V3	Site-1	Active	
4	DoorV2_Device	Door V2	Site-1	Active	
3	DoorV1_Device	Door V1	Site-1	Active	
2	PATH V2_1	Path V2	Site-1	Active	
2	ARGO_FACE_PD	Panel200 Door	Site-1	Active	
1	PathV2_2	Path V2	Site-1	Active	
1	Argo_1Device	Panel200 Door	Site-1	Active	

At the bottom, it indicates '1 - 14 of 15 records' and has pagination controls showing '1' and '2'.

Click **New +** and select **Panel200** as device type and click **Continue**.



The **Device Configuration** page of Panel200 appears on your screen.



To add Devices automatically, click Admin Module> System Configuration> Global Policy> Device. Select the “Auto Add New Devices” check box to enable. Once the device is connected in network, it will come online in the COSEC Monitor.



Make sure the Monitor Service is running while adding the device to COSEC.

The assignment of user on Panel Doors can be done from respective Panel Door Configuration > Assign Users.

To configure the parameters, you can:

- copy the parameters from another device, refer to [“Copy Parameters From”](#).
- **OR**
- can click each link to configure the parameters, refer to [“Selective Configuration”](#).

## Copy Parameters From

You can also copy the parameters from another device, if required.



*The Copy Configuration From option is applicable in Add (after you have selected the desired device type) as well as Edit mode of any added device.*

*If certain parameters are configured and Copy Parameters From option is clicked, then:*

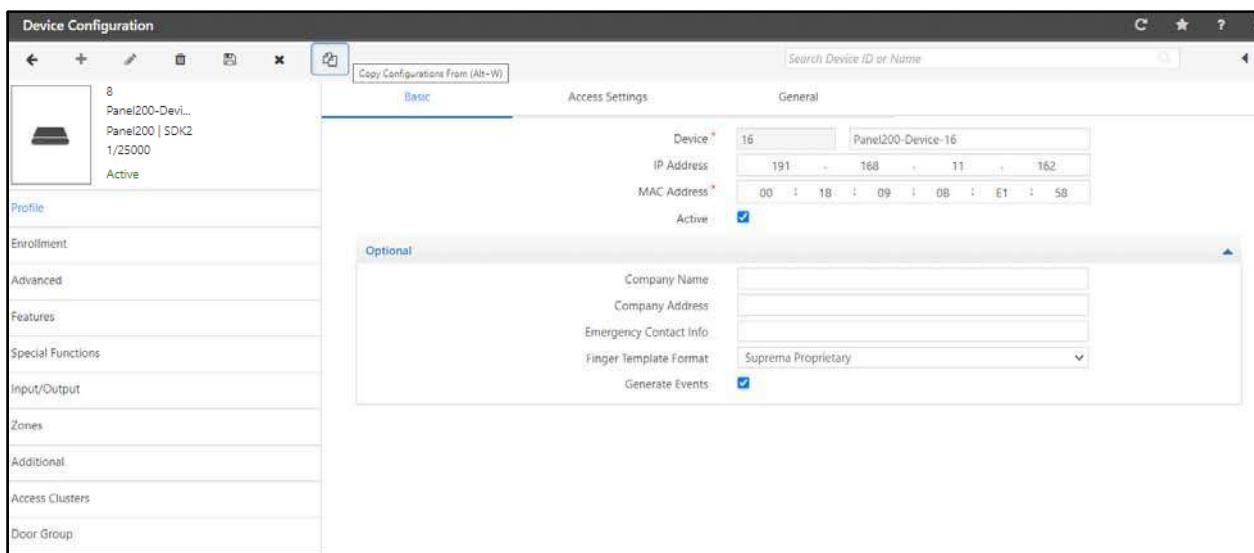
- *the value of the applicable parameters already configured will be over-written with the values as configured in the selected device.*
- *the values of other parameters that are configured will remain as they are.*

*If none of the parameters are configured and Copy Parameters From option is clicked, then*

- *all the applicable parameter values will be copied from the selected device.*
- *the values of the other parameters will be their default values.*

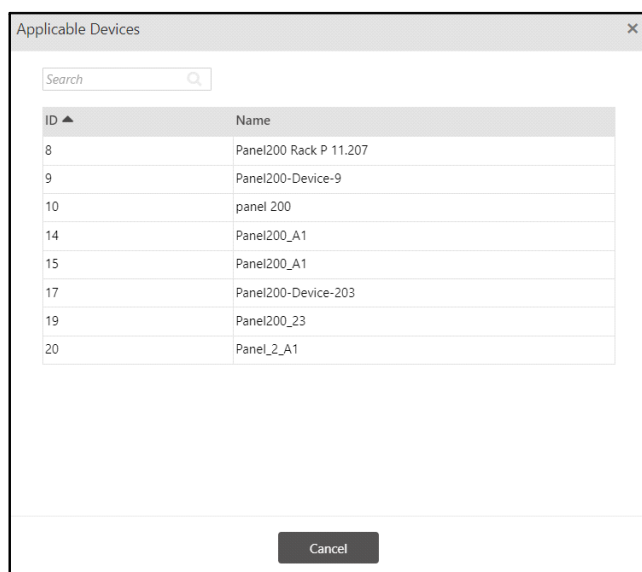
*To know more about the applicable parameters that will be copied, refer to [“Copy Parameter Details”](#)*

To do so, click **Copy Configuration From** .



The screenshot shows the 'Device Configuration' window. On the left, a sidebar lists various configuration tabs: Profile, Enrollment, Advanced, Features, Special Functions, Input/Output, Zones, Additional, Access Clusters, and Door Group. The main area is titled 'Copy Configurations From (Alt-W)' and contains a search bar 'Search Device ID or Name'. Below this, there are three tabs: 'Basic', 'Access Settings', and 'General'. The 'General' tab is selected, showing fields for 'Device' (16), 'IP Address' (191.168.11.162), 'MAC Address' (00:1B:09:0B:E1:58), and 'Active' (checked). An 'Optional' section is expanded, showing fields for 'Company Name', 'Company Address', 'Emergency Contact Info', 'Finger Template Format' (Suprema Proprietary), and 'Generate Events' (checked).

The **Applicable Devices** pop-up appears.



*The devices that appear in the Applicable Devices pop-up will be of the same family and device type. That is, the pop-up will display other Panel200 devices only. For example, if you have devices — ARGO1, ARGO2, Panel1 and Panel2, then this pop-up will display only Panel1 and Panel2.*

Select the desired device from which you wish to copy the configurations.

OR

You can also search for the desired device using the Search option and then select the device.

A Warning pop-up appears. Click **Yes** to copy all the applicable parameters. A processing screen appears.



*Only applicable parameters will be copied. For details, refer to [“Copy Parameter Details”](#).*

*If during the processing screen, you click Cancel, then the entire copy process will be aborted.*

If all applicable parameters are copied successfully, then the Applicable Configurations are Successfully Copied message will be displayed.

If all applicable parameters are not copied successfully, then the Failed to copy. Please try again message will be displayed.

## Selective Configuration

To know more about configuring the Panel200, click on the links.

- [“Profile”](#)
- [“Enrollment”](#)
- [“Advanced”](#)
- [“Features”](#)



- [“Special Functions”](#)
- [“Input/Output”](#)
- [“Setting Up Access Zones”](#)
- [“Additional”](#)
- [“Access Clusters”](#)
- [“Door Group”](#)

## Profile

This section enables the user to set up the basic profile for any new device. Setting up a profile involves defining basic parameters to set up the device.

Click each link to configure the Profile parameters:

- [“Basic”](#)
- [“Access Settings”](#)
- [“General”](#)

## Basic

The **Profile > Basic** and the page appears as shown below:

The screenshot shows the 'Device Configuration' window with the 'Basic' tab selected. The left sidebar lists various configuration options: Profile, Enrollment, Advanced, Features, Special Functions, and Input/Output. The main area displays the following fields:

- Device:** 2 (Panel200-Device-2)
- IP Address:** 192 . 168 . 103 . 203
- MAC Address:** 00 : 18 : 09 : 03 : DF : 5A
- Active:** ☒
- Optional:**
  - Company Name:**
  - Company Address:**
  - Emergency Contact Info:**
  - Finger Template Format:** Suprema Proprietary
  - Generate Events:** ☒

Configure the following options as required:

- **Device:** Enter a **Name** for the new Panel200 device. The **ID** will be assigned by the system.
- **IP Address and MAC Address:** Enter the MAC address of the Panel. The IP address will be displayed automatically once the device comes online in Monitor.



MAC address of Panel is required while manually adding the Panel to the COSEC Monitor. Take a note of the MAC address from the device when it is powered on.

Make sure the Panel200 is set in the Server Mode. To do so,

- Enter the IP Address of the Panel200 in the browser.
- The Panel200 Web page appears.
- Click Configuration > Basic Profile > Panel Mode
- Select Server Mode

- **Active:** If the device is active on the network, select this check box to enable this option.



To add the Device automatically, click Admin Module> System Configuration> Global Policy> Device. Select the **Auto Add New Devices** check box to enable.

The device will be added automatically but make sure you enable the **Active** check box in order to connect the device to the network. Once the device is connected to the network, it will come online in the COSEC Monitor.

## Optional

Click the **Optional** collapsible panel. It provides optional configurations as shown below:

- Configure the **Company Name**, **Company Address** and **Emergency Contact Info**.
- **Finger Template Format:** Select the Finger Template Format as **Suprema Proprietary** or **Suprema ISO**.



If you select either of the formats, then all the Existing Suprema Finger Templates will be deleted from the device and user will have to enroll with selected Fingerprint template format again.

*Suprema Proprietary is a local format of Suprema, while Suprema ISO is the standard format.*

- **Generate Events:** By default, this option is enabled, that is the events generated in the Panel Doors will be displayed in the COSEC Monitor.

Clear the check box if you do not wish to view the Panel Door events in the COSEC Monitor.

## Access Settings

Click **Profile > Access Settings** and the page appears as shown below:

The screenshot shows the 'Device Configuration' web interface. On the left is a sidebar with a device icon and details: '8 Panel200-Dev...', 'Panel200 | SDK2', '1/25000', and 'Active'. Below this are menu items: Profile, Enrollment, Advanced, Features, Special Functions, Input/Output, Zones, Additional, and Access Clusters. The main area has three tabs: Basic, Access Settings (selected), and General. Under 'Access Settings', there are fields for 'Universal Time Zone' (set to '(GMT+05:30)Chennai, Kolkata, New Delhi, Mum'), 'Time Format' (set to '24 Hours'), and 'Auto Synchronize with NTP' (unchecked). Below these is a 'Preferred NTP Server' field. Further down is a 'Working Days' section with checkboxes for Sun, Mon, Tue, Wed, Thu, Fri, Sat, and Holiday, all of which are checked. Below this are 'Working Hours (HH:MM)' (00:00 to 23:59), 'Break Hours(HH:MM)' (13:00 to 14:00), 'Allowed Early-IN (HH:MM)' (00:10), and 'Allowed Late-OUT (HH:MM)' (00:10). At the bottom are four 'Holiday Schedule' entries, each with a number (1-4) and a 'Schedule' dropdown menu.

- **Universal Time Zone:** Select the geographic time zone in which the Panel will operate.
- **Time Format:** Specifies the time format to be displayed on Panel Door LCD display connected with the Panel200. The formats available are:
  - 24 Hours
  - 12 HoursSelect the relevant option from the drop down list as per the site requirements.
- **Auto Synchronize with NTP:** If Date and time is to be automatically synchronized as per the Preferred NTP Server (predefined or user-defined NTP server address) selected by user, then you must enable Auto Synchronize With NTP check box.



*Independent of the mode set from server as Auto or Manual, the user can change the date and time settings from the Panel200 as well as the Panel Door device web-page, which will be reflected on the Panel Door device LCD display.*

- When Auto Synchronization with NTP is disabled Preferred NTP Server field will be disabled.
- When Auto Synchronization with NTP is enabled,
  - You can specify the Preferred NTP server of your choice. In this case Panel will first try to get Date and Time from that server address.

If it does not get Date and Time in three tries; Panel will check from pre-defined NTP servers.

If you have entered one of the three pre-defined NTP servers (ntp1.cs.wisc.edu, time.windows.com, time.nist.gov); then Panel will first check that server first.

- If it receives updated Date and Time then Updated Date and Time will be reflected on Panel webpage and Panel Door device display screen.

- You can keep the Preferred NTP server as blank. In this case Panel will check for Date and Time from the first NTP server.



*If user has manually entered Date and Time from web-page of the Panel Door or Device Menu then those values of Date and Time will be reflected on device web-page and display screen.*

*In the case of the Manual option the administrator can manually update the time on the Door with that of the system time as and when required. This can be accomplished from the COSEC Monitor and control application.*

- **Working Days:** While adding new devices, by default all the days including holidays for access are enabled. To change the default settings of working days, click on the relevant boxes which are not to be included in active working days.
- **Working Hours (HH:MM):** While adding new devices, the default working hours is set as 00:00 to 23:59. The user can change the default working hours in HH:MM format.
- **Allowed Early-IN (HH:MM):** Specifies the number of hours before official entry time, during which the user should be allowed entry.
- **Allowed Late-OUT (HH:MM):** Specifies the number of hours after official exit time, during which the user should be allowed to exit.
- **Holiday Schedule:** This section allows the administrator to assign up to four holiday schedules to the device by using the Holiday Schedule picklist



*If the same holiday schedule is configured for a user and for the door controller on which the user is assigned, then the user's attendance marking on the device, on any of the scheduled holidays will always be marked as a holiday.*

*All these configurations will be applicable to the Panel Doors connected with the Panel.*

## General

Click **Profile > General** and the page appears as shown below.

The screenshot shows the 'Device Configuration' web interface. On the left is a sidebar with a device icon and details: '8 Panel200-Devi...', 'Panel200 | SDK2', '1/25000', and 'Active'. Below this are menu items: Profile, Enrollment, Advanced, Features, Special Functions, Input/Output, Zones, Additional, Access Clusters, and Door Group. The main area has tabs for 'Basic', 'Access Settings', and 'General' (which is selected). Under the 'General' tab, there are several settings: 'Enable Display Messages' (checkbox), 'Custom Birthday Message' (text field with 'Happy Birthday'), and four 'Display Message' sections (1, 2, 3, 4). Each section has a checked checkbox, a 'Schedule' (two time pickers), and a 'Message' (text field). For example, Display Message 1 has a schedule from 00:00 to 11:59 and the message 'Good Morning'. At the bottom, there is a 'Multi-Language Support' checkbox.

- **Enable Display Messages:** Select this check box to enable the Custom Birthday Message and the Display Messages. Upto 4 Display Messages can be configured.
- **Custom Birthday Message:** Configure the birthday message which you wish to display on the Panel Door when the user punches on the door on his/her birth date.

The valid values are

**A-Z**

**a-z**

**0-9**

**`~!@#\$%^&\*()\_+-{}|\\|.;?<>,.\'\"**

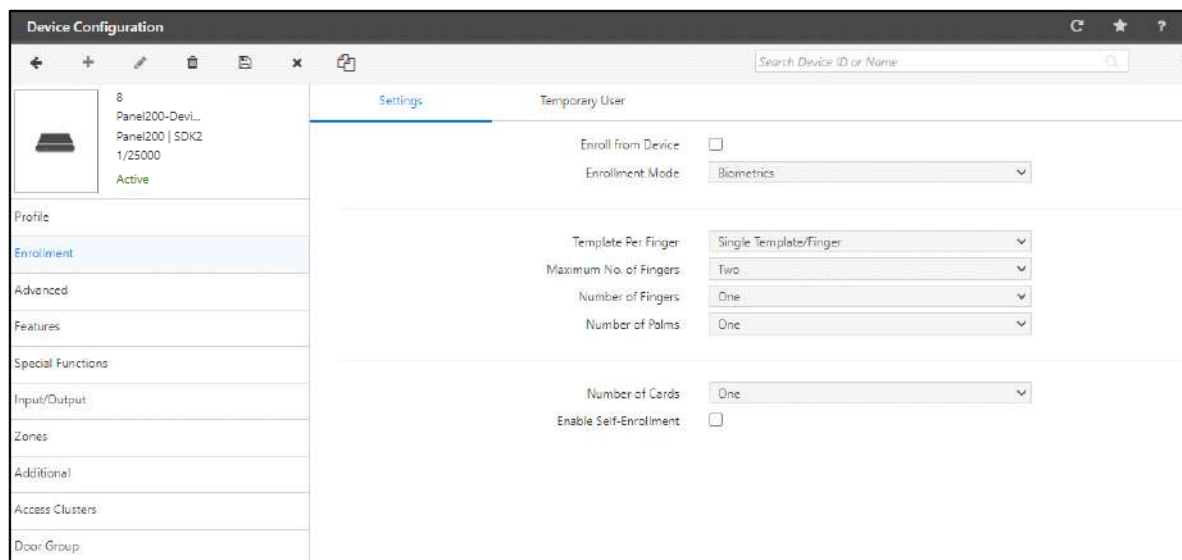
- **Display Message 1 to Display Message 4:** Select the respective check box of the desired Display Messages from 1 to 4, to enable.
  - **Schedule:** For each **Display Message**, define the time period for which the message is to be displayed.
  - **Message:** For each **Display Message**, configure the message you wish to display on the Panel Door as per the time set in the Schedule. Maximum 21 characters allowed.
- **Multi-Language Support:** Select this check box to enable multi-language support for the Panel Doors.



*Wireless Door/PVR Door/Door V3 will support languages with English fonts (A-Z,a-z) only.*

# Enrollment

On the **Device Configuration** page, click the **Enrollment** tab in the left pane.



To configure the Enrollment parameters click the following links:

- [“Settings”](#)
- [“Temporary User”](#)

## Settings



*Settings is applicable for Direct Door only.*

Click the **Settings** tab. The **Settings** page appears.

Settings	Temporary User
Enroll from Device	<input type="checkbox"/>
Enrollment Mode	Biometrics
Template Per Finger	Single Template/Finger
Maximum No. of Fingers	Two
Number of Fingers	One
Number of Palms	One
Number of Cards	One
Enable Self-Enrollment	<input type="checkbox"/>

Configure the following parameters.

- **Enroll from Device:** Select this check box to enable the enrollment of user from the Panel Door.

When this check box is enabled, **Enroll User** under Special Function is enabled automatically.

Similarly, if Enroll User under Special Function and Enroll From Device check-box both are inactive in device configuration, then if you enable Enroll User under Special Function, Enroll From Device check box is enabled automatically.

- **Enrollment Mode:** Select the Credential — Biometrics, ReadOnlyCard, SmartCard, BiometricthenCard, Face and DuressFinger that you wish to enroll from the Panel Door. The selected option will work only if supported by the connected Panel Door.

Refer to “[Enroll Credentials](#)” or “[Enrolling Users](#)” to enroll User/Worker.

Refer “[Enrollment](#)” or “[Enroll Credentials](#)” to enroll Worker.

Refer “[Enroll Credentials](#)” to enroll a Visitor.



*DuressFinger is only applicable for User and Worker.*

- **Template Per Finger:** Displays the values as configured at the global level. This field is not editable.
- **Maximum No. of Fingers:** Displays the values of the maximum number of fingers configured at the global level. This field is not editable.
- **Number of Fingers and Palms/Cards:** Select the number of cards or fingerprints to be enrolled based on the credential option selected in the **Enrollment Mode**.
- **Enable Self-Enrollment:** Select this check box to enable the self-enrollment feature on the Panel Door.

## Temporary User



*Make sure, User Access Mode (Door) in Zones is — Face, Biometric or Card — as per your requirement.*

Click the **Temporary User** tab. The **Temporary User** page appears.

Click the **Temporary User** tab. The **Temporary User** page appears.

Configure the following parameter.

- **Temporary Addition of Unknown User:** Select this check box to enable the temporary addition of users/ workers on Panel Doors.

Make sure you also configure the parameters of Temporary User/Worker for the desired Panel Door.

## Advanced

The Advanced tab allows the user to configure some advanced parameters such as access control Settings, Alarms, Timers and Wiegand.



*The configurations done in Panel will be functional only if supported by the Device connected with it.*

Click each link to configure the Advanced parameters:

- [“Settings”](#)
- [“Alarms”](#)
- [“Timers”](#)
- [“Wiegand”](#)

## Settings

The **Advanced > Settings** and the page appears as shown below:

The screenshot shows the 'Device Configuration' window with the 'Settings' tab selected. The left sidebar lists various configuration categories, with 'Advanced' currently highlighted. The main panel displays a list of settings for the selected device, 'Panel200-Dev1'. These settings include checkboxes for 'Generate Exit Switch Events' and 'Generate Invalid User Events', a 'Degraded Access' checkbox, a 'Degraded Wait Timer (Sec)' input field set to 5, an 'Access Mode' dropdown menu set to 'Any One', a 'Facility Code' input field set to 1, an 'Allow Facility Code Verification' checkbox, an 'Enable Additional Security' checkbox set to 'Disabled', an 'Enable Smart Identification' checkbox, an 'Access Level' dropdown menu set to 8, an 'Access Mode' dropdown menu set to 'Card', an 'Auto Acknowledge Alarm' checkbox, an 'Alarm Auto Acknowledge Timer (Sec)' input field set to 10, and an 'Override IO Linking/Time Triggered during Disarm' checkbox.



- **Generate Exit Switch Events:** Select this check box to enable the Panel Door to generate events every-time the exit switch is used.
- **Generate Invalid User Events:** Select this check box to enable the Panel Door to generate events for invalid user inputs.



**Generate Invalid User Events** is applicable for all other credentials except **Face**.

To generate events for **Face** credentials, make sure **Generate Unidentified Face Event** is enabled:

- under **"Face/Image Settings"** for **"ARGO FACE Door"**.
- under **"Identification Server"** for **"ARGO Door"**.
- under **"Identification Server"** for **"VEGA Door"**.
- **Degraded Access:** Degraded mode allows a valid user to access the facility even if the Panel Door is not communicating with the Panel200. Select this check box to enable this feature at the Panel level. Make sure you also configure the Degraded Mode parameters in **"Configuration"** under **"Setting Up Access Zones"**.
- **Degrade Wait Timer (sec):** Specifies the time period in seconds after the expiry of which the Panel Door switches from Network Fault to Degraded Mode. Default value is 5 sec.
- **Access Mode** - Defines the type and combination of credentials required to identify and validate a user at the Panel Door. Select the appropriate credential combination from the drop-down list. The options available are:
  - Any One
  - Card
  - Card + Biometrics
  - Card + Biometrics + PIN
  - Card + PIN
  - Biometrics
  - Biometrics + PIN

- Biometrics then Card
- Biometrics + Group
- **Facility Code:** Facility or site codes are encoded on cards, along with a card number, to ensure that cards belong to the facility where access is attempted. Facility Code is unique 8 or 16 bits of every HID Proximity card number specific to a site and is encoded into the card by the manufacturer.

COSEC also supports end user defined Facility Code (FC) to be written on to the card at the time of enrollment while using Smart Cards. Configure the Facility Code (ranging from 1 to 65535) as per your requirement.

- **Allow Facility Code Verification:** Select this check box to avail facility code verification on Panel Door.
- **Enable Additional Security:** In order to keep additional level of security check other than Facility Code and card number check, Smart Cards can be written with Additional Security Code that takes security to the next higher level. Select this check box to enable this functionality at the Panel level.
  - **Additional Security Code:** Configure the code (ranging from 1 to 65535).
  - **Re-enter Code:** Configure the code again to confirm.

Enable Additional Security ☒

Additional Security Code \*

Re-enter Code \*

Default Code

- **Default Code:** If your wish to use the default code, click the Default Code button, the Additional Security Code and Re-enter Code fields will be updated automatically.
- **Enable Smart Identification:** Select this check box to enable this functionality at the Panel.
- **Access Level:** Select the desired level from 1 to 15.
- **Access Mode:** Select the desired mode — Card, Card+PIN, Card+Biometrics, Card+Biometrics+PIN.

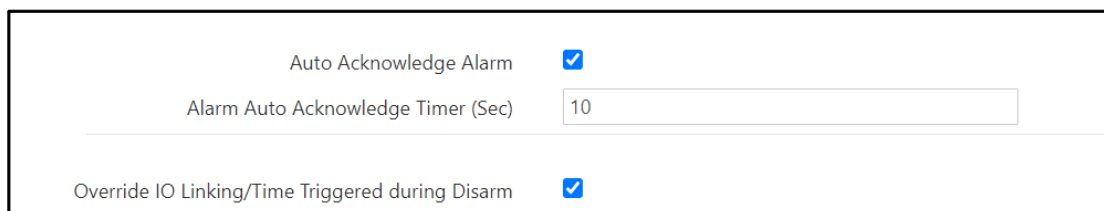
Enable Smart Identification ☐

Access Level

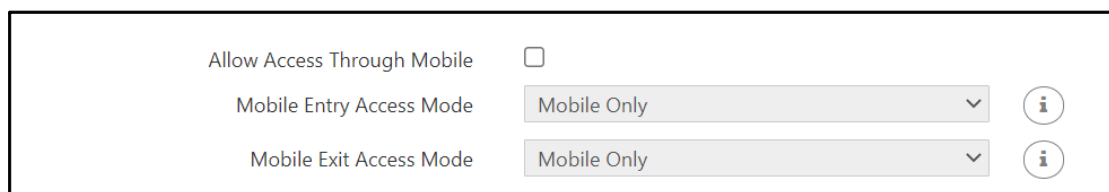
Access Mode

- **Auto Acknowledge Alarm:** Select this check box to enable the auto-acknowledgment of all alarms.

- **Alarm Auto Acknowledge Timer (sec):** Set the time in seconds after the expiry of which the alarm buzzer will stop automatically.



- **Override IO Linking/Time Triggered during Disarm:** Select this check box to enable Overriding of IO Linking/ Time Triggered configurations when the Disarm under Special Function is enabled.
- **Allow Access Through Mobile:** Select this check box to enable this functionality.

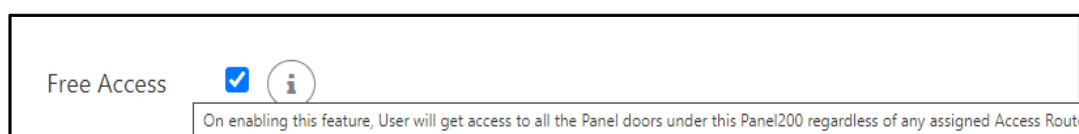


- **Mobile Entry/Exit Access Mode:** Select the entry and exit door access mode from the options — Mobile Only, Mobile then Biometrics, Mobile then PIN and Mobile then Card.



If User Access Mode is selected as “None” in Zone Configuration and Mobile Access Mode is selected as “Mobile Then Biometrics” then Panel Door can be accessed through Mobile then Biometric credential.

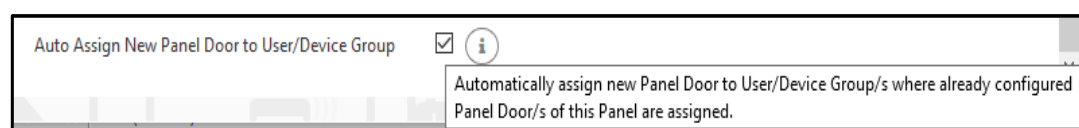
- **Free Access:** Select this check box to allow the users to access all Panel Doors connected with the Panel200. If the user is assigned an Access Route, then such doors within the route will allowed access as per the defined route. However, the users will also have access to the all other doors.



Clear this check box, you wish to allow access to users to doors as per the Access Route only.

- **Auto Assign New Panel Door to User/Device Group:** Enabling this check box allows Panel to assign the new configured Panel Doors to the respective users and/or device groups automatically.

For example: Panel Door 1 and Panel Door 2 are assigned to the User 1 and Device Group 1. Now if the Panel Door 3 has been added in the same configured Panel and if this check box is enabled then, the newly added Panel Door 3 will be automatically assigned to the User 1 and Device Group 1.



- **Face Sync In Panel Door:** Select the option to sync the face images in Panel Door from the options — via Panel or via Server. The default value is via Panel.

If you select **via Panel**, the face images in Panel Door will be synced via Panel.

If you select **via Server**, the face images in Panel Door will be synced via Server. On selecting via Server, the following pop-up appears.

Click **OK**. The drop-down value changes to via Server and the pop-up closes. Clicking on **Save** will save the configuration.



*If you have selected the option - via Panel,*

- *Panel200 will discard any new images received from the Server when its memory is full and Face Sync will stop.*
- *When Face Sync process starts and if Panel200 or Panel Door memory is full then, Face Sync will stop.*
- *On encountering 90% storage full condition, the Panel200 will notify the Server and an alert will be triggered. This alert can be configured from Admin module > System Configuration > Alert Message Configuration. Make sure you select Alert Filter as **System** and Event as **Device Storage**.*
- **Advertise Bluetooth:** Select this check box to enable bluetooth of the Panel by which the Panel will be visible to others. Then configure the following parameters.

- **Bluetooth Name:** Configure the name of the bluetooth by which it can be identified by other devices. Default: MATRIX.

If required, you can configure the bluetooth name as per your requirement. The **Bluetooth Name** can be a maximum of 10 characters.

- **Bluetooth Range:** Select the range for bluetooth as **Short**, **Medium** or **Long**. If Short range is selected then the Panel will be visible to the nearby devices which are in the range of 1m to 2m.

Select the Bluetooth Range as — **Short (1m-2m)**, **Medium (5m-7m)** or **Long (>8m)**.

- **Panel Door Secured Communication:** Select this check box to establish secure communication between Panel and Panel doors.

Panel Door Secured Communication	<input checked="" type="checkbox"/>	Activate Wind Go to Settings to a
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Click **Save** to save all the configurations.

## Alarms

Click **Advanced > Alarms** and the page appears as shown below.

Select the desired check boxes for the respective alarms to activate the same. You can configure upto 3 **Custom Alarms** also as per your requirement.

- **Duress Alarm:** Duress Alarm can be generated when a facility/premises has been accessed by a valid user but under some threat or force entry. In this situation; the user can alert the security by entering the duress code along with user code. This duress will be reported to the security at remote location without any local alarm.



Enable the Duress Detection feature and set the Duress Code from Duress Detection in **“Set3”** or/and Enroll Duress Finger from **“Enrollment”**.

- **Dead Man Alarm:** Dead Man Alarm is generated when the person working in restricted environment does not come out of the Dead Man Zone within a pre-defined Alert time.



Enable the Dead Man Zone feature at Panel level from Access Features > **“Set3”** and at Zone level from Zones> Configuration.

- **Panic Alarm:** You can enable the system to generate a Panic Alarm from the Panel Door by enabling the Panic Alarm check box. Also Door Alarm must be activated and the door must be in the normal condition (i.e. armed) then Panic Alarm will be generated.

- **Door Offline Alarm:** You can enable the system to generate a Door Offline Alarm by enabling the Door Offline check box. Also Door Alarm must be activated so when the door is offline then Door Offline alarm will be generated.
- **Door Fault Alarm:** You can enable the system to generate a Door Fault Alarm by enabling the Door Fault check box. Also door alarm must be active. So when the door is accessed and held opened for long time, then door fault alarm will be generated.
- **Occupancy Violated Alarm:** You can enable the system to generate the Occupancy Violated alarm, when the number of users permitted within a secured area or controlled zone exceed.



*Enable the Occupancy Control feature at Panel level from Access Features > Set1 and at Zone level from Zones> Configuration.*

- **Tail-Gating Alarm:** You can enable the system to generate the Tail-Gating alarm, when more than one person enters a secured area using a single person's access credentials.
- **Man Trap Timer Violation Alarm:** Whenever the Man Trap Timer is configured for a particular door, the user is expected to punch on the door present in the same zone within the specified Mantrap timer. If user fails to do so, Man Trap Timer Violation Alarm will be activated.



*Enable Man Trap for the Zone level from Zones> Configuration.*

- **Access Denied-Anti-Pass Back Alarm:** This alarm can be enabled to alert the fraudulent use of card when Anti-Pass back feature is applied in a zone. When the restriction is hard, the user has to follow entry and exit sequence before entering again; else access will be denied and alarm will be generated.



*Enable the Anti-Pass back feature at Panel level from Access Features > "Set3" and at Zone level from Zones> Configuration.*

- **Access Denied- Access Route Violated:** This alarm can be enabled to alert the violation of access route configured for the user. When the restriction is hard, the user has to follow the access route; only then he will be allowed to access the doors in the route.



*Enable the Access Route feature at Panel level from Access Features > Set1 and configure the Access Route feature from Access Control module> Access Route.*

- **Access Denied-Other Reasons:** This alarm can be enabled to alert the violations of other Access control policies (other than APB violation & Access Route violation) while accessing the door.
- **Multiple Unauthorized Attempts:** This alarm can be enabled to provide an alert when an unauthorized user is trying to access the door multiple times.
- **User Unidentified:** This alarm can be enabled to provide an alert when the credential of user accessing the door are not identified.
- **Access Denied - Access Route Timer Violated:** This alarm is activated when the Access Route Timer is violated.
- **Custom Alarm 1/2/3:** You can configure custom alarm as per your requirements.
- **Alarm Reissue Wait Timer (min):** Define the time in minutes for which an acknowledged alarm should wait before being re-issued. Default value is 5 minutes.

- **Man Trap Alarm Wait Timer:** This check box enables an alarm wait timer on the panel to ensure that the user accesses sequential doors of a Man Trap within a specific time-frame.

## Timers

This section allows the configuration of various types of pre-defined timers which can trigger off specific responses.

Click **Advanced > Timers** and the page appears as shown below:

Timer	Value
Inter-Digit Wait Timer (Sec)	3
Multi-Input Wait Timer (Sec)	5
Late-IN Early-OUT Timer (Min)	60
Door Abnormal Wait Timer (Sec)	10
Palm Enrollment Time Out (Sec)	60

Configure the following options as required:

- **Inter-Digit Wait Timer (sec):** Specifies the time period in seconds for which the Panel Door waits between two digits before considering the user input code as complete. Default value is 3 sec.
- **Multi-Input Wait Timer (sec):** Specifies the time for which system needs to wait for the second credential input from the user when more than one credential is to be used to grant access. Default value is 5 sec.

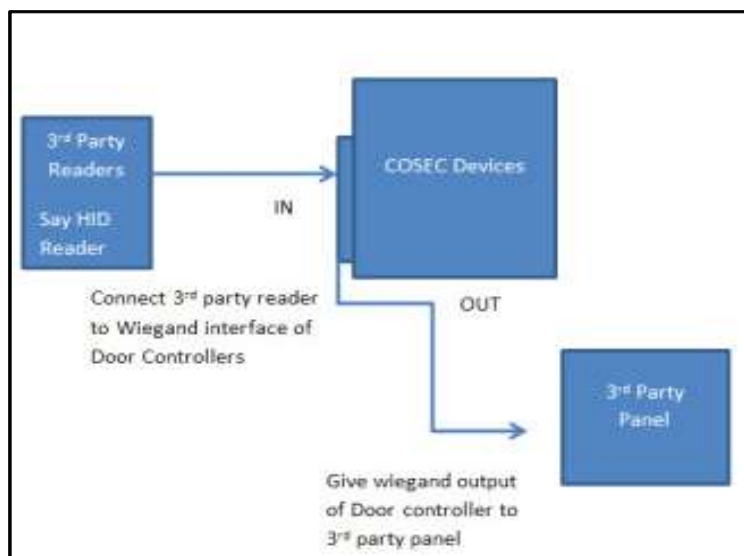
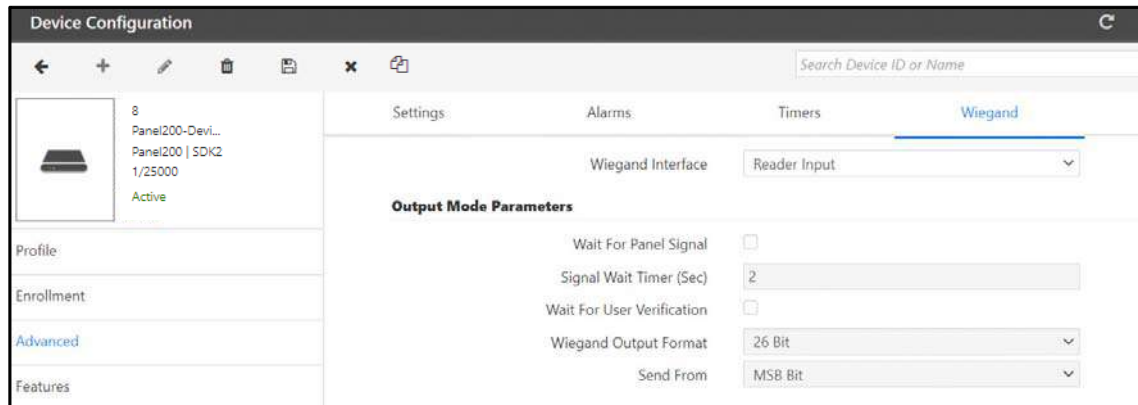


*We recommend you to set the timer value as greater than or equal to 10 seconds to avoid access denial issues to users. This is applicable when the system reads the credentials (biometric) from the user's Smart Cards.*

- **Late-IN Early-OUT Timer (min):** Specify the time in minutes for which the Late In and Early Out special functions will remain in effect after being enabled at the Panel.
- **Door Abnormal Wait Timer (sec):** Specify the time in seconds for which system needs to wait before generating an alarm for abnormal door status.
- **Palm Enrollment Time Out (sec):** Specify the time in seconds for which a Palm enrollment command will be valid for credential input on a PVR Panel Door. Once this timer runs out, a new enrollment command will have to be generated.

## Wiegand

Click **Advanced > Wiegand** and the page appears as shown below:



- **Wiegand Interface:** Panel200 can be connected both as input devices (e.g. to receive data from a Wiegand Reader) or output devices (e.g. to support output to third party panel) via the Wiegand interface as shown above.

So select the interface of Panel Door as **Output Mode** to work as Wiegand Output to Panel or **Reader Input** to take data from third party reader. If Reader Input option is selected, all the output mode parameters will be disabled.

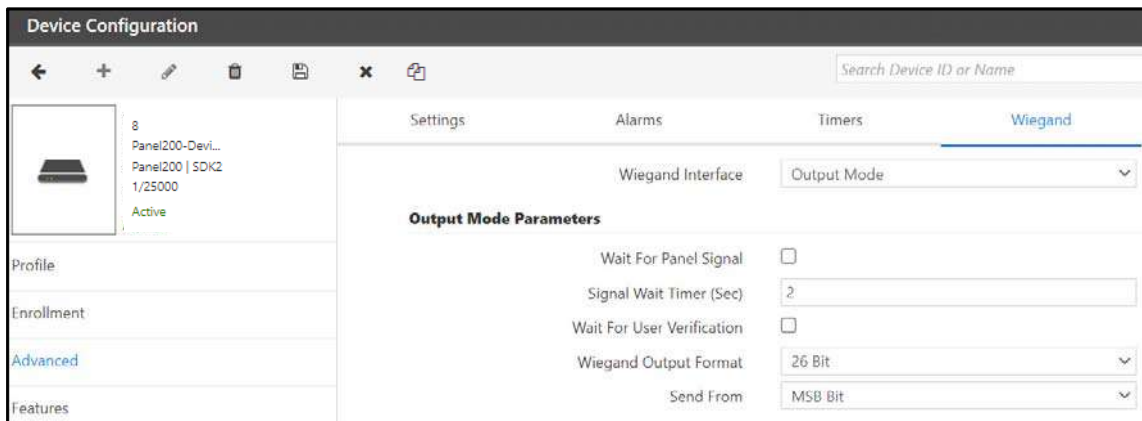
If you select Output Mode then configure the **Output Mode Parameters**.

### Output Mode Parameters

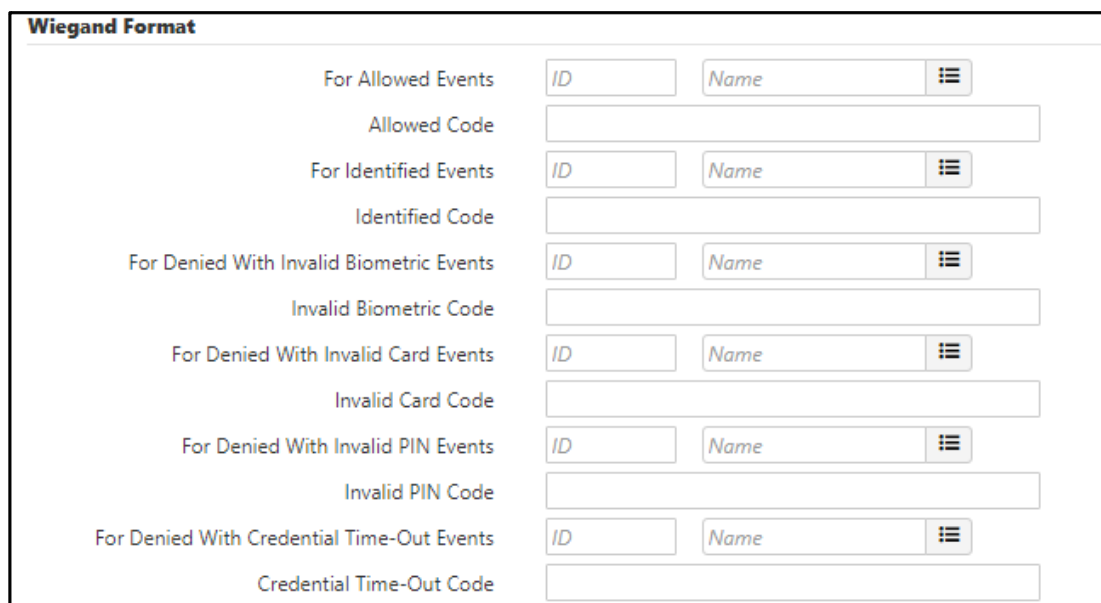
- **Wait For Panel Signal:** Select the check box to enable. If this option is enabled the Panel Door will wait for reply from the connected third party device before triggering any output. You need to configure the **Signal Wait Timer (Sec)**.
- **Signal Wait Timer:** Specify the time for which the Panel Door should wait for reply from the connected third party device before triggering any output.



- **Wait For User Verification:** Select the check box to enable. If this option is enabled, user verification will be requested on the third party device before triggering any output.
- **Wiegand Output Format:** Select the desired format — 26 Bit, 37 Bit, Actual or Custom.



If you select **Custom**, you can configure details of fields to be sent as output from the Wiegand reader that has been added.



- For each of the listed events, click the picklist to select the desired **Wiegand Output Format**.
- Assign an Access **Code** for each communication (for example Invalid PIN Code). This will depend on the number of output bits configured for Access Code in the selected Wiegand Output Format.
- **Send From:** Select the desired sending order for reader data — MSB or LSB Bit.

## Features

The Features tab allows the you to enable certain Access Control features.



*The Features tab is available only with the Access Control Module license.*

*The configurations done in Panel will be functional only if supported by the Device connected with it.*

Click each link for details.

- [“Set1”](#)
- [“Set2”](#)
- [“Set3”](#)

## Set1

This page allows the configuration of following rules - **Absentee Rule**, **Occupancy Control**, **Use Count Control**, **Soft Override**, **Access Route**, **Elevator Access Control** and **Block Users**.

Click **Features > Set1** and the page appears as shown below:

Set1	Set2	Set3
<b>Absentee Rule</b>		
Enable		<input type="checkbox"/>
<b>Occupancy Control</b>		
Enable		<input type="checkbox"/>
Default Occupancy Limit		9
<b>Use Count Control</b>		
Enable		<input type="checkbox"/>
Default Use Count Limit (per minute)		5
<b>Soft Override</b>		
Enable		<input type="checkbox"/>
<b>Access Route</b>		
Enable		<input type="checkbox"/>
<b>Elevator Access Control</b>		
Enable		<input type="checkbox"/>
<b>Block Users</b>		
Tail-Gating		<input type="checkbox"/>
Man Trap Timer Violation		<input type="checkbox"/>
Occupancy Violation		<input type="checkbox"/>
Anti-Pass Back Violation		<input type="checkbox"/>
Multiple Unauthorized Attempts		<input type="checkbox"/>
Allowed Unauthorized Attempts		3

- **Absentee Rule:** This rule sets the maximum number of days for which the credential is not used (1 - 365 days). On expiry (that is, no usage of the credential for the maximum number of days set) the User will be blocked automatically. Select the **Enable** check box to enable this feature at the Panel level.
- **Occupancy Control:** Occupancy Control functionality enables the system to monitor and control the number of users permitted within a secured area or controlled zone. Occupancy control functionality requires entry and exit readers on the controlled area. Select the **Enable** check box to enable the feature at the Panel level and then enable the same at the Zone level.
- **Default Occupancy Limit:** Set the number of users to be considered as default Occupancy limit for Occupancy Control.
- **Use Count Control:** Use Count Control sets a maximum number of times an authorized user can use their credential in order to enter/exit a controlled area within a minute, after which the credential is blocked. Select the **Enable** check box to enable this feature at the Panel level.

- **Default Use Count Limit (per minute):** Specify the maximum number of times a user can use his/her credential per minute.
- **Soft Override:** The override function allows you to change the current status of a system temporarily, from the software application. Select the **Enable** box for enabling this functionality at the Panel level.



Once the **Soft Override** check box is enabled, you can temporarily Override the following Access Rule features — 2 Person Rule, ACS Policies, Alarm, Anti-Pass Back, First-IN User Rule, Mantrap, Occupancy Control and Visitor Escort Rule. Refer "[Soft Override](#)" for details.

- **Access Route:** This rule allows the you to enable defining an access path for users on a Panel by specifying the member Panel Doors using the *Access Control* module.
- **Elevator Access Control:** Enable this check box to enable Elevator Access Control at the Panel.
- **Block Users:** These check boxes can be used to enable conditions on the violation of which a user should be blocked on the Panel Door. For example, to block a user for multiple attempts at unauthorized access, select the **Multiple Unauthorized Attempts** check box. The maximum number of attempts allowed before the user is blocked can be specified using the **Allowed Unauthorized Attempts** option.

## Set2

This page allows the configuration of following rules - **First-IN User Rule**, **Anti-Pass-Back (APB)** and **2-Person Rule**.

Click **Features > Set2** and the page appears as shown below.

The screenshot shows the 'Set2' configuration page with three main sections:

- First IN User Rule:** Includes an 'Enable' checkbox, four 'Group' input fields (1-4), and four 'List' dropdown menus (List 1-4).
- Anti-Pass Back (APB):** Includes an 'Enable' checkbox, 'On Entry' and 'On Exit' checkboxes with 'Local' dropdowns, a 'Hard/Soft' dropdown set to 'Soft', a 'Forgiveness' checkbox, a 'Reset After' section with 'Day Change' and 'Timer Expiry' options, and a 'Forgiveness Timer (Min)' input field set to '1'.
- 2-Person Rule:** Includes an 'Enable' checkbox, a 'Default Mode' dropdown set to 'Primary: Must', a 'Default Primary Group' dropdown set to 'Select', a 'Default Secondary Group' dropdown set to 'None', and a '2nd Person Wait Timer (Sec)' input field set to '5'.

- **First-IN User Rule:** Select the **Enable** check box to enable the feature at the Panel Door.
- Select the First-In User **Group 1 to 4** which would be valid at the door.

For configuring the rule, refer to Access Control> First- In User Rule> Assignment.

- **Anti-Pass Back (APB):** Select the **Enable** check box to enable the feature at the Panel Door. For configuring refer to *Access Control> Anti-Pass Back*.
- **2-Person Rule:** Select the **Enable** check box to enable the feature at the Panel Door and set the **2nd Person Wait Timer** in seconds after which the second person is allowed to punch on the door. For configuring refer to *Access Control> 2- Person Rule*.

## Set3

This page allows the configuration of following rules - **Visitor Escort Rule, Dead Man Zone, Duress Detection, Man Trap Door Interlock, DND Zone** and **Access Clusters**.

Click **Features > Set3** and the page appears as shown below.

Set1	Set2	Set3
<b>Visitor Escort Rule</b>		
Enable		<input type="checkbox"/>
<b>Dead Man Zone</b>		
Enable		<input type="checkbox"/>
Default Warning Timer (Min)		3
Default Alert Timer (Min)		10
<b>Duress Detection</b>		
Enable		<input type="checkbox"/>
Default Code		10
<b>Man Trap Door Interlock</b>		
Enable		<input type="checkbox"/>
Man Trap Wait Timer (Sec)		5
Functioning		Zone Based
<b>DND Zone</b>		
Enable		<input type="checkbox"/>
Default Access Level		15
<b>Access Clusters</b>		
Enable		<input type="checkbox"/>

- **Visitor Escort Rule:** This rule requires all Visitors to be accompanied by an escort and the display of the visitor's credential has to be followed by the credential of the Escort within the stipulated time period. Select the **Enable** check box to enable this feature.
- **Dead Man Zone:** This condition allows the system to track the safety and security of a user while a specific task is being performed. This requires the user to show his credential within the pre-defined dead man time period. Select the **Enable** check box to enable this feature.
- **Default Warning Timer (min):** Specify the minimum time in minutes, within which any user inside the dead man zone should show his/her card/finger to reset the timer and thus prevent the alarm.

- **Default Alert Timer (min):** Specify the maximum time in minutes, for which the user is allowed to remain inside the dead man zone.
- **Duress Detection:** Duress detection enables the card holder to trigger an alarm on output device in the event of threats or being forced to grant access to an unauthorized person.

This feature can be activated by:

- finger credential, refer to [“Enrollment”](#) or/and
- when two digit duress code is keyed in, at the end of a User's allotted PIN Code.

To activate this feature using PIN,

- Select the **Enable** check box to enable this feature at the Panel level.
- Once this feature is enabled the system waits for the duress code after the User PIN and the right arrow key input before enabling the duress alarm. The keys have to be pressed in the following order:

**(User Pin Code) → (Right Arrow Key) → (2 digit Duress Code)**



- **Default Code:** Specify the default two digit duress code (ranging from 10 to 99).
- **Man Trap Door Interlock:** Mantrap interlock or airlock systems provide safety, security and environmental control between two or more rooms by ensuring that opening any door causes all other doors to lock until the opened door returns to the closed position. Select the **Enable** check box to enable the feature at the Panel level and then enable the same at the Zone level.



*Door sense is must for this feature as the system will ignore the door status either in the absence of a door sense or its fault state.*

*This feature is not supported when the Panel Doors are in Degrade Mode.*

- **Man Trap Wait Timer:** Specify the time in seconds for which the Panel Door needs to wait for the other door in the same zone where the mantrap feature is enabled to get closed. By default the value of the Man Trap Timer is 5 seconds and valid range is from 3 sec to 99 sec.
- **Functioning:** Select the desired option — Zone Based, Door Group Based.
- **DND Zone:** DND feature allows the user to declare that a particular zone is not to be accessed by other users for a specific period of time thereby ensuring that the users inside the zone are not disturbed by others. Select the **Enable** check box to enable this feature. The DND is activated using a special card or through the Menu of the Panel Doors.

- **Default Access Level:** Specify the default Access level for DND Zone within a range of 1-15.
- **Access Clusters:** Select the **Enable** check box to enable checking for access control restrictions when a user punches on any of the assigned Panel Doors.

## Special Functions

COSEC provides its users the privilege to perform certain pre-defined operations directly from the Panel Doors. These operations are related to various time and attendance marking functions, administrative tasks, zone-related access and door-control functionality as well as alarms management.

A special function may be used in three different ways:

- Entering short codes on the device keypad.
- Navigating the device menu.
- Using Special Cards.



*The configurations done in Panel will be functional only if supported by the Device connected with it.*

## Special Cards

A Special Card is especially useful when the user has to perform routine tasks, where repeated manual entry of codes can become tedious. It is also required when a Panel Door does not have keypad or LCD display for manual entry of special codes. In such a case, an RFID card can be encoded for a special function and the card-holder can perform a special function at the device just by showing this Special Card.

**Example:** In factories where workers avail shortleave; security guard can show the Special Card enrolled for Shortleave IN on the Entry door and can give the access to the worker. This same card can be used for multiple workers.

## Configuring Special Functions

To access this,

Click **Special Functions** and the page appears as shown below:

The screenshot shows the 'Device Configuration' window with a sidebar on the left containing a tree view with options like Profile, Enrollment, Advanced, Features, Special Functions (highlighted), Input/Output, Zones, and Additional. The main area has two tabs: 'Configuration' and 'Schedule'. The 'Configuration' tab displays a table with 12 rows of special functions. Each row includes a number, a function name, an 'Active' status, a 'User Group', and four columns for 'Card 1' through 'Card 4'. Each card column has a small icon of a card. The 'Schedule' tab is currently inactive.

No.	Function Name	Active	User Group	Card 1	Card 2	Card 3	Card 4
1	Official Work - IN	Yes	All				
2	Official Work - OUT	Yes	All				
3	Short Leave - IN	Yes	All				
4	Short Leave - OUT	Yes	All				
5	Regular - IN	Yes	All				
6	Regular - OUT	Yes	All				
7	Break End	Yes	All				
8	Break Start	Yes	All				
9	Overtime - IN	Yes	All				
10	Overtime - OUT	Yes	All				
12	Set Panic Alarm	Yes	All				

The COSEC system pre-defines 38 special functions for its users. For instance, all the special functions in the given list are supported on all COSEC Panels. The following list provides details of the special functions supported on Panel200.

### Time and Attendance Functions *(Available only with the Time & Attendance add on module)*

Special Function	Description
Official Work-IN / Official Work-OUT	Late-IN as well as Early-OUT is marked as User's Official work in Time & Attendance.
Short Leave-IN / Short Leave-OUT	Late -IN as well as Early-OUT is marked as User's short leave in Time & Attendance.
Regular - IN / Regular - OUT	Normally used in Time & Attendance system in the absence of an exit reader. The punch in at start of shift and punch out at end of shift are sent with the appropriate flags.
Break End / Break Start	Clock-IN is marked as User post break entry and Clock-OUT is marked as User exit at start of break.
Late-IN Start / Late-IN Stop	System starts / stops inserting the special ID to T&A events of all users who clock-IN after this function.
Early-OUT Start / Early-OUT Stop	System starts / stops inserting the special ID to T&A events of all users who clock-OUT after this function.
Over Time - IN / Over Time - OUT	The IN punch is marked as User entering at start of over time while the OUT punch is marked as User exiting after completion of overtime.

### Administrative Functions *(Available with the Basic platform license.)*

Special Function	Description
Enroll User	Application switches the door controller mode to Enrolment mode and User Credentials are enrolled against the defined user ID. Global Enrolment mode is selected by default for users.
Enroll Special Card	Application switches the door controller mode to Enrolment mode and special Cards are enrolled against special function ID
Delete Credentials	Enables user to delete the existing credential data from the PANEL User database against the selected user ID.
View User Profile	System reads the User's Smart Card and displays the stored user profile.

### Zone Settings *(Highlighted options available only with the Access Control add on module)*

Special Function	Description
Activate DND / Deactivate DND	System switches the door zone from Normal to DND and vice versa.
Activate Dead-Man / Deactivate Dead-Man	System switches all Door Controllers of the zone from Normal mode to activated Dead Man Zone mode and vice versa.
Door Lock / Door Unlock	System locks/unlocks the selected Door. Entry is denied to all users. Exit request however, is enabled and the user can still provide T&A events.
Zone Lock / Zone Unlock	System locks/unlocks all Doors of the Zone. Entry is denied to all users. Exit request however, is enabled and the user can still provide T&A events.

Special Function	Description
Door Normal	System switches the mode of the door controller to the normal or controlled mode.
Zone Normal	System switches the mode of all Doors of the Zone to the normal or controlled mode.

### Alarms *(Available only with the Access Control add on module)*

Special Function	Description
Set Panic Alarm	System enables the user to generate a Panic Alarm from the Door Controller.
Mute Door Buzzer	Enables the user to mute the Door Controller's existing Alarms.
Mute Panel Buzzer	Enables the user to mute the PANEL's existing Alarms.
Clear Door Aux O/P	Enables the user to Reset the Aux output of Door Controller and switch it back to Normal/Controlled state from its current state.
Clear Panel Aux O/P	Enables the user to Reset the Alarm output of PANEL and switch it back to Normal/Controlled state from its current state.
Door Arm/Door Disarm	To enable/disable door alarms using special function cards.
Zone Arm/Zone Disarm	To enable/disable zone alarms (for all doors in the zone) using special function cards.

To configure Special Functions, click **Edit** . For details, refer to [“Special Functions”](#).

## Input/Output

The Input/Output (I/O) configuration of a system determines how the output or response of a system is influenced by the input applied on it. In case of the COSEC Access Control System, the I/O configuration should enable the system to monitor and trigger a specific response to any changes in door state or event occurrences at the door device. This change of door state or occurrence of events will be considered as an input while the response or action that is generated by the system on detection of this input, will be considered as the output.

The I/O configuration of Panels allows the user to enable Auxiliary Ports, create Input and Output groups, configure I/O Linking and set up Time Triggered Output functions.



*This functionality is available only with the Access Control add-on module license.*

*The configurations done in Panel will be functional only if supported by the Device connected with it.*

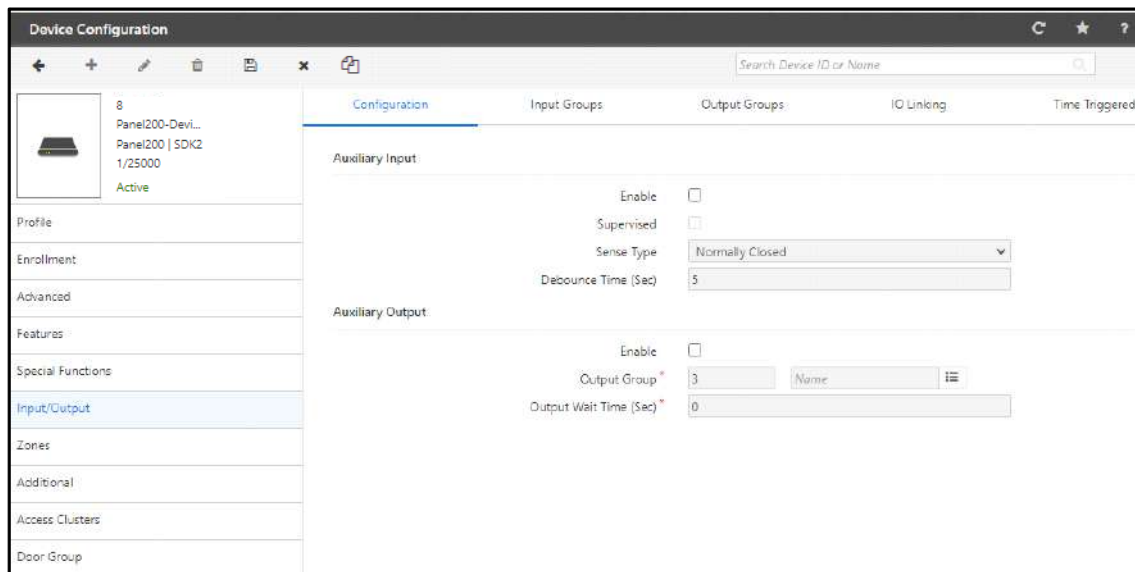
Click each link to configure the Input Output parameters:

- [“Configuration”](#)
- [“Input Groups”](#)
- [“Output Groups”](#)
- [“IO Linking”](#)
- [“Time Triggered”](#)



## Configuration

Click **Input/Output > Configuration** and the page appears as shown below:



### Auxiliary Input

- **Enable:** Select the **Enable** check box option for Auxiliary Input (e.g. Smoke Detectors) depending on normal or supervised door state monitoring.
- **Supervised:** Select the **Supervised** check box to enable the door for four-state monitoring where the door is also monitored for Door Fault and Door Disconnection.
- **Sense Type:** The system by default can sense two states of a door — Normally Open and Normally Closed —depending on which the output is determined. For example, any deviation of the door from its normal state may lead to the trigger of a Door Abnormal alarm. Specify the **Sense Type** as **Normally Closed** or **Normally Open**.
- **Debounce Time (Sec):** It defines the minimum time for which an input interface must be maintained in a given state before the system reports it. For example, if a Normal door state is changed to Alarm, the state must remain in Alarm for five seconds before an alarm is generated. Specify the Debounce time in seconds. Range should be 0-99 sec.

### Auxiliary Output

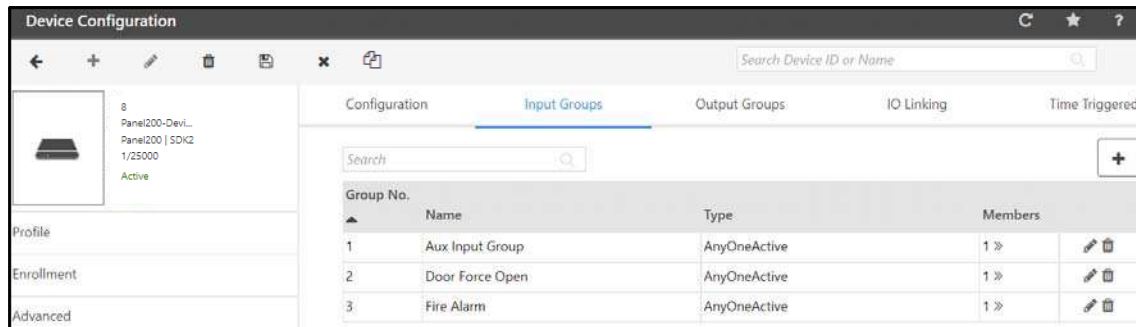
- **Enable:** Select the **Enable** check box to enable Auxiliary Output (e.g. Fire Alarm).
- **Output Group:** Click the picklist to select an Output Group to which the auxiliary output is to be assigned based on the output groups defined on the system.

To configure the output groups listed in the picklist, click **Device Configuration page > Input/Output > Output Groups**.

- **Output Wait Time (Sec):** Specify an Output Wait Time in Sec to set an additional waiting period before the Aux Output signal is sent.

## Input Groups


Click **Input/Output > Input Groups** and the page appears as shown below:



Each Panel has one Input port while each of the slave Panel Doors have 4 inputs. The **Input Groups** option enables you to club these inputs into groups before they can be used in the Input/Output Linking.

Multiple input ports (logical ports) can be grouped together to form an input port group. This option allows you to assign user-friendly names to frequently used inputs and also setting the input parameters. You can club any of the inputs (not constrained to particular Panel Doors) and define them in a group.

Click **Add** to add a new Input Group.

- **Name:** Specify a user-friendly name to the Input group.
- **Type:** Select the Output **Type** from the options available in the drop down list (All, Active, AnyOneActive).
- **Members:** Click . The Member Configuration pop-up window appears.
- **Source:** Select the desired option — Panel, Door, Zone, Door Group.

- **Port:** The option in this will depend on the Source you select. Configure these as per your requirement.

Member Configuration

Member No. 1

Source Panel

Port MC\_AlarmInput

User Denied All

Panel 1 Panel200

Input Port Active Timer (Sec) 0

Update Cancel

Member No. ▲	Source ID	Panel/Panel Door Name	Port	
1	1	Panel200	MC_AlarmInput	

If Man Trap feature with functioning as “Door Group based” is enabled, only then Door Group appears as Source in Member Configuration to configure the Input Group.

Enable ☒

Man Trap Wait Timer (Sec) 5

Functioning Zone Based

DND Zone Door Group Based

Member Configuration

Member No.

Source Panel

Port Panel

Panel Door

Zone

Door Group

Input Port Active Timer (Sec) 0

Update Cancel

If you select **Source** as “*Door*” and **Port** as “DC\_UserAllowed” or “DC\_UserDenied” then a new parameter **User** will appear.

Member Configuration

Member No.

Source

Port

User Denied

Panel Door No.

Input Port Active Timer (Sec)

Member No. Source ID Port

DC\_Offline  
DC\_Fault  
DC\_DoorForceOpen  
DC\_DoorAbnormal  
DC\_TamperFail  
DC\_AUX\_1\_IN\_ACTIVE  
DC\_DuressAlarm  
DC\_PanicAlarm  
DC\_DeathAndAlarm  
DC\_UserAllowed  
DC\_UserDenied  
Tail\_Gating  
Multiple\_Unauthorized\_Attempts  
User\_Unidentified  
DC\_AUX\_1\_IN\_INACTIVE  
DC\_AUX\_2\_IN\_ACTIVE  
DC\_AUX\_2\_IN\_INACTIVE  
DC\_AUX\_3\_IN\_ACTIVE  
DC\_AUX\_3\_IN\_INACTIVE

Member Configuration

Member No.

Source

Port

User Denied

Panel Door No.

Input Port Active Timer (Sec)

User

Add Cancel

Member No. Source ID Panel/Panel Door Name Port

No Data

- **User:** You can select the desired option — All, Selected.

If you select the **Selected**, then in **Users Selected** click the picklist to select desired users.

**Member Configuration**

Member No.

Source

Port

User Denied

Panel Door No.

Input Port Active Timer (Sec)

User

Users Selected

**Add** **Cancel**

**Picklist For User**

Total Selected : 3 Records

Search

Show Selected

User ID	Name
006	adfr1
011	UtsaviB
014	pathv2 priyanka
019	rined_123
020	Podugu Uday Kiran
78	user-10

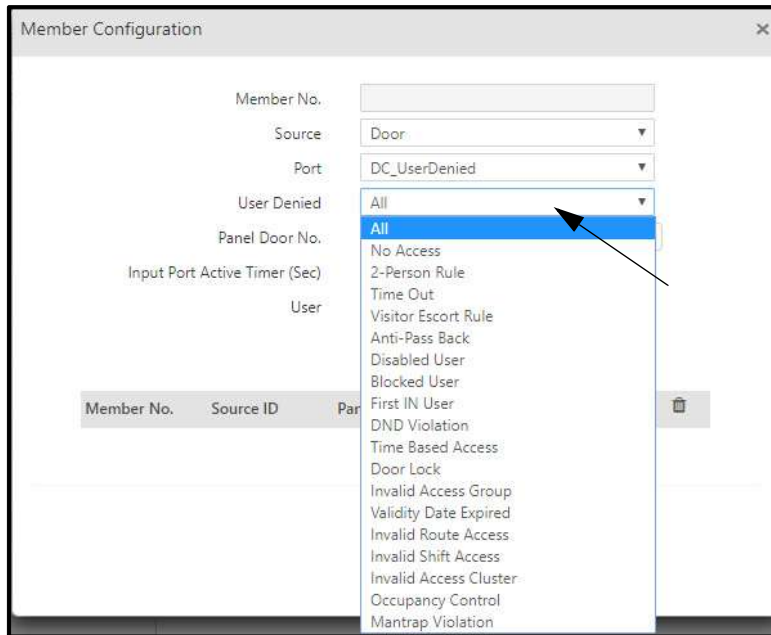
**OK** **Cancel**

To do so,

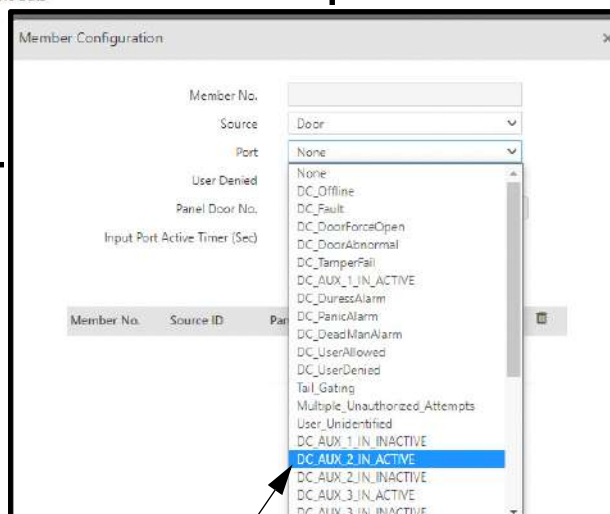
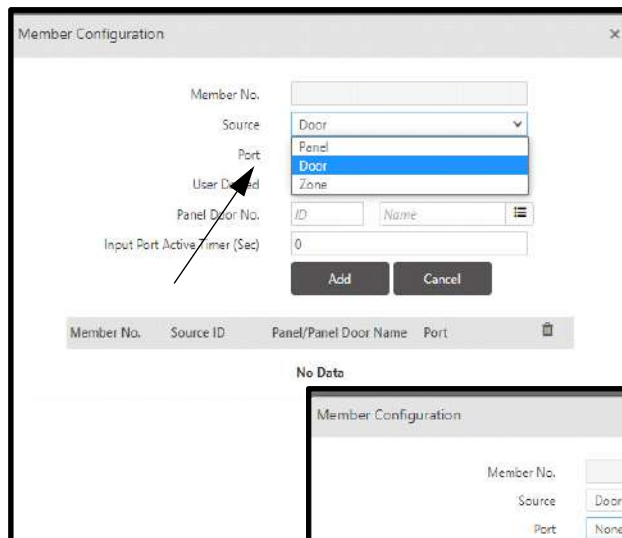
Select the check box of corresponding user that you wish to add.

Click **OK**.

- **User Denied:** Will be editable when Source is selected as “DC\_UserDenied”.




If you select **Source** as **Door** and **Port** as **DC\_AUX-2\_IN\_ACTIVE** or **DC\_AUX-2\_IN\_INACTIVE** then in the **Picklist For Panel Door Masters** for the parameter **Panel Door No.**, **ARC DC 200 Single Door Dual Reader** will be visible and can be selected.



Refer “ARC as Panel Door” to add a new **ARC DC 200 Single Door Dual Reader Panel door**.

The screenshots illustrate the steps to add a new ARC DC 200 Single Door Dual Reader Panel door. The first window, 'Picklist For Panel Door Masters', shows a table with one entry: '1' and 'Auxiliary ARC DC 200 Panel'. The second window, 'Member Configuration', shows the configuration fields for a new member. The third window, also 'Member Configuration', shows the configuration fields for a new member, with the 'Source' set to 'Panel' and 'Port' set to 'None'. The table in the third window shows one entry: '1' and 'Auxiliary ARC DC 200 Panel'.

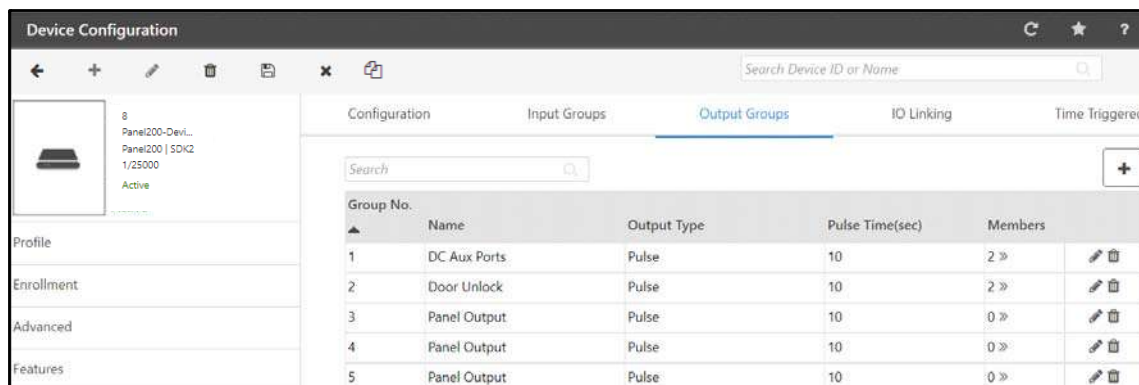
- **Panel Door No.:** Click the picklist to select the desired Panel Door.
- **Input Port Active Timer (Sec):** Specify the time in seconds for which the input port needs to remain active.

Click on **OK**  once done with the configuration.

You can now assign the individual relay outputs at the Panel and Panel Doors to this Input group as per the site requirements, prior to defining the IO Linking with this output group.

## Output Groups


Click **Input/Output > Output Groups** and the page appears as shown below.

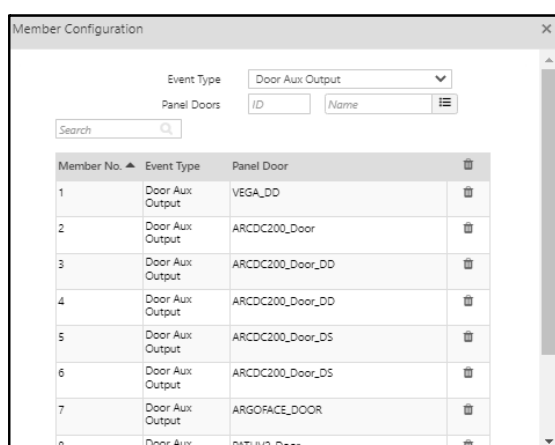


Each Panel has one Output port while each of the Panel Door has 2 Outputs one of which is used as a Door Relay. This option enables you to club these outputs into groups before they can be used in the Input/ Output Linking.

The output ports are physical ports and they can be assigned in to a group called Output Ports Group. The system supports up to 99 Output groups.

Click on **Add** button to add a new Output Group.

- **Name:** Specify a user-friendly name to the Output group.
- **Type:** Select the Output **Type** from the four options available in the drop down list (Pulse, Interlock, Latch, Toggle).
  - In the event of a **Pulse** type output, user needs to define the **Pulse time** in seconds.
  - In the **Interlock** option the Output group follows the input group. All member outputs are triggered as long as the input group is activated after which they return to normal state.
  - The **latch** option denotes the condition where all member outputs will be in an energized condition for infinite period and need to be reset manually.
  - In the **Toggle** option, the output group toggles its state whenever an input group is activated.
- **Members:** Configure the members as per your requirement.
- Click . The **Member Configuration** pop-up appears.

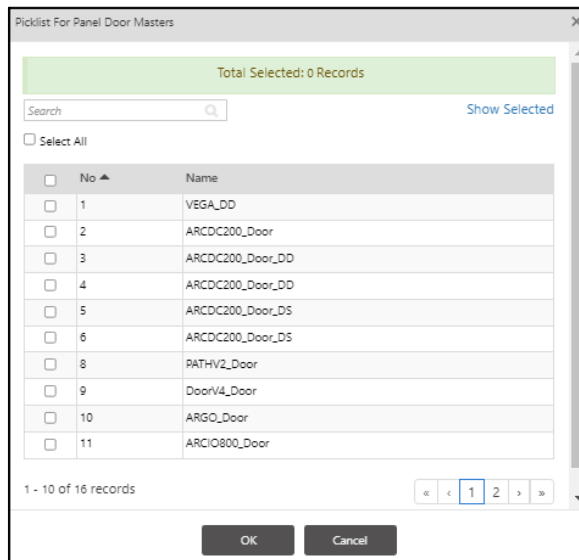




In this pop-up,

Select the desired Event Type — Door Lock, Door Unlock, Door Aux Output.

Click the **Panel Doors** picklist. The **Picklist For Panel Door Masters** pop-up appears.



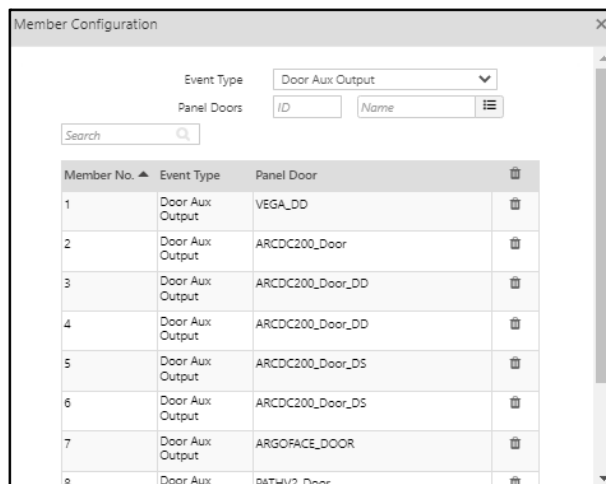
You can either select particular devices or can select all the devices at once.


To select particular devices, click the check boxes of the desired devices.

**OR**

To select all the devices, select the **Select All** check box. The devices on all the pages will be selected.

Click **OK**. You return to the **Member Configuration** and the selected devices are displayed here.



You can also delete the desired devices. To do so, click the **Delete**  icon of the respective device.

Close the pop-up the number of selected devices are displayed under **Supported Devices** in the grid.

- Click on **OK** once done with the configuration.

You can now go and assign the individual relay outputs at the Panel and Panel Doors to this Output group as per the site requirements, prior to defining the IO Linking with this output group.

## IO Linking

Click **Input/Output > IO Linking** and the page appears as shown below:

No.	Name	Input Group	Output Group	Status	
1	Aux Linking	Aux Input Group	DC Aux Ports	Inactive	
2	Force Open link	Door Force Open	Panel Output	Inactive	
3	Fire-Unlock	Fire Alarm	Door Unlock	Inactive	

The COSEC application supports the Input Output Group linking feature to activate single or multiple output ports (output Group) based on a trigger received from single or multiple input ports (Input Group). This option enables the administrator to define how an event or events (input port group) will trigger outputs belonging to an output ports group.

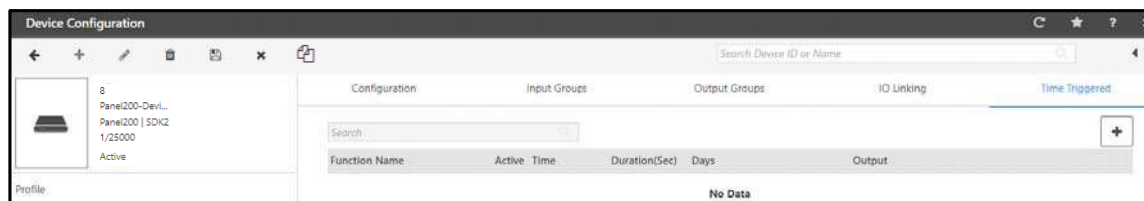
Input Output Group linking is a feature which enables the user to define programs which activate single or multiple output ports (output Group) based on a trigger received from single or multiple input ports (Input Group) on the Panels and Panel Doors.

- **Link Name** - Specify a user-friendly name to the linking program and
- **Active:** Select the check box to activate the linking program.
- **Input Group No.:** Click the picklist and select the desired input group.
- **Output Group No.** - Click the picklist and select the desired output group.
- **Raise Alarm:** Select a Custom Alarm (*See Advanced Configuration*) to be configured as output against an access violation event, if required.
- **Time Zone** - The Time Zones define the time slots in which the I/O linking Program must be activated.

Click **Add** once done with the configuration.

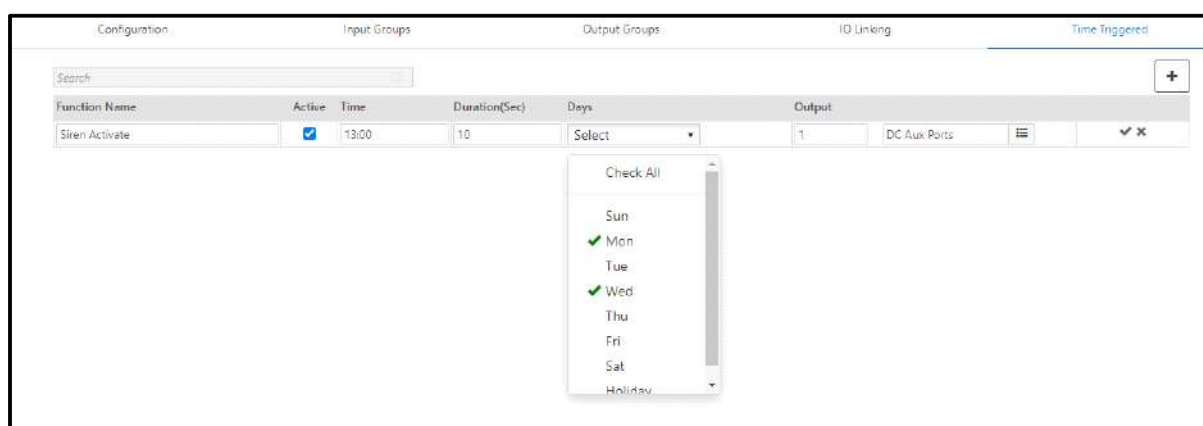
## Time Triggered

Click **Input/Output > Time Triggering** and the page appears as shown below.



This functionality enables the user to control the activity of an Output without manual intervention. The time triggered functions are used for activating events like door unlock and siren activation that are set as per the start time and for the configured time duration. This functionality is designed to energize outputs for predefined periods at the configured time. The COSEC access control system supports up to 20 Time Triggered functions.

Click **Add** to add a new Profile for Time Trigger.



- **Function Name:** Configure a name to identify the function.
- **Active:** Select the check box to enable the function.
- **Time:** Configure the start time to trigger the function.
- **Duration (Sec):** Configure the duration for which this function should remain in the triggered state.
- **Days:** Select the days on which this functionality must be triggered.
- **Output:** Click the picklist to select the desired output.

Click **OK** once done with the configuration.

## Setting Up Access Zones

Access Zones are areas with well defined boundaries, which are defined to effectively implement an Access Security System with Access Policies. A site can have multiple Access Zones, each Zone having multiple Panel Doors. You need to define the Access Zones before defining the Panel Doors and assigning the Access Zones. Any defined Access Zone can be directly assigned to users for free access during active working hours, without matching their Access Level with that of the zone's, by either defining the Zone as a **Home Zone** or a **Visit Zone**.

During the non-working hours, the non-working access level of the user's access group has to be higher than the Zone Access Level for allowing access to the user. All zones other than assigned Home Zone and Visit Zone are control zones to users and access to these zones are based on the result of the comparison between the user Access Level and the Zone's Access Level. The User Access Level has to be higher than the Zone Access Level to allow access. The system supports up to 99 Access Zones.



*This section is available only with the Access Control add-on module license.*

*The configurations done in Panel will be functional only if supported by the Device connected with it.*

Click each link to configure the Zone parameters:

- [“Setup”](#)
- [“Configuration”](#)
- [“Occupancy Control”](#)

## Setup

Click **Zones > Setup** tab and the page appears as shown below.

By default **Zone-1** is created. You can either edit this zone or add a new zone as per your requirement.

To edit Zone-1,

- Click on Zone-1 in the grid. Edit the parameter as per your requirement.
- Click **Update**.

To add a new Zone,

- **Name:** Assign a name to the Zone you wish to add.
- **Access Level:** Select the access level you wish to assign to the zone. Valid Range:01 to 15.

- Select the mode of credentials required to identify and validate a **User** and **Visitor** both for internal and external readers. You can select the appropriate credential combination of Pin, Card, Face, BLE, Biometrics and Biometrics + Group or None in the following parameters.
  - **User Access Mode (Door):** Entry mode of user.
  - **Visitor Access Mode (Door):** Entry mode of visitor.
  - **User Access Mode (External Reader):** Exit mode of user.
  - **Visitor Access Mode (External Reader):** Exit mode of visitor.
- **Access Control on Exit Mode:** Select the check box to enable. The following Access Control Policies will be checked when the external reader is in the 'exit' mode.
  - User enabled
  - User validity
  - Blocked user
  - Time Based Access Check
  - ASC
  - User Access Group

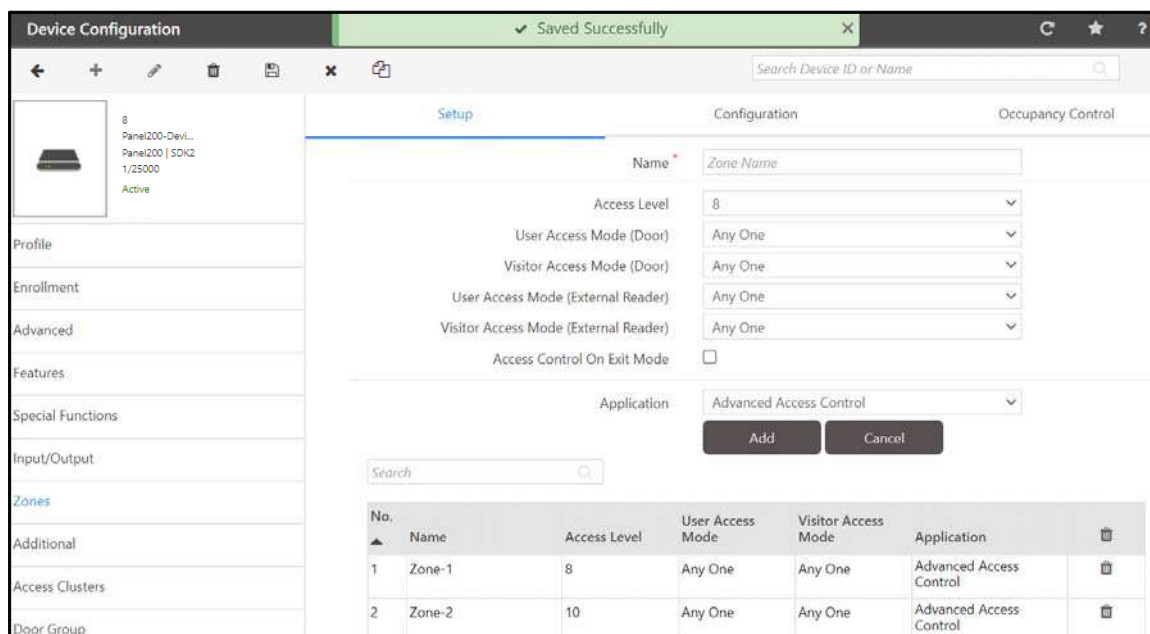
Clear the check box to disable. All the following access control features will be checked (which are applicable and configured).

- User enabled
  - Blocked user
  - Time Based Access Check
  - ASC
  - User Access Group
  - Deadman
  - Door application mode
  - Use count
  - Mantrap
  - Anti-pass back
  - Panel Route access
  - Smart card based route access
  - 2-person
  - Access mode
  - Occupancy control
  - Visitor escort rule
- **Application:** Select the desired Application — Advanced Access Control (inclusive of T&A) or Basic Access Control.



*If you select Basic Access Control mode, Access Control functionalities mentioned above will not be applicable for the Zone. System will not check the same for the user access level for the Time and Attendance zone.*

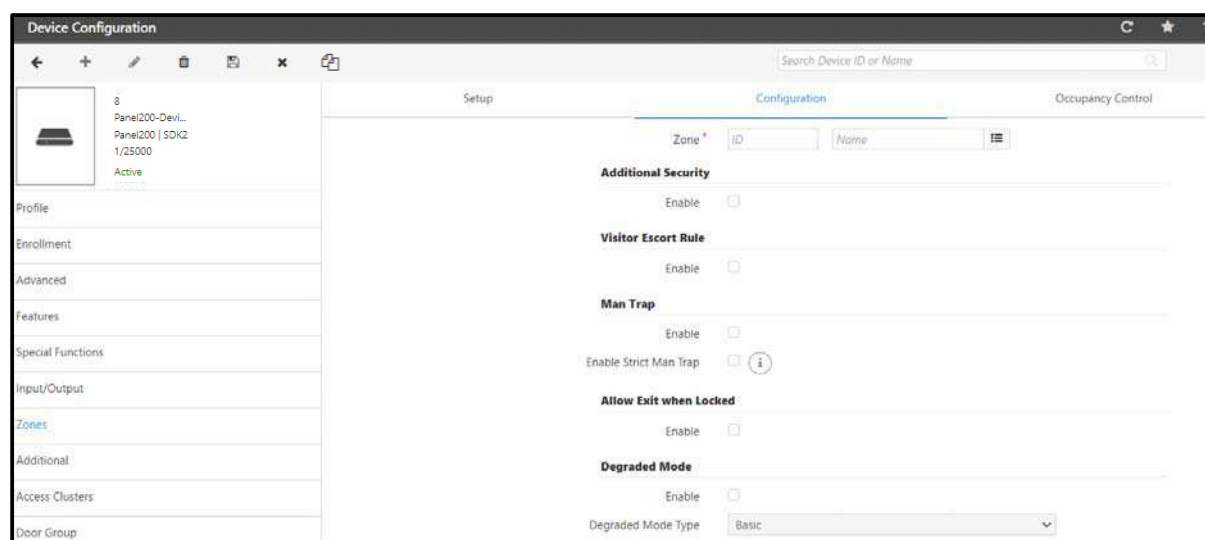
Click **Add** once done with the configuration. The newly added zone is displayed in the grid as shown below.

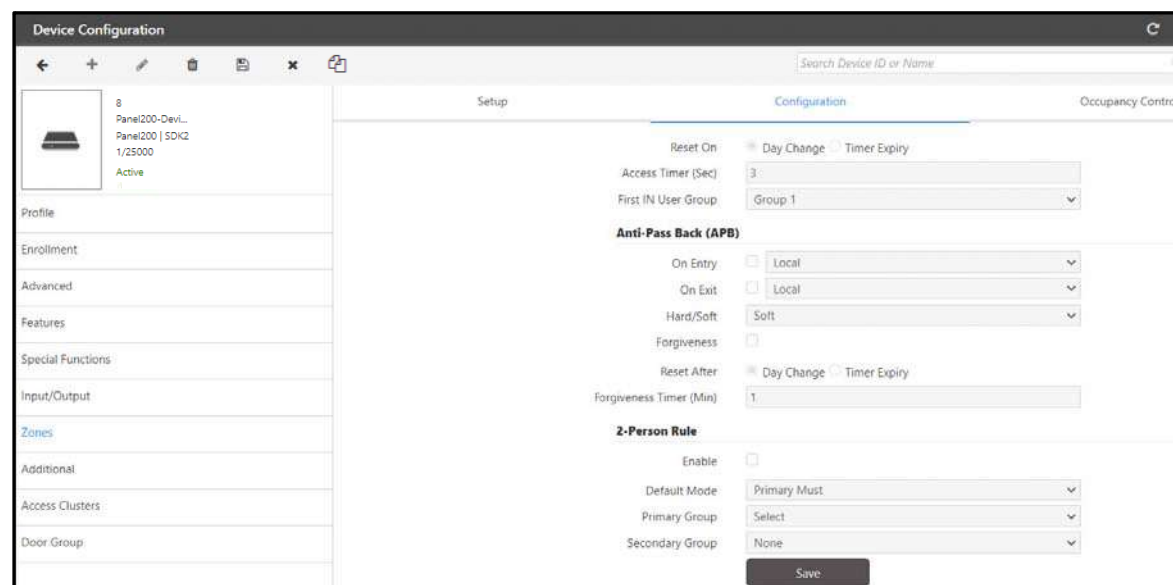
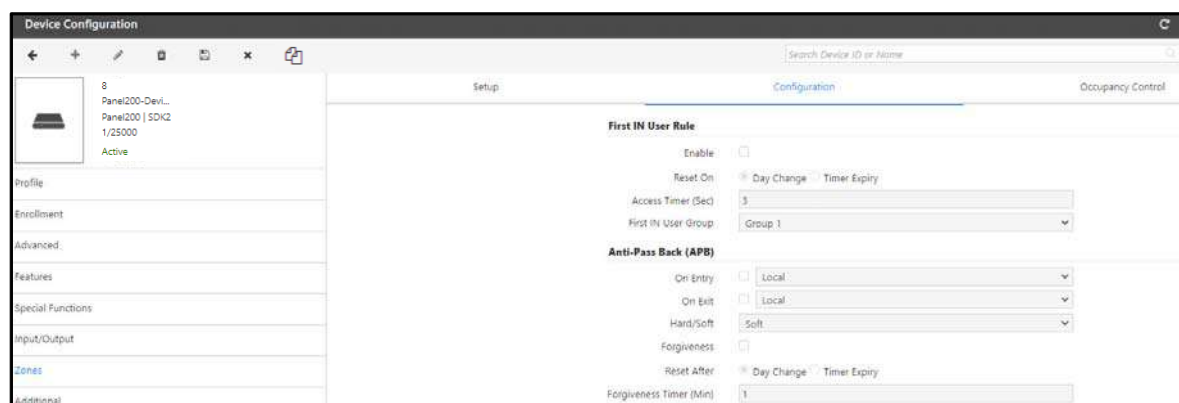
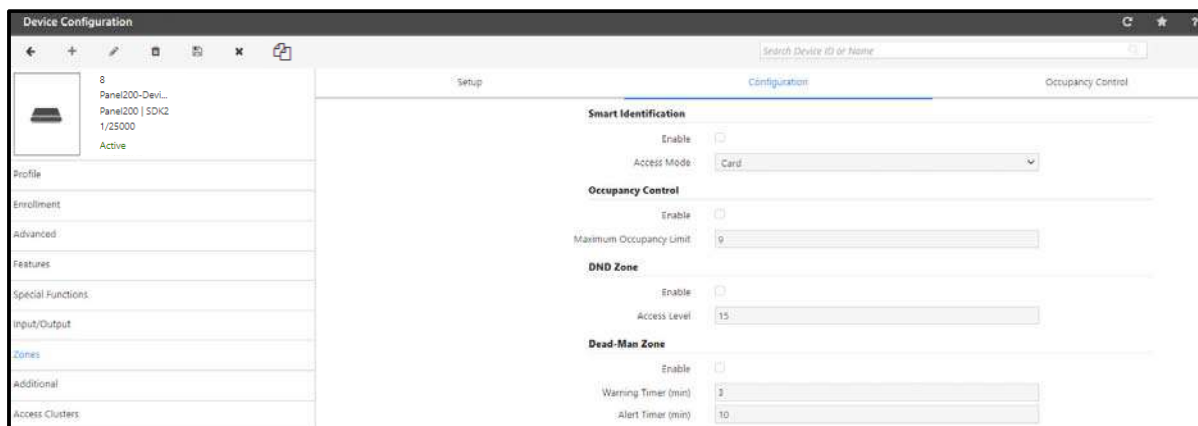


## Configuration

Click **Zones > Configuration** and the page appears as shown below.

- **Zone:** Click the picklist to select the desired Zone.





Select and configure desired Access Control Policies you wish to apply to the selected zone and configure their respective parameters.

- **Additional Security:** Configure the following:
  - **Enable:** Select this check-box to enable the Additional Security feature for the Zone.

This Additional Security Check is possible only with Smart Cards which will prevent the duplicacy of card and restrict unauthorized access to the facility.

The user; who is assigned the zone enabled with ASC will be checked for ASC verification on the door.

- **Visitor Escort Rule:** For details, refer to [“Visitor Escort”](#).
- **Man Trap:** For details, refer to [“Man Trap”](#).
- **Allow Exit when Locked:** Select this check box to enable the user to exit when the Panel Door is locked.
- **Degraded Mode:** Configure the following:
  - **Enable:** Select this check box to allow a valid user to access the facility even if the Panel Door is not in communication with the Panel. Make sure you have enabled Degraded Mode and configured the Degraded Wait Timer under **Advanced > Settings**.
  - **Degraded Mode Type:** If you have enabled Degraded Mode, you can select the Degraded Mode Type — Basic, Advanced.

If you select **Basic**, the user will be allowed/denied entry on the basis of limited checking of credential (that is finger and card) verification, as well as Access Policies will not be checked if configured. For Exit, user will be allowed to exit only after credential are verified. No other checking/verification will be done during exit.

If you select **Advanced**, the user will be allowed/denied entry/exit on the basis of checking the credential (all credentials will be supported) as well as the user details will be verified and checked. However Access Policies will not be checked, if configured.

- **Smart Identification:** For details, refer to [“Smart Identification”](#).
- **Occupancy Control:** For details, refer to [“Occupancy Control”](#).
- **DND Zone:** For details, refer to [“Do Not Disturb”](#).
- **Dead-Man Zone:** For details, refer to [“Dead Man Zone”](#).
- **First IN User Rule:** For details, refer to [“First In User”](#) and [“First In User Assignment”](#).
- **Anti-Pass Back (APB):** For details, refer to [“Anti-Pass Back”](#).
- **2-Person Rule:** For details, refer to [“2 Person Group”](#) and [“2 Person Rule Assignment”](#).

Make sure the Access Control Policies are also enabled in [“Features”](#). The Configuration of the policies will be activated when these are configured from the Access Control module. For details refer to [“Access Control”](#).

Click **Save** once done with the configurations.

## Occupancy Control

Click **Zones > Occupancy** and the page appears as shown below.



- **Control Zone:** Click the picklist to select the desired zone, that is the zone whose occupancy is to be controlled.
- **Access Mode:** Select the desired access mode for the Control Zone — Entry, Exit or Both.
- **Action:** Select the desired action to be taken, that is raise an **Alarm** or to **Restrict** access to or from the control zone.
- **Alarm Timer (Sec):** If you have selected **Alarm** as the Action, set the alarm timer in seconds.
- **Monitor Zones:** Click the picklist to select upto 2 zones as **Monitor Zones** i.e. zones whose occupancy shall determine the occupancy of the control zone. These may be same or different from the one as configured in Control Zone.
- **Avoid Occupancy:** Set the occupancy condition for each Monitor Zone — Equal to, Greater than or Less than along with the number you wish to allow. This defines an occupancy condition that must be satisfied in the monitor zone, for an action to be triggered in the Control Zone, such as restricting entry/exit for a user, or generating an alarm (as specified earlier).

- **Check Conditions For:** Select the desired option — Both Zones, Any One Zone. The Avoid Occupancy condition will be checked as per the option selected, that is for both monitor zones or for any one monitor zone in order to trigger the specified action in the control zone.

Click **Add** once done with the configuration. The newly added Control Zone is displayed in the grid as shown below.

The screenshot shows a web application window with a green header bar indicating 'Saved Successfully'. Below the header, there is a search bar labeled 'Search Device ID or Name'. The main content area has three tabs: 'Setup', 'Configuration', and 'Occupancy Control'. The 'Occupancy Control' tab is active, displaying a form for configuring occupancy control settings. The form includes fields for 'Control Zone' (ID and Name), 'Access Mode' (Entry), 'Action' (Alarm), 'Alarm Timer (Sec)' (0), 'Monitor Zone-1' (ID and Name), 'Avoid Occupancy' (Equal To, 0), 'Monitor Zone-2' (ID and Name), 'Avoid Occupancy' (Equal To, 0 - 999), and 'Check Conditions For' (Any One Zone). Below the form are 'Add' and 'Cancel' buttons. At the bottom, there is a table with columns: 'Control Zone', 'Action', 'Monitor Zone-1', 'Monitor Zone-2', and a delete icon. The table contains one row for 'Zone-1' with 'Alarm' as the action and 'Zone-1' as the monitor zone.

Control Zone	Action	Monitor Zone-1	Monitor Zone-2
Zone-1	Alarm	Zone-1	

Let us understand this with the help of the following example..

A manufacturing facility is divided into three zone types - a *Security Cabin* which leads into a *High Security Area (HSA Zone)* within which there are several secure *Sub-Zones (Sub-HSA Zone)* such as storage areas, equipment rooms etc.

The facility has specific security requirements as follows:

### Scenario 1

- Condition 1: There must be minimum two occupants in the Security Cabin always.
- Configuration: Here, exit from the Security Cabin has been restricted when occupancy of Security Cabin is less than 3.

The screenshot shows the 'Occupancy Control' configuration window. The 'Control Zone' is set to '1' and 'Security Cabin'. The 'Access Mode' is set to 'Exit' and the 'Action' is set to 'Restrict'. The 'Monitor Zone-1' is set to '1' and 'Security Cabin'. The 'Avoid Occupancy' for Monitor Zone-1 is set to 'Less Than' and '3'. The 'Monitor Zone-2' is empty. The 'Avoid Occupancy' for Monitor Zone-2 is set to 'Equal To' and '0'. The 'Check Conditions For' is set to 'Any One Zone'. Below the form are 'Update' and 'Cancel' buttons.

## Scenario 2

- Condition 2: The security cabin cannot be left unoccupied, when there are people present in the HSA Zone.
- Configuration :Here, exit from the Security Cabin has been restricted when occupancy of Security Cabin is 1 and occupancy of the HSA Zone is greater than 0.

The screenshot shows the 'Occupancy Control' configuration window. It has three tabs: 'Setup', 'Configuration', and 'Occupancy Control' (which is active). The configuration includes the following fields:

- Control Zone:** 1, Security Cabin
- Access Mode:** Exit
- Action:** Restrict
- Monitor Zone-1:** 1, Security Cabin
- Avoid Occupancy:** Equal To, 1
- Monitor Zone-2:** 2, HSA Zone
- Avoid Occupancy:** Greater Than, 0
- Check Conditions For:** Both Zones

At the bottom are 'Update' and 'Cancel' buttons.

## Scenario 3

- Condition 3: At a time, any person entering the HSA Zone or any of the Sub-HSA Zones must always be accompanied by a security personnel.
- Configuration: Here, an alarm has been set to be triggered if occupancy of the HSA Zone is 1 for more than a time of 10 seconds. Hence, when the HSA Zone has zero occupancy, the entry of the first occupant should set off the alarm timer till entry of the second occupant. The same can also be configured for each of the Sub-HSA Zones.

The screenshot shows the 'Occupancy Control' configuration window for Scenario 3. The configuration includes the following fields:

- Control Zone:** 2, HSA Zone
- Access Mode:** Both
- Action:** Alarm
- Alarm Timer (Sec):** 10
- Monitor Zone-1:** 2, HSA Zone
- Avoid Occupancy:** Equal To, 1
- Monitor Zone-2:** (empty), (empty)
- Avoid Occupancy:** Equal To, 0
- Check Conditions For:** Any One Zone

At the bottom are 'Update' and 'Cancel' buttons.

To know how Occupancy control parameters affect access control functionality, refer to [“Occupancy Control”](#).

## Additional

This section lists some additional configurations that can be enabled for Panel Doors.

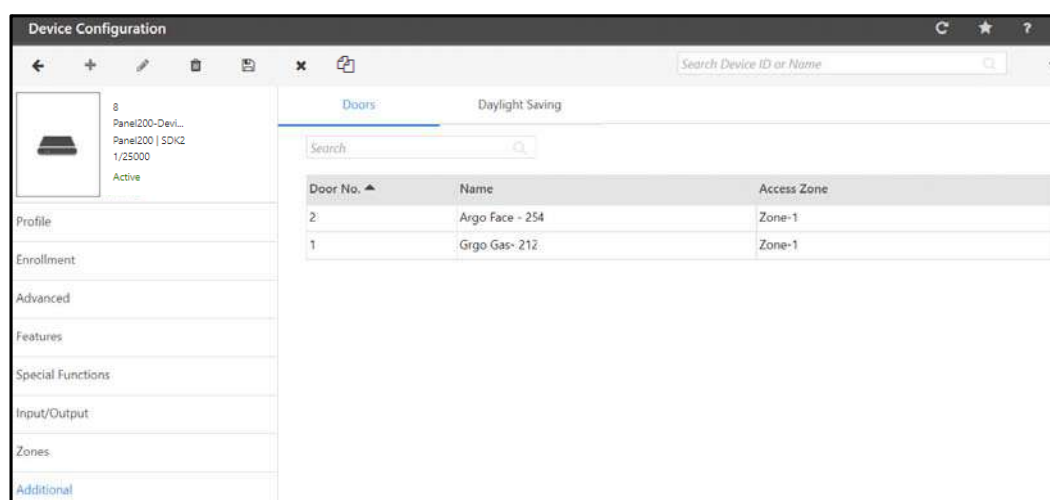
Many countries observe the convention of adjusting clocks forward and backward. Clocks are set ahead during the spring and back to standard time in the autumn. COSEC doors can be configured to be compatible with this procedure keeping the RTC of the system updated with such changes.

Click each link to configure the Additional parameters:

- [“Doors”](#)
- [“Daylight Savings”](#)

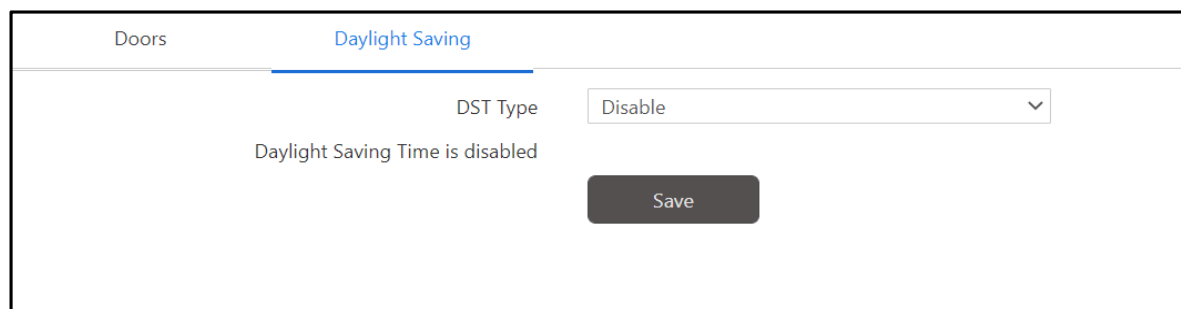
## Doors

Click **Additional > Doors** and the page appears as shown below.



## Daylight Savings

Click **Additional > Daylight Saving** and the page appears as shown below.



**DST Type:** Select the desired Daylight Saving configuration type — Disable, Day-Month wise or Date-Month wise.

The screenshot shows the 'Daylight Saving' configuration page. The 'DST Type' dropdown menu is open, displaying three options: 'Disable', 'Day-Month wise', and 'Date-Month wise'. The 'Disable' option is currently selected and highlighted in blue. The text 'Daylight Saving Time is disabled' is visible below the dropdown.

- If you select **Disable** option, DST will not be applicable.
- If you select **Day-Month wise** option, the DST is set by the day of the month on which clock needs to be forwarded and reverted back to normal.
  - Set the **Month**, **Week No.**, **Day of Week**, and **Time** for both the **Forward Clock** and **Backward Clock**.
- If you select **Date-Month wise** option, the DST is set by date of the month on which clock needs to be forwarded and reverted back to normal.
- Set the **Time Period** for the date-month wise DST settings in *24-hours* format, and specify **Month**, **Date** and **Time** for the **Forward Clock** and the **Backward Clock**.

The screenshot shows the 'Daylight Saving' configuration page with the following settings:

- DST Type:** Day-Month wise
- Time Period:** 08:00
- Forward Clock:**
  - Month:** November
  - Week No.:** 1st
  - Day of Week:** Sunday
  - Time:** 09:00
- Backward Clock:**
  - Month:** January
  - Week No.:** 1st
  - Day of Week:** Sunday
  - Time:** 10:00

A 'Save' button is located at the bottom of the configuration area.

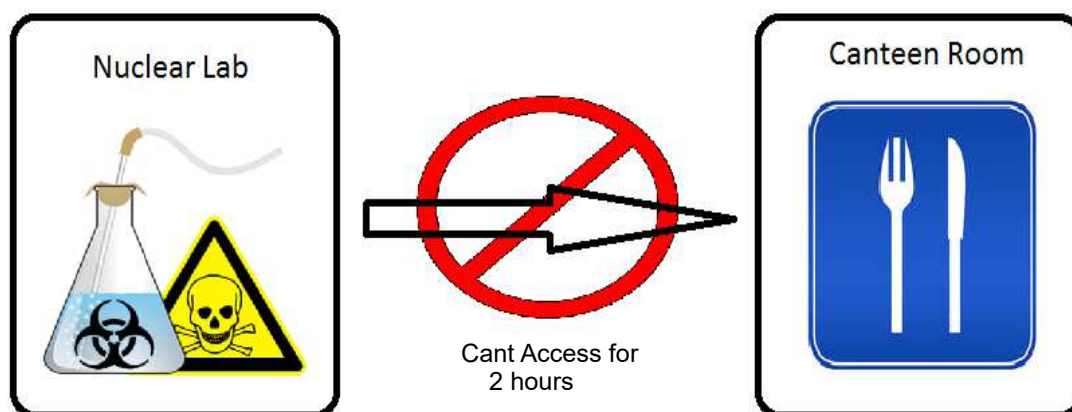
As per the above configuration, the DST Setting will be applicable on 1st Sunday of November at 09:00 hours, the clock will be forwarded by 08:00 hours. And on 1st Sunday of January at 10:00 hours, the clock will be reversed by 08:00 hours.

Click **Save** once done with the configurations.

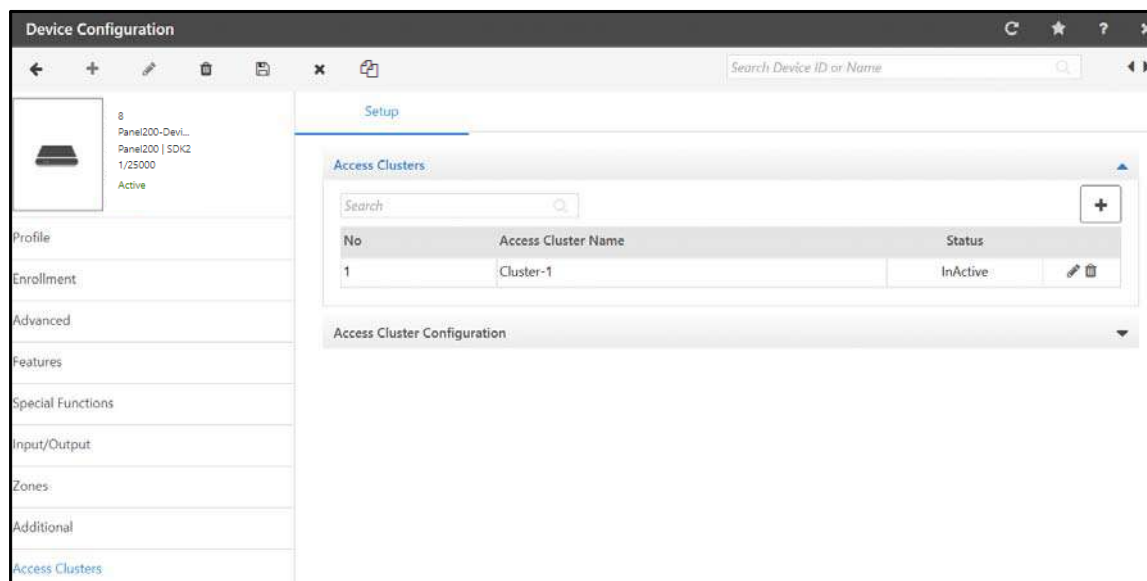
## Access Clusters

Access Clusters are door groups that can be created under each panel to restrict or limit access of users to some special regions. Once access clusters are defined under a panel, panel doors can be assigned to specific clusters.

For e.g. In some workplaces, such as Chemical factories, once a user goes into a radiation exposed area, he/she must not be allowed in public areas such as the Admin department or the Cafeteria. However, this user will be allowed access to a specific quarantined zone. Such purpose can be served using the access cluster feature whereby, users going into one cluster can be allowed or denied access to other clusters based on configured policies.



Click **Access Clusters > Setup** and the page appears as shown below.



## Access Clusters

Click the **Access Clusters** collapsible panel.

Click **Add** to add a new Cluster. You can Upto 75 clusters.

No	Access Cluster Name	Status
	Cluster-2	<input type="checkbox"/>
1	Cluster-1	InActive

- **Access Cluster Name:** Assign a name for the new access cluster.
- **Active:** Select the **Active** check box to enable access cluster restrictions for this cluster.

Click **OK**. The cluster appears in the grid.

## Access Cluster Configuration

Click the **Access Cluster Configuration** collapsible panel.

- **Access Cluster:** Click the picklist to select the desired Access Cluster.
- **Cluster Mode:** Select the desired mode for the selected cluster — **Allow All**, **Deny All**, **Selected**.

- **Allow All:** Select this option to allow access for all clusters of the Panel.
- **Selected:** Select this option to allow access for selected clusters of the Panel.
  - **Allowed Cluster:** Click the picklist and select the desired clusters.
- **Deny All:** Select this option to deny access for all clusters of the Panel.
- **Restricted Duration:** Define the time period (HH:MM) for which the **Allow/Deny Mode** will be applicable to the cluster.

Click **Save** once done with the configurations.

## Door Group

Door Group enables the grouping of Panel Doors belonging to different Zones of corresponding Panel.

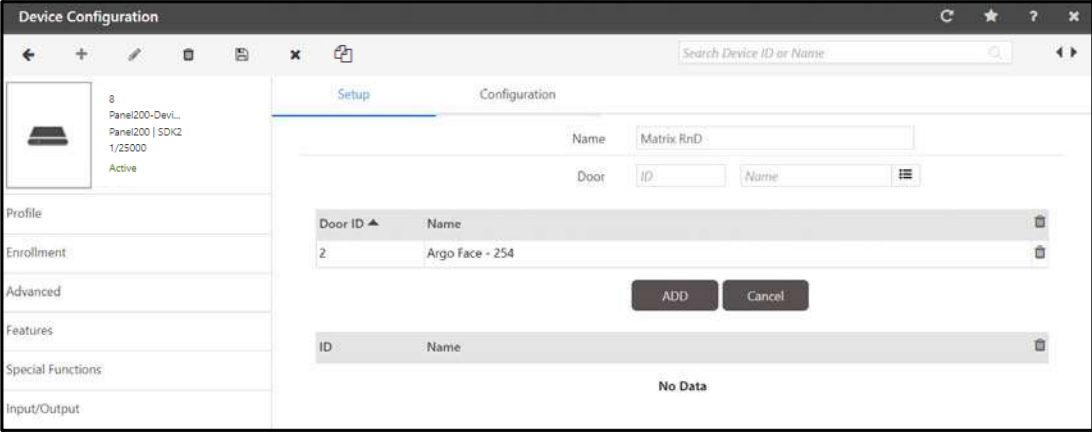
Then Man Trap feature can be configured to operate on the basis of Zone OR Group.

Click each link to configure the Door Group parameters:

- [“Setup”](#)
- [“Configuration”](#)

## Setup

Click **Door Group > Setup** and the page appears as shown below.



The screenshot shows the 'Device Configuration' window with the 'Setup' tab selected. The window title is 'Device Configuration'. On the left, there is a sidebar with a list of devices: '8 Panel200-Dev...', 'Panel200 | SDK2', '1/25000', and 'Active'. Below this, there are tabs for 'Profile', 'Enrollment', 'Advanced', 'Features', 'Special Functions', and 'Input/Output'. The main area is divided into two sections: 'Setup' and 'Configuration'. The 'Setup' section has a 'Name' field with the value 'Matrix RnD'. Below it, there is a 'Door' section with a table showing 'Door ID' and 'Name'. The table has one row with '2' and 'Argo Face - 254'. Below the table are 'ADD' and 'Cancel' buttons. The 'Configuration' section has a table with 'ID' and 'Name' columns, which is currently empty and shows 'No Data'.

From the Setup, you can create Door Groups and assign multiple Panel Doors to it. Maximum 15 Door Groups can be configured for the selected Panel. Each Door Group can consist of maximum 9 Panel Doors.

- **Name:** Assign a user friendly name to the Door Group.
- **Door:** Click the picklist to select the desired Panel Doors to be added to the group.



- Click **Add** when done with the configurations. The Door Group will be displayed in the grid as shown.



*At any instance of time a Panel Door can be assigned to only one Door Group.*

## Configuration

Click **Door Group > Configuration** and the page appears as shown below.

From Configuration, you can enable Man Trap for corresponding Door Group. Also you can enable Strict Man Trap from here. Doing so will allow opening a door only when all other doors of the respective group are closed irrespective of the Man Trap Wait Timer.

- **Door Group:** Click the picklist to select the desired door group for which Mantrap feature is to be enabled.

## Man Trap



To enable the Man Trap feature on Door Groups:

- You must enable Man trap Door Interlock from **Features > Set3 > Man Trap Door Interlock** and select **Functioning as “Door Group Based”** as shown below:

Man Trap Door Interlock	
Enable	<input checked="" type="checkbox"/>
Man Trap Wait Timer (Sec)	<input type="text" value="5"/>
Functioning	<input type="text" value="Door Group Based"/>

The Door Group must be assigned in the Input Group. For details, refer to [“Input/Output”](#).

**Enable:** Select the **Enable** check box to activate the Man Trap feature.

**Enable Strict Man Trap:** If you wish to apply Strict Man trap, select this check box.

Click **Save** to save the settings.

# MODE Door

The MODE (**M**obile **D**evice) devices are used for Time-Attendance solution in which user can mark the punch by using Face recognition method. MODE Door can be connected as **Direct Door** only.

The Device Configuration page for MODE Door appears as shown below.

**Sequence Number** - This is a system generated sequence number for each new device.

**Device**- Specify a name that can be assigned to the Mobile device. The Device ID is auto-generated by the system.

**IP Address** - This is the IP address assigned to the device. Once the device connection is established, this field will automatically display the door IP address.

**UUID**- Enter the UUID of the device which is the IMEI number of the Mobile device (Tablet device).

**Active** - Check the box to activate the device on the network.

To add Devices automatically, go to Admin Module> System Configuration> Global Policy> Device. Enable the “Auto Add New Devices” checkbox. Once the device is connected in network, it will come online in COSEC Monitor.



*The Monitor Service must be running while adding the device to COSEC.*

*The Auto added MODE device will be **Inactive** by default to avoid misuse of auto-add feature on mobile phones. Make sure you enable the **Active** checkbox in order to connect the device to the network. Once the device is connected to the network, it will come online in COSEC Monitor.*

To configure the parameters, you can:

- copy the parameters from another device, refer to [“Copy Parameters From”](#).
- OR**
- can click each link to configure the parameters, refer to [“Selective Configuration”](#).

## Copy Parameters From

You can also copy the parameters from another device, if required.



*The Copy Configuration From option is applicable in Add (after you have selected the desired device type) as well as Edit mode of any added device.*

*If certain parameters are configured and Copy Parameters From option is clicked, then:*

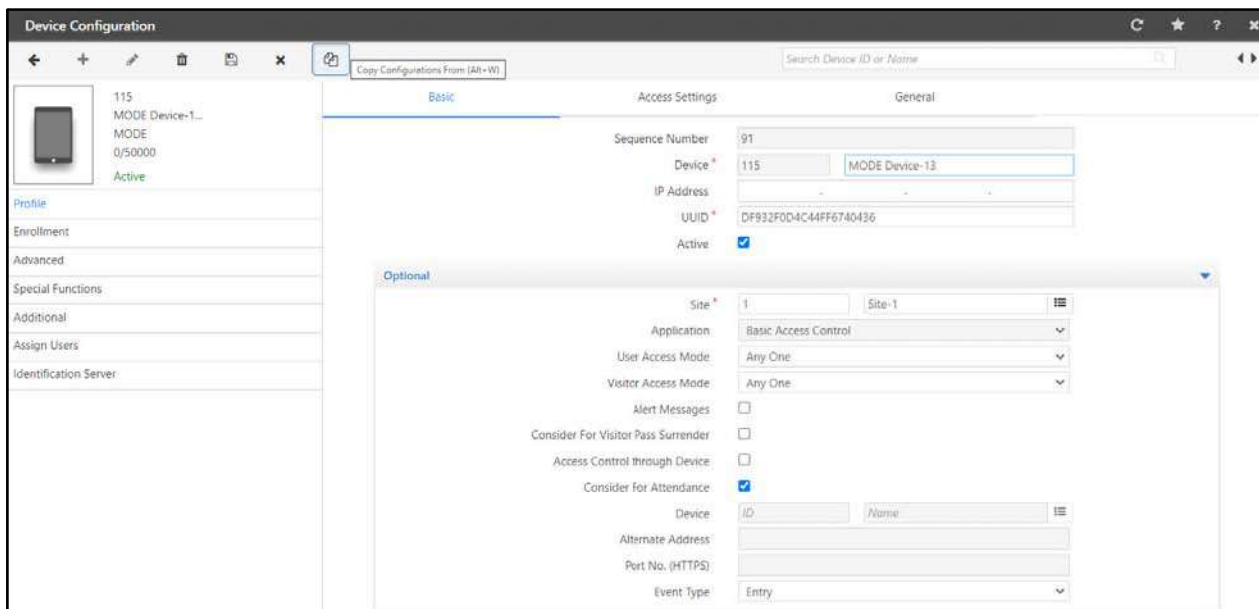
- *the value of the applicable parameters already configured will be over-written with the values as configured in the selected device.*
- *the values of other parameters that are configured will remain as they are.*

*If none of the parameters are configured and Copy Parameters From option is clicked, then*

- *all the applicable parameter values will be copied from the selected device.*
- *the values of the other parameters will be their default values.*

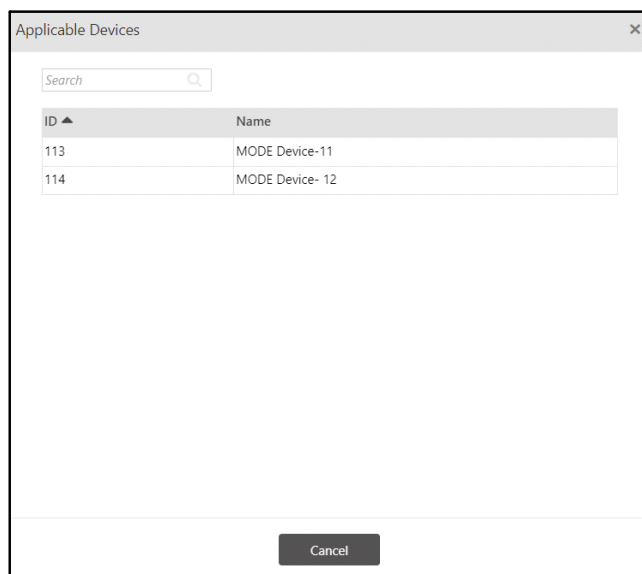
*To know more about the applicable parameters that will be copied, refer to [“Copy Parameter Details”](#)*

To do so, click **Copy Configuration From** .



The screenshot displays the 'Device Configuration' window. On the left, a sidebar lists various configuration tabs: Profile, Enrollment, Advanced, Special Functions, Additional, Assign Users, and Identification Server. The main area is divided into three sections: Basic, Access Settings, and General. The 'Basic' section is currently active, showing fields for Sequence Number (91), Device (115), IP Address, UUID (DF932F0D4C44FF6740436), and Active (checked). Below this, the 'Optional' section is expanded, showing Site (1), Application (Basic Access Control), User Access Mode (Any One), Visitor Access Mode (Any One), Alert Messages (unchecked), Consider For Visitor Pass Surrender (unchecked), Access Control through Device (unchecked), Consider for Attendance (checked), Device (ID/Name), Alternate Address, Port No. (HTTPS), and Event Type (Entry).

The **Applicable Devices** pop-up appears.



*The devices that appear in the Applicable Devices pop-up will be of the same family and device type. That is, the pop-up will display other Mode devices only. For example, if you have direct door devices — ARG01, ARG02, MODE1 and MODE2, then this pop-up will display only MODE1 and MODE2.*

Select the desired device from which you wish to copy the configurations.

OR

You can also search for the desired device using the Search option and then select the device.

A Warning pop-up appears. Click **Yes** to copy all the applicable parameters. A processing screen appears.



*Only applicable parameters will be copied. For details, refer to [“Copy Parameter Details”](#).*

*If during the processing screen, you click Cancel, then the entire copy process will be aborted.*

If all applicable parameters are copied successfully, then the Applicable Configurations are Successfully Copied message will be displayed.

If all applicable parameters are not copied successfully, then the Failed to copy. Please try again message will be displayed.

## Selective Configuration

To know more about configuring devices, click on the links for different tabs of Device configuration.

- [“Profile”](#)
- [“Enrollment”](#)
- [“Advanced”](#)
- [“Video Surveillance”](#)

- “Special Functions”
- “Additional”
- “Assign Users”
- “Identification Server”

## Profile

This section enables the user to set up the basic profile for any new device. Setting up a door profile involves defining basic parameters to set up any device.

### Basic

The **Basic** section is shown below:

The screenshot shows a web interface for configuring a device profile. It has three tabs: 'Basic' (selected), 'Access Settings', and 'General'. The 'Basic' tab contains the following fields:

- Sequence Number: 91
- Device: 108 (with a '30 chars' limit indicator)
- IP Address: (empty)
- UUID: (empty)
- Active: ☒

Below these fields is an 'Optional' section, which is expanded. It contains the following fields:

- Site: 1 (with a 'Site-1' dropdown menu)
- Application: Basic Access Control (dropdown)
- User Access Mode: Any One (dropdown)
- Visitor Access Mode: Any One (dropdown)
- Alert Messages: ☐
- Consider For Visitor Pass Surrender: ☐
- Access Control through Device: ☐
- Consider For Attendance: ☒
- Device: ID (with a 'Name' dropdown menu)
- Alternate Address: (empty)
- Port No. (HTTPS): (empty)
- Event Type: Entry (dropdown)

### Optional

The **Basic** page has an **Optional** tab which provides optional configurations as shown below:

- **Site** - Select the site to which this Mobile device is to be assigned from the site pick-list window. Site is created from Devices> Masters> Site.
- **Application** - The application type for which the device is to be used is set as **Basic Access Control**.
- **User/Visitor Access Mode** - This defines the type and combination of credentials required to identify and validate a user at the Mobile device. Select the appropriate credential combination from the drop down list.

The options available are:

- Any one
- Face
- PIN + Face



*If FR license is not available then User/Visitor Access Mode will have Any One option only.*

- **Alert Messages** - Select this check-box to enable the application to send alerts based on events from this device.
- **Consider for Visitor Pass Surrender**- Check the box to consider the selected device for visitor pass surrender. The Visitor can show his credential on this device to surrender the pass.
- **Access Control through Device**- Enable this check-box if the events coming from the door are to be considered as access control events.
- **Consider for Attendance**- Select the option as **Attendance** if the events sent by this door are to be considered for Time and Attendance data processing.
- **Alternate Address**: To access MODE from an external network (public network), enter an alternate address. It can be the Device IP Address or the Domain Name.

If MODE is selected for Location1. The IP address (Internal Address) of MODE is 192.168.104.114. The Alternate Address of Door V3 is 173.183.4.11:43.

When the door is accessed from external network then alternate address will be used for communication.

If you are using APTA in the external network at Location1 and tries to access MODE, then it will be accessed through 173.183.4.11:43. In Door API response to APTA, alternate IP address will be sent in response.

The communication between MODE and the external network takes place via device port configured in **Port No. (HTTPS)**.

- **Port No. (HTTPS)**: Enter the Device Port number for secure communication between the device and the external network.

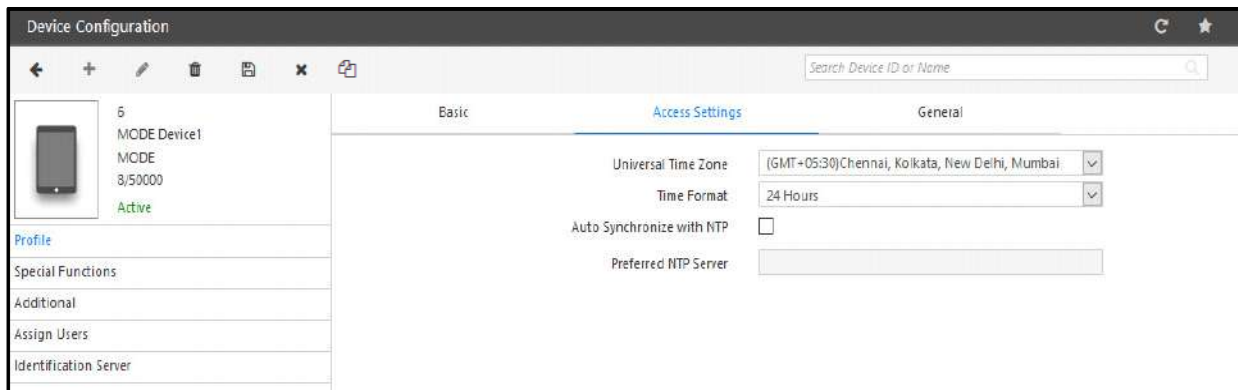


*The Device picklist will show active Direct Doors and Panel200 doors (Except ARC IO 800 Panel Door and ARC IO 800 as direct door and MODE).*

Consider For	Access Control		▼
Device *	1	Door V3-Device-1	☰
Alternate Address	173.183.4.11:43		
Event Type	Entry		

## Access Settings

The **Access Settings** page appears as shown below:



- **Universal Time Zone** - Select the geographic time zone in which the DOOR will operate.
- **Time Format** - Specifies the time format to be displayed on Door Controller LCD display. The formats available are:
  - 24 Hours
  - 12 Hours

Select the relevant option from the drop down list as per the site requirements.

### Auto Synchronize with NTP

If Date and time is to be automatically synchronized as per the **Preferred NTP Server** (predefined or user-defined NTP server address) selected by user, then you must enable **Auto Synchronize With NTP** checkbox.

Independent of the mode set from server as Auto or Manual, the user can change the date and time settings from device webpage, which will be reflected on device display.

- When Auto Synchronization with NTP is disabled Preferred NTP Server field will be disabled.
- When Auto Synchronization with NTP is enabled,
  1. You can specify the Preferred NTP server of your choice. In this case device will first try to get Date and Time from that server address.  
If it does not get Date and Time in three tries; device will check from pre-defined NTP servers.  
If you have entered one of the three pre-defined NTP servers(ntp1.cs.wisc.edu , time.windows.com , time.nist.gov); then device will first check that server first.  
If it receives updated Date and Time then Updated Date and Time will be reflected on device webpage and display screen.
  2. You can keep the Preferred NTP server as blank. In this case device will check for Date and Time from the first NTP server.
  3. If user has manually entered Date and Time from webpage or Device Menu then those values of Date and Time will be reflected on device webpage and display screen.

In the case of the **Manual** option the administrator can manually update the time on the Door with that of the system time as and when required. This can be accomplished from the COSEC Monitor and control application.



## General

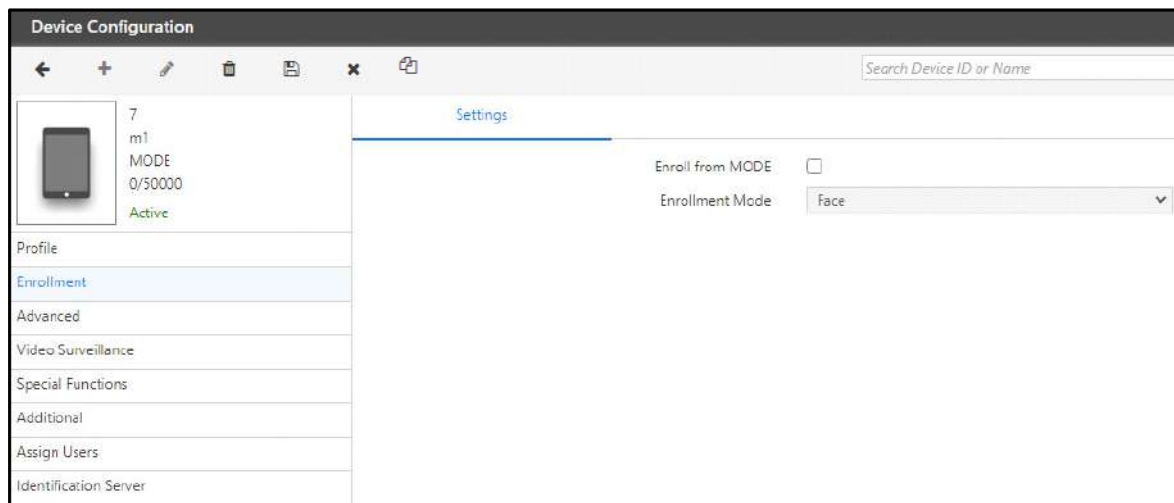
The **General** page appears as follows. Enter all general details applicable to the device in this section.

The screenshot shows the 'Device Configuration' window with the 'General' tab selected. On the left, a sidebar lists device details: '28', 'MODE-Device-2...', 'MODE', '0/50000', and 'Active'. Below this are links for 'Profile', 'Special Functions', 'Additional', 'Assign Users', and 'Identification Server'. The main area has tabs for 'Basic', 'Access Settings', and 'General'. Under 'Access Settings', there is a 'Mute Buzzer' checkbox. Below that, there are two sections: 'Allowed Acknowledgement' and 'Denied Acknowledgement'. Each section contains a 'Display Duration (ms)' text input field (both set to '3000') and an 'LED - Buzzer Duration' dropdown menu (both set to 'Long'). Information icons are present next to the dropdown menus.

- **Mute Buzzer** - User can mute or unmute the door buzzer by checking or clearing the box respectively.
- **Allowed Acknowledgment**
  - **Display Duration (ms)** - Define the time duration in between 500 to 3000ms till which the 'Acknowledgment Allowed' message will be displayed.
  - **LED - Buzzer Duration** - Select the time duration as Long, Medium or short for the LED Buzzer.
- **Denied Acknowledgment**
  - **Display Duration (ms)** - Define the time duration in between 500 to 3000ms till which the 'Acknowledgment Denied' message will be displayed.
  - **LED - Buzzer Duration** - Select the time duration as Long, Medium or short for the LED Buzzer.

## Enrollment

The Enrollment page appears as shown below.

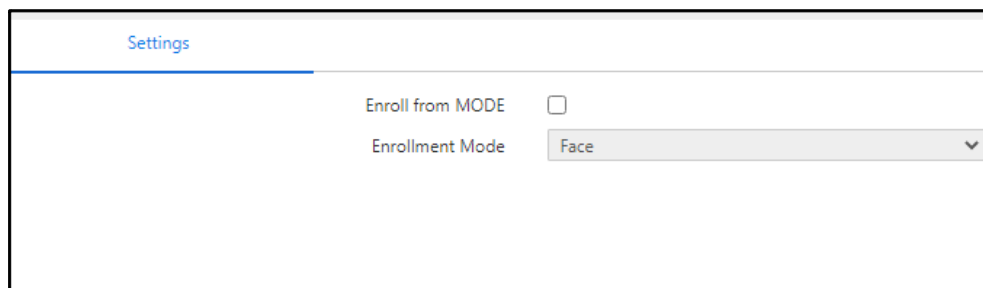


To configure the Enrollment parameters click the following links:

- [“Settings”](#)

## Settings

Click the **Settings** tab. The **Settings** page appears.



Configure the following parameters.

- **Enroll from MODE** - Select this checkbox to enable the enrollment of user from MODE.
- **Enrollment Mode** - The type of credential that can be enrolled using MODE is displayed i.e. Face.

## Advanced

The Advanced tab allows the user to configure some advanced parameters such as access control settings.

To access this, After selecting the device, Select the **Advanced** tab from **Device Configuration** page. The advanced settings can be configured from following sections:

- [“Settings”](#)

## Settings

The Advance Settings page for MODE appears on your screen as shown below:

The screenshot shows the 'Device Configuration' window with the 'Settings' tab selected. On the left, a sidebar lists various configuration categories: Profile, Enrollment, Advanced (selected), Video Surveillance, Special Functions, Additional, Assign Users, and Identification Server. The main area is divided into two sections: 'Temperature Logging' and 'Face Mask Compulsion'. The 'Temperature Logging' section has an 'Enable' checkbox, a 'Sensor Type' dropdown (set to 'Web-Based'), a 'Sensor Interface' dropdown (set to 'HTTP/S'), a 'Calibration Parameter' with '+' and '-' buttons and a value of '0.0', and several numerical input fields: 'Approach to Sensor Wait-Time (Sec)' (3.0), 'Temperature Detection Time Out (Sec)' (10), 'Tolerance between Consecutive Readings' (0.5), 'Consecutive Readings Count within Tolerance' (5), 'Temperature Threshold (°F)' (99.5), and 'Minimum Temperature for Access (°F)' (95.0). There is also a 'Restriction Type' dropdown (set to 'Soft') and a 'Bypass If Sensor Disconnected' checkbox. The 'Face Mask Compulsion' section has an 'Enable' checkbox with a red '1' icon, an 'Approach to Camera Wait-Time (Sec)' (3.0), a 'Mask Detection Time Out (Sec)' (4), and a 'Restriction Type' dropdown (set to 'Soft').

- **Enable GPS Location on IN-OUT Events:** Select the check box to enable GPS location to be received by the Server in Events generated from MODE.



*Make sure this check box is selected and Location is turned on in the COSEC MODE App to send GPS coordinates in Events.*

*GPS Events generation is supported in the following devices only - Direct Doors (VEGA, ARGO, PATH Controller, ARC DC 200, ARGO FACE) and Panel Doors (ARGO, VEGA, PATH Controller and ARC DC 200).*

## Temperature Logging

- **Enable:** Enable the temperature logging feature on the zone.
- **Sensor Type:** Select the type of thermal sensor integrated in the device. There are three sensors: *Web-Based*.
- **Sensor Interface:** Select the interface on which device will communicate with the sensor.  
For Sensor Type: Web-based  
Sensor Interface options will be: HTTP/S
- **Emissivity:** Set the emissivity parameter for Sensor. This parameter should only be visible when Sensor Type is AST. Default value is 0.95.  
It is used to define accuracy in sensor to detect temperature of different skin or objects.
- **Calibration Parameter:** Set the calibration parameter for the thermal sensor.  
On click of + the value should increase by 0.1 and on click of – it should decrease by 0.1.
- **Approach to Sensor Wait-Timer:** Time for which the device will wait for user to approach the device before starting Temperature Detection.

- **Temperature Detection Time-Out:** The timer till which temperature detection will be done for the user and if valid temperatures are not found till the expiry of timer then timeout will be declared.
- **Tolerance between consecutive readings:** The Tolerance range of reference temperature within which the consecutive readings are considered to be valid user temperature readings. If current temperature doesn't fall in tolerance range the reference temperature is updated with the current temperature and the process continues.
- **Consecutive readings count within tolerance:** The Tolerance range of reference temperature within which the consecutive readings are considered to be valid user temperature readings. If current temperature doesn't fall in tolerance range the reference temperature is updated with the current temperature and the process continues.
- **Minimum Temperature for Access:** The minimum temperature value that should be detected is to be considered as valid temperature.

It should be less than threshold temperature. If user tries to enter a value equal to or greater than threshold temperature validation should be shown.

The default value, unit and range should be updated based on the Temperature unit set on Panel.

- **Temperature Threshold:** To set the threshold value of the temperature. The default value, unit and range can be updated based on the Temperature unit set on Panel.
- **Restriction Type:** To set restriction type as soft/hard.
- **Bypass if Sensor Disconnected:** Enable this check-box to give provision of bypassing the feature if sensor connectivity is lost.

## Face Mask Compulsion

Face Mask Compulsion feature is used to enforce users to wear masks while they are within the premises.

After identifying the user, Device will prompt the user to show Face with Mask when "Face Mask Compulsion" is enabled.

Based on identification of Mask, user will be allowed or denied access.

Make sure you have enabled **Enable FR** checkbox in **Devices> Device Configuration> Identification Server> Face Recognition> Enable FR** and configure the below mentioned parameters to avail this feature.

- **Enable:** Select this checkbox to enable Face Mask Compulsion feature for IDS.
- **Approach to Camera Wait-Timer (Sec):** This parameter defines the time within which the user must approach the camera for face mask detection.
  - You must enter the Wait-Time between 0.0-15.0 seconds.
  - By default, it is 3.0 seconds.
- **Mask Detection Time Out (Sec):** This parameter defines the maximum time duration for user's face mask detection.
  - You must enter the detection time out between 0.0-15.0 seconds.
  - By default, it is 4.0 seconds.

- **Restriction Type:** Select the type of restriction to be imposed when the configured policy is violated. Select the desired option - Soft or Hard.
- **Soft Restriction:** The access will be granted even if the user is identified without wearing a mask; however, an event and a warning are generated that indicates the user has been identified without wearing a mask.
- **Hard Restriction:** The access will be denied if the user is identified without wearing a mask.

By default it is **Soft Restriction**.



Users face enrollments are dependent on the Visible Face parameter value set by you. To know more, refer "[Face Recognition](#)".

## Video Surveillance

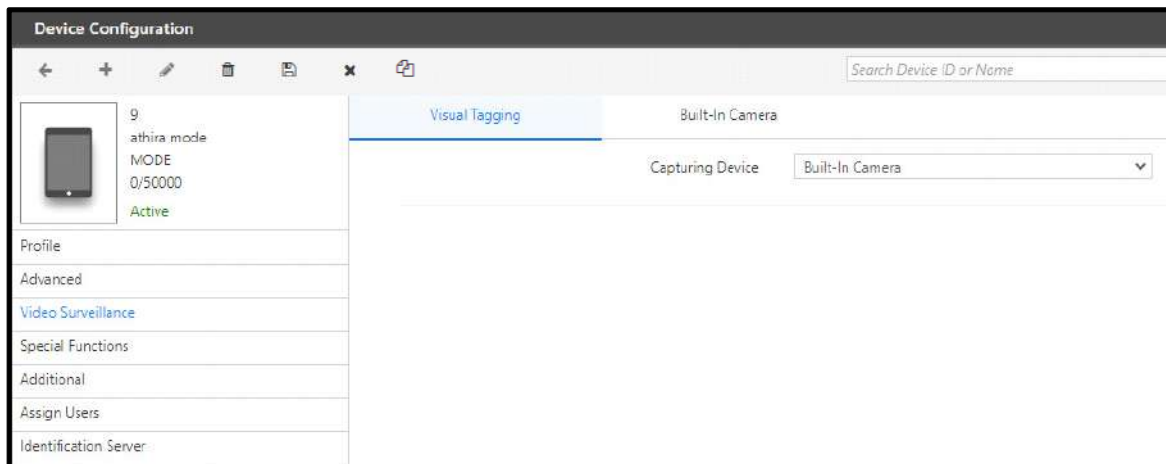
The Video Surveillance tab allows the user to configure parameters for video surveillance integration with the COSEC MODE.

This feature is useful to track if any user accesses using someone else's credentials.

Make sure you have enabled the **Consider for Attendance** checkbox in **Devices> Mode Device Configuration> Profile> Basic> Optional> Consider for Attendance**.

## Visual Tagging

The COSEC application can interface with some supported hybrid and network video recording systems and grab images triggered by user events at the Doors. The **Visual Tagging** option enables the administrator to define the video recorder parameters. The **Visual Tagging** page appears as shown below.



**Capturing Device:** Select the video recording device type from the dropdown list.

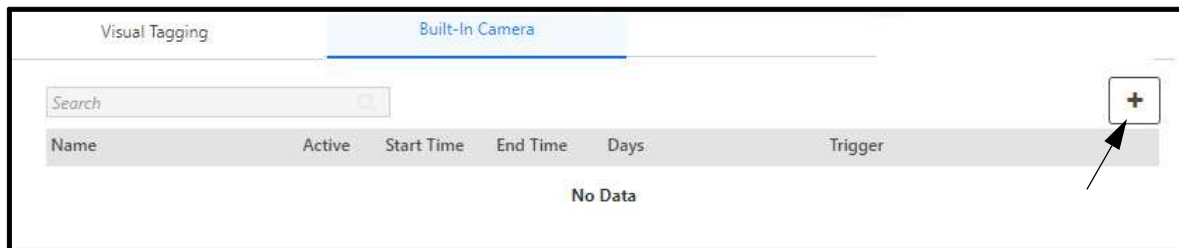
- None
- Built-In Camera

Select the **Built-In Camera** option to schedule the capture configuration.

## Built-In Camera

This functionality enables configuration and scheduling of image capturing using the in-built camera of MODE device.

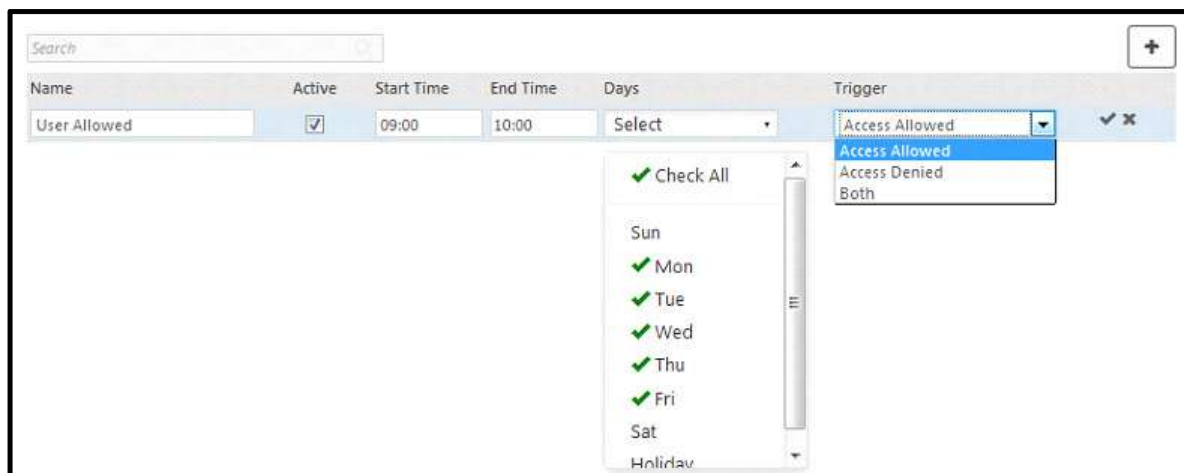
Click the **Built-In Camera** tab. The **Built-In Camera** configuration page appears as shown below.



The Built-In Camera of MODE can be scheduled to capture images during specific periods which will be triggered by specific user events.

To configure the schedule, click **Add** button as shown above.

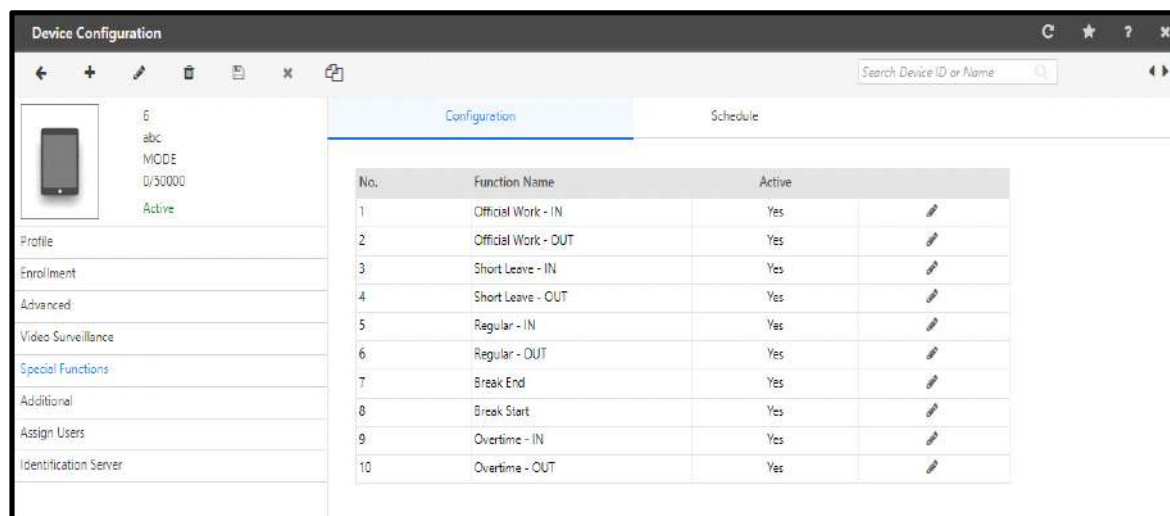
- Specify the function **Name** and select the **Active** check box to enable it.
- Specify the **Start** and **End Time** for the schedule.
- Select the Applicable **Days** for the schedule.
- Select the user events from the dropdown list by which you want image capturing to be **triggered**. The options are Access Allowed, Access Denied and Both.



- Click **OK** button and **Save** button to save the schedule.

## Special Functions

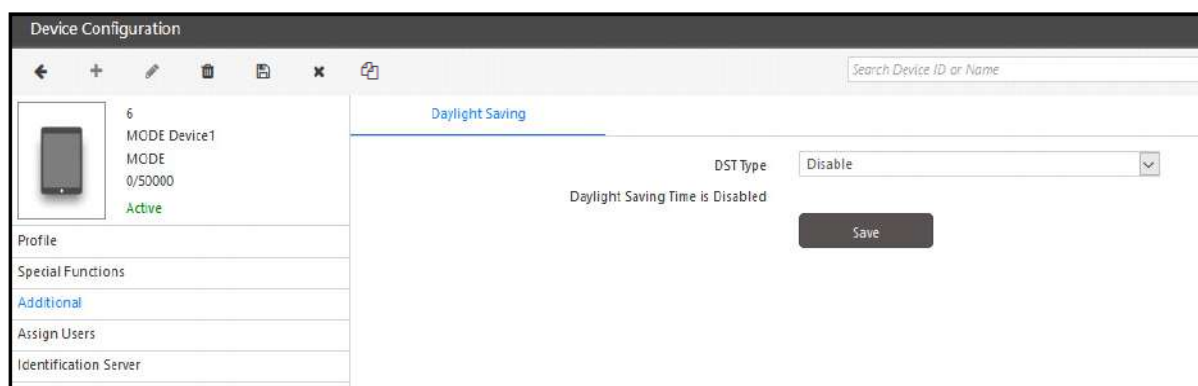
To configure *Special Functions* for COSEC doors, refer to [“Special Functions”](#).



## Additional

This section lists some additional configurations that can be enabled for door controllers.

To access these configurations, Go to **Device Configuration > Additional > Daylight Saving**



Many countries observe the convention of adjusting clocks forward and backward. Clocks are set ahead during the spring and back to standard time in the autumn. COSEC devices can be configured to be compatible with this procedure keeping the RTC of the system updated with such changes.

The **Daylight Saving** configuration can be done in 2 ways i.e. **Day-Month wise** or **Date-Month wise**. The **Disable** option when selected, disables the application of DST on the system time.

On selection of DST type as **Day-Month wise** option, the DST is set by the day of the month on which clock needs to be forwarded and reverted back to normal. Set the month, week number, day of the week, and time for both the **Forward Clock** and **Backward Clock** as shown.

- This DST Setting implies that on 1st sunday of November at 09:00 hours, the clock will be forwarded by 08:00 hours. And on 1st sunday of January at 10:00 hours, the clock will be reversed or backwarded by 08:00 hours.

**Device Configuration**

Search Device ID or Name

6  
MODE Device1  
MODE  
0/50000  
Active

Profile  
Special Functions  
Additional  
Assign Users  
Identification Server

**Daylight Saving**

DST Type: Day-Month wise

Time Period: 08:00

**Forward Clock**

Month: November  
Week No.: 1st  
Day of Week: Sunday  
Time: 09:00

**Backward Clock**

Month: January  
Week No.: 1st  
Day of Week: Sunday  
Time: 10:00

Save

On selection of the **Date-Month wise** option, the DST is set by date of the month on which clock needs to be forwarded and reverted back to normal. Specify the **Time Period** for the date-month wise DST settings in 24-hours format, and specify the day of the week, date and time for the **Forward Clock** and the **Backward Clock** as shown.

**Device Configuration**

Search Device ID or Name

6  
MODE Device1  
MODE  
0/50000  
Active

Profile  
Special Functions  
Additional  
Assign Users  
Identification Server

**Daylight Saving**

DST Type: Date-Month wise

Time Period: 08:00

**Forward Clock**

Month: November  
Date: 1  
Time: 09:00

**Backward Clock**

Month: January  
Date: 1  
Time: 10:00

Save

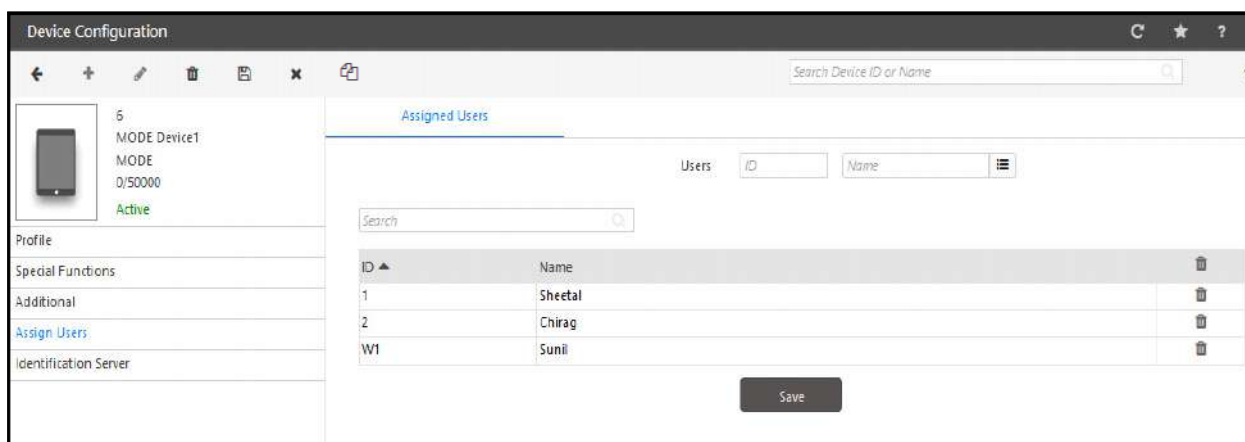
- Click the **Save** button.



## Assign Users

To the configured device, you can select and assign the users.

Click the picklist button and select the users.



- Click the **Save** button to assign all the added users to the selected device.

## Identification Server

This tab enables the selected device to assign the Identification mode as Local or Server Assisted.

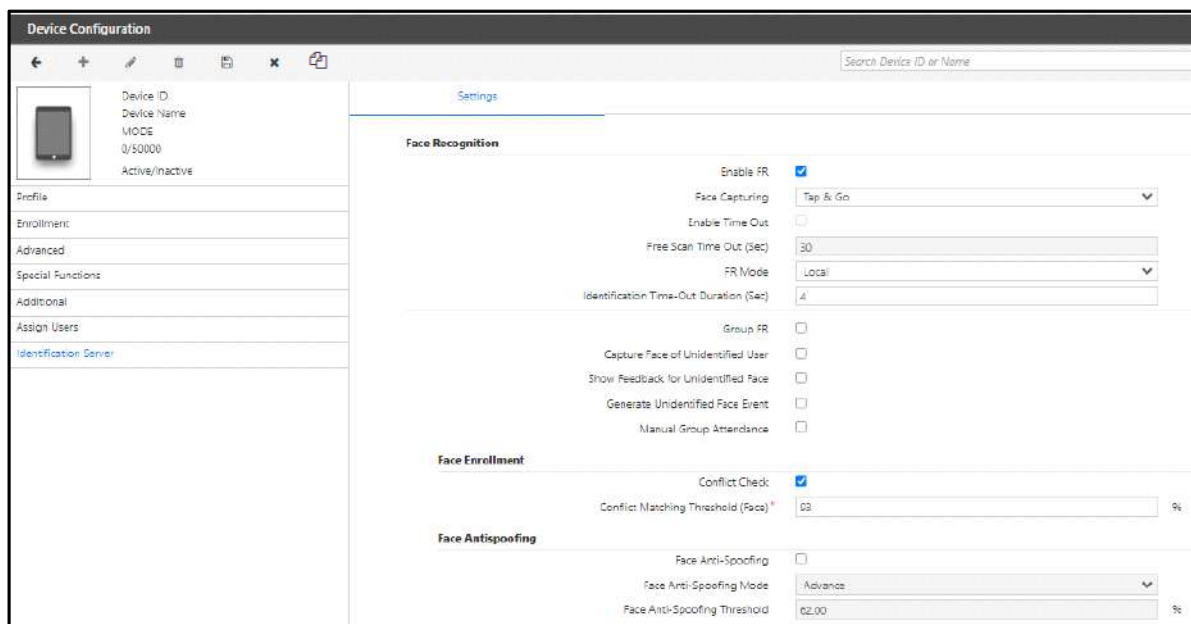
Device has a limited memory capacity for storage of templates so we need Identification Server which will store more number of templates and respond to device when asked for identification.

For more information on Identification Servers, See *Admin> System Configuration> Identification Server Configuration*.



*If FR license is not available then Identification Server tab will not be available.*

To access these configurations, select the **Identification Server** tab.



## Face Recognition

- **Enable FR:** By default, this check box is enabled, that is Face Recognition feature is enabled in the device. Clear the checkbox to disable.



Make sure “**Enable FR**” flag is checked and “**Consider For Attendance**” flag is enabled in *Devices > Device Configuration > Profile > Basic > Optional* in order to edit the parameters in Identification Server Settings.

- **Face Capturing:** Select the desired Face Capturing option.
  - **Tap and Go:** If you select this option, user needs to tap on the device screen once. The MJPEG, that is motion recording screen appears. Device will capture and then identify the users face. If during working hours device is idle, then user needs to tap the device to scan the face and gain access.
  - **Free Scan:** If you select this option, the device will display the MJPEG, that is motion recording screen till the expiry of the Free Scan Time Out timer
- **Enable Time Out:** Select this box to enable the time out.
- **Free Scan Time Out (Sec):** Enter the Free scan time out duration. The valid range is 1 to 999 sec. In Free Scan method, multiple users can mark their attendance easily during peak entry hours.

For example, if the Free Scan Time Out is set as 30sec and if the user is identified in 10S then the system reloads the Free Scan Time Out timer again. Hence, device remains in the scanning mode.

- **FR Mode:** Select the FR mode as **Local** or **Server Assisted**.
  - **Local:** In this Local mode Face templates will be stored in FR hardware module which can store 1 lakh face templates. The captured face template will be verified with the templates stored in the FR module.
  - **Server Assisted:** In Server Assisted mode, an identification server and the fields to configure an individual identification server will get enabled as shown below. You must select the Identification server from where the face templates will be identified.

When FR Mode is selected as **Local** below mentioned parameters are to be configured:

The screenshot shows the 'Face Recognition' configuration window. The 'FR Mode' dropdown is set to 'Local' and is highlighted with a red box. Other visible settings include 'Enable FR' (checked), 'Face Capturing' (Tap & Go), 'Free Scan Time Out (Sec)' (30), and 'Identification Time-Out Duration (Sec)' (4). Below the red box, there are several unchecked checkboxes: 'Group FR', 'Capture Face of Unidentified User', 'Show Feedback for Unidentified Face', 'Generate Unidentified Face Event', and 'Manual Group Attendance'.

- **Identification Time-Out Duration (Sec):** Enter the duration in seconds after which the face identification will get timed out.  
**Example:** If 5 seconds is specified, then the identification server will try to identify the face till 5 seconds and if not found then it will show time-out to the user.

If you select FR Mode as **Server Assisted**, you must configure the following parameters:

User can either assign a separate or a common Identification Server which is shared by other biometric credentials.

The screenshot shows the 'Face Recognition' configuration window with 'FR Mode' set to 'Server Assisted', highlighted by a red box. The 'Identification Server' is selected from a dropdown menu. Below it, the 'Configure Alternate Server Address' checkbox is unchecked. The 'Server Address' field is empty, and the 'Server Port' is set to '11005'. The 'Identification Time-Out Duration (Sec)' is set to '4'. Other settings like 'Enable FR' (checked) and 'Free Scan Time Out (Sec)' (30) are visible above the red box. The same set of unchecked checkboxes as in the Local mode screenshot is visible below.

- **Identification Server:** Select the Identification server from the picklist to which the device is to be assigned to save the records.
- **Configure Alternate Server Address:** Select this check box to configure external IP address of Identification Server.

- **Server Address:** By default, this is a non-editable field by which will display the configured Identification Server for FR. This field allows user to enter the Alternate IP Address for FR if **Configure Alternate Server Address** is enabled.
- **Server Port:** Enter the TCP port number. The default port number is 11005.
- **Identification Time-Out Duration (Sec):** Specify the duration in seconds after which the face identification will get timed out.  
**Example:** If 5 seconds is specified, then the identification server will try to identify the face till 5 seconds and if not found then it will show time-out to the user.
- **Group FR:** Select this checkbox to enable face recognition feature for multiple users and mark their attendance at the same time via this door.



For Group FR ("**Mark Group Attendance**") feature to work, ensure that the desired Identification Service is selected in COSEC Admin > License and Service. For more details refer Admin Management Portal User Manual.

Once you enable Group FR, a pop-up will display the features that will not be supported:

- Adaptive Face Enrollment
  - Capture Face of Unidentified User
  - Face Mask Compulsion
  - Temperature Logging
  - Face Antispoofing
  - Show Feedback for Unidentified Face
- **Capture Face of Unidentified User:** Select this checkbox to enroll unidentified faces of users via this door.



For Capture Face of Unidentified User feature to work, ensure that the desired Identification Service is selected in COSEC Admin > License and Service. For more details refer Admin Management Portal User Manual.

If you have enabled the **Capture Face of Unidentified User** feature then make sure that you schedule a task of **Delete Unidentified Face** in Admin > System Utilities> Task Scheduler to avoid storage of excess data in the database.

- **Show Feedback for Unidentified Face:** Select this check box, if you wish to display a message on the Device display screen to user's whose face is not identified.



If you wish that events should be generated for Unidentified Face, enable **Generate Unidentified Face Event**.

If you have enabled **Group FR**, **Show Feedback for Unidentified Face** feature will not be functional.

- **Generate Unidentified Face Event:** Select this check box, if you wish to generate events when a user's face is unidentified.

These events can be viewed from **Admin Module > View/Logs > Event View** as well as **Device Module > Reports > Invalid Events**.

If you wish to view the snapshots in the Events/Logs, make sure you have configured “**Built-In Camera**” in “**Visual Tagging**”. Make sure you select the Trigger as **Access Denied** or **Both** to view the snapshots for **User Denied- User Invalid** event.



**Generate Unidentified Face Event** is applicable for **Face** credentials only. However, PIN credential events will be generated automatically.

If you wish that a message should be displayed on the device display screen for Unidentified Face, enable **Show Feedback for Unidentified Face**.

- **Manual Group Attendance:** Select this check box if you wish to allow marking of attendance manually for a group of users from the Mode Application. Make sure **Tap & Go** is selected as the **Face Capturing** option.



*Manual Group Attendance is supported in FR Mode-Local as well as Server Assisted.*

*For Manual Group Attendance feature to work in Server Assisted mode, ensure that the desired Identification Service is selected in COSEC Admin > License and Service. For more details refer Admin Management Portal User Manual.*

## Face Enrollment



If the **FR Mode** is **Server-Assisted** and you wish to enroll faces from the device, make sure **Enable Face Recognition** is selected in Users > User Configuration > Face Recognition and/or Visitor Management > Visitor Profile > Face Recognition and/or Contract Worker Management > Worker Profile > Face Recognition.

- **Conflict Check:** Select the checkbox for the system to check the conflict between the new face of a user and the already (existing) enrolled faces of all the users (available in the database) during the face enrollment process.
- **Conflict Matching Threshold:** Enter the desired Conflict Matching Threshold value in percentage.

The system will consider this value while comparing the face with the face templates already present in the database.

If a conflict is found, that is, if the system detects a face template in the database similar to the new face, then a conflict error will be displayed.

Make sure a higher value is set for this parameter, as it will result in less equivalent matches with the face templates available in the database.



Make sure the **Conflict Matching Threshold** is set lower than **Matching Threshold** in Admin module > System Configuration > Identification Server Configuration.

### Example: Face Enrollment of Suresh

- **Conflict Check** checkbox is selected.
- **Conflict Matching Threshold** is set as 93%.

Now during the face enrollment of Suresh, the system will check in its database if his face matches with faces of other users available in the database.

- **Case 1:** If Suresh's face matches 92% with Ram, then the system will allow to enroll Suresh's face.

- **Case 2:** If Suresh's face matches 94% with Shyam, then the system will display the conflict error while enrolling Suresh's face.

## Adaptive Face Enrollment

When **FR Mode** is set as **Server Assisted Mode**, configure the following parameters:

- **Adaptive Face Enrollment:** Select this check box to Enable adaptive face enrollment for identification server.
  - Adaptive face enrollment provides automatic real time face enrollment whenever change is experienced in facial features.
  - Enabling adaptive enrollment process parameter, an additional slot will be provided internally to store 10 more face templates of a user.
  - IDS will learn from face recognized, adapt and would take decision of storing new template of a user database.

If you enable adaptive face enrollment, you must configure the following parameters.

- **Threshold Deviation (Face):** Enter the value of deviation from matching threshold in percentage. Based on the value entered for deviation, template for Adaptive Face Enrollment will be decided.

Example: If deviation entered is 3% and matching threshold is 98% then it will classify template which has matching score between 98 - 95 and one lower than this will be classified below margin.

- **Multi-User Matching Score Deviation (Face):** Enter the value of deviation from matching score between 2 different users while Adaptive Face Enrollment.

Difference between matching scores of templates will be done, when we have templates of two or more users falling under above specified deviation.

Let us understand this with the help of the following example:

- *Threshold value = 98%*
- *Threshold Deviation= 3%*

*So, Result will display all matching templates having matching score between range 98 to 95*

- *Multi-user Matching score deviation = 0.5%*

*If, 5 best templates of 2 users fall between 98 -95% range*

<b>User</b>	<b>Matching Score</b>
User 1	97.8
User 1	97.6
User 1	97.4
User 2	97.25
User 2	97

*As we have obtained templates of 2 users in which user 1 is having template of highest matching score, so will make a difference between lowest score template of user 1 and highest matching score template of user 2.*

$97.4 - 97.25 = 0.15$ ; this is less than 0.5

As difference is less than 0.5, user 1's template having matching score 97.8 for adaptive enrollment will not be used.

- **Threshold Deviation and Multi-user Matching score deviation** will act as two filters to fetch appropriate template for adaptive enrollment. Values can be added in decimal.



*We recommend to set the multi-user matching score deviation higher always e.g.2.0 to reduce the probability of enrolling a particular user's face template in some different user's enrolled faces.*

- **Confirm before Adaptive Face Enrollment:** Select this check box, if face enrolled using Adaptive face enrollment requires confirmation from User.



*Faces enrolled under Adaptive enrollment process will be synced automatically, but when IDS is restarted due to any reason, the adaptive faces which are not synced will be removed by default.*

## Face Antispoofing

- **Face Anti-Spoofing:** To use this feature, make sure **Enable FR** checkbox is selected.

Then, select the **Face Anti-Spoofing** check box to enable this feature and configure the following parameters:

- **Face Anti-Spoofing Mode:** Liveness Detection helps to limit the fierce risk of spoofing attacks by using several anti-spoofing approaches. Along with the configurations to be done for Face Anti-Spoofing you also need to take care of the recommended settings for liveness verification and for face recognition, refer ["Recommendations for Liveness Verification"](#) and ["Recommendations for Face Recognition"](#).

Select the Face Anti-Spoofing Mode for liveness detection from the following:

1. **Basic:** This mode detects face as well as photos from the mobile phones.  
Select this option when the distance between Camera and Face is more than 3 feet
2. **Moderate:** This mode analyzes the texture of face.  
Select this option when the distance between Camera and Face is less than 2 feet
3. **Advance:** This mode combines the features of **Basic Mode** and **Moderate Mode** of Face Anti-Spoofing.  
Select this option when the distance between Camera and Face is more than 1 feet and less than 2 feet.  
By default, Face Anti-Spoofing Mode will be **Advance**.

If **FR Mode** is selected as Server Assisted, select the Face Anti-Spoofing Mode for detection from the following:

1. **Moderate:** This mode analyzes the texture of face. Select this option when the distance between Camera and Face is less than 2 feet
  2. **Advance:** Select this option when the distance between Camera and Face is more than 1 feet and less than 2 feet. By default, Face Anti-Spoofing Mode will be **Advance**.
- **Face Anti-Spoofing Threshold:** Enter the Face Anti-Spoofing threshold value in percentage within the range from 1.00 to 99.99 to identify user's face liveness for considering him/her as genuine person.
  - **Default Biometric Group No.:** When FR Mode is selected as Server Assisted, enter the default biometric group number to be assigned to the device. It is a number allotted to a device to be assigned to the

Identification Server. This enables the Identification Server to match the template against only those devices that belong to the corresponding biometric group. This reduces the false detection as well time to search template.



*When FR Mode is selected as Server assisted, then the Adaptive Enrollment feature can be configured in Admin> System Configuration> Identification Configuration.*

*In Local Mode Adaptive Enrollment feature is not supported.*



# ARGO FACE Door

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Matrix COSEC ARGO FACE is a powerful Face Recognition Device powered by Matrix's advanced AI-based Deep Learning algorithms to offer superior Face Recognition performance. The COSEC ARGO FACE is an all-integrated, compact, elegant and robust Face Recognition Device specifically designed for enterprise-grade People Mobility applications. Loaded with versatile functions and a range of features, COSEC ARGO FACE is an ideal solution for organizations requiring accuracy, speed, ease of use and security.

ARGO FACE comes with built-in facial recognition and liveness detection support for Access Control, Time Attendance & Cafeteria. It consists of POE terminal with Ingress Protection (IP65 rated) and IK08 protection. It has an elegant design with graphical display. It supports Face, Card, PIN and BLE credentials. It also supports QR Code, if enabled. To know more refer to "[Image Settings](#)".

There are in total 4 variants of ARGO FACE door. They are:

Variants	Reader Supported
COSEC ARGO FACEE	EM Prox
COSEC ARGO FACEM	MiFare
COSEC ARGO FACEI	HID iClass
COSEC ARGO FACE200T	-

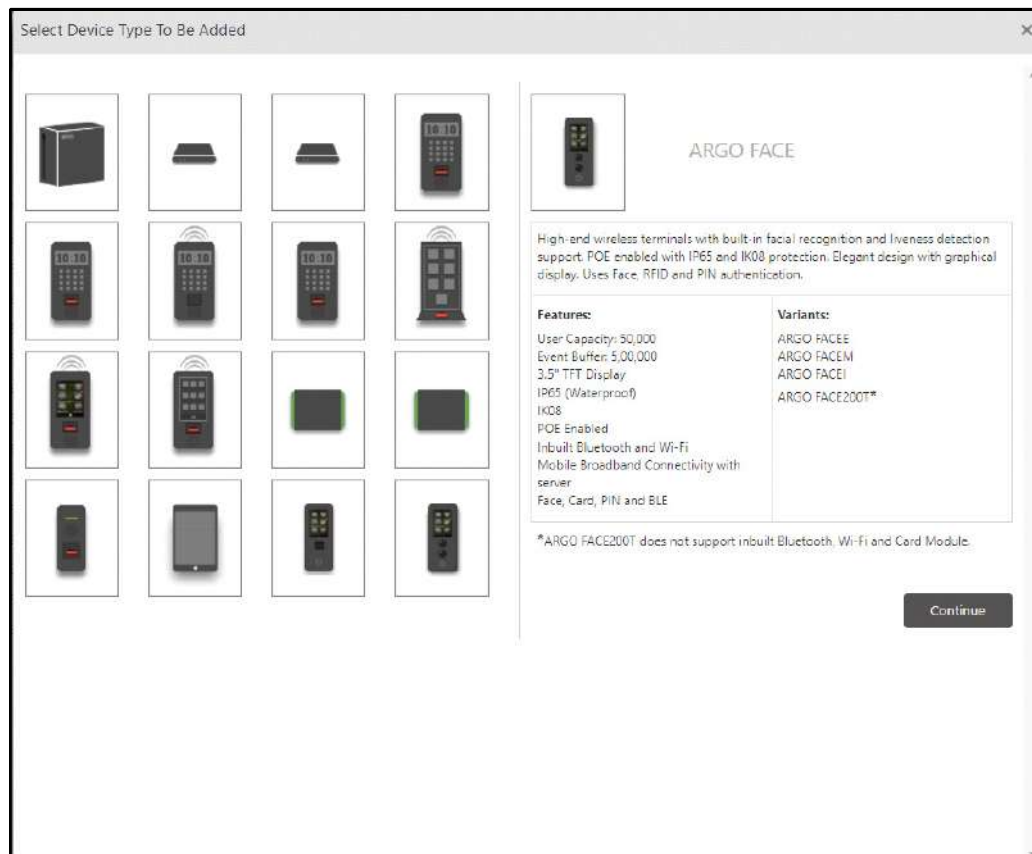


*The features and functionalities supported will differ as per the variant installed.*

ARGO FACE can be connected as **Direct Door** as well as **Panel Door**.

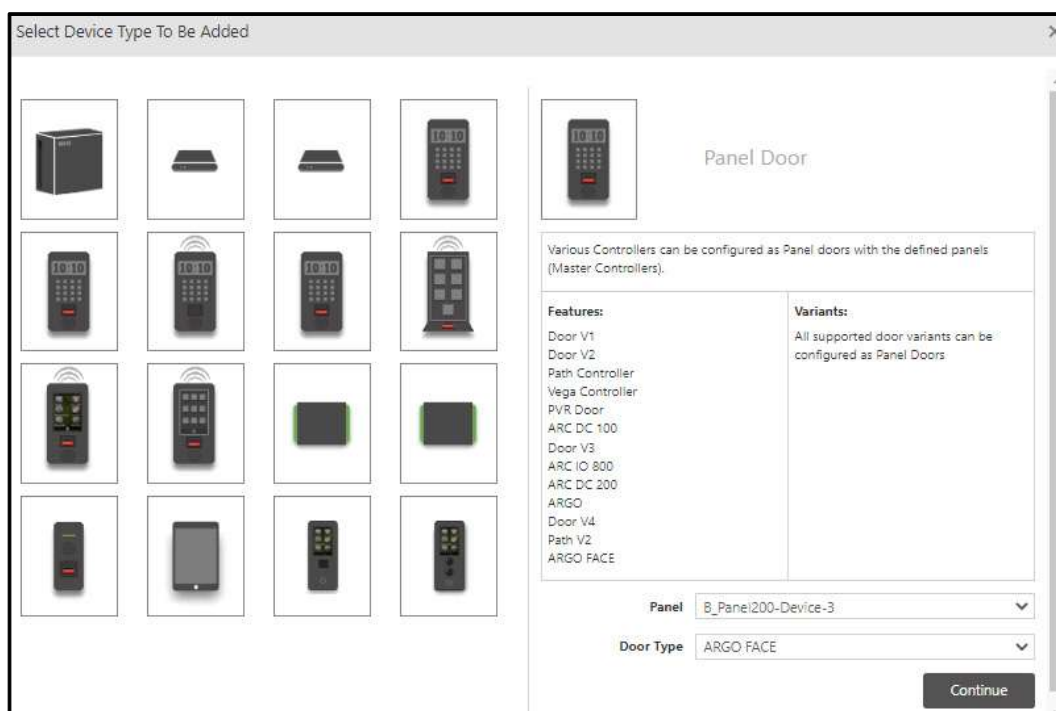


Click the ARGO FACE device from the Device List to add it as a **Direct Door**.



OR

Click Panel Door to add ARGO FACE device as a **Panel Door**.



**Panel:** Select the desired Panel from the drop-down list with which you wish to connect the Door.

**Door Type:** Select **ARGO FACE** from the drop-down list.

Click **Continue**.

The **Device Configuration** page for ARGO FACE Door appears.

To add Devices automatically, click Admin Module > System Configuration > Global Policy > Device. Select the “Auto Add New Devices” check box. Once the device is connected in the network, it comes online in COSEC Monitor.



*While adding the device to COSEC Server, make sure the COSEC Monitor Service is running.*

To configure the parameters, you can:

- copy the parameters from another device, refer to [“Copy Parameters From”](#).
- OR**
- can click each link to configure the parameters, refer to [“Selective Configuration”](#).

## Copy Parameters From

You can also copy the parameters from another device, if required.



*The Copy Configuration From option is applicable in Add (after you have selected the desired device type) as well as Edit mode of any added device.*

*If certain parameters are configured and Copy Parameters From option is clicked, then:*

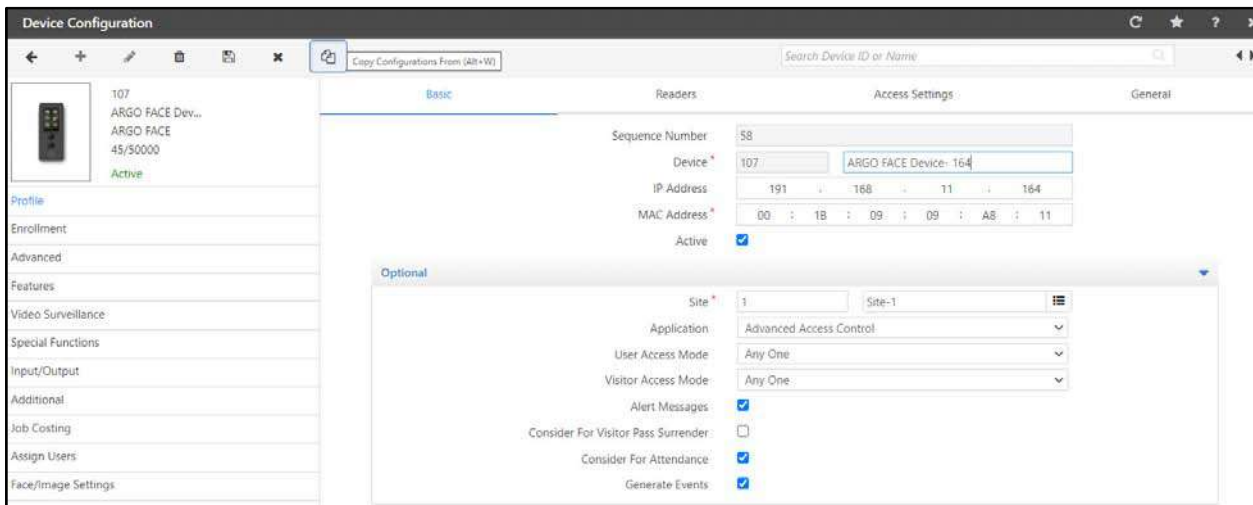
- *the value of the applicable parameters already configured will be over-written with the values as configured in the selected device.*
- *the values of other parameters that are configured will remain as they are.*

*If none of the parameters are configured and Copy Parameters From option is clicked, then*

- *all the applicable parameter values will be copied from the selected device.*
- *the values of the other parameters will be their default values.*

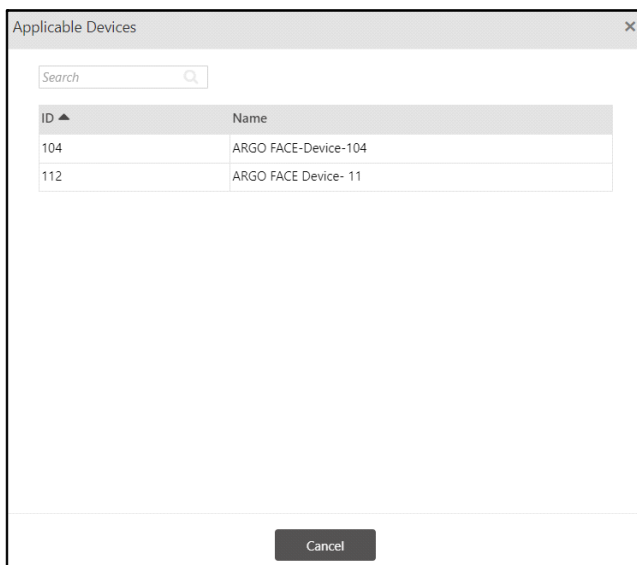
*To know more about the applicable parameters that will be copied, refer to [“Copy Parameter Details”](#).*

To do so, click **Copy Configuration From** .



The screenshot shows the 'Device Configuration' window. On the left, a sidebar lists various configuration categories. The main area is divided into tabs: 'Basic', 'Readers', 'Access Settings', and 'General'. The 'Optional' section is expanded, showing settings for 'Site', 'Application', 'User Access Mode', 'Visitor Access Mode', 'Alert Messages', 'Consider For Visitor Pass Surrender', 'Consider For Attendance', and 'Generate Events'. The 'Device' field is set to '107' and 'ARGO FACE Device- 164'.

The **Applicable Devices** pop-up appears.



The 'Applicable Devices' pop-up window displays a search bar and a table of devices. The table has two columns: 'ID' and 'Name'.

ID	Name
104	ARGO FACE-Device-104
112	ARGO FACE Device- 11

A 'Cancel' button is located at the bottom right of the pop-up.



*The devices that appear in the Applicable Devices pop-up will be of the same family and device type. Let us understand this:*

- In case of Direct Door, the pop-up will display other ARGO FACE Direct Doors only. For example, if you have direct door devices — ARGOFACE1, ARGOFACE2, Vega1 and Vega2, then this pop-up will display only ARGOFACE1 and ARGOFACE2.
- In case of Panel Door, the pop-up will display other Vega Panel Doors connected with the same Panel only. For example if you have two Panels — Panel1 and Panel2 connected. In Panel1 the connected Panel Doors are VegaPD1, VegaPD2, ARGOFACEPD1, ARGOFACEPD2. In Panel2 the Panel Doors connected are ARGOFACEPD3 and ARGOFACEPD4. Then, if you are adding the new ARGO Panel Door to Panel1, then this pop-up will display ARGOFACEPD1 and ARGOFACEPD2 only.

Select the desired device from which you wish to copy the configurations.

OR

You can also search for the desired device using the Search option and then select the device.

A Warning pop-up appears. Click **Yes** to copy all the applicable parameters. A processing screen appears.



*Only applicable parameters will be copied. For details, refer to [“Copy Parameter Details”](#).*

*If during the processing screen, you click Cancel, then the entire copy process will be aborted.*

If all applicable parameters are copied successfully, then the Applicable Configurations are Successfully Copied message will be displayed.

If all applicable parameters are not copied successfully, then the Failed to copy. Please try again message will be displayed.

## Selective Configuration

To know more about configuring the device, click on the links for different tabs of Device configuration.

- [“Profile”](#)
- [“Enrollment”](#)
- [“Advanced”](#)
- [“Features”](#)
- [“Video Surveillance”](#)
- [“Special Functions”](#)
- [“Input/Output”](#)
- [“Additional”](#)
- [“Job Costing”](#)
- [“Assign Users”](#)
- [“Cafeteria”](#)
- [“Face/Image Settings”](#)

# Profile

The screenshot shows the 'Device Configuration' window. On the left, a sidebar lists configuration categories: Profile, Enrollment, Advanced, Features, Video Surveillance, Special Functions, Input/Output, Additional, Job Costing, Assign Users, and Face Settings. The 'Profile' category is selected. The main window has four tabs: Basic, Readers, Access Settings, and General. The 'Basic' tab is active, displaying fields for Sequence Number (15), Device (2003), IP Address, MAC Address (12-AD-78-12-AA-47), and an Active checkbox. Below these is an 'Optional' section with Site (1), Application (Basic Access Control), User Access Mode (Any One), Visitor Access Mode (Any One), Alert Messages, Consider For Visitor Pass Surrender, Consider For Attendance, and Generate Events.

This section enables the user to set up the basic profile for any new device. Setting up a door profile involves defining basic parameters to set up any door controller device.

To do this, on the **Device Configuration** page, click the **Profile** tab in the left pane. To configure the Profile parameters click the following links:

- [“Basic”](#)
- [“Readers”](#)
- [“Access Settings”](#)
- [“General”](#)

## Basic

The **Basic** section appears on your screen as shown below.



*Sequence Number, Device, IP Address, MAC Address and Active are applicable for both Direct Door and Panel Door.*

For ARGO FACE as a **Direct Door**,

This screenshot is a zoomed-in view of the 'Basic' tab in the 'Device Configuration' window. It shows the same fields as the previous image: Sequence Number (15), Device (2003), IP Address, MAC Address (12-AD-78-12-AA-47), and an Active checkbox. The 'Optional' section is also visible, showing Site (1), Application (Basic Access Control), User Access Mode (Any One), Visitor Access Mode (Any One), Alert Messages, Consider For Visitor Pass Surrender, Consider For Attendance, and Generate Events.

Configure the following options:

- **Sequence Number:** This is a system generated sequence number for each new device.

- **Device:** Specify a name that can be assigned to the door. The Door ID is auto-generated by the system.
- **IP Address:** This is the IP address assigned to the door. Once the device connection is established, this field will automatically display the door IP address.
- **MAC Address:** Enter the MAC Address of the door.



*MAC address of door is required while manually adding the door to the COSEC Monitor. Note the MAC address from the device when it is powered on.*

- **Active:** Select the check box to activate the device in the network.



*To add the Device automatically, click Admin Module> System Configuration> Global Policy> Device. Enable the **Auto Add New Devices** check box.*

*The device will be added automatically but make sure you enable the **Active** check box in order to connect the device to the network. Once the device is connected to the network, it will come online in COSEC Monitor.*

Click the **Optional** collapsible tab, to configure the parameters:

- **Site:** Click the picklist and select the site to which this door is to be assigned. Site is created from **Devices> Masters> Site**.
- **Application:** Select the type of application for which the device is to be used. Option are — **Basic Access Control, Advanced Access Control** and **Cafeteria**. All devices set to **Cafeteria** will subsequently be available for Cafeteria configuration.
- **User/Visitor Access Mode:** Defines the type and combination of credentials required to identify and validate a user at the Door Controller. Select the appropriate credential combination from the drop-down list. The options are
  - Any one
  - Card
  - Card + PIN
  - None
  - Face
  - Card+ Face
  - PIN + Face



*Users will be able to use QR Code as credentials (if enabled) and if User/Visitor Access Mode is selected as Any one, Card, Card+PIN or Card+Face.*

- **Cafeteria Face Access Mode:** When Application option is set as 'Cafeteria', only then this configuration is available to the Admin and to add provision of using face as a credential to make transactions on cafeteria devices.

Select the mode type from the drop-down list to allow a user to choose multiple menu items and upon checkout do transactions using face as credential.

The options available are **None, Default Item** and **Item Selection**.

**Default Item:** This mode in cafeteria will allow users a touch-less cafeteria experience. In Default Item mode only the transaction for default item is allowed. A default item is assigned in each scheduled menu.

- **Item Selection:** This mode in cafeteria will allow users to select the desired menu items and make a transaction using Face as a credential.
- **Alert Messages:** Select this check box to enable the application to send alerts based on events from this door.
- **Consider for Visitor Pass Surrender:** Select this check box to consider the selected device for visitor pass surrender. The Visitors can show their credentials on this device to surrender their passes.
- **Consider for Attendance:** Select this check box if the events sent by this door are to be considered for Time and Attendance data processing. If this option is disabled, then the system would consider all events coming from the door as Access Control events.
- **Generate Events:** By default, this check box is selected. Click to disable, if the server is not required to receive any events from the this device.

For ARGO FACE as a **Panel Door**,

Click the **Optional** collapsible panel, to configure the parameters:

- **Site:** Click the picklist and select the site to which this door is to be assigned. Site is created from Devices> Masters> Site.
- **Consider for Attendance:** Select this check box if the events sent by this door are to be considered for Time and Attendance data processing. If this option is disabled, then the system would consider all events coming from the door as Access Control events.
- **Alert Messages:** Select this check box to enable the application to send alerts based on events from this door.
- **Access Zone:** Assign an access zone to the door by selecting the desired zone from the drop-down list.
- **Access Cluster:** Assign an access cluster to the door by selecting the desired access cluster from the drop-down list
- **Door Group:** The Door Group drop-down includes the list of all configured Door Groups on the corresponding Panel. An additional option as 'None' is available and selected by default.
- **Auto IP Assignment:** There is an option where the panel door can be assigned its IP from the device webpage. To enable this option, select the Auto IP Assignment check box.





Access Zone is configured while configuring Panel200.

## Readers

Readers are important hardware components in a biometric door device. They may be internal or external. This section enables the administrator to configure both internal and external readers for a door as shown below.

Click the **Reader** tab and configure the following parameters:



*Door Mode Selection, Prompt Special Function and Auto Detect Readers are applicable for Direct Door only.*

- **Door Mode Selection:** Select the check box, if you want the user to select the punch type as IN or OUT while punching on the device.

E.g: When a door is in Entry mode, your punches will always be in Entry side. But if you want to mark the punch in exit mode then you can select the door mode if “Door Mode Selection” is enabled.

If not selected, user will need to enable Scheduling to set reader mode of door as entry or exit as per user-defined schedules. For information on creating Reader Mode Schedules, refer **Devices > Masters > Reader Mode Scheduler**.

- **Prompt Special Function:** This will provide selection of special function on device screen and based on the selection of particular type of special function, job codes for JPC user will be prompted.

This can be enabled only when Door Mode Selection is enabled.

- **Auto Detect Readers:** Select this check box to enable auto detection of Readers on the door controller connected to the server.

## Internal Readers

This option allows the configuration for the Internal Reader of the selected door.

Click **Internal Readers** collapsible panel and configure the following parameters.



*Mode, Card Reader Type and Card Format are applicable for both Direct Door and Panel Door.*

- **Mode:** Select the Mode as **Entry** or **Exit** from the drop-down list.
- **Card Reader Type:** Select the desired Card Reader Type from the drop- down list.
- **Card Format:** Single or multiple card formats can be assigned to the readers of the door. The default card format is assigned to device as shown in the grid. If no other card format is assigned to device; then this default format will be applied. To know more about Card Formatting, refer [“Card Formats”](#).

### Multiple Card Format

- To assign multiple card formats to device click **Add**. Then click the picklist to select the desired card format and click **OK** to save the format.

- Similarly, you can add maximum 5 card formats. When the card format is saved, the Configured bits of that format as configured from Masters> Card format will be displayed here. Multiple Card format configurations will be sent by the server to the door separated by '**Format ID**' that is 'Member No.' along with all other format related parameters.

**Internal Readers**

Mode: Entry

Card Reader Type: EM Prox Reader

Search

Member No ▲	Card Format	Configurable Bits
1	Default Format	0
2	Format1	26
3	Format2	32



*Enable Scheduling and Reader Mode Schedule are applicable for Direct Door only.*

- **Enable Scheduling:** Select the check box to enable automated control of an Internal Reader. This will set reader mode of door as entry or exit as per user-defined schedules.
- **Reader Mode Schedule:** Click the picklist and select the schedule which is to be assigned to the internal reader of ARGO FACE Door. With this the same reader can be configured to function both in Entry as well as Exit mode based on scheduled timings.



*For configuring Reader Mode Schedule refer Devices> Masters> Reader Mode Scheduler.*



*Advertise Bluetooth, Bluetooth Name and Bluetooth Range are applicable for both Direct Door and Panel Door.*

- **Advertise Bluetooth:** Select this check box to enable Bluetooth of the device by which the device will be visible to others. Then configure the following parameters:
  - **Bluetooth Name:** By default, if the Device Name is configured then it will be displayed here along with the Mode. The prefix will be the Device Name and the suffix will be -IN or -OUT as per the set Mode.  
  
If required, you can configure the bluetooth name as per your requirement. The Bluetooth Name can be a maximum of 10 characters.
  - **Bluetooth Range:** The system supports different ranges of bluetooth using which the users can mark their attendance. You can set the desired range to control the boundary for marking the attendance.  
  
Select the Bluetooth Range as — Short (1m-2m), Medium (5m-7m), Long (>8m) or Custom.
  - **Custom Bluetooth Range (dBm):** If you select **Custom** option for Bluetooth Range, enter the Bluetooth range manually or set the range using the slider. Drag the slider towards the left to decrease the value or drag the slider to the right to increase the value.
- Click **Save**.

## External Readers

This option allows you to configure the External Reader for the selected door.



*Mode, External Reader Type, Card Format and Exit Switch are applicable for both Panel Door and Direct Door.*

Click **External Readers** collapsible panel and configure the following parameters.

- **Mode:** Select the Mode as **Entry** or **Exit** from the drop-down list.
- **External Reader Type:** Select the desired type of External Reader from the drop-down list.



*If you are using PIN-W Reader; user's will be able to change their PIN number from the devices.*



*User Access Mode, Visitor Access Mode and Access Control on Exit Mode is applicable for Direct Door only.*

- **Exit Switch:** Select this check box to enable the use of **Exit Switch**.
- **User/ Visitor Access Mode:** Select the access mode from the options:
  - Any One
  - Card
  - None
  - BLE
  - Card + PIN
- **Card Format:** Select a card format to be applicable for external readers of the device. This is applicable for all Direct Doors and all Panel Doors. For multiple format description refer "[Multiple Card Format](#)".

Bluetooth parameters are configurable for both Direct Door as well as Panel Door.

- **Configure Bluetooth from Server:** When you select External Reader Type as — CB U Reader, ATOM RD300, ATOM RD200 or ATOM RD100, select Configure Bluetooth from Server check box to enable Bluetooth feature of aforementioned readers.

Once you enable Configure Bluetooth from Server, configure the following Bluetooth parameters:

- **Advertise Bluetooth:** Select this check box to enable Bluetooth of the device by which the device will be visible to others. Then configure the following parameters:

- **Bluetooth Name:** By default, if the Device Name is configured then it will be displayed here along with the Mode. The prefix will be the Device Name and the suffix will be -IN or -OUT as per the set Mode.

If required, you can configure the bluetooth name as per your requirement. The Bluetooth Name can be a maximum of 20 characters.

- **Bluetooth Range:** The system supports different ranges of bluetooth using which the users can mark their attendance. You can set the desired range to control the boundary for marking the attendance.

If you select the **External Reader Type** option as ATOM RD200/300, then only you can select the **Custom** option for Bluetooth Range.

- **Custom Bluetooth Range (dBm):** If you select **Custom** option for Bluetooth Range, enter the Bluetooth range manually or set the range using the slider. Drag the slider towards the left to decrease the value or drag the slider to the right to increase the value.
- **Access Control On Exit Mode:** Select this check box to enable the checking of the following access control policies on the door when the external reader is in the 'Exit' mode.
  - User enabled
  - User validity
  - Blocked user
  - Time Based Access Check
  - ASC
  - User Access Group

## Access Settings



*Access Settings are applicable for Direct Door only.*

Click the **Access Settings** tab. The **Access Settings** page appears:

- **Universal Time Zone:** Select the geographic time zone in which the DOOR will operate. Select the relevant option from the drop-down list as per the site requirement.

- **Time Format:** Specifies the time format to be displayed on the Door Controller's LCD display. Select the relevant option from the drop-down list as per the site requirements.
  - 24 Hours
  - 12 Hours

**Auto Synchronize with NTP:** If Date and time is to be automatically synchronized as per the **Preferred NTP Server** (predefined or user-defined NTP server address) selected by user, then you must select the **Auto Synchronize With NTP** check box to enable.

Independent of the mode set from server as Auto or Manual, the user can change the date and time settings from device webpage, which will be reflected on device display.

- When Auto Synchronization with NTP is disabled Preferred NTP Server field will be disabled.
- When Auto Synchronization with NTP is enabled,
  - You can specify the **Preferred NTP Server** of your choice. In this case device will first try to get Date and Time from that server address.

If it does not get Date and Time in three tries; device will check from pre-defined NTP servers.

If you have entered one of the three pre-defined NTP servers(ntp1.cs.wisc.edu , time.windows.com, time.nist.gov); then device will first check that server first.

If it receives updated Date and Time then Updated Date and Time will be reflected on device webpage and display screen.

- You can keep the Preferred NTP Server as blank. In this case device will check for Date and Time from the first NTP server.



*If user has manually entered Date and Time from device web page or Device Menu, then these values of Date and Time will be reflected on device webpage and display screen.*

*In the case of the **Manual** option the administrator can manually update the time on the Door with that of the system time as and when required. This can be accomplished from the COSEC Monitor.*

- **Working Days:** Specify the days on which the default working hours should be applicable. Select the respective check boxes of the relevant days.
- **Working Hours (HH:MM):** Define the default working hours in HH:MM format.
- **Holiday Schedule:** Click the picklist and select the desired Holiday Schedule. The Administrator can assign upto four Holiday Schedules to the device.



*If the same Holiday Schedule is configured for a user and for the door controller on which the user is assigned, then the user's attendance marking on this device, on any of the scheduled holidays will always be marked as a holiday.*

- **Device Access Schedule:** All the Access Schedules created from the "[Access Schedules](#)" page appear in the drop-down list. By default, the Access Schedule, if assigned from the Access Schedule page appears here. If you wish to change the Access Schedule, select the desired Access Schedule to be assigned to the device from the drop-down list.

If an Access Schedule is selected, it will override the Working Days configuration.

If an Access Schedule is already assigned from “[Access Schedules](#)” page and a different schedule is selected here, it will override the schedule assigned from “[Access Schedules](#)” page and vice versa.

To revoke an Access Schedule, select the **Select** option from the list. The device will be removed from the Access Schedule under the “[Assign Doors](#)” section on the “[Access Schedules](#)” page.

## General

Click the **General** tab.

Enter all general details applicable to the device in this section.



*Mute Buzzer, Allowed Acknowledgment, Denied Acknowledgment and Auto Hide Menu Bar are applicable for both Direct Door and Panel Door.*

*If you have connected Readers — ATOM RD100/200/300, PATH — then the configurations for Allowed/ Denied Acknowledgment will be applicable to these readers as well.*

- **Mute Buzzer:** Select the check box to enable door buzzer muting.
- **Allowed Acknowledgment**
  - **Display Duration (ms):** Specify the time duration for which the **Acknowledgment Allowed** message should be displayed. Valid Range is 250 to 3000 ms.
  - **LED - Buzzer Duration:** Select the time duration for the LED Buzzer from the drop-down list options— Long, Medium, Short, Shortest.
- **Denied Acknowledgment**
  - **Display Duration (ms):** Specify the time duration for which the **Acknowledgment Denied** message should be displayed. Valid Range is 250 to 3000 ms.

- **LED - Buzzer Duration:** Select the time duration for the LED Buzzer from the drop-down list options—Long, Medium, Short, Shortest.



*Enable Display Messages, Custom Birthday Message, Display Message 1 to 4, Schedule, Message and Multi-Language Support are applicable for Direct Door only.*

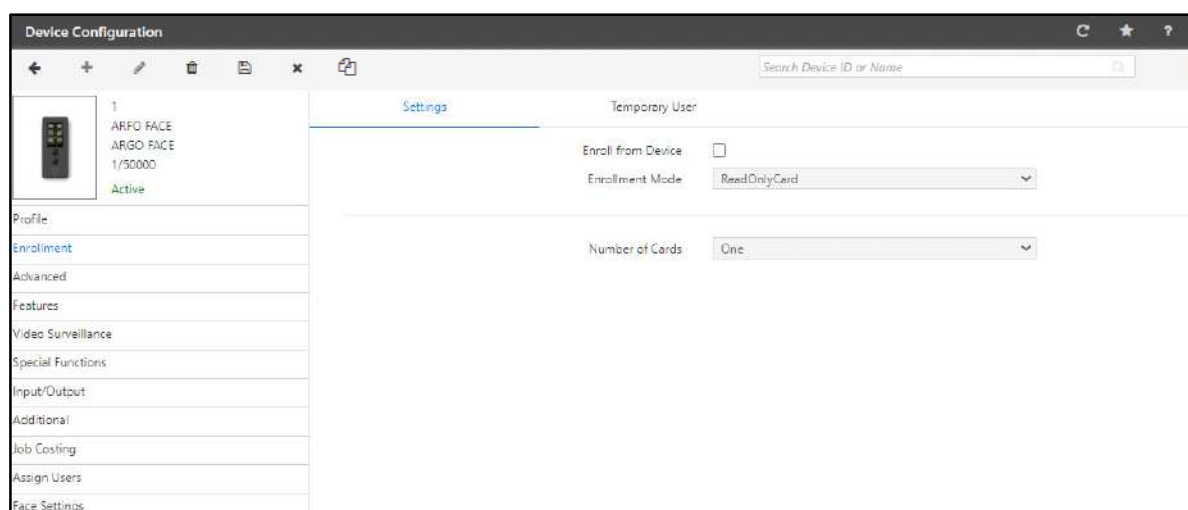
- **Enable Display Messages:** Select this check box, if you wish to customize the messages as well as display them on the device. You can customize and display the Birthday Message and 4 other Messages.
- **Custom Birthday Message:** Enter the birthday message to be displayed on the door to the user, when the user punches on the door on her/his birth date.

The valid values are: A-Z a-z 0-9 `~!@#\$%^&\*()\_+-{}|\\|:;?<>.,\''"

- **Display Message 1 to 4:** Select this check box to enable each display message. These check boxes are enabled automatically if you select the **Enable Display Message** check box.
- **Schedule:** Specify the time duration for which the display message should be displayed in HH:MM format.
- **Message:** Enter the message to be displayed. Maximum 21 characters are allowed.
- **Multi-Language Support:** Select this check box to enable multi-language support for the selected device.
- **Auto Hide Menu Bar:** If any user touches the device screen by mistake and enters into the Menu; then users punch will not be accepted by the device till the Menu is closed or till time out occurs. To avoid such a scenario, select this check box. This will hide the Menu, hence users will be able to punch on the door. To access the Menu, swipe upwards on the device screen. The Menu appears.

## Enrollment

On the **Device Configuration** page, click the **Enrollment** tab in the left pane. The Enrollment page appears.



To configure the Enrollment parameters click the following links:

- [“Settings”](#)
- [“Temporary User”](#)



## Settings



*Settings is applicable for Direct Door only.*

Click the **Settings** tab. The **Settings** page appears.

Settings		Temporary User	
Enroll from Device	<input type="checkbox"/>		
Enrollment Mode		ReadOnlyCard	▼
Number of Cards		One	▼

Configure the following parameters.

- **Enroll from Device:** Select this check box to enable the enrollment of user from the door controller. When this check box is enabled, 'Enroll User' special function on that device will get activated.



*If 'Enroll User' Special Function & 'Enroll From Device' check box both are disabled in device configuration, then on activating 'Enroll User' special function, 'Enroll From Device' check box will be enabled.*

- **Enrollment Mode:** Select the Credential from the drop-down list that can be enrolled using the special function at the DOOR. The options are — **ReadOnlyCard, SmartCard and Face.**
- **Number of Cards:** Select the number of cards to be enrolled based on the credential option (ReadOnlyCard or SmartCard) selected in the Enrollment Mode parameter.

## Temporary User



*Temporary User/Worker is applicable for both Direct Door and Panel Door.*

*Temporary User/Worker is not applicable for Cafeteria mode of devices.*

*For Panel Door to add Temporary User/Worker, make sure*

- *Temporary Addition of Unknown User is enabled from Panel200 > Enrollment > Temporary User.*
- *User Access Mode (Door) in Zones is — Face, Biometric or Card — as per your requirement.*

*For Direct Doors make sure the User Access Mode selected in Profile is — Face, Biometric or Card — as per your requirement.*

Click the **Temporary User** tab. The **Temporary User** page appears.

Settings Temporary User

Temporary Addition of Unknown User Disabled

Confirm before adding Temporary User

**Auto Generate ID**

ID Format

Numeric Value Length 0

Zero Padding required

**Auto Generate Name**

Add Name via Device

Name Format

**Group**

Organization	1	Organization-1
Branch	1	Branch-1
Department	1	Department-1
Section	1	Section-1
Category	1	Category-1
Grade	1	Grade-1
Designation	1	Designation-1
Custom Group 1	1	Custom Group 1
Custom Group 2	1	Custom Group 2
Custom Group 3	1	Custom Group 3

Configure the following parameters.

- **Temporary Addition of Unknown User:** Select the option to temporarily add an unknown user from the drop-down list. The options are — Disabled, As Temporary Worker or As Temporary User. By default, **Disabled** is selected. If you select **Disabled**, all the parameters are disabled.

You can add an unknown user either as a temporary user or worker from the device at a time.

If you select As Temporary User, for details refer to [“As Temporary User”](#).

If you select As Temporary Worker, for details refer to [“As Temporary Worker”](#).

## As Temporary User

Temporary User		
Temporary Addition of Unknown User	Disabled	
Confirm before adding Temporary User	<input type="checkbox"/>	
<b>Auto Generate ID</b>		
ID Format		
Numeric Value Length	0	
Zero Padding required	<input type="checkbox"/>	
<b>Auto Generate Name</b>		
Add Name via Device	<input type="checkbox"/>	
Name Format		
<b>Group</b>		
Organization	1	Organization-1
Branch	1	Branch-1
Department	1	Department-1
Section	1	Section-1
Category	1	Category-1
Grade	1	Grade-1
Designation	1	Designation-1
Custom Group 1	1	Custom Group 1
Custom Group 2	1	Custom Group 2
Custom Group 3	1	Custom Group 3


If you select **As Temporary User**, configure the following parameters.

- **Confirm before adding Temporary User:** Select the check box if you wish that a confirmation message should be displayed on the device display screen, to confirm a user before adding that user as a temporary user when enrolling the same from the device. If this is not enabled, no confirmation message will be displayed and the user/worker will be enrolled automatically. You need to check the Temporary User/ Worker list to verify if the user is enrolled in the system.

### Auto Generate ID

- **ID Format:** Configure the required format of the ID as 'Numeric Value Format' and/or other Value Formats in any order as per the requirement. You can also enter the fixed value which will always be displayed along with the other components of the User ID for every user.

To select the different format for the ID, Enter the \* in **ID Format** box and the drop-down list containing different Value format list will appears. Select the required one from the drop-down list.


Click **Copy User Format from Global Policy**  to copy the ID Format if you have configured the same from Global Policy. For more details, refer to ["Generate User ID"](#).

- **Numeric Value Length:** Enter the desired number of the digits from 1 to 15 till which the 'NUMVAL' will be generated. For example: 4.

- **Zero Padding Required:** Select the check box to allow the addition of zeros before the 'NUMVAL' value to reach the configured Numeric value length. For example, if the Numeric value length is configured as 4 and the number assignment starts from a single digit then as explained in above example, the new user id to be generated is 'MATRIX4DOC1' if Zero Padding is enabled, it will generated as 'MATRIXDOC0001'.

## Auto Generate Name

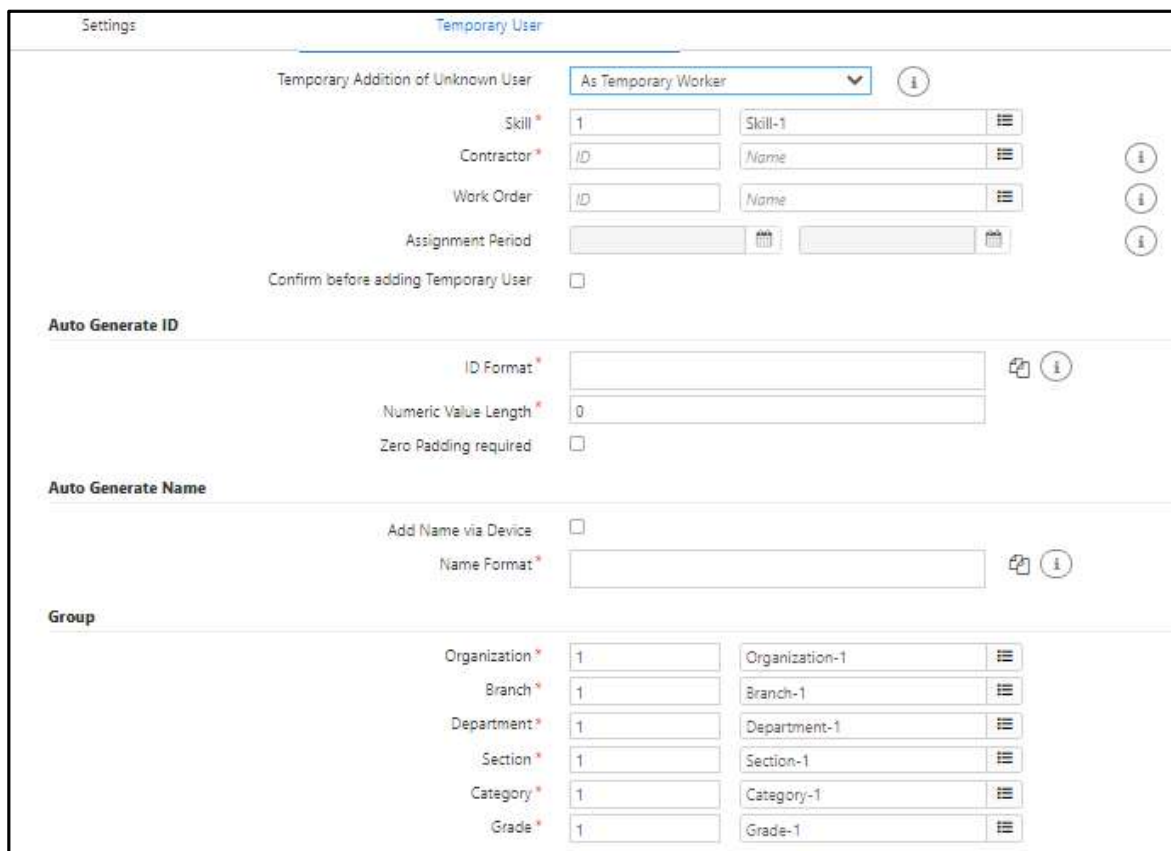
- **Add Name via Device:** Select the check box to enable adding the name of the temporary user through the device display screen while enrolling the user. If enabled, the **Name Format** parameter is disabled.
- **Name Format:** Configure the required format of the Name as 'Numeric Value Format' and/or other Value Formats in any order as per the requirement. You can also enter the fixed value which will always be displayed along with the other components of the User ID for every user. To select a different format for the ID, enter \* in **Name Format** box and select the desired format from drop-down list.

You can also copy the Name Format as configured in ID Format. To do so, click **Copy ID Format**  .

## Group

By default, groups for Organization, Branch, Department, Section, Category, Grade, Designation, Custom Group 1, 2 and 3 are assigned. If you wish to assign different groups to the temporary user, you need to create groups from the Enterprise Module. Create the desired groups and then select the group from the respective picklist. For details on creating groups, refer to ["Configuring Groups"](#).

## As Temporary Worker



Settings Temporary User

Temporary Addition of Unknown User: As Temporary Worker

Skill: 1 Skill-1



Contractor: ID Name

Work Order: ID Name

Assignment Period: [Date Picker] [Date Picker]

Confirm before adding Temporary User: ☐

**Auto Generate ID**



ID Format: [Text Box]  

Numeric Value Length: 0

Zero Padding required: ☐

**Auto Generate Name**

Add Name via Device: ☐

Name Format: [Text Box]  

**Group**

Organization: 1 Organization-1

Branch: 1 Branch-1

Department: 1 Department-1

Section: 1 Section-1

Category: 1 Category-1

Grade: 1 Grade-1

If you select **As Temporary Worker**, configure the following parameters.

- **Skill:** Select the Skill to be assigned to the temporary worker from the picklist.

- **Contractor:** Select the Contractor to be assigned to the temporary worker from the picklist.



*If the Contractor does not appear in the picklist, check the Contractor's **Validity End Date**. The Validity End Date shall not be included in the validity period of the Contractor. For details, refer to "[Contractor Profile](#)".*

- **Work Order:** Select the Work Order to be assigned to the temporary worker from the picklist.
- **Assignment Period:** The work order assignment period is auto-displayed based on the work order selected. If you wish to change the assignment period, select the start date and end date of work assignment using the calendar.

The other temporary worker parameters are similar to that of temporary user. For details, refer to "[As Temporary User](#)".

## Advanced

The screenshot shows the 'Device Configuration' window with the 'Advanced' tab selected. The left sidebar lists various configuration categories, and the main area displays settings for a device with ID '0/50000' and name 'ARGO FACE'.

Category	Setting	Value
Settings	Generate Exit Switch Events	<input type="checkbox"/>
	Generate Invalid User Events	<input type="checkbox"/>
	Generate Sequential IN-OUT Events	<input type="checkbox"/>
	Two Credentials Required	<input type="checkbox"/>
	Show PIN	<input type="checkbox"/>
	Allow Exit when Door Lock	<input checked="" type="checkbox"/>
	Auto Relock	<input type="checkbox"/>
	Auto Relock Timer (Sec)	3
	Enable Additional Security	<input type="checkbox"/> Disabled
	Enable Smart Identification	<input type="checkbox"/>
Access Control	Access Level	8
	Access Mode	Card
Alarms	Auto Acknowledge Alarm	<input type="checkbox"/>
	Auto Acknowledge Alarm (Sec)	10
Facility	Facility Code	1
	Allow Access Through Mobile	<input type="checkbox"/>
Mobile Access	Mobile Entry Access Mode	Mobile Only
	Mobile Exit Access Mode	Mobile Only
Attendance	Show Attendance Details	<input type="checkbox"/>
	Duplicate Access Time Interval (Sec) *	0

The Advanced tab allows you to configure some advanced parameters such as Access Control Settings, Alarms and Device Timers as well as Wiegand.

To access this, on the **Device Configuration** page, click the **Advanced** tab in the left pane. The advanced settings can be configured from following sections:

- “Settings”
- “Alarms”
- “Timers”
- “Wiegand”

## Settings

Click the **Settings** tab.

The Settings parameters differ for ARGO Face as Direct Door and Panel Door.

### Settings - Direct Door

The **Advanced> Settings** page for ARGO Face as **Direct Door** appears as shown below.

The screenshot displays the 'Device Configuration' window for an ARGO FACE device (ID: 0/50000, Active/Inactive). The left sidebar contains a list of configuration sections: Profile, Enrollment, Advanced (selected), Features, Video Surveillance, Special Functions, Input/Output, Additional, Job Costing, Assign Users, and Face/Image Settings. The main area shows the 'Settings' tab with various configuration options:

- Generate Exit Switch Events: ☐
- Generate Invalid User Events: ☐
- Generate Sequential IN-OUT Events: ☐
- Two Credentials Required: ☐
- Show PIN: ☐
- Allow Exit when Door Lock: ☒
- Auto Relock: ☐
- Auto Relock Timer (Sec): 3
- Enable Additional Security: ☐ Disabled
- Enable Smart Identification: ☐
- Access Level: 8
- Access Mode: Card
- Auto Acknowledge Alarm: ☐
- Auto Acknowledge Alarm (Sec): 10
- Facility Code: 1
- Allow Access Through Mobile: ☐
- Mobile Entry Access Mode: Mobile Only
- Mobile Exit Access Mode: Mobile Only
- Show Attendance Details: ☐
- Duplicate Access Time Interval (Sec): 0

Configure the following parameters:

- **Generate Exit Switch Events:** Select this check box to enable the door to generate events every-time the exit switch is used.
- **Generate Invalid User Events:** Select this check box to enable the door to generate events for invalid user inputs.



***Generate Invalid User Events** is applicable for all other credentials except **Face**. To generate events for **Face** credentials, make sure **Generate Unidentified Face Event** is enabled under [“Face/Image Settings”](#).*

- **Generate Sequential IN-OUT Events:** Select this check box to generate user punches on device as the sequential IN-OUT events irrespective of the mode in which the device is functioning.
- **Two Credentials Required:** Select this check box to enable the feature of verifying 2 credentials compulsorily for users.
- **Show PIN:** Select this check box to display the characters of the PIN when the PIN is entered on the device.
- **Allow Exit when Door Lock:** Select this check box if users are to be allowed to exit even when the Door relay is in locked condition.
- **Auto Relock:** Select this check box to allow the door to relock immediately when the door status changes to close after normal open irrespective of the defined pulse time. However, it is supported only if a door sense is installed and enabled.
- **Auto Relock Timer:** Specify the time in seconds after which the door should relock. Valid Range: 1 to 65535.
- **Enable Additional Security:** Select this check box to enable additional security at the selected Door Controller.
- **Enable Smart Identification:** Select this check box to enable this functionality on the selected Door Controller and select the **Access Level** and the **Access Mode** from the drop-down list.
- **Auto Acknowledge Alarm:** Select this check box to enable the auto-acknowledgment of all alarms for this device.
- **Auto Acknowledge Alarm (sec):** Set the time in seconds The wait timer will start and on expiry of the timer, the alarm buzzer will stop automatically.
- **Facility Code:** Set a value for Facility Code to be set for access modes other than “Card”, if Facility Code is expected in Wiegand Output. This will be applicable to all direct doors except Door V1 and V2.
- **Allow Access Through Mobile:** Check the box to allow the access to device using COSEC ACS Application.
- **Mobile Entry/Exit Access Mode:** Select the entry and exit door access mode from the options — **Mobile Only**, **Mobile then Card** and **Mobile then PIN**.



*Users will be able to use QR Code as credentials (if enabled) and Mobile Entry/Exit Mode is selected as Mobile then Card.*

- **Show Attendance Details:** Select this check box for displaying the Attendance Details of the user on ARGO FACE door. This allows users to view their attendance details on ARGO FACE door and there is no need to login to ESS application to view attendance details.

The attendance details of user will be displayed for a period of 3-4 seconds after the Access Allowed screen.



1. The user whose Attendance details are to be displayed on ARGO FACE door must be enabled for this feature. Enable the check-box **Show Attendance details on Device** from User Configuration> T&A> Attendance.

2. While an attendance detail of one user is being displayed on the device and second user tries to access the device; new user request will be processed.

3. Whenever both users of 2-person rule are allowed to get access on device then attendance details screen of second user will be loaded on device.

- **Duplicate Access Time Interval (Sec):** Configure the maximum duration in seconds for which the device should consider a subsequent user punch (after the first successful allowed punch) received as a duplicate punch. Valid Range: 0 to 9999 seconds. Default: 0.



The Duplicate Access Time Interval is not applicable:

- if Duress Finger is detected by the device.
- if the device is in Cafeteria mode.
- to Smart Identification users.

## Temperature Logging



To configure Temperature Logging parameters, make sure the Enable check box for **Temperature Configuration** under “Temperature and Symptoms Configuration” in “User Policy” under “Defining Global Policies” is enabled.

Temperature Logging	
Enable	<input type="checkbox"/>
Sensor Type	FEVOBOT
Sensor Interface	USB
Calibration Parameter	+ 0.0
Approach to Sensor Wait-Timer (Sec)	3.0
Temperature Detection Time Out (Sec)	10
Tolerance between Consecutive Readings	0.5
Consecutive Readings Count within Tolerance	5
Temperature Threshold (°F)	99.5
Minimum Temperature for Access (°F)	95.0
Restriction Type	Soft
Bypass If Sensor Disconnected	<input type="checkbox"/>

- **Sensor Type:** Select the type of thermal sensor integrated in the device. There are three sensors: *Web-Based* and *FEVOBOT*. Default: *FEVOBOT*.
- **Sensor Interface:** Select the interface on which device will communicate with the sensor. For Sensor Type- Web-based, the Sensor Interface options will be: HTTP/S  
For Sensor Type-FEVOBOT, the Sensor Interface options will be: USB

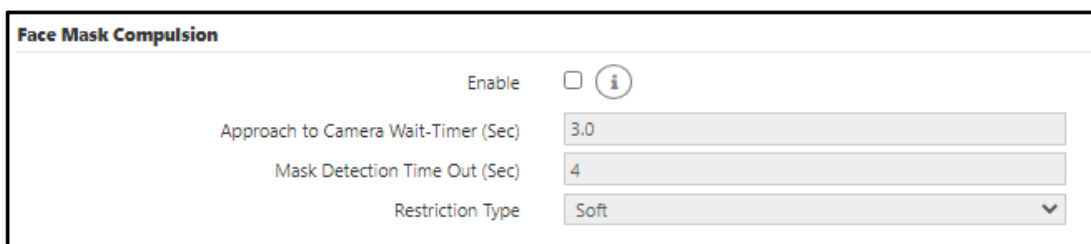


- **Calibration Parameter:** Set the calibration parameter for the thermal sensor. Not applicable for FEVOBOT. Click + the value increases by 0.1 and click – the value decreases by 0.1.
- **Approach to Sensor Wait-Timer:** This is the time for which the device will wait for user to approach the device before starting Temperature Detection.
- **Temperature Detection Time-Out:** The timer till which temperature detection will be done for the user and if valid temperatures are not found till the expiry of timer then timeout will be declared.
- **Tolerance between Consecutive Readings:** The Tolerance range of reference temperature within which the consecutive readings are considered to be valid user temperature readings. If current temperature doesn't fall in the tolerance range the reference temperature is updated with the current temperature and the process continues. Not applicable for FEVOBOT.
- **Consecutive Readings Count within Tolerance:** The Tolerance range of reference temperature within which the consecutive readings are considered to be valid user temperature readings. If current temperature doesn't fall in tolerance range the reference temperature is updated with the current temperature and the process continues. Not applicable for FEVOBOT.
- **Temperature Threshold:** To set the threshold value of the temperature. Default: 99.5
- **Minimum Temperature for Access:** The minimum temperature value detected that should be considered as valid temperature. Default: 95.0

It should be less than threshold temperature. If user tries to enter a value equal to or greater than threshold temperature validation should be displayed.

- **Restriction Type:** You can set the restriction type as soft/hard.
- **Bypass if Sensor Disconnected:** Enable this check box to give provision of bypassing the feature if sensor connectivity is lost.

## Face Mask Compulsion



The screenshot displays the 'Face Mask Compulsion' configuration window. At the top, there is an 'Enable' checkbox and an information icon. Below these, there are three configuration fields: 'Approach to Camera Wait-Timer (Sec)' with a value of 3.0, 'Mask Detection Time Out (Sec)' with a value of 4, and 'Restriction Type' which is a dropdown menu currently set to 'Soft'.

Face Mask Compulsion feature is used to enforce users to wear masks while they are within the premises.

After identifying the user, Device will prompt the user to show Face with Mask when "Face Mask Compulsion" is enabled.

Based on identification of Mask, user will be allowed or denied access.

Make sure you have enabled **Enable FR** check box in **Devices> Device Configuration> Identification Server> Face Recognition> Enable FR** and configure the below mentioned parameters to avail this feature.

- **Enable:** Select this check box to enable Face Mask Compulsion feature for IDS.

- **Approach to Camera Wait-Timer (Sec):** This parameter defines the time within which the user must approach the camera for face mask detection.
  - You must enter the Wait-Time between 0.0-15.0 seconds.
  - By default, it is 3.0 seconds.
- **Mask Detection Time Out (Sec):** This parameter defines the maximum time duration for user's face mask detection.
  - You must enter the detection time out between 0.0-15.0 seconds.
  - By default, it is 4.0 seconds.
- **Restriction Type:** Select the type of restriction to be imposed when the configured policy is violated. Select the desired option - Soft or Hard.
  - **Soft Restriction:** The access will be granted even if the user is identified without wearing a mask; however, an event and warning are generated that indicates the user has been identified without wearing a mask.
  - **Hard Restriction:** The access will be denied if the user is identified without wearing a mask.

By default it is **Soft Restriction**.



Users face enrollments are dependent on the Visible Face parameter value set by you. To know more, refer "[Face Recognition](#)".

## Settings - Panel Door

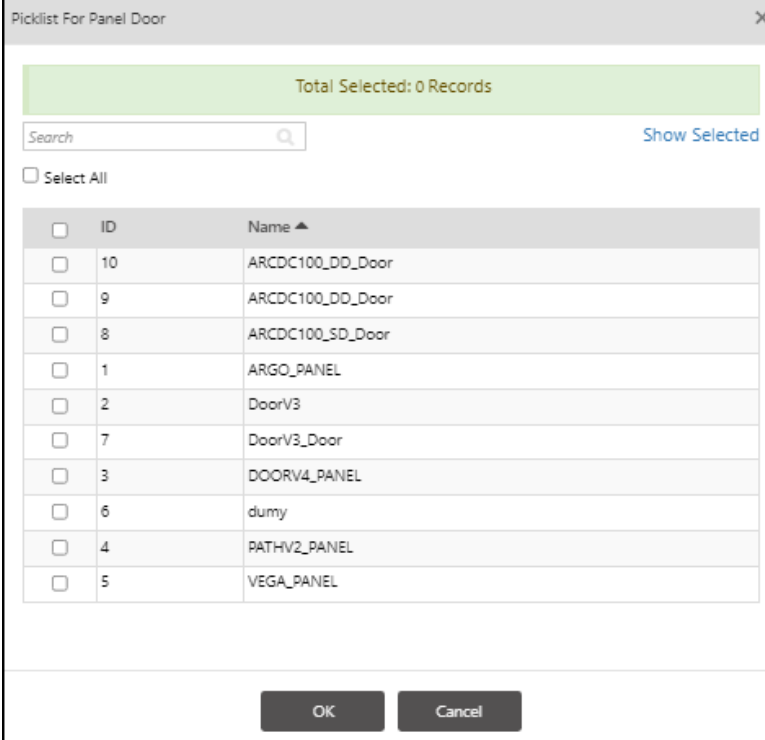
The **Advanced > Settings** page for ARGO FACE as **Panel Door** appears as shown below.

The screenshot shows the 'Device Configuration' window with the 'Settings' tab selected. The left sidebar lists 'Device ID', 'Device Name', 'Panel200 Door', 'ARGO FACE', 'Panel200', 'Active/Inactive', 'Profile', 'Enrollment', 'Advanced' (selected), and 'Video Surveillance'. The main content area shows the following settings:

- Auto Relock:** A checkbox that is currently unchecked.
- Auto Relock Timer (Sec):** A text input field with the value '3'.
- Man Trap Timer - Internal Reader (Sec):** A text input field with the value '0'.
- Man Trap Timer - External Reader (Sec):** A text input field with the value '0'.
- Enable Man Trap Door Interlocking:** A checkbox that is currently unchecked.
- Select Doors for Interlocking:** A section with two input fields labeled 'ID' and 'Name', and a list icon.
- Duplicate Access Time Interval (Sec):** A text input field with the value '0'.

- **Auto Relock:** Select this check box to allow the door to relock immediately when the door status changes to close after normal open irrespective of the defined pulse time. However, it is supported only if a door sense is installed and enabled.
- **Auto Relock Timer (Sec):** Specify the time in seconds after which the door should relock.
- **Man Trap Timer-Internal Reader (Sec):** This check-box enables an alarm wait timer on the panel door to ensure that the user enters the next sequential door of a man-trap within a specific time-frame.

- **Man Trap Timer-External Reader (Sec):** This check-box enables an alarm wait timer on the panel door to ensure that the user exits the panel door to enter the next sequential door of a man-trap within a specific time-frame.
- **Enable Man Trap Door Interlocking:** Select this check-box to activate the Door Interlock for the selected door (say Door1). This means if the Door1 is open then other doors will remain close.
- **Select Doors for Interlocking:** Select the doors to be assigned for Interlocking from the picklist. You can select particular doors or all the doors at once.
- To do so, click the **Select Doors** for Interlocking picklist. The **Picklist For Panel Door** pop-up appears.



Picklist For Panel Door

Total Selected: 0 Records

Search  [Show Selected](#)

☐ Select All


<input type="checkbox"/>	ID	Name ▲
<input type="checkbox"/>	10	ARCDC100_DD_Door
<input type="checkbox"/>	9	ARCDC100_DD_Door
<input type="checkbox"/>	8	ARCDC100_SD_Door
<input type="checkbox"/>	1	ARGO_PANEL
<input type="checkbox"/>	2	DoorV3
<input type="checkbox"/>	7	DoorV3_Door
<input type="checkbox"/>	3	DOORV4_PANEL
<input type="checkbox"/>	6	dummy
<input type="checkbox"/>	4	PATHV2_PANEL
<input type="checkbox"/>	5	VEGA_PANEL

OK Cancel

To select particular doors, click the check boxes of the desired doors.

**OR**

To select all the doors, select the **Select All** check box.

Click **OK**. Hover over the **Info**  icon. It displays the number of selected doors.

Suppose Door2 and Door3 are selected for Interlock with Door1. So When Door1 opens; Door2 and Door3 will remain close.



*For Degrade mode Door Interlocking feature will not work.*

*Whenever a door is in abnormal state and for that door interlocking is enabled then user access in other doors of the interlocking group is allowed.*

- **Duplicate Access Time Interval (Sec):** Configure the maximum duration in seconds for which the device should consider a subsequent user punch (after the first successful allowed punch) received as a duplicate punch. Valid Range: 0 to 9999 seconds. Default: 0.



The Duplicate Access Time Interval is not applicable:

- if Duress Finger is detected by the device.
- when Panel200 Server mode is in Degraded mode.
- to Smart Identification users.

## Face Mask Compulsion

Face Mask Compulsion feature is used to enforce users to wear masks while they are within the premises.

After identifying the user, Device will prompt the user to show Face with Mask when “Face Mask Compulsion” is enabled.

Based on identification of Mask, user will be allowed or denied access.

Make sure you have enabled **Enable FR** check box in **Devices> Device Configuration> Identification Server> Face Recognition> Enable FR** and configure the below mentioned parameters to avail this feature.

- **Enable:** Select this check box to enable Face Mask Compulsion feature for IDS.
- **Approach to Camera Wait-Timer (Sec):** This parameter defines the time within which the user must approach the camera for face mask detection.
  - You must enter the Wait-Time between 0.0-15.0 seconds.
  - By default, it is 3.0 seconds.
- **Mask Detection Time Out (Sec):** This parameter defines the maximum time duration for user’s face mask detection.
  - You must enter the detection time out between 0.0-15.0 seconds.
  - By default, it is 4.0 seconds.
- **Restriction Type:** Select the type of restriction to be imposed when the configured policy is violated. Select the desired option - Soft or Hard.
  - **Soft Restriction:** The access will be granted even if the user is identified without wearing a mask; however, an event and warning are generated that indicates the user has been identified without wearing a mask.
  - **Hard Restriction:** The access will be denied if the user is identified without wearing a mask.

By default it is **Soft Restriction**.



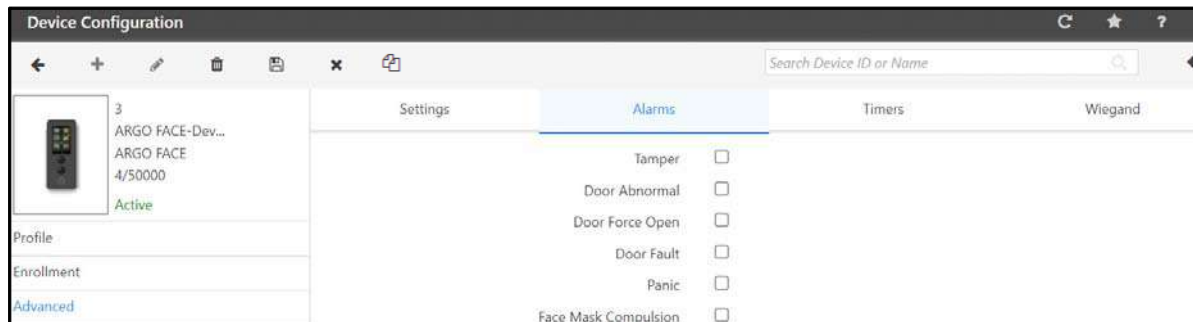
Users face enrollments are dependent on the Visible Face parameter value set by you. To know more, refer [“Face Recognition”](#).

## Alarms

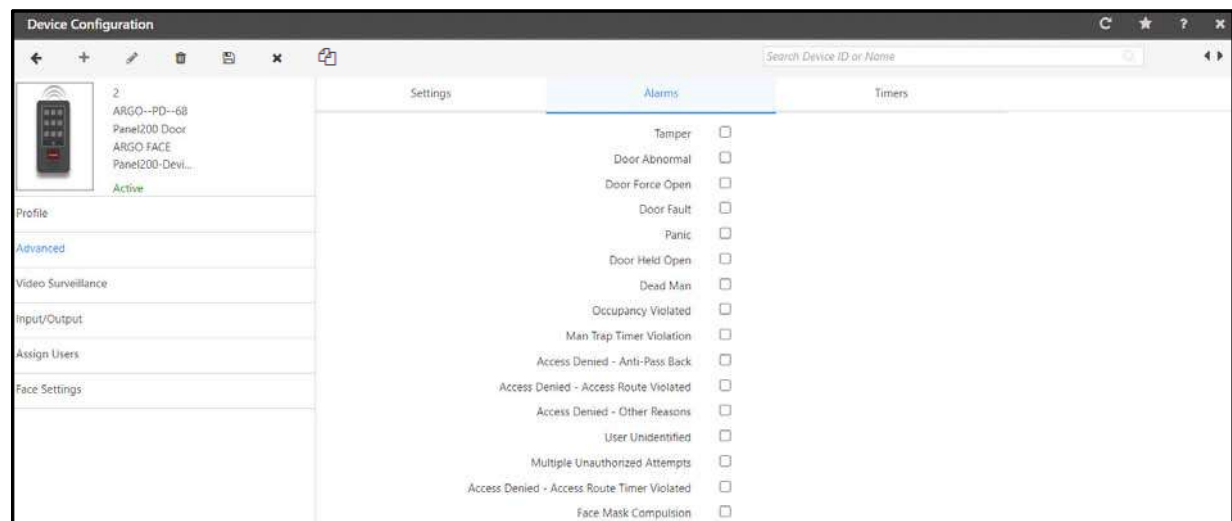
In the **Alarm** tab, you can assign below list of alarms to the door.

Click the **Alarms** tab. A different set of Alarms can be enabled/disabled for ARGO Face as Direct Door as well as Panel Door.

The **Alarms** page for ARGO FACE as **Direct Door** appears as shown below.



The **Alarms** page for ARGO FACE as **Panel Door** appears as shown below.



Select the check boxes of the desired Alarms you wish to enable.

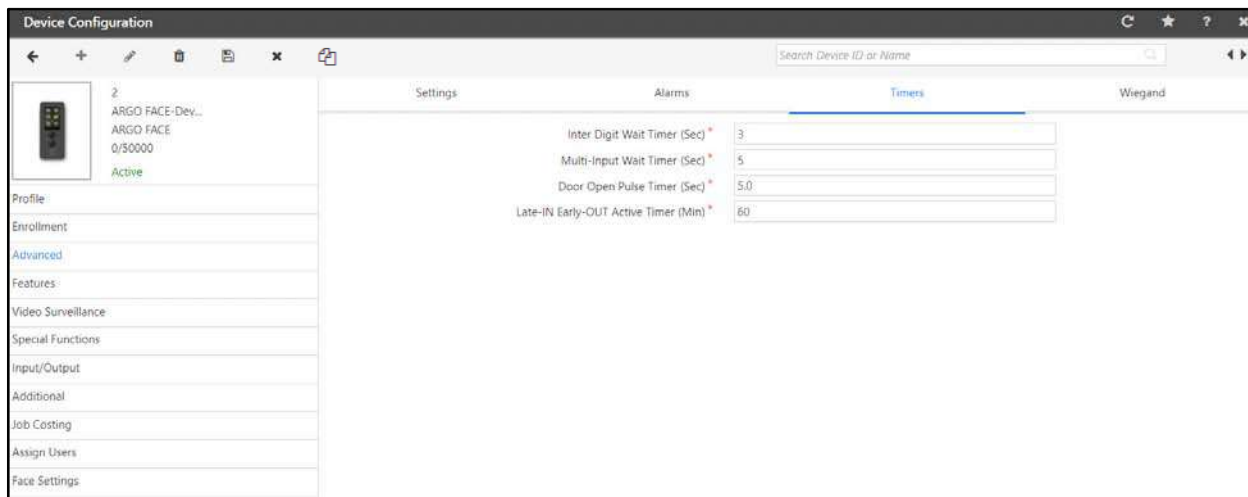
## Timers

This section allows the configuration of various types of pre-defined device timers which can trigger specific responses. In COSEC, timers are often used to control door behavior and for triggering alarms.

The Timers parameters differ for ARGO FACE as Direct Door and Panel Door.

### Timers - Direct Door

Click the **Timers** tab. The **Timers** page for **ARGO FACE** as a **Direct Door** appears.



Configure the following parameters:

- **Inter-Digit Wait Timer (sec):** Specify the time period in seconds (1 to 99) between two key inputs on the device keypad. On expiry of this timer, the system considers the user input to be complete and is ready for the next input.
- **Multi-Input Wait Timer (sec):** Specify the time in seconds (3 to 99) for which system needs to wait for the second credential input from the user when more than one credential is to be used to grant access.



*We recommend you to set the timer value as greater than or equal to 10 seconds to avoid access denial issues to users. This is applicable when the system reads the credentials (biometric) from the user's Smart Cards.*

- **Door Open Pulse Timer (sec):** Specify the time in seconds (0.1-65535.0) for the door to be energized for a valid credential. If the opened door does not return to a closed state before the expiry of this timer, the door will generate a "Door Abnormal" alarm.

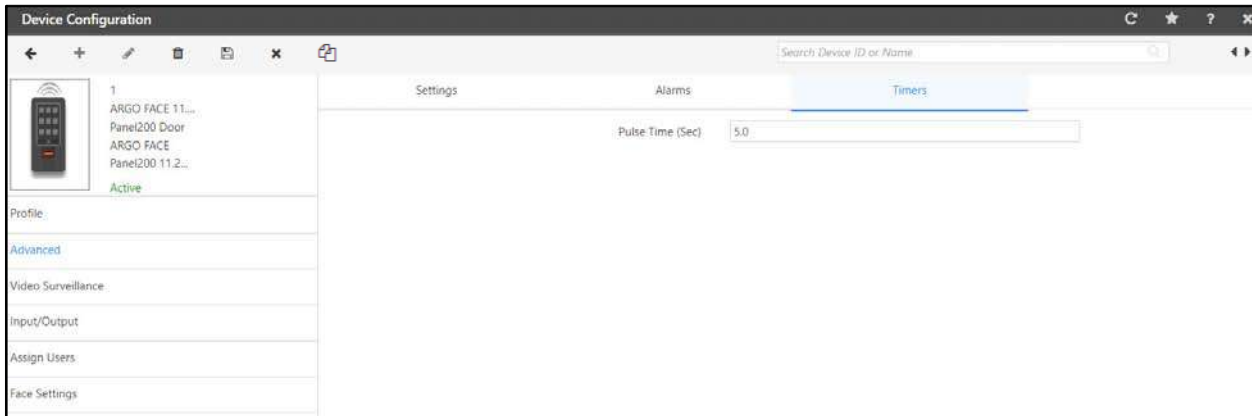


*To ensure smooth functioning of this feature, make sure the Server and Device Firmwares are upgraded to the latest version.*

- **Late-IN Early-OUT Active Timer (min):** Specify the time in minutes (1 to 99) for which the Late-IN and Early-OUT special functions will remain active after being enabled for the Door Controller.

## Timers - Panel Door

Click the **Timers** tab. The **Timers** page for **ARGO FACE** as a **Panel Door** appears.



- **Pulse Time (sec):** Specify the time in seconds (0.1 to 65535.0) for the panel door to be energized for a valid credential.



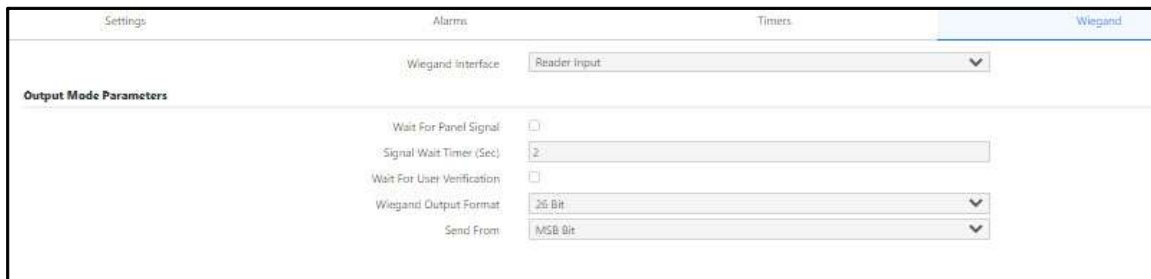
*To ensure smooth functioning of this feature, make sure the Server and Device Firmwares are upgraded to the latest version.*

## Wiegand

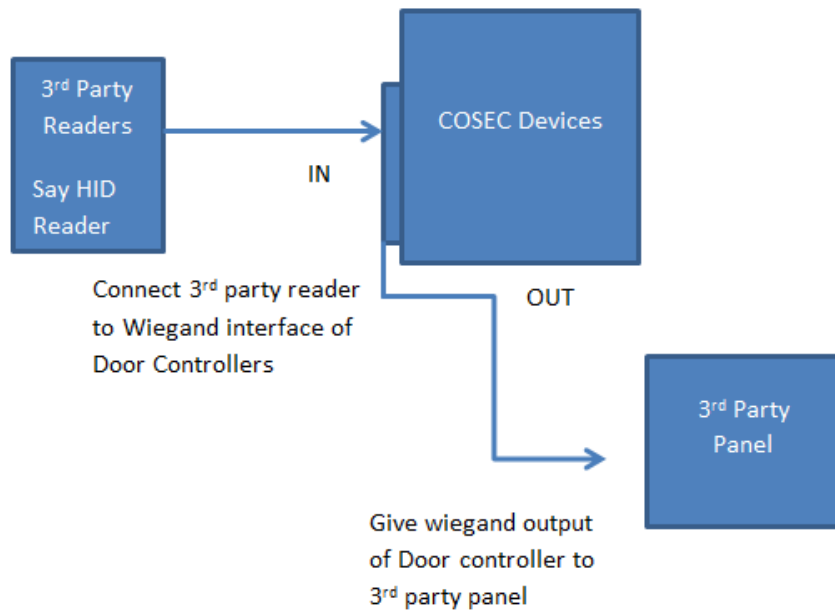


*Wiegand is applicable for Direct Door only.*

Click the **Wiegand** tab. The **Wiegand** page appears:



- **Wiegand Interface:** The COSEC device can be connected both as input devices (e.g. to receive data from a Wiegand Reader) or output devices (e.g. to support output to third party panel) via the Wiegand interface as shown below.



So select the interface of Door controller as **Output Mode** to work as Wiegand output to panel or **Reader Input** to take data from third party reader. If Reader Input option is selected, all the Output Mode parameters will be disabled.

If you select Output Mode then configure the following **Output Mode Parameters**:

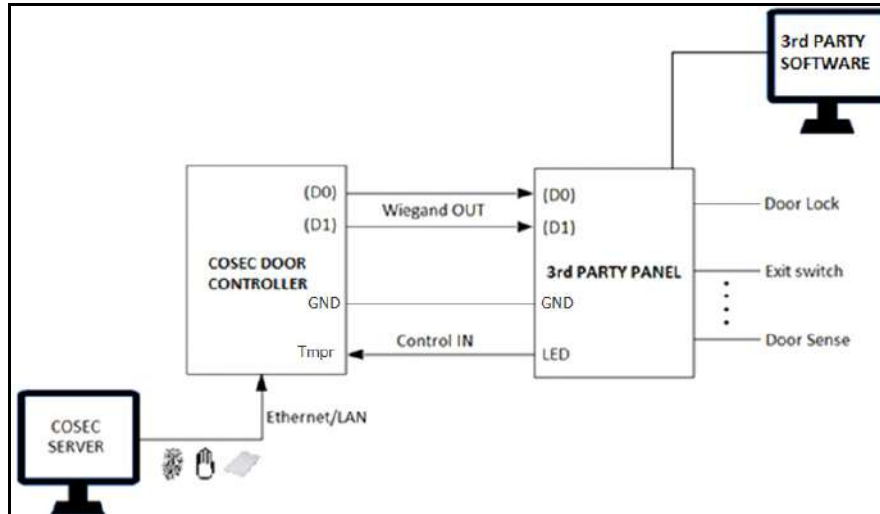
- **Wait For Panel Signal:** Select the check box to enable this option. The door will wait for reply from the connected third party device before triggering any output, as per the defined **Signal Wait Timer (Sec)**.
- **Signal Wait Timer (Sec):** The time for which the device will wait to receive the reply from the third party panel, before it triggers any output.
- **Wait For User Verification:** Select the check box to enable this option. The user verification will be requested to the third party device before triggering any output.
- **Wiegand Output Format:** Select the desired Wiegand Output Format from the options 26 Bit, 37 Bit, Actual or Custom.

If you select Custom, you need to configure the Wiegand Format. For details refer to Devices Module > Masters > Wiegand Output Format.

- **Send From:** Specify the sending order for reader data as MSB or LSB Bit.



## Wiegand Out Interface



## Door Access using QR code

The user can access the COSEC device using COSEC APTA installed in the mobile device. If the user has rights for COSEC APTA and the access to the device is allowed for the user, then he can use his mobile device to scan the QR code which constitutes the details of the COSEC door.

There is icon for QR code in the COSEC APTA application. Click the icon, it will open the camera in your mobile. Now you can scan the QR Code using the mobile camera. The COSEC door will get opened after verifying the security key and access policies of the user.

## Steps to create a QR code

Step 1: Enter details in JSON format

```
{"version":"x","ip": "x.x.x.x","port":"x","pdid":"x","mode":"x"}
```

Valid values:

Field	Field range	Default Value	Remark
version	1-255	1	
ip	0.0.0.0-255.255.255.255	0.0.0.0	
port	0-65535	0	
pdid	0-255	0	If door is in direct door mode then, then PDID will be 0  If door is in panel door mode then, PDID will have values from 1-255
mode	0,1	0	0= for entry mode 1=for exit mode



**Note:**

**Step1:** If door is in direct door mode enter IP & port of the direct door.

**Step 2:** Encrypt the JSON string using key "matrix12" with simple DES/ECB mode.

**Step 3:** Encode the encrypted string using Base 64.

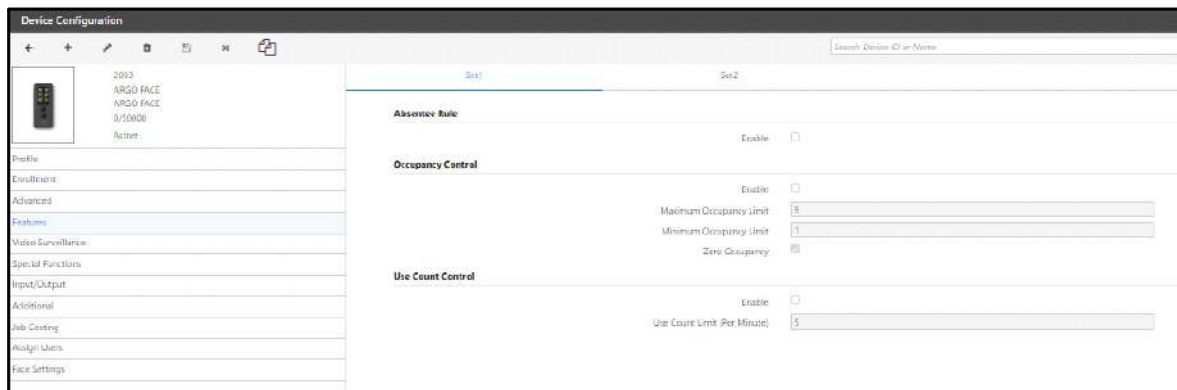
**Step 4:** Use this string to generate QR code through any third party software.

## Features



*The Features are available only with the Access Control Module license and are applicable for Direct Door only.*

On the **Device Configuration** page, click **Features** on the left pane. This tab allows the user to enable certain Access Control features for the device.



To set the access control features for the device, click the following:

- “Set1”
- “Set2”

## Set1

This page allows you to set the parameters for three rules - **Absentee Rule**, **Occupancy Control** and **Use Count Control**. Click the **Set1** tab, the page appears.

The screenshot shows a web interface with two tabs at the top: 'Set1' (selected) and 'Set2'. Below the tabs are three sections for configuring rules:

- Absentee Rule**: Contains an 'Enable' checkbox which is currently unchecked.
- Occupancy Control**: Contains an 'Enable' checkbox (unchecked), a 'Maximum Occupancy Limit' input field with the value '9', a 'Minimum Occupancy Limit' input field with the value '1', and a 'Zero Occupancy' checkbox (unchecked).
- Use Count Control**: Contains an 'Enable' checkbox (unchecked) and a 'Use Count Limit (Per Minute)' input field with the value '5'.

- **Absentee Rule:** Select the **Enable** check box to enable the feature on the door. This rule sets the maximum number of days for non-use of a credential. On expiration of days limit, the user will be automatically blocked. For configuring the rule, refer to *Access Control> Absentee Rule*.
- **Occupancy Control:** Select the **Enable** check box to enable this feature on the door.
  - **Maximum Occupancy Limit:** Specify the maximum number of users to be allowed within the controlled area after which a user exit is required to enable access to another user.
  - **Minimum Occupancy Limit:** Specify the minimum number of occupants the designated zone should have.
  - **Zero Occupancy:** Select the check box to enable, that is whether the designated zone should be allowed to be empty or not.

For configuring the rule, refer to *Access Control> Occupancy Control*.

- **Use Count Control:** Select the Enable check box to enable this feature on the door.
  - **User Count Limit (Per Minute):** Specify the maximum number of uses per minute allowed to the user.

For configuring the rule, refer to *Access Control> Use Count Control*.

## Set2

This page allows you to set the parameter for the three rules - **First-IN User Rule**, **Anti-Pass-Back (APB)** and **2-Person Rule**. Click the **Set2** tab and the page appears.

The screenshot displays the configuration interface for the Matrix COSEC System, divided into three main sections:

- First IN User Rule:**
  - Enable:** A checkbox that is currently unchecked.
  - Reset On:** Radio buttons for "Day Change" (selected) and "Timer Expiry".
  - Access Timer (Sec):** A text input field containing the value "3".
  - First IN User Group:** A dropdown menu showing "1" and a "List 1" button.
- Anti-Pass Back (APB):**
  - On Entry:** An unchecked checkbox.
  - On Exit:** An unchecked checkbox.
  - Hard/Soft:** A dropdown menu set to "Soft".
  - Forgiveness:** A checked checkbox.
  - Reset After:** Radio buttons for "Day Change" (selected) and "Timer Expiry".
  - Forgiveness Timer (Min):** A text input field containing the value "1".
- 2-Person Rule:**
  - Enable:** An unchecked checkbox.
  - Mode:** A dropdown menu set to "Primary Must".
  - Primary Group:** A dropdown menu set to "Select".
  - Secondary Group:** A dropdown menu set to "None".
  - 2nd Person Wait Timer (Sec):** A text input field containing the value "5".

- **First-IN User Rule:** Select the Enable check box to enable the feature on the direct door and configure the parameters.

- **Reset On:** You can reset the rule as per your requirement. Select the desired option f — **Day Change** or **Time Expiry**.

If you select **Time Expiry**, configure the **Access Timer (Sec)**.

- **Access Timer (sec):** Configure the duration for which the rule should be applied. After the expiry of this timer the rule will be reset for all the users.
- **First-In User Group:** Click the picklist to select the desired group which would be valid at the door. For configuring the rule, *refer to Access Control> First- In User Rule> Assignment*
- **Anti-Pass Back (APB):** Select the Enable check box to enable this feature on the direct door and configure the parameters.
  - **On Entry:** Select the check box so that the system monitors the entry reader for APB violation.
  - **On Exit:** Select the check box also so that the system monitors the entry as well as the exit readers for APB violations.
  - **Hard/Soft:** Select the restriction type as Hard or Soft.
    - **Hard APB:** The access will be denied if the exit is not registered first. It does not allow a second entry using the same card without an exit.
    - **Soft APB:** The access will be granted even if the exit is not registered. It allows a second entry of the same user without an exit; however, an event and warning are generated that indicates the second entry.

- **Forgiveness:** Select this check box to enable the system to reset the APB status. When forgiveness is enabled, you can select one of the following options to reset the pass.
- **Day Change:** This will reset the APB status of all the users to NULL at midnight. This enables a user, who left the building in the evening without exit punch, to use her/his card for entry in the next morning.
- **Timer Expiry:** This will reset the APB status of all the users after the expiry of user defined time. If you select this option, configure the Forgiveness Timer (Mins).
- **Forgiveness Timer (Mins):** Enter the time duration in minutes after which Anti-pass back status should be reset and the pass will be in original state.
- **2-Person Rule:** Select the Enable check box to enable the feature on the door and configure the parameters.
- **Mode:** Set the Mode as **Primary Must** or **Primary & Secondary Must**.
- **Primary Group:** Select the desired group from the drop-down list.
- **Secondary Group:** Select the desired group from the drop-down list.
- **2nd Person Wait Timer:** Set the wait time in seconds after which the second person is allowed to punch on the door.

For configuring the rule, refer to *Access Control > 2- Person Rule*

## Video Surveillance



*Video Surveillance is applicable for both Direct Door and Panel Door.* On the **Device Configuration** page,

Click **Video Surveillance** on the left pane. The Video Surveillance tab allows you to configure parameters for video surveillance integration with the COSEC device. It is available in Basic License.

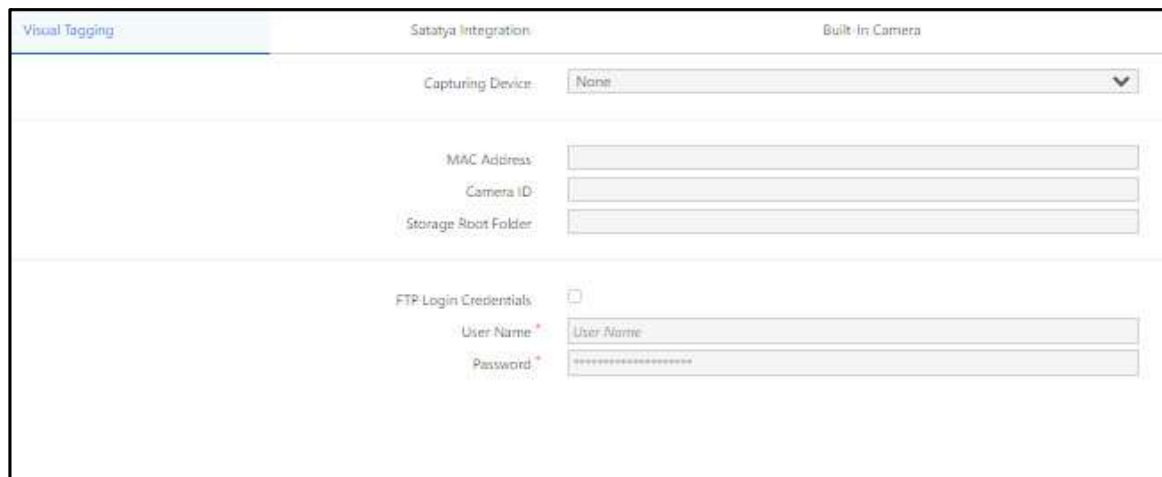
To set parameters, click the following links:

- [“Visual Tagging”](#)
- [“Satatya Integration”](#)
- [“Built-In Camera”](#)

## Visual Tagging

The COSEC application acts as an interface between supported hybrid and network video recording systems as well as IP Cameras and grab images triggered by user events at the Doors. The **Visual Tagging** option enables the administrator to define the video recorder and IP Camera parameters.

Click **Visual Tagging** tab. The **Visual Tagging** page appears.



To view the user events and related images, click **Admin > Views/Logs > Event View**. To know more about viewing events, refer [“Event View”](#).

Configure the following parameters:

- **Capturing Device:** Select the video recording type of device or IP Camera from the drop-down list.
  - Matrix HVR/NVR
  - Built-In Camera
  - Milestone

If you select **Matrix HVR/NVR**, configure the following:

- **MAC Address:** Specify the MAC address of the video recorder device using “\_” (underscore) as the separator.
- **Camera ID:** Specify the camera number or camera ID of the IP cameras. For analog cameras specify the camera number.
- **Storage Root Folder:** Specify the Root folder path or FTP Path where the uploaded images will be saved.
- **FTP Login Credentials:** Select this check box to enable FTP login credentials for authentication.
  - **Username:** Specify the FTP Server Username.
  - **Password:** Specify the FTP Server Password.



Some COSEC devices do not support all the network connection options.

If you select **Milestone**, refer to [“Milestone Integration”](#).

If you select **Built-In Camera**, refer to [“Built-In Camera”](#).

## Satatya Integration

This functionality is available for configuration only when the **Matrix HVR/NVR** device type is selected as the **Capturing Device** under **Visual Tagging**. It enables the configured COSEC devices to directly send commands to the SATATYA HVR/NVR devices as per the configurations.



Click the **Satatya Integration** tab. The Satatya configuration page appears.

Integration Type	Wired																									
Active	<input type="checkbox"/>																									
IP Address *																										
Port Number *	1024-65535																									
Schedule Name																										
Active	<input type="checkbox"/>																									
Schedule Range *	00:00 23:59																									
Days *	<input checked="" type="checkbox"/> Sun <input checked="" type="checkbox"/> Mon <input checked="" type="checkbox"/> Tue <input checked="" type="checkbox"/> Wed <input checked="" type="checkbox"/> Thu <input checked="" type="checkbox"/> Fri <input checked="" type="checkbox"/> Sat <input checked="" type="checkbox"/> Holiday																									
Event	Access Allowed																									
Mode	Both																									
Action	Recording																									
Duration Min *																										
Camera *	<table><tr><td><input type="checkbox"/> 1</td><td><input type="checkbox"/> 2</td><td><input type="checkbox"/> 3</td><td><input type="checkbox"/> 4</td><td><input type="checkbox"/> 5</td></tr><tr><td><input type="checkbox"/> 6</td><td><input type="checkbox"/> 7</td><td><input type="checkbox"/> 8</td><td><input type="checkbox"/> 9</td><td><input type="checkbox"/> 10</td></tr><tr><td><input type="checkbox"/> 11</td><td><input type="checkbox"/> 12</td><td><input type="checkbox"/> 13</td><td><input type="checkbox"/> 14</td><td><input type="checkbox"/> 15</td></tr><tr><td><input type="checkbox"/> 16</td><td><input type="checkbox"/> 17</td><td><input type="checkbox"/> 18</td><td><input type="checkbox"/> 19</td><td><input type="checkbox"/> 20</td></tr><tr><td><input type="checkbox"/> 21</td><td><input type="checkbox"/> 22</td><td><input type="checkbox"/> 23</td><td><input type="checkbox"/> 24</td><td></td></tr></table>	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5	<input type="checkbox"/> 6	<input type="checkbox"/> 7	<input type="checkbox"/> 8	<input type="checkbox"/> 9	<input type="checkbox"/> 10	<input type="checkbox"/> 11	<input type="checkbox"/> 12	<input type="checkbox"/> 13	<input type="checkbox"/> 14	<input type="checkbox"/> 15	<input type="checkbox"/> 16	<input type="checkbox"/> 17	<input type="checkbox"/> 18	<input type="checkbox"/> 19	<input type="checkbox"/> 20	<input type="checkbox"/> 21	<input type="checkbox"/> 22	<input type="checkbox"/> 23	<input type="checkbox"/> 24	
<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5																						
<input type="checkbox"/> 6	<input type="checkbox"/> 7	<input type="checkbox"/> 8	<input type="checkbox"/> 9	<input type="checkbox"/> 10																						
<input type="checkbox"/> 11	<input type="checkbox"/> 12	<input type="checkbox"/> 13	<input type="checkbox"/> 14	<input type="checkbox"/> 15																						
<input type="checkbox"/> 16	<input type="checkbox"/> 17	<input type="checkbox"/> 18	<input type="checkbox"/> 19	<input type="checkbox"/> 20																						
<input type="checkbox"/> 21	<input type="checkbox"/> 22	<input type="checkbox"/> 23	<input type="checkbox"/> 24																							
<div>Add Cancel</div>																										

- **Integration type:** Select the desired options — Wired, Network.

In **Wired**, the door is physically connected with Satatya Device. If you select this option then you do need to configure any other parameters.

In **Network**, connection can be though Ethernet, Wireless or Broadband depending upon the COSEC device support. If you select this option, configure the following parameters:

- **Active:** Select the check box to enable the connection.
- **IP Address:** Specify the IP Address of HVR/NVR.

- **Port Number:** Specify the Port Number of HVR/NVR.
- **Schedule Name:** Specify a user friendly name for the schedule function.**Active:** Select the check box to enable the SATATYA Integration functionality.
- **Schedule Range:** To run the schedule for the function, configure the start and the end time (*24 Hours format*).
- **Days:** To apply the configured schedule to the days of the week, select the check boxes of the desired days of the week.
- **Event:** Select the desired COSEC event from the drop-down list for which the action is to be configured.
- **Mode:** Select the desired event mode from the options — Entry, Exit and Both.
- **Action:** Select the action to be taken by the Satatya device from the drop-down list. The options are — Recording, Image Upload, Video Pop-up, PTZ Preset, Mail Image.

If you select **Recording**, configure the **Duration Min.** as well as select the desired **Camera** channels.

If you select **Upload Image**, select the desired **Camera** channels. Images will be uploaded as per the FTP settings.

If you select **Video Pop-up**, configure the **Duration Sec.** as well as select the desired **Camera** channels. The video pop up will be generated on the local client of Satatya device for the selected cameras.

If you select **PTZ Preset**, configure the desired **Position No.** as defined in the SATATYA device as well as select the desired **Camera** channels.

If you select **Mail Image**, configure the **Email ID** as well as select the desired **Camera** channels.

- **Camera:** Select the check boxes of the relevant camera channels depending on the action selected.

**Example:** For Access allowed event on COSEC Device, the video pop up of Camera 12 will be shown for 10 seconds.

Click **Add** to complete the process of linking the event with the action. You can also configure other event-action linkages as per your requirements.

The screenshot shows a configuration window with the following fields and options:

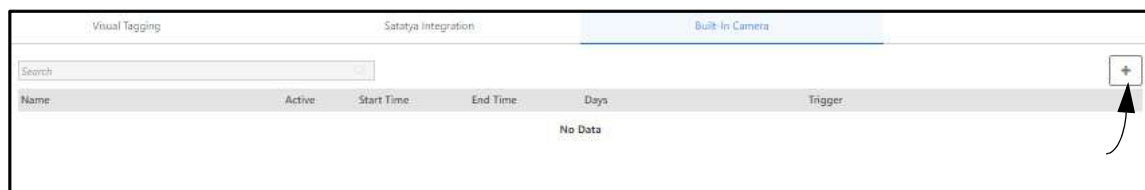
- Event:** Access Allowed (dropdown menu)
- Mode:** Both (dropdown menu)
- Action:** Video Pop-Up (dropdown menu)
- Duration Sec.:** 10 (text input field)
- Camera:** A grid of checkboxes for cameras 1 through 24. Camera 12 is selected (checked).

<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5
<input type="checkbox"/> 6	<input type="checkbox"/> 7	<input type="checkbox"/> 8	<input type="checkbox"/> 9	<input type="checkbox"/> 10
<input type="checkbox"/> 11	<input checked="" type="checkbox"/> 12	<input type="checkbox"/> 13	<input type="checkbox"/> 14	<input type="checkbox"/> 15
<input type="checkbox"/> 16	<input type="checkbox"/> 17	<input type="checkbox"/> 18	<input type="checkbox"/> 19	<input type="checkbox"/> 20
<input type="checkbox"/> 21	<input type="checkbox"/> 22	<input type="checkbox"/> 23	<input type="checkbox"/> 24	



## Built-In Camera

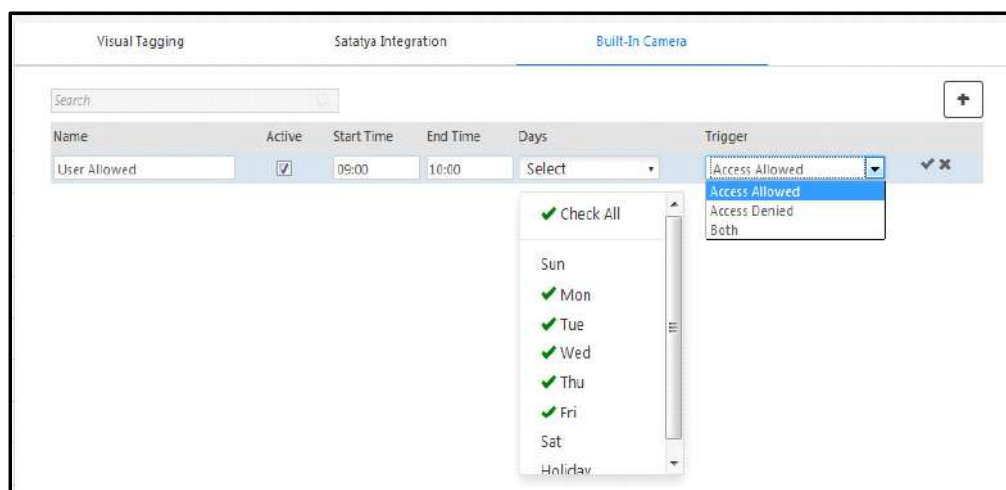
This functionality enables configuration and scheduling of image capturing using the in-built camera of the door. Click the **Built-In Camera** tab. The **Built-In Camera** configuration page appears.



The ARGO FACE's built-in camera can be scheduled to capture images during scheduled periods and can be triggered by specific user events.

To configure a schedule click **Add** button as shown above.

- Specify the function **Name** and select the **Active** check box to enable it on the system.
- Specify a schedule by entering **Start** and **End Time**.
- Select the Applicable **Days**.
- Select the user events Trigger from the drop-down list on the occurrence of which the image capturing should be triggered. The options are Access Allowed, Access Denied and Both.



- Click **OK** and then click **Save** to save the schedule for the selected device.



*If you delete ARGO FACE Panel Door from your device list, then the configurations stored for Built-In Camera will not be deleted. If you add the same ARGO FACE Panel Door again with the same Panel Door ID, then the configurations for Built-In Camera will be restored and displayed on the same page.*

## Special Functions



*Special Functions are applicable for Direct Door only.*

On the **Device Configuration** page, click the **Special Functions** tab on the left pane.

No.	Function Name	Active	Job Selection	User Group	Card 1	Card 2	Card 3	Card 4
1	Official Work - IN	Yes	Yes	All				
2	Official Work - OUT	Yes	Yes	All				
3	Short Leave - IN	Yes	Yes	All				
4	Short Leave - OUT	Yes	Yes	All				
5	Regular - IN	Yes	Yes	All				
6	Regular - OUT	Yes	Yes	All				
7	Break Start	Yes	Yes	All				
8	Break End	Yes	Yes	All				
9	Quarantine - IN	Yes	Yes	All				
10	Quarantine - OUT	Yes	Yes	All				
11	Normal User	Yes	No	All				
12	Normal Special Card	Yes	No	All				

To configure *Special Functions* for COSEC doors, refer to [“Special Functions”](#).



*Users will be able to use QR Code as credentials (if enabled) for Special Functions, if the QR number is configured against a Card1/2/3/4.*

## Input/Output

The Input/Output (I/O) configuration of a system determines how the output or response of a system is influenced by the input applied on it. In case of the COSEC Access Control System, the I/O configuration should enable the system to monitor and trigger a specific response to any change in the door state or event occurrences at the door device. This change of door state or occurrence of events is considered as an input while the response or action that is generated by the system on detection of this input, is defined as the output.

**Device Configuration**

Search Device ID or Name

Configuration Linking Time Triggered

**Door Sense**

Enable ☐

Supervised ☐


Door Sense Type: Normally Open

**Accept External IO Linking**

Enable ☐

Network Interface: Ethernet



1. This functionality cannot be fully accessed in the Edit  mode for a selected device.
2. This functionality is available only with the Access Control add-on module license.

On the **Device Configuration** page, click the **Input Output** tab on the left pane. Click the following links to configure the parameters:

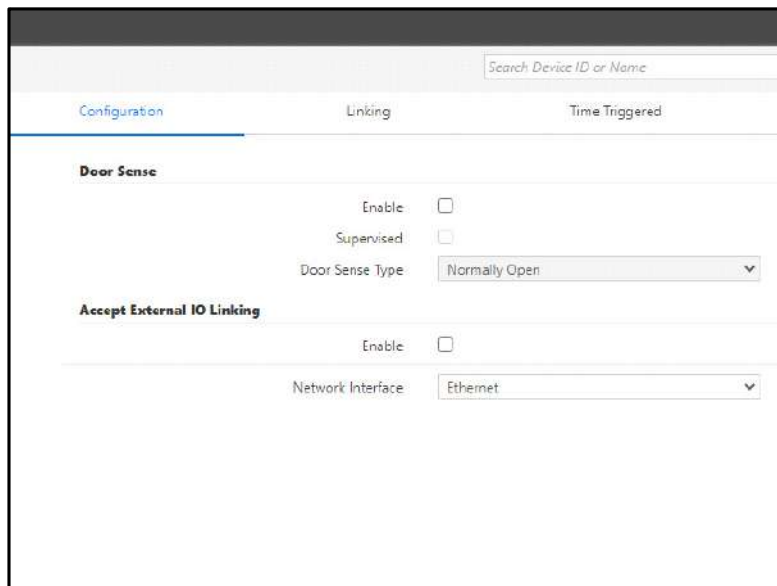
- ["Configuration"](#)
- ["Linking"](#)
- ["Time Triggered"](#)

## Configuration



Configuration is applicable for both Direct Door and Panel Door but the parameters differ.

Click the **Configuration** tab. The **Configuration** page for ARGO FACE as **Direct Door** is shown below.



- **Door Sense:** The system by default can sense two states of a door - *Normally Open* and *Normally Closed* depending on which the output is determined. For example, any deviation of the door from its normal state may lead to the trigger of a *Door Abnormal* alarm.
  - Select the **Enable** check box to enable the system for two-state monitoring.
  - Select the **Supervised** check box to enable the door for four-state monitoring where the door is also monitored for *door fault* and *door disconnection*.
  - Specify the **Door Sense Type** as **Normally Closed** or **Normally Open**.
- **Accept External IO Linking:** Select the **Enable** check box to enable device-to-device IO Linking i.e. input from one Direct Door can trigger output in another Direct Door.
- **Network Interface:** Select the interface option for IO linking with external devices. The options are:
  - Ethernet

- Wireless
- Mobile Broadband

The **Configuration** page for ARGO FACE as **Panel Door** is shown below.

- **Door Sense:** The system by default can sense two states of a door - *Normally Open (NO)* and *Normally Closed (NC)* depending on which the output is determined. For example, any deviation of the door from its normal state may lead to the trigger of a *Door Abnormal* alarm.
- Select the **Enable** check box to enable the system for two-state monitoring.
- Select the **Supervised** check box to enable the door for four-state monitoring where the door is also monitored for *door fault* and *door disconnection*.
- Specify the **Door Sense Type** as **Normally Closed** or **Normally Open**.
- **Relay Output:** This indicates the physical output which is received for opening and closing of the door.
- **Output Group Number (Door Unlock):** Select the Output Group Number to which the device output for Door Unlock is to be assigned from the picklist.
- **Output Group Number (Door Lock):** Select the Output Group Number to which the device output for Door Lock is to be assigned from the picklist.

## Linking




*Linking is applicable for Direct Door only.*

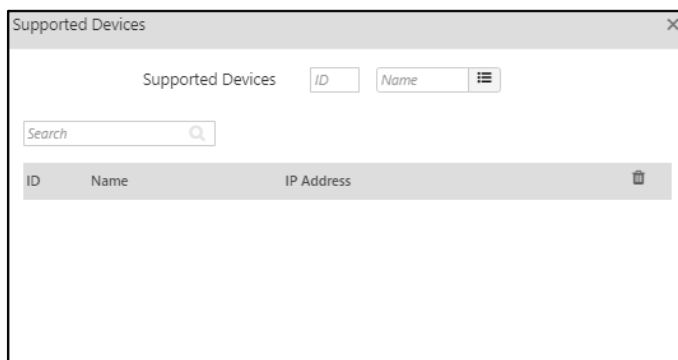
Click the **Linking** tab. The **Linking** page appears.

Name	Active	Input	Output	Output Type	Pulse Time(Sec)	Reset Link	Reset Time	Supported Devices
	No	Intercom Panic	Door Relay			Inactive	00:00	0 »
	No	User Allowed	Door Relay			Inactive	00:00	0 »
	No	User Denied	Door Relay			Inactive	00:00	0 »
	No	Zone Empty	Door Relay			Inactive	00:00	0 »

The COSEC application supports the Input/Output Linking feature to activate an output port based on a trigger received from an input port on the same Direct Door. This option enables the administrator to define how an event or events (input port) will trigger an output on the selected door.

Select a Input-Output linking row or click **Edit** button.

- **Name:** Specify a name for the new I/O linking program.
  - **Active:** Select this check box to activate this linking program.
  - **Output Type:** Specify the appropriate type of output from the following four options available in the drop-down list:
    - **Pulse:** With this type of output, the user needs to define the Pulse time in seconds.
    - **Interlock:** With this option, the output follows the input. The relay output is triggered as long as the input is activated after which it returns to normal state.
    - **Latch:** With this option, it is denoted that the relay output will be in an energized condition for infinite period and needs to be reset manually.
    - **Toggle:** With this option, the output group toggles its state whenever an input group is activated.
  - **Pulse Time (sec):** For a *Pulse* output type, specify the pulse duration in seconds.
  - **Reset Link:** Select this check box to reset the link automatically after a defined time period.
  - **Reset Time:** Enter the time period in hh:mm format after which the link should be reset automatically.
- For example, an IO Link gets activated on 21/04/2017 at 15:00. And Reset Time is set as 18:00. When Device Time is 18:00 then that IO link will get reset.
- **Supported Devices:** Click the picklist, all devices supported for external IO Linking will appear in this . Select the desired devices. Upto 255 external devices can be added by the administrator.
  - Click **Supported Devices**  icon. The **Supported Devices pop-up** appears.



- In this pop-up, click the **Supported Devices** picklist, the **Picklist For Direct Door** pop-up appears.

Picklist For Direct Door

Total Selected: 0 Records

Search  Show Selected

☐ Select All

<input type="checkbox"/>	Door No ▲	Name	Type	Status
<input type="checkbox"/>	50	RnD1 3rd Floor VEGA	Vega Controller	Enable
<input type="checkbox"/>	52	Factory Vega Production-2	Vega Controller	Enable
<input type="checkbox"/>	57	RnD1 GF TRIPOD LEFT OUT	PVR Door	Enable
<input type="checkbox"/>	59	RnD1 BOOM BARRIER IN	Vega Controller	Enable
<input type="checkbox"/>	60	RnD1 BOOM BARRIER OUT	Vega Controller	Enable
<input type="checkbox"/>	69	FACTORY ACCOUNT	Door V3	Enable
<input type="checkbox"/>	70	FACTORY SECURITY GUARD -1	Door V3	Enable
<input type="checkbox"/>	71	FACTORY SECURITY GUARD -2	Door V3	Enable
<input type="checkbox"/>	72	FACTORY STORE	Door V3	Enable
<input type="checkbox"/>	77	RnD1 2nd Floor FB FMX IN	Door FMX	Enable

1 - 10 of 54 records

« < 1 2 3 ... 6 > »

OK Cancel

You can select particular devices or all the devices at once.

To select particular devices, click the check boxes of the desired devices.

**OR**

To select all the devices, select the **Select All** check box.

Click **OK**. You return to the **Supported Devices** pop-up and the selected devices are displayed here.

Supported Devices

Supported Devices ID Name

Search

ID ▲	Name	IP Address	
50	RnD1 3rd Floor VEGA	192.168.151.3	
52	Factory Vega Production-2	192.168.10.27	

OK Cancel

You can also delete the desired devices. To do so, click **Delete** of the respective device.

Close the pop-up the number of selected devices are displayed under **Supported Devices** in the grid.

- Click the **OK** button and **Save** the configuration.

## Time Triggered



*Time Triggered is applicable for Direct Door only.*

This functionality enables the user to control the activity of an Output without manual intervention.

The time triggered functions are used for activating events like door unlock and siren activation that are set as per the start time and for the configured time duration.

This functionality is designed to energize outputs for predefined periods at the configured time. The COSEC Access Control System supports up to 20 Time Triggered functions on a Direct Door

Click the **Time Triggered** tab and the page appears.

Click **Add**.

- Enter the **Function Name**.
- Select the **Active** check box.
- Enter the **Time** and **Duration** of the triggered function.
- Select the **Days** on which this function should be triggered.
- Click **OK** and then **Save** to save the settings.

## Additional



*Additional is applicable for Direct Door only.*

This section lists some additional configurations that can be enabled for door controllers.

On the **Device Configuration** page, click the **Additional** tab.

Many countries observe the convention of adjusting clocks forward and backward. Clocks are set ahead during the spring and back to standard time in the autumn. COSEC doors can be configured and made compatible, keeping the RTC of the system updated with such changes.

The **Daylight Saving** configuration can be done in 2 ways. that is Day-Month wise or Date-Month wise.

- Select the **DST Type** as Day-Month wise or Date-Month wise.

Select **Disable** if you do not wish to apply DST.

- If you select the **Day-Month wise** option, the DST is set by the day of the month on which clock needs to be forwarded and reverted to normal. Set the month, week number, day of the week, and time for both the **Forward Clock** and **Backward Clock** as shown.

The screenshot shows the 'Daylight Saving' configuration window. At the top, 'Daylight Saving' is selected in the left sidebar. The main form has two sections: 'Forward Clock' and 'Backward Clock'. In the 'Forward Clock' section, 'DST Type' is set to 'Day-Month wise' (dropdown), 'Time Period' is '00:00' (text input), 'Month' is 'January' (dropdown), 'Week No.' is '1st' (dropdown), 'Day of Week' is 'Sunday' (dropdown), and 'Time' is '00:00' (text input). The 'Backward Clock' section has identical fields: 'Month' is 'January', 'Week No.' is '1st', 'Day of Week' is 'Sunday', and 'Time' is '00:00'. A 'Save' button is at the bottom right.

- If you select the **Date-Month wise** option, the DST is set by date of the month on which clock needs to be forwarded and reverted to normal. Define the **Time Period** for the date-month wise DST settings in *24-hours* format, and specify the day of the week, date and time for the **Forward Clock** and the **Backward Clock** as shown.

The screenshot shows the 'Daylight Saving' configuration window with 'Date-Month wise' selected for 'DST Type'. The 'Forward Clock' section shows 'Month' as 'January', 'Date' as '1' (dropdown), and 'Time' as '00:00'. The 'Backward Clock' section also shows 'Month' as 'January', 'Date' as '1', and 'Time' as '00:00'. The 'Time Period' field is present but empty. A 'Save' button is at the bottom right.

This DST Setting implies that on 1st Sunday of November at 09:00 hours, the clock will be forwarded by 08:00 hours. And on 1st Sunday of January at 10:00 hours, the clock will be reversed or set backward by 08:00 hours.

- Click the **Save** button.

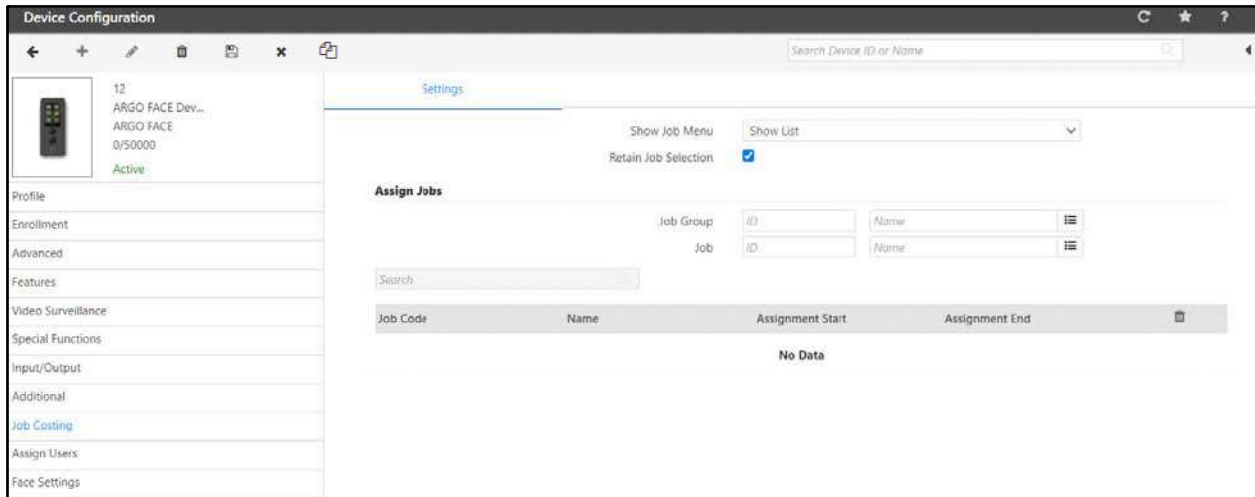


## Job Costing



*Job Costing is applicable for Direct Door only.*

When user punches on any device, there will be an option to select the Job Code on which the user is working. Job Costing enables the Administrator to display or hide Job Code selection on device. It also enables the Administrator to assign default jobs on device.



*Make sure the **Device Based Job Assignment** check box is enabled for the desired Users.*

- **Show Job Menu:** Select the option as **Show List** or **Allocate Default**.

### Show List

When **Show List** is selected; then multiple jobs can be assigned to the device. The user can select the relevant Job Code while punching on the device. His/her job hours will be recorded for that Job Code.

- **Retain Job Selection:** If Retain Job Selection check box is selected, it allows the device to remember the last Job Code selected by a user and the same would be applicable for all the subsequent users until another job selection is done on the device. This is useful in environments where dynamic job selection prevails.

In this case, if the user selects a Job Code the same is saved and retained for future use by the device. If the user selects None option on the device, it ends the current job and assigns None until a new Job Code is selected by the user.

If the you clear the check box, then the device does not retain any job selection done by the user.

For example, in an educational setup, teachers may have dynamic job assignments, while students have static ones. After a teacher selects a Job Code, that code is retained by the device. Any student who punches in afterward will be assigned the teacher's Job Code until the teacher selects a new one or selects None.

### Assign Jobs

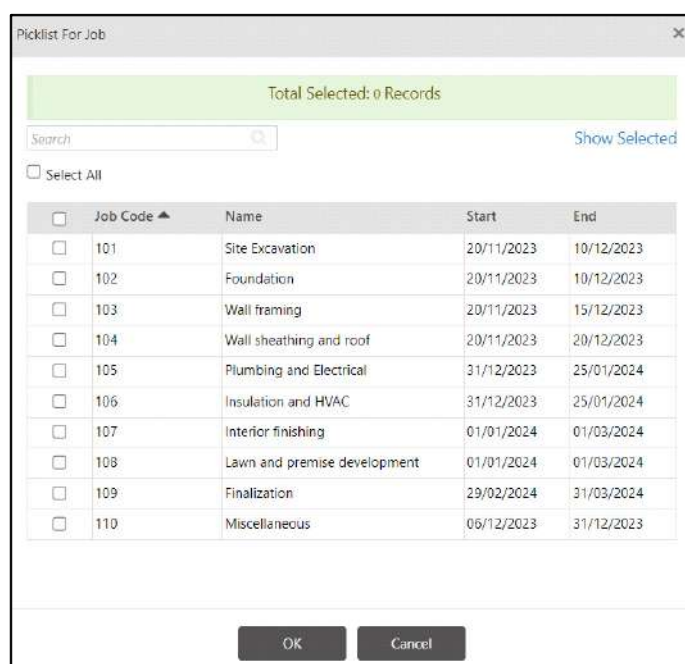
- **Assign Jobs:** You can select Job Group as well as individual Jobs.

- To select **Job Group**, click the Job Group picklist, the **Picklist For Job Group** pop-up appears. Select the desired Job Group.

Click **Save**. The Jobs of the selected Job Group appear in the grid.


You can delete the desired Job. To do so, click **Edit**  and then click **Delete**  of the respective Job.

- To select **Jobs**, click the Jobs picklist. The **Picklist For Job** pop-up appears.



Picklist For Job

Total Selected: 0 Records

Search  [Show Selected](#)

☐ Select All

<input type="checkbox"/>	Job Code ▲	Name	Start	End
<input type="checkbox"/>	101	Site Excavation	20/11/2023	10/12/2023
<input type="checkbox"/>	102	Foundation	20/11/2023	10/12/2023
<input type="checkbox"/>	103	Wall framing	20/11/2023	15/12/2023
<input type="checkbox"/>	104	Wall sheathing and roof	20/11/2023	20/12/2023
<input type="checkbox"/>	105	Plumbing and Electrical	31/12/2023	25/01/2024
<input type="checkbox"/>	106	Insulation and HVAC	31/12/2023	25/01/2024
<input type="checkbox"/>	107	Interior finishing	01/01/2024	01/03/2024
<input type="checkbox"/>	108	Lawn and premise development	01/01/2024	01/03/2024
<input type="checkbox"/>	109	Finalization	29/02/2024	31/03/2024
<input type="checkbox"/>	110	Miscellaneous	06/12/2023	31/12/2023

OK Cancel


You can either select particular jobs or can select all the jobs at once.

To select particular jobs, select the check boxes of the desired jobs.

**OR**

To select all the jobs, select the **Select All** check box. The jobs on all the pages will be selected.

Click **OK**.

The selected Jobs appear in the grid. You can also delete the desired Job. To do so, click **Delete**  of the respective Job.

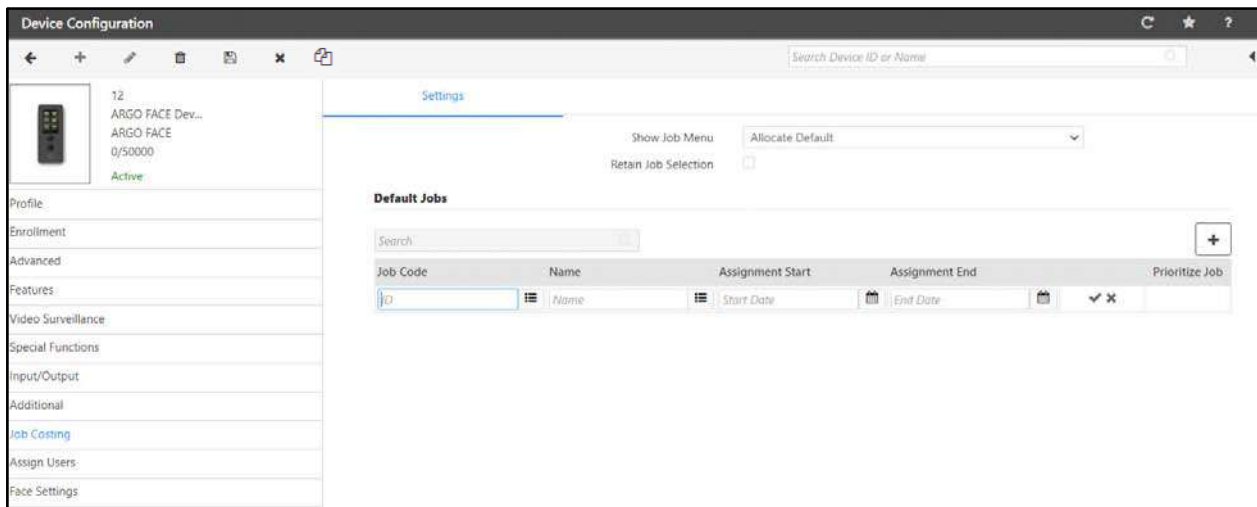
- Click **Save**.

## Allocate Default

When **Allocate Default** is selected; then default jobs for the device can be selected. The Job costing user can directly punch on this door for starting the default job.

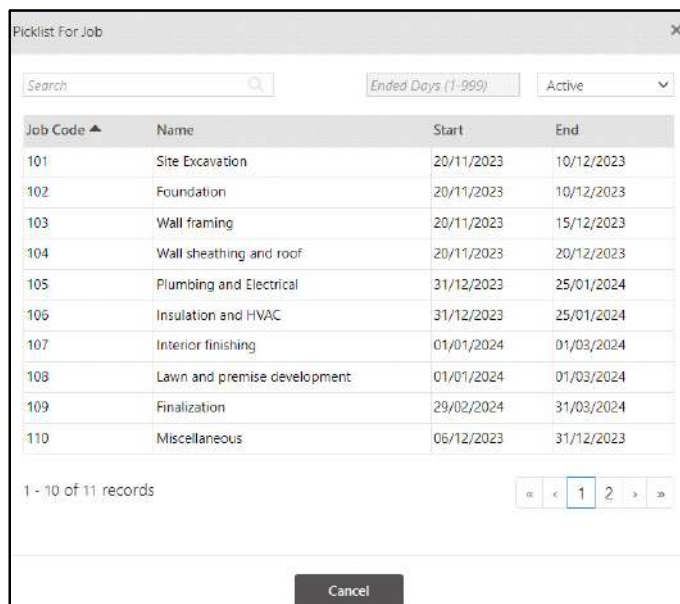
## Default Jobs

Multiple default jobs can be assigned with overlapping Assignment Date Ranges. You can also set the priority of the assigned jobs if required. If you have jobs with overlapping dates and you have set their priority as per your requirement, then the first job will be considered as the default job.



- Click **Add**  . Click the picklist under **Job Code/Name** to select the desired Jobs.

The **Picklist For Job** appears.



By default, all the **Active** jobs are displayed. Click **Active** and select the desired option — **All**, **Active**, **Expired** — to filter the jobs. The jobs appear as per the set filter.

If you select **Expired**, you can set another filter.

Configure the number of days in Ended Days (1-999). The system will display the expired jobs, derived using the following: Current Date minus Number of days configured in Ended Days.

For example:

Ended Days configured = 2

Current Date= April 25, 2024

All the jobs expired between April 23, 2024 to April 25, 2024 (midnight), will be displayed.

Click to select the desired job from the list. You can also search for the desired job using the search bar. The selected job appears in the grid.

- **Assignment Start** and **Assignment End**: The selected Jobs Start and End dates are displayed. You can change the Assignment Start and Assignment End dates of the job if required. To do so, click the calendar and select the desired start and end dates.

- Click **Save** to save the configuration.

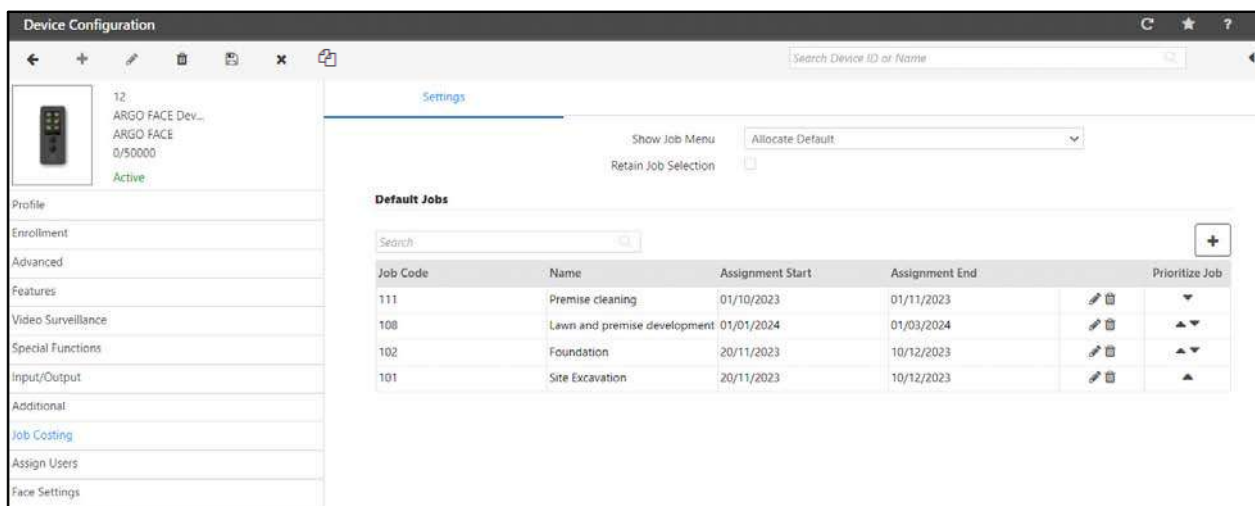
The **Default Jobs** grid will consist of all the jobs, that is expired, in-progress as well as assigned.



*It is recommended to set job priority only if overlapping dates are assigned to the jobs.*

*If a new job is assigned, by default it will appear at the highest priority. You can change the priority later, if required.*

You can set the priority of the jobs as per your requirement. To do so,



- Under **Prioritize Job**, click the **Up** arrow button to move a job upwards in the list. Similarly, click the **Down** arrow button to move a job downwards in the list.

If you have overlapping dates assigned to Jobs, in such scenarios there will be multiple Jobs in which the punches are possible.

To resolve this set the Job with highest priority at the first position, so that when the system searches for the Job as per the date, the punch will be marked in the first Job in which the date is detected.

Let us understand this with the help of an example.

#### Example:

User 1 has been assigned the following jobs:

Job Code	Job Name	Assignment Start	Assignment End	Prioritize Job
J1	Job 1	01/10/2023	10/10/2023	1

Job Code	Job Name	Assignment Start	Assignment End	Prioritize Job
J2	Job 2	09/10/2023	15/10/2023	2
J3	Job 3	17/10/2023	25/10/2023	3
J4	Job 4	25/10/2023	31/10/2023	4

Now, User 1 changes the priority of the assigned jobs as follows:

Job Code	Job Name	Assignment Start	Assignment End	Prioritize Job
J2	Job 2	09/10/2023	15/10/2023	1
J1	Job 1	01/10/2023	10/10/2023	2
J4	Job 4	25/10/2023	31/10/2023	3
J3	Job 3	17/10/2023	25/10/2023	4

When User 1 will punch on 09/10/2023, the punch will be marked against Job 2 as it has been set at priority number 1. Similarly, when User 1 will punch on 25/10/2023, the punch will be marked against Job 4 as it is at a higher priority than Job 3.



*Make sure that the assigned jobs are prioritized correctly to ensure that the punches are in place.*

## Assign Users

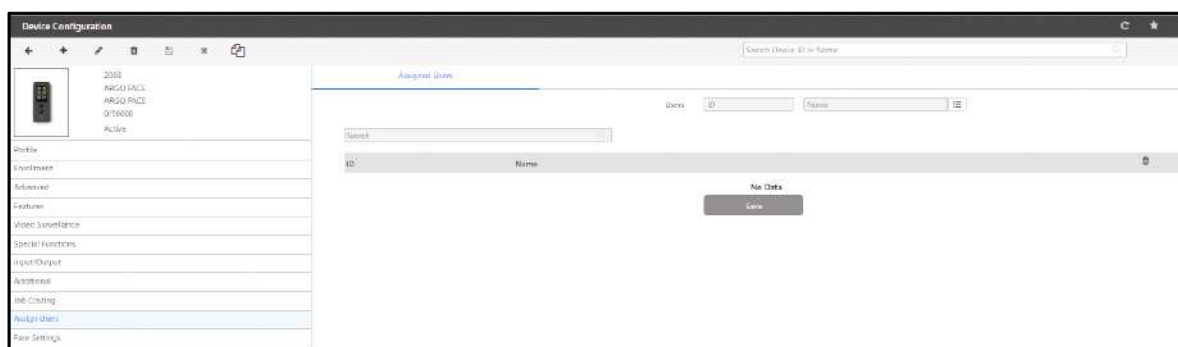


*Assign Users is applicable for both Direct Door and Panel Door.*

### For Direct Doors

You can select and assign users to the door.


On the **Device configuration** page, click **Assign Users**. The Assign Users page appears.



- **Users:** Click the picklist. The Picklist For All Users window appears.

Select the check boxes of the desired Users and click **OK**.

The grid displays the list of selected users.

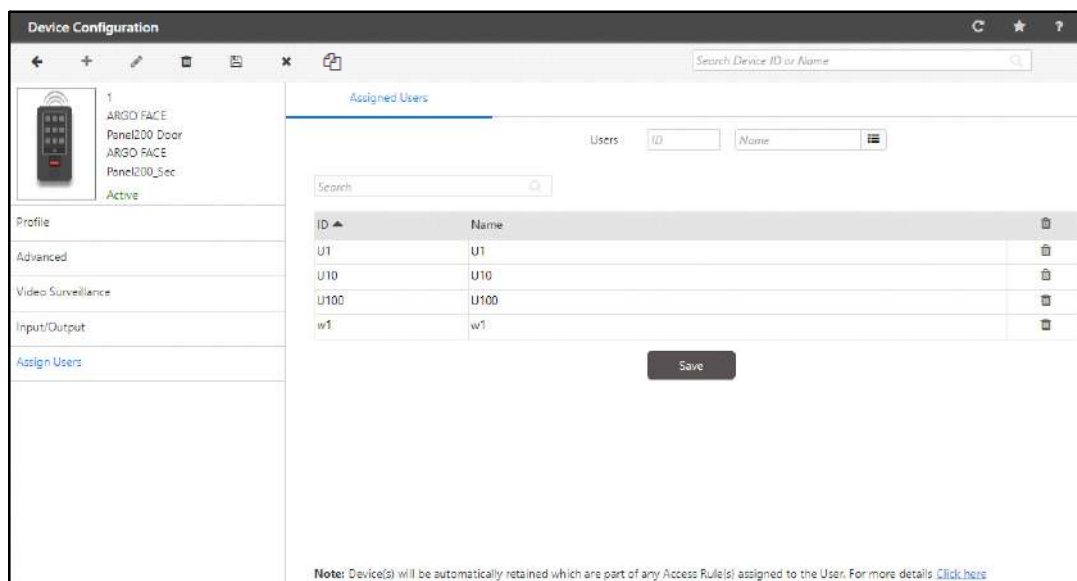
If you wish to remove any assigned user, click the respective **Delete**  icon.

- Click **Save**.

## For Panel Doors

You can select and assign users to the door.


On the **Device configuration** page, click **Assign Users**. The Assign Users page appears.



- **Users:** Click the picklist. The **Picklist For All Users** window appears.

Select the check boxes of the desired Users and click **OK**.

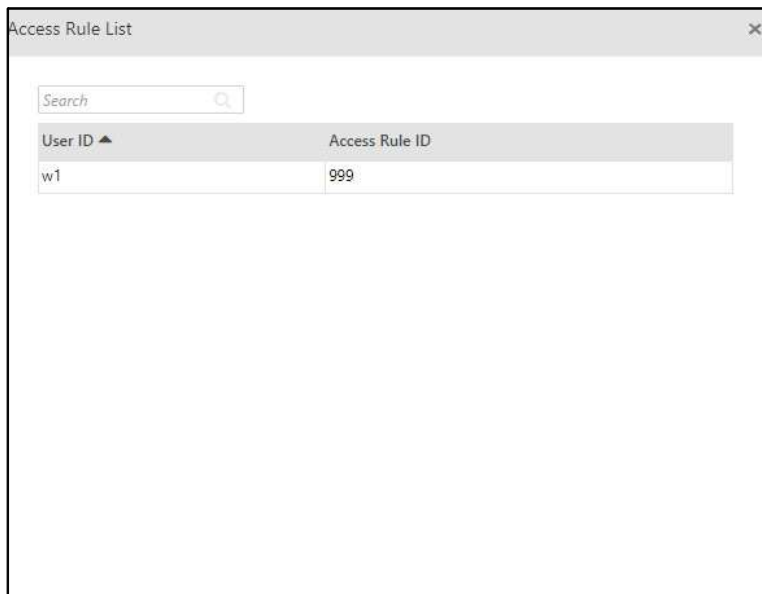
The grid displays the list of selected users.

If you wish to remove any assigned user, click the respective **Delete**  icon.



*If you wish to delete a user which is assigned to this device and it is a part of any Access Rule assigned to that user, then such user and door/s will be retained.*

- If you wish to check the users assigned against any Access Rule, click the **Click here** link at the bottom of the page. The **Access Rule List** pop-up appears.



The image shows a pop-up window titled "Access Rule List". It contains a search bar at the top. Below it is a table with two columns: "User ID" and "Access Rule ID". The table has one row with the values "w1" and "999".

User ID	Access Rule ID
w1	999

It displays the list of User ID along with the Access Rule ID against which they are assigned.

- Click **Save** to assign all the added users to this door.

## Cafeteria

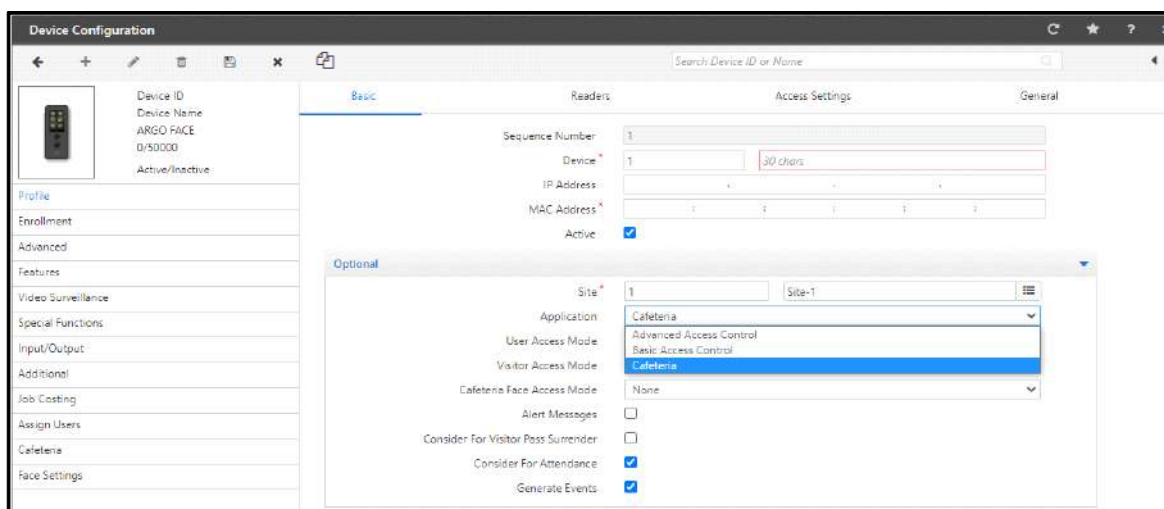


*Cafeteria is applicable for Direct Door only.*

*View Cafeteria Balance from Device will be functional using Card, QR Code (if Allow Access Via QR is enabled) as well as Face (if Enable FR is enabled) credentials.*

The COSEC system enables you to configure devices which will be used by the Cafeteria management module.

To configure a door for Cafeteria application, make sure you have selected **Cafeteria** option in **Application** (Device Profile > Basic > Application) as shown below.



The image shows the "Device Configuration" window with the "Application" tab selected. The left sidebar shows a list of configuration options: Profile, Enrollment, Advanced, Features, Video Surveillance, Special Functions, Input/Output, Additional, Job Costing, Assign Users, Cafeteria, and Face Settings. The main area displays the "Application" configuration for a device named "ARGO FACE". The "Application" dropdown is set to "Cafeteria". Other options include "User Access Mode" (Basic Access Control), "Visitor Access Mode" (Basic Access Control), "Cafeteria Face Access Mode" (None), "Alert Messages" (unchecked), "Consider For Visitor Pass Surrender" (unchecked), "Consider For Attendance" (checked), and "Generate Events" (checked).

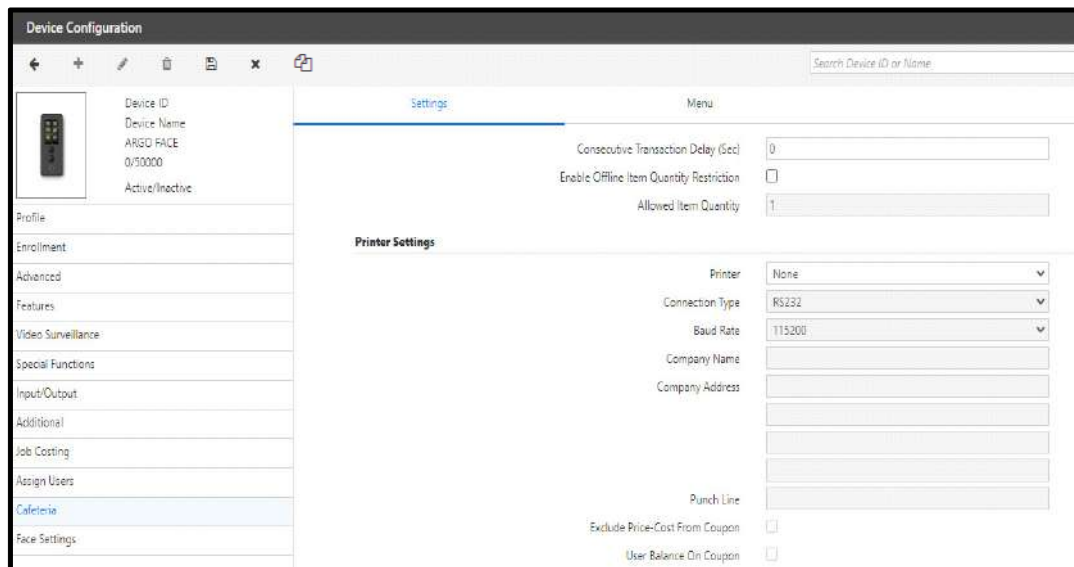
On the **Device Configuration** page, click **Cafeteria** on the left pane.

For the Cafeteria configurations, click the following links.

- “Settings”
- “Menu”

## Settings

Click **Settings** tab. The Cafeteria configuration for ARGO FACE Door appear.



The screenshot shows the 'Device Configuration' window. On the left, a sidebar lists various configuration categories: Profile, Enrollment, Advanced, Features, Video Surveillance, Special Functions, Input/Output, Additional, Job Costing, Assign Users, Cafeteria (selected), and Face Settings. The main area is titled 'Settings' and contains the following fields:

- Consecutive Transaction Delay (Sec):** A text input field with the value '0'.
- Enable Offline Item Quantity Restriction:** A checkbox that is currently unchecked.
- Allowed Item Quantity:** A text input field with the value '1'.
- Printer Settings:** A section containing several fields:
  - Printer:** A dropdown menu with 'None' selected.
  - Connection Type:** A dropdown menu with 'RS232' selected.
  - Baud Rate:** A dropdown menu with '115200' selected.
  - Company Name:** A text input field.
  - Company Address:** A text input field.
  - Punch Line:** A text input field.
  - Exclude Price-Cost From Coupon:** A checkbox that is currently unchecked.
  - User Balance On Coupon:** A checkbox that is currently unchecked.

- **Consecutive Transaction Delay (Sec):** Enter the time interval after which you wish to allow the second transaction from the same user.
- **Enable Offline Item Quantity Restriction:** Select the check box if you desire restricting transaction on exceeding the item quantity while the device is in offline mode.
- **Allowed Item Quantity:** Specify the number of item quantity to be allowed when the device is in offline mode. This will be applicable for each item present in the Menu.

For example, if the Menu has two items Tea and Poha and you have configured the **Allowed Item Quantity** as 2, then when the device is offline, the user/worker will be allowed to consume Tea twice as well as Poha twice.

## Printer Settings

- **Printer:** Select the printer from the drop-down list based on the site requirements.
- **Connection Type:** Select the printer connection type from the drop-down list. The options available are:
  - RS232 (serial)
  - USB
- **Baud Rate:** In the event of a serial printer, select the appropriate baud rate from the drop-down list.
- Specify the **Company Name**, **Company Address** and the **Punch Line** as per the site requirements. These details will be printed on the receipt dispensed from the selected printer.



- **Exclude Price-Cost From Coupon:** Select this check box if you want to exclude the price from the coupon.
- **User Balance On Coupon:** Select the check box, if you want Current Balance/ Current Month Usage and Weekly Remaining Limit to be printed on the Cafeteria receipt.  
For pre-paid account users, Current Balance and Weekly Remaining Limit will be printed.

For post-paid account users, Current Month Usage and Weekly Remaining Limit will be printed.

For details refer to [“Cafeteria Usage Policy”](#).

## Menu

Click the **Menu** tab.

COSEC allows the administrator to assign one or more Cafeteria Menus (Menu 1, Menu 2, Menu 3... upto 99.) to a device. These can be configured by selecting pre-defined menus from the Menu picklist.

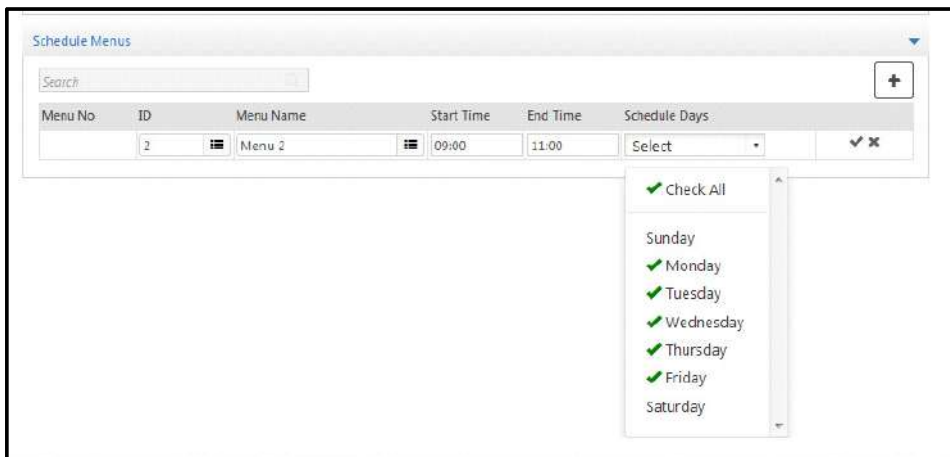


*The Menu is created from Cafeteria module.*

The Menu can also be scheduled from Cafeteria module which will be displayed under “Schedule Menus” in above screen.

If you have to assign menu and schedule it on the door from Device Configuration page, then select the Menu from the picklist. The Menu will be displayed in the grid as shown below.

Now to schedule the Menu click **Add**.



- **ID:** Click the picklist to select the desired Menu ID
- **Name:** Click the picklist to select the desired Menu Name.
- **Start Time/End Time:** Specify the **Start Time** and **End Time** for which the Menu will be active and is available to users on the selected door.
- **Days:** Select the **days** for which this menu will be available, that is, scheduled on the door.
- Click **OK** and **Save** to save the Menu schedule on the door.



*Two Menus cannot be scheduled for the same timing.*

## Face/Image Settings



*Face/Image Settings (except Group FR which is applicable for Direct Door only) are applicable for both Direct Door and Panel Door.*

*ARGO Face as Panel Door supports FR Mode - Local only.*

Device has a limited memory capacity for storage of templates so we need the Identification Server which will store more number of templates and respond to the device when asked for identification.

For more information on Identification Servers, refer to *Admin> System Configuration> Identification Server Configuration*.

On the Device Configuration page, click **Face/Image Settings** on the left pane.

The screenshot shows the 'Device Configuration' interface. On the left, a sidebar lists various settings categories: Profile, Enrollment, Advanced, Features, Video Surveillance, Special Functions, Input/Output, Additional, Job Costing, Assign Users, and Face/Image Settings (which is highlighted). The main area displays the 'Settings' for the selected device. Under the 'Image Settings' section, the following options are visible: 'Enable FR' (checked), 'Allow Access Via QR' (unchecked), 'Image Capturing Mode' (set to 'Free Scan'), 'Enable Time Out' (unchecked), 'Free Scan Time Out (Sec)' (set to 30), and 'Identification Time-Out Duration (Sec)' (set to 4). Below this, the 'Face Recognition' section includes 'FR Mode' (set to 'Local'), 'Matching Threshold (Face)' (set to 94.00%), 'Threshold for Face Detection' (set to 50%), 'Group FR' (unchecked), 'Capture Face of Unidentified User' (unchecked), 'Show Feedback for Unidentified Face' (checked), and 'Generate Unidentified Face Event' (unchecked).

## Image Settings



*The parameters under **Image Settings** are applicable when **Enable FR** and/or **Allow Access Via QR** are enabled.*

*If both **Enable FR** and **Allow Access Via QR** are enabled then all the credentials will be functional.*

- **Enable FR:** By default, this check box is enabled, that is Face Recognition feature is enabled in the device. Clear the check box to disable.



*If only **Enable FR** is enabled, then the credentials with Face will be functional, but Access Via QR feature will not be functional.*

- **Allow Access Via QR:** If you wish to allow users/workers to access the Device using QR Code, select this check box. Enabling this feature will eliminate the need of connecting a Wiegand QR Reader separately for detecting QR Codes.



- *Access Via QR feature is not applicable for Temporary Users.*
- *Access Via QR feature is applicable for:*
  - *Application mode select as Basic Access Control, Advanced Access Control as well as Cafeteria mode.*
  - *If only **Allow Access Via QR** is enabled, then the credentials with Card only will be functional and FR feature will not be functional.*
  - *Credential option selected in Mobile Entry/Exit Access Mode is set as Mobile then Card (when only Allow Access Via QR is enabled).*
- *Users will be able to use QR Code as credentials (if enabled) for Special Functions, if the QR number is configured against a Card1/2/3/4.*

For the QR Code functionality to work, make sure:

- you have generated the QR Code for the desired user, refer to **"Credentials"**, Access Card 2.

- you have generated the QR Code for the desired worker, refer to [“Worker Profile- Credentials”](#), Access Card 2.
- enabled the Alert, so that the generated/re-generated QR can be sent to the desired users/workers using SMS/Email/WhatsApp. Make sure you select the Alert Filter as Users and Event as User Access - QR Credentials. For details, refer to [“Configuring Alert Messages”](#).

If you add new devices and want **Allow Access Via QR** check box to be enabled by default, make sure you have enabled the same in Global Policy > Device. For details refer to [“Device”](#) in [“Defining Global Policies”](#).

- **Image Capturing Mode:** Select the desired Image Capturing option.
  - **Tap and Go:** If you select this option, user needs to tap on the device screen once. The MJPEG, that is motion recording screen appears. Device will capture and then identify the users face. If during working hours device is idle, then user needs to tap the device to scan the face and gain access.
  - **Free Scan:** If you select this option, the device will display the MJPEG, that is motion recording screen till the expiry of the Free Scan Time Out timer.
    - **Enable Time Out:** Select this box to enable the time out.
    - **Free Scan Time Out (Sec):** Enter the Free scan time out duration. The valid range is 1 to 999 sec.

In Free Scan method, multiple users can mark their attendance easily during peak entry hours.

For example, if the Free Scan Time Out is set as 30sec and if the user is identified in 10S then the system reloads the Free Scan Time Out timer again. Hence, device remains in the scanning mode.

- **Identification Time-Out Duration (Sec):** Specify the duration in seconds after which the face identification will get timed out. For Example: If 5 seconds is specified, then the identification server will try to identify the face till 5 seconds and if not found then it will show time-out to the user.

## Face Recognition

- **FR Mode:** Select the FR Mode as **Local** or **Server Assisted**.



*ARGO Face as Panel Door supports FR Mode - Local only.*

- **Local:** In this Local mode Face templates will be stored in FR hardware module which can store 2 lakh face templates. The captured face template will be verified with the templates stored in the FR module.
- **Server Assisted:** In Server Assisted mode, an identification server and the fields to configure an individual identification server will get enabled as shown below. You must select the Identification server from where the face templates will be identified.



*Card will be identified and verified locally by the device irrespective of the FR Mode. Whereas, Face will be identified and verified based on the selected FR Mode.*

When FR Mode is selected as **Local** below mentioned parameters are to be configured:

The screenshot shows the 'Settings' page with two main sections: 'Image Settings' and 'Face Recognition'. In the 'Image Settings' section, 'Enable FR' is checked, 'Allow Access Via QR' is unchecked, 'Image Capturing Mode' is set to 'Free Scan', 'Enable Time Out' is unchecked, 'Free Scan Time Out (Sec)' is set to 30, and 'Identification Time-Out Duration (Sec)' is set to 4. These four settings are enclosed in a red rectangular box. The 'Face Recognition' section shows 'FR Mode' set to 'Local', 'Matching Threshold (Face)' at 94.00%, and 'Threshold for Face Detection' at 50%. Below these are 'Group FR' (unchecked), 'Capture Face of Unidentified User' (unchecked), 'Show Feedback for Unidentified Face' (checked), and 'Generate Unidentified Face Event' (unchecked).

- **Matching Threshold (Face):** Enter the Matching Threshold in percentage for Face Recognition. This will be considered while face identification of the user. This value can be configured upto two decimal points. *Example:* If you set Matching threshold as low (e.g.: 20%) then false matching may be found. i. e. your Face may match with other person.

But if you set matching at high percentage (e.g.: 70%) then more accurate matching of your template will be done and accordingly access will be granted or denied.

- **Threshold for Face Detection:** Set the value in percentage. The system will consider this percentage as confidence of face presence in the received image. When the user image received is above this threshold it will be considered for further processing.



*If you upgrade the system to V20R08 and later, the value of Threshold for Face Detection will be set as 50 by default.*

If you select FR Mode as **Server Assisted**, you must configure the following parameters:

User can either assign a separate or a common Identification Server which is shared by other biometric credentials.

The screenshot shows the 'Settings' page with the 'Image Settings' section. The 'Face Recognition' sub-section is highlighted with a red box. The settings within this section are:

- FR Mode: Server Assisted (dropdown)
- Identification Server: ID (picklist), Name (picklist)
- Configure Alternate Server Address: ☐
- Server Address: (text field)
- Server Port: 11005 (text field)
- Threshold for Face Detection: 50 (text field) %

- **Identification Server:** Select the Identification server from the picklist to which the device is to be assigned to save the records.
- **Configure Alternate Server Address:** Select this check box to configure external IP address of Identification Server.
- **Server Address:** By default, this will display the configured Identification Server for FR. This field allows user to enter the Alternate IP Address for FR if **Configure Alternate Server Address** is enabled.
- **Server Port:** Enter the TCP port number. The default port number is 11005.
- **Threshold for Face Detection:** Set the value in percentage. The system will consider this percentage as confidence of face presence in the received image. When the user image received is above this threshold it will be considered for further processing.



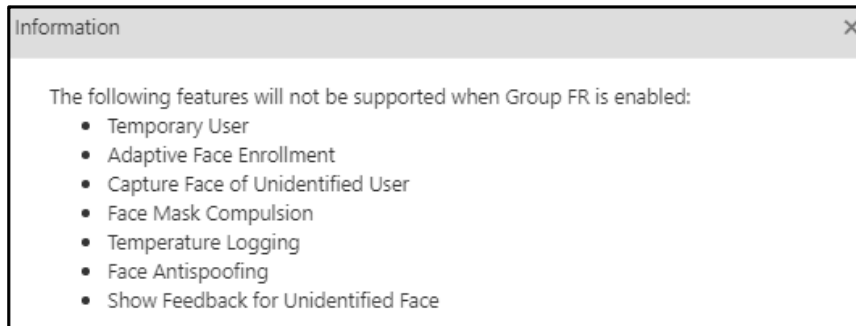
*Group FR is applicable for Direct Door only.*

- **Group FR:** Select this check box to enable face recognition feature for multiple users and marking their attendance at the same time via this door. Group FR will be applicable only if you have selected **Free Scan** as the **Capturing Mode**.



For Group FR ("[Mark Group Attendance](#)") feature to work, ensure that Server Assisted is selected as the FR Mode and the desired Identification Service is selected in COSEC Admin > License and Service. For more details refer Admin Management Portal User Manual.

Once you enable Group FR, a pop-up will be displayed as shown below:



The features listed in the pop-up will not be functional.

- **Capture Face of Unidentified User:** Select this check box to enroll unidentified faces of users via this door.



For Capture Face of Unidentified User feature to work, ensure that the desired Identification Service is selected in COSEC Admin > License and Service. For more details refer Admin Management Portal User Manual.

If you have enabled the **Capture Face of Unidentified User** feature then make sure that you schedule a task of **Delete Unidentified Face** in Admin > System Utilities> Task Scheduler to avoid storage of excess data in the database.

- **Show Feedback for Unidentified Face:** Select this check box, if you wish to display a message on the Device display screen to user's whose face is not identified.



If you wish that events should be generated for Unidentified Face, enable **Generate Unidentified Face Event**.

If you have enabled **Group FR**, **Show Feedback for Unidentified Face** feature will not be functional.

- **Generate Unidentified Face Event:** Select this check box, if you wish to generate events when a user's face is unidentified.

These events can be viewed from **Admin Module > View/Logs > Event View** as well as **Device Module > Reports > Invalid Events**.

If you wish to view the snapshots in the Events/Logs, make sure you have configured "[Built-In Camera](#)" in "[Visual Tagging](#)". Make sure you select the Trigger as **Access Denied** or **Both** to view the snapshots for **User Denied- User Invalid** event.



**Generate Unidentified Face Event** is applicable for **Face** credentials only.

For ARGO FACE Direct Door, to generate events for all other credentials, make sure **Generate Invalid User Events** is enabled under **“Settings - Direct Door”** in **“Advanced”**.

For ARGO FACE Panel Door, to generate events for all other credentials, make sure **Generate Invalid User Events** is enabled under **“Settings”** tab in **“Advanced”** in **“Panel200”**.

If you wish that a message should be displayed on the device display screen for Unidentified Face, enable **Show Feedback for Unidentified Face**.

## Face Enrollment



If the **FR Mode** is **Server-Assisted** and you wish to enroll faces from the device, make sure **Enable Face Recognition** is selected in **Users > User Configuration > Face Recognition and/or Visitor Management > Visitor Profile > Face Recognition and/or Contract Worker Management > Worker Profile > Face Recognition**.

The screenshot shows the 'Settings' page with a 'Face Enrollment' section. The 'Conflict Check' checkbox is checked, and the 'Conflict Matching Threshold (Face)' is set to 93.00%. The 'Adaptive Face Enrollment' section has 'Adaptive Face Enrollment' unchecked, 'Threshold Deviation (Face)' set to 02.0%, 'Multi-User Matching Score Deviation (Face)' set to 02.0%, and 'Confirm Before Adaptive Face Enrollment' unchecked. The 'Face Antispoofing' section has 'Face Anti-Spoofing' unchecked, 'Face Anti-Spoofing Mode' set to 'Advance', 'Face Anti-Spoofing Threshold' set to 62.00%, and 'Default Biometric Group No.' set to 0.

Setting	Value
Server Port	11005
Threshold for Face Detection	50 %
Group FR	<input type="checkbox"/>
Capture Face of Unidentified User	<input type="checkbox"/>
Show Feedback for Unidentified Face	<input checked="" type="checkbox"/>
Generate Unidentified Face Event	<input type="checkbox"/>
<b>Face Enrollment</b>	
Conflict Check	<input checked="" type="checkbox"/>
Conflict Matching Threshold (Face) *	93.00 %
<b>Adaptive Face Enrollment</b>	
Adaptive Face Enrollment	<input type="checkbox"/>
Threshold Deviation (Face)	02.0 %
Multi-User Matching Score Deviation (Face)	02.0 %
Confirm Before Adaptive Face Enrollment	<input type="checkbox"/>
<b>Face Antispoofing</b>	
Face Anti-Spoofing	<input type="checkbox"/>
Face Anti-Spoofing Mode	Advance
Face Anti-Spoofing Threshold	62.00 %
Default Biometric Group No.	0

- **Conflict Check:** Select the check box for the system to check the conflict between the new face of a user and the already (existing) enrolled faces of all the users (available in the database) during the face enrollment process.
- **Conflict Matching Threshold (Face):** Enter the desired Conflict Matching Threshold (Face) value in percentage.

The system will consider this value while comparing the face with the face templates already present in the database.



If a conflict is found, that is, if the system detects a face template in the database similar to the new face, then a conflict error will be displayed.

Make sure a higher value is set for this parameter, as it will result in less equivalent matches with the face templates available in the database.



Make sure the **Conflict Matching Threshold (Face)** is set lower than **Matching Threshold** in **Admin module > System Configuration > Identification Server Configuration**.

#### Example: Face Enrollment of Suresh

- **Conflict Check** check box is selected.
- **Conflict Matching Threshold (Face)** is set as 93%.

Now during the face enrollment of Suresh, the system will check in its database if his face matches with faces of other users available in the database.

- **Case 1:** If Suresh's face matches 92% with Ram, then the system will allow to enroll Suresh's face.
- **Case 2:** If Suresh's face matches 94% with Shyam, then the system will display the conflict error while enrolling Suresh's face.

## Adaptive Face Enrollment

- **Adaptive Face Enrollment:** Select this check box to Enable Adaptive Face Enrollment for identification server.
- Adaptive face enrollment provides automatic real time face enrollment whenever change is experienced in facial features.
- Enabling adaptive enrollment process parameter, an additional slot will be provided internally to store 10 more face templates of a user.
- IDS will learn from face recognized, adapt and would take decision of storing new template of a user database.

If you enable Adaptive Face Enrollment, you must configure the following parameters.

- **Threshold Deviation (Face):** Enter the value of deviation from matching threshold in percentage. Based on the value entered for deviation, template for Adaptive Face Enrollment will be decided.

Example: If deviation entered is 3% and matching threshold is 98% then it will classify template which has matching score between 98 - 95 and one lower than this will be classified below margin.

- **Multi-user Matching Score Deviation (Face):** Enter the value of deviation from matching score between 2 different users while Adaptive Face Enrollment.

Difference between matching scores of templates will be done, when we have templates of two or more users falling under above specified deviation.

Let us understand this with the help of the following example:

- *Threshold value = 98%*
- *Threshold Deviation= 3%*

So, Result will display all matching templates having matching score between range 98 to 95

- Multi-user Matching score deviation = 0.5%

If, 5 best templates of 2 users fall between 98 -95% range

User	Matching Score
User 1	97.8
User 1	97.6
User 1	97.4
User 2	97.25
User 2	97

As we have obtained templates of 2 users in which user 1 is having template of highest matching score, so will make a difference between lowest score template of user 1 and highest matching score template of user 2.

$97.4 - 97.25 = 0.15$ ; this is less than 0.5

As difference is less than 0.5, user 1's template having matching score 97.8 for adaptive enrollment will not be used.

- Threshold Deviation and Multi-user Matching score deviation will act as two filters to fetch appropriate template for adaptive enrollment. Values can be added in decimal.



We recommend to set the multi-user matching score deviation higher always e.g.2.0 to reduce the probability of enrolling a particular user's face template in some different user's enrolled faces.

- **Confirm before Adaptive Face Enrollment:** Select this check box, if face enrolled using Adaptive face enrollment requires confirmation from User.



Faces enrolled under Adaptive enrollment process will be synced automatically, but when IDS is restarted due to any reason, the adaptive faces which are not synced will be removed by default.

## Face Antispoofing

- **Face Anti-Spoofing:** Face Anti-Spoofing feature prevents false face verification by using a photo, video, mask or a different substitute for an unauthorized person's face.

To use this feature, make sure **Enable FR** check box is selected. Select the **Face Anti-Spoofing** check box to enable this feature and configure the following parameters:

- **Face Anti-Spoofing Mode:** This parameter is applicable when **FR Mode** is selected as **Server Assisted**.

Liveness Detection helps to limit the fierce risk of spoofing attacks by using several anti-spoofing approaches. Along with the configurations to be done for Face Anti-Spoofing you also need to take care of the recommended settings for liveness verification and for face recognition, refer "[Recommendations for Liveness Verification](#)" and "[Recommendations for Face Recognition](#)".

Select the Face Anti-Spoofing Mode for liveness detection from the following:

1. **Moderate:** This mode analyzes the texture of face. Select this option when the distance between Camera and Face is less than 2 feet
  2. **Advance:** Select this option when the distance between Camera and Face is more than 1 feet and less than 2 feet. By default, Face Anti-Spoofing Mode will be **Advance**.
- **Face Anti-Spoofing Threshold:** Enter the Face Anti-Spoofing threshold value in percentage within the range from 1.00 to 99.99 to identify user's face liveness for considering him/her as genuine person.



*For FR Mode as Local, the default value of Face Anti-Spoofing Threshold will be 90.*

*If you upgrade the system to V20R08 and later, the value of Face Anti-Spoofing Threshold will be set as 90 by default.*

Default **Biometric Group** is applicable only if you have selected **Server Assisted** as the **FR Mode**.

- **Default Biometric Group No.:** Enter the default biometric group number to be assigned to the device. It is a number allotted to a device to be assigned to the Identification Server. This enables the Identification Server to match the template against only those devices that belong to the corresponding biometric group. This reduces the false detection as well time to search template.

Click **Save**.

# Device Access Schedule

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Device Access Schedule allows you to create Time Frames and Access Schedules which define the time period for which the devices will remain active. These schedules enable you to create specific time slots during a day when the devices should be accessible to selected users, after which the devices will switch into inactive mode. This ensures that the devices are accessible only during designated time slots, so that user access is controlled and monitored easily.

Device Access Schedule is supported in the following Direct Doors — ARGO, VEGA, ARGO FACE, Path V2 and ARC DC200.

To use this feature, you must:

- create Time Frames. For details, refer to [“Time Frames”](#).
- create Access Schedule. For details, refer to [“Access Schedules”](#).
- assign the Time Frames to the Access Schedule. For details, refer to [“Select Time Frames”](#).
- assign Devices to the Access Schedule. For details, refer to [“Assign Doors”](#).
- assign Access Schedule to the desired device. For details, refer to [“Access Settings”](#) in ARC DC200, [“Access Settings”](#) in Path V2, [“Access Settings”](#) in ARGO, [“Access Settings”](#) in VEGA and [“Access Settings”](#) in ARGO FACE.



*Device Access Schedule is not applicable:*

- *when device is in Cafeteria mode.*
- *when device has active IO Linking and/or Time Triggered configuration.*

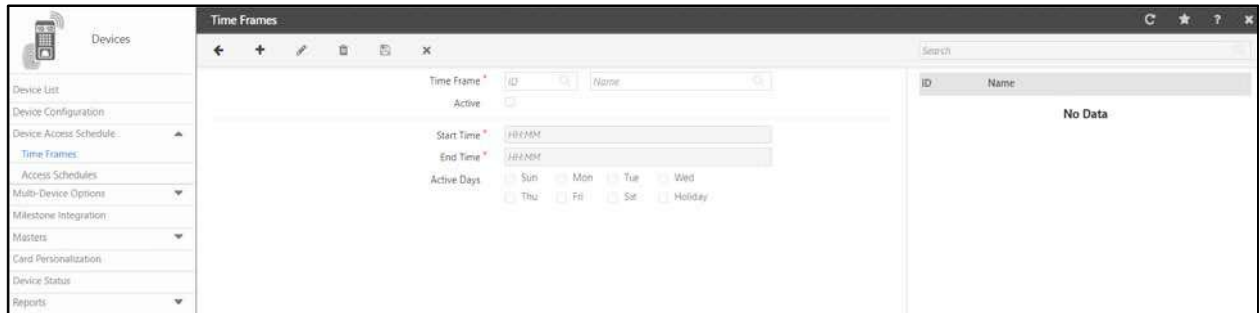
*The devices will respond to the commands from —COSEC Server, COSEC Monitor, Device Webpage and Device display menu (If Hide Menu Bar outside the Schedule is disabled) — irrespective of the Device Access Schedule assignment.*

*Special Cards will not function when the device is not within the assigned Access Schedule.*

# Time Frames

To configure Time Frames,

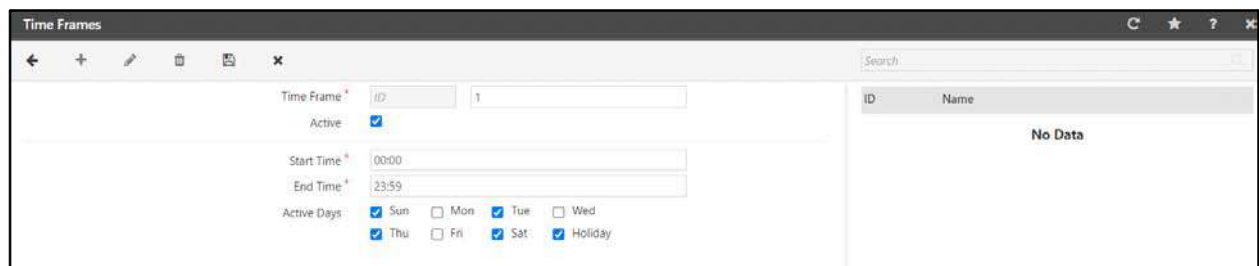
- Click **Devices module > Device Access Schedule > Time Frames**.




- Click **New**  .



*Maximum 99 Time Frames can be created.*



Configure the following parameters:

- Time Frame:** Specify a user friendly name for the new Time Frame. The ID is auto-generated by default.
  - Active:** Select the check box to activate the Time Frame.
  - Start Time:** Specify the Start Time for the Time Frame in HH:MM format. Valid Range: HH: 00-23, MM:00-59.
  - End Time:** Specify the End Time for the Time Frame in HH:MM format. Valid Range: HH: 00-23, MM:00-59.
  - Active Days:** Select the check boxes for the days on which you wish to apply the Time Frame. The Holiday check box will be displayed only if TAM or ACM module license is activated.
- Click **Save**  to save the Time Frame.

The new Time Frame appears in the right grid.

Time Frames

Time Frame \* 1 1

Active ☒

Start Time \* 00:00


End Time \* 23:59

Active Days ☒ Sun ☐ Mon ☐ Tue ☐ Wed ☒ Thu ☐ Fri ☒ Sat ☐ Holiday

Note: Time Frame cannot be deleted if already assigned to Access Schedule(s). For more details: [Click Here](#)

ID	Name
1	1

If you wish to edit any Time Frame,

- Click the desired Time Frame from the right pane. The details appear on the left. Edit the Time Frame as per your requirement.
- Click **Save**  to save the Time Frame.

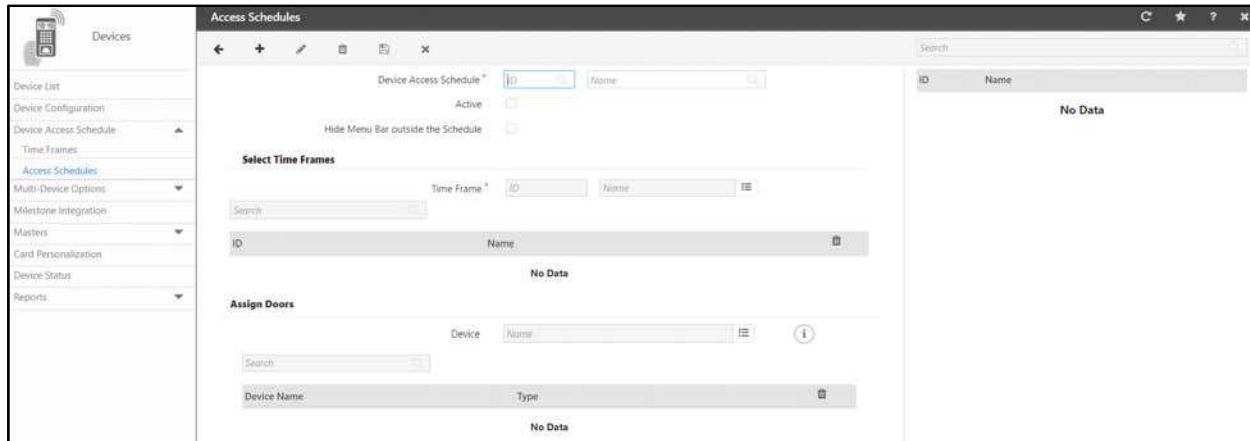


*A Time Frame that is assigned to any Access Schedule cannot be deleted. To view the details, click the **Click Here** link.*

# Access Schedules

To configure Access Schedules,

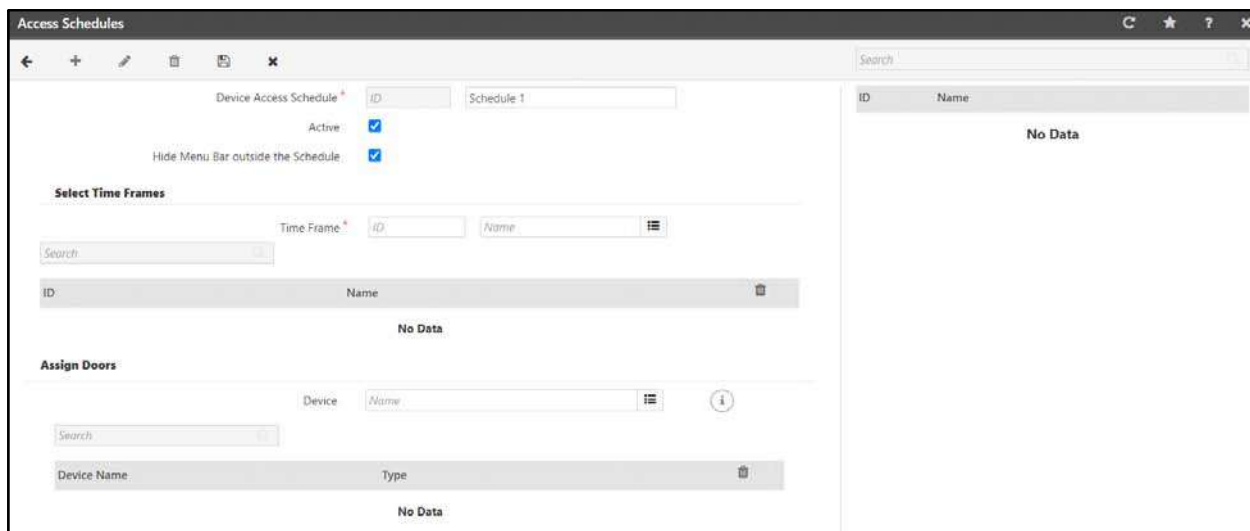
- Click **Devices module > Device Access Schedule > Access Schedule**.



- Click **New** .



*Maximum 99 Access Schedules can be created.*



Configure the following parameters:

- Access Schedule:** Specify a user friendly name for the new Access Schedule. The ID is auto-generated by default.
- Active:** Select the check box to activate the Access Schedule.
- Hide Menu Bar outside the Schedule:** Select the check box to hide the menu bar on device display screen once the defined schedule time frame expires.




If device is not within the assigned Access Schedule and Hide Menu Bar outside the Schedule is enabled, then it will override the Auto Hide Menu Bar (Device Configuration > Profile > General) parameter for that device.

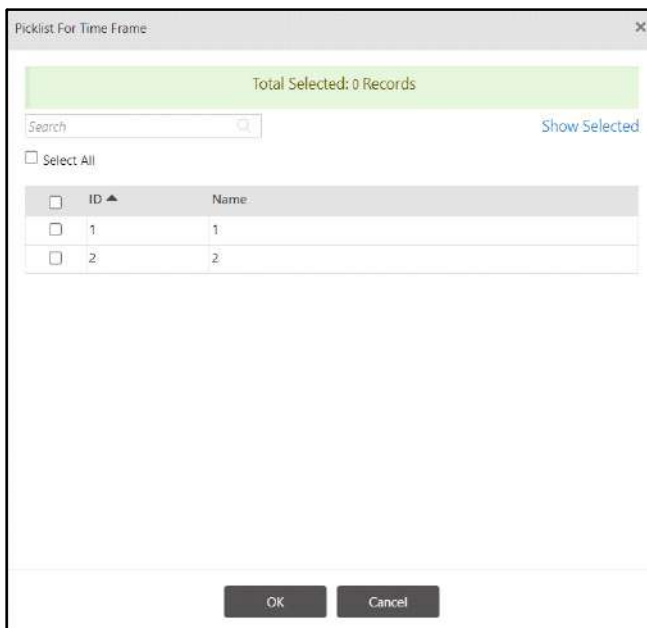
## Select Time Frames



A single Time Frame can be assigned to multiple Access Schedules. Maximum 32 Time Frames can be assigned to each Access Schedule.

Atleast one Time Frame must be assigned to each Access Schedule.

- **Time Frame:** Select the desired Time Frame/s which you wish to assign to the Access Schedule using the **Time Frame**  picklist. Click the picklist, the **Picklist For Time Frame** pop-up appears.



ID	Name
1	1
2	2

- You can either select particular Time Frame or select all the Time Frames at once.
- To select particular Time Frames, select the check boxes of the desired Time Frames. You can also search for the desired Time Frame using the search bar.



Picklist For Time Frame

Total Selected: 1 Records

Search  Show Selected

☐ Select All

<input type="checkbox"/>	ID ▲	Name
<input checked="" type="checkbox"/>	1	1
<input type="checkbox"/>	2	2

OK Cancel

OR

- To select all the Time Frames at once, select the **Select All** check box. The Time Frames on all the pages will be selected.

Picklist For Time Frame

Total Selected: 2 Records

Search  Show Selected


☒ Select All

<input checked="" type="checkbox"/>	ID ▲	Name
<input checked="" type="checkbox"/>	1	1
<input checked="" type="checkbox"/>	2	2

OK Cancel

- Click **OK**.
- The selected Time Frames appear in the grid.


The Time Frame details displayed are — ID and Name.

- You can also delete the desired Time Frames. To do so, click **Delete**  of the respective Time Frame.

## Assign Doors



*Only one Access Schedule can be assigned to a device. However, a particular Access Schedule can be assigned to multiple devices.*

- Device:** Select the desired devices which you wish to assign to the Access Schedule using the **Device**  picklist. Click the picklist, the **Select Device** pop-up appears.

- Only those devices which have not been assigned any Access Schedule appear in this list. You can either select particular device or select all the devices at once.
- To select particular devices, select the check boxes of the desired devices. You can also search for the desired device using the search bar.

The 'Select Device' dialog box shows a green header bar with 'Total Selected: 1 Records'. Below it is a search bar and a 'Show Selected' link. A 'Select All' checkbox is unchecked. The table below has three rows: 'Vega' (selected), 'ARGO Device\_1', and 'ARGO FACE\_1'.

	Name	Type
<input checked="" type="checkbox"/>	Vega	Vega Controller
<input type="checkbox"/>	ARGO Device_1	ARGO
<input type="checkbox"/>	ARGO FACE_1	ARGO FACE

At the bottom are 'OK' and 'Cancel' buttons.

**OR**

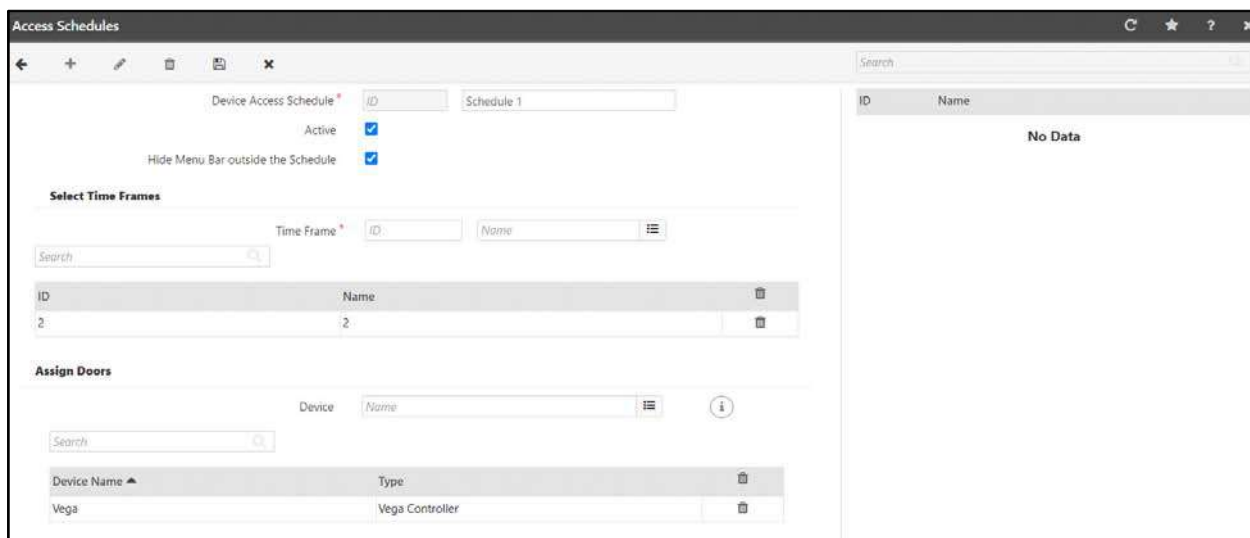
- To select all the devices at once, select the **Select All** check box. The devices on all the pages will be selected.

The 'Select Device' dialog box shows a green header bar with 'Total Selected: 3 Records'. Below it is a search bar and a 'Show Selected' link. A 'Select All' checkbox is checked. The table below has three rows: 'Vega', 'ARGO Device\_1', and 'ARGO FACE\_1', all of which are selected.



	Name	Type
<input checked="" type="checkbox"/>	Vega	Vega Controller
<input checked="" type="checkbox"/>	ARGO Device_1	ARGO
<input checked="" type="checkbox"/>	ARGO FACE_1	ARGO FACE

At the bottom are 'OK' and 'Cancel' buttons.

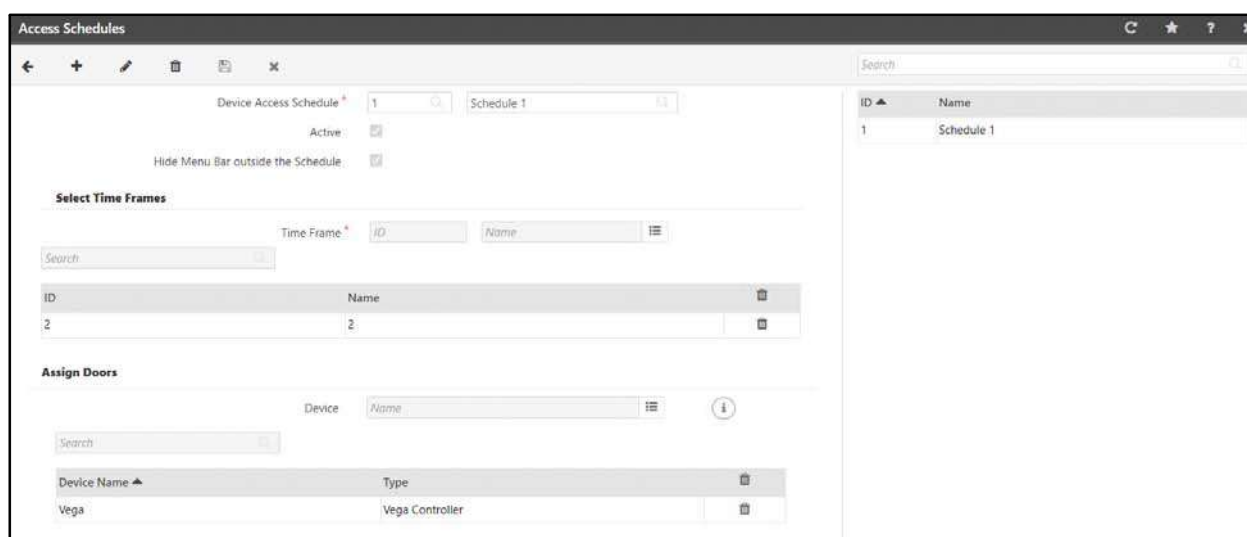
- Click **OK**.
- The selected devices appear in the grid.




The device details displayed are — Device Name and Type.

- You can also delete the desired devices. To do so, click **Delete**  of the respective device.
- Click **Save**  to save the Access Schedule.

The new Access Schedule appears in the right grid.



If you wish to edit any Access Schedule,

- Click the desired Access Schedule from the right pane. The details appear on the left. Edit the Access Schedule as per your requirement.
- Click **Save**  to save the Access Schedule.



*If an Access Schedule is assigned from Device Configuration > Profile > Access Settings page and a different schedule is selected here, it will override the schedule assigned from Device Configuration > Profile > Access Settings page and vice versa.*

*If both; Access Schedule and Reader Mode Schedule are assigned to a device, then the Access Schedule will have a higher priority when the device is not within the assigned Access Schedule.*

*User Access will be allowed on devices when the device is not within the assigned Access Schedule, only if:*

- *Access Control on Exit Mode is disabled, and*
- *Internal and/or External Reader Mode is set as Exit*

*If you wish to revoke an Access Schedule from a device, select the **Select** option for Device Access Schedule in Profile > Access Settings for the particular device.*

# Special Functions

COSEC provides its users the privilege to perform certain pre-defined operations directly from the COSEC device. These operations are related to various time and attendance marking functions, administrative tasks, zone-related access and door-control functionality as well as alarms management. It also provides privilege to schedule these special functions. A special function may be used in three different ways by a user -

- Entering short codes on the device keypad.
- Navigating the device menu.
- Using Special Cards.

To access this functionality, select **Devices> Multi-Device Options> Special Functions**.

*“Single Device Special function”*

*“Multiple Device Special functions”*

## Special Cards

A *Special Card* is especially useful when the user has to perform routine tasks, where repeated manual entry of codes can become tedious. It is also required when a door controller device does not have keypad or LCD display for manual entry of special codes. In such a case, an RFID card can be encoded for a special function and the card-holder can perform a special function at the device just by showing this special card.

Example: In factories where workers avail shortleave; security guard can show the Special card enrolled for Shortleave IN on the Entry door and can give the access to the worker. This same card can be used for multiple workers.

## Configuring Special Functions

The COSEC system pre-defines 38 special functions for its users. These functions are supported differently by different COSEC devices. For instance, all the special functions in the given list are supported on all COSEC Panel200. The following list provides details of some of the available special functions and the devices they are supported on:

**Time and Attendance Functions:** *(Available only with the Time & Attendance add on module)*

Special Function	Available on	Description
Official Work-IN / Official Work-OUT	Panel200 and DIRECT DOORS.	Late-IN as well as Early-OUT is marked as User's Official work in Time & Attendance.
Short Leave-IN / Short Leave-OUT	Panel200 and DIRECT DOORS.	Late-IN as well as Early-OUT is marked as User's short leave in Time & Attendance.
Regular - IN / Regular - OUT	Panel200 and DIRECT DOORS.	Normally used in Time & Attendance system in the absence of an exit reader. The punch in at start of shift and punch out at end of shift are sent with the appropriate flags.
Break End / Break Start	Panel200 and DIRECT DOORS.	Clock-IN is marked as User post break entry and Clock-OUT is marked as User exit at start of break.
Late-IN Start / Late-IN Stop	Panel200 and DIRECT DOORS.	System starts / stops inserting the special ID to T&A events of all users who clock-IN after this function.
Early-OUT Start / Early-OUT Stop	Panel200 and DIRECT DOORS.	System starts / stops inserting the special ID to T&A events of all users who clock-OUT after this function.

Special Function	Available on	Description
Over Time - IN / Over Time - OUT	Panel200 and DIRECT DOORS.	The IN punch is marked as User entering at start of over time while the OUT punch is marked as User exiting after completion of overtime.

**Administrative Functions:** *(Available with the Basic platform license.)*

Special Function	Available on	Description
Enroll User	Panel200 and DIRECT DOORS	Application switches the door controller mode to Enrollment mode and User Credentials are enrolled against the defined user ID. Global Enrollment mode is selected by default for users.
Enroll Special Card	Panel200 and DIRECT DOORS	Application switches the door controller mode to Enrollment mode and special Cards are enrolled against special function ID
Delete Credentials	Panel200 and DIRECT DOORS	Enables user to delete the existing credential data from the PANEL User database against the selected user ID.
View User Profile	Panel200 only.	System reads the User's Smart Card and displays the stored user profile.

**Zone Settings:** *(Highlighted options available only with the Access Control add on module)*

Special Function	Available on	Description
Activate DND / Deactivate DND	Panel200 only.	System switches the door zone from Normal to DND and vice versa.
Activate Dead-Man / Deactivate Dead-Man	Panel200 only.	System switches all Door Controllers of the zone from Normal mode to activated Dead Man Zone mode and vice versa.
Door Lock / Door Unlock	Panel200 and DIRECT DOORS.	System locks/unlocks the selected Door. Entry is denied to all users. Exit request however, is enabled and the user can still provide T&A events.
Zone Lock / Zone Unlock	Panel200 only.	System locks/unlocks all Doors of the Zone. Entry is denied to all users. Exit request however, is enabled and the user can still provide T&A events.
Door Normal	Panel200 and DIRECT DOORS.	System switches the mode of the door controller to the normal or controlled mode.
Zone Normal	Panel200 only.	System switches the mode of all Doors of the Zone to the normal or controlled mode.
Guard Tour	Panel200 only.	The security guard carries the guard tour card which is linked to the guard tour-ID.

**Alarms:** *(Available only with the Access Control add on module)*

Special Function	Available on	Description
Set Panic Alarm	Panel200 only	System enables the user to generate a Panic Alarm from the Door Controller.
Mute Door Buzzer	Panel200 only	Enables the user to mute the Door Controller's existing Alarms.
Mute Panel Buzzer	Panel200 only	Enables the user to mute the PANEL's existing Alarms.

Special Function	Available on	Description
Clear Door Aux O/P	Panel200 only	Enables the user to Reset the Aux output of Door Controller and switch it back to Normal/Controlled state from its current state.
Clear Panel Aux O/P	Panel200 only	Enables the user to Reset the Alarm output of PANEL and switch it back to Normal/Controlled state from its current state.
Door Arm/Door Disarm	Panel200 only	To enable/disable door alarms using special function cards.
Zone Arm/Zone Disarm	Panel200 only	To enable/disable zone alarms (for all doors in the zone) using special function cards.
Clear Alarm	DIRECT DOORS only.	Enables the user to clear all the alarms at the DIRECT DOOR.

**Cafeteria:** (Available only with the Cafeteria add on module)

Special Function	Available on	Description
Sold Out	Cafeteria devices	System enables the user to mark an item as Sold Out.
Available	Cafeteria devices	Enables the user to mark an item as available.

## Single Device Special function

To configure special functions for a single device,

- Select the **Devices module > Device Configuration > Special Functions**

The **Special Functions** page appears for Door V3:

No.	Function Name	Active	Job Selection	User Group	Card-1	Card-2	Card-3	Card-4
1	Official Work - IN	Yes	Yes	All				
2	Official Work - OUT	Yes	Yes	All				
3	Short Leave - IN	Yes	Yes	All				
4	Short Leave - OUT	Yes	Yes	All				
5	Regular - IN	Yes	Yes	All				
6	Regular - OUT	Yes	Yes	All				
7	Break End	Yes	Yes	All				
8	Break Start	Yes	Yes	All				
9	Overtime - IN	Yes	Yes	All				
10	Overtime - OUT	Yes	Yes	All				
11	Enroll User	Yes	No	All				
12	Enroll Special Card	Yes	No	All				



1. Select a **Function Name** from the list on the Special Functions page.

No.	Function Name	Active	Job Selection	User Group	Card-1	Card-2	Card-3	Card-4
1	Official Work - IN	Yes	Yes	All				
2	Official Work - OUT	Yes	Yes	All				
3	Short Leave - IN	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	All	1453			
4	Short Leave - OUT	Yes	Yes	All				
5	Regular - IN	Yes	Yes	All				
6	Regular - OUT	Yes	Yes	All				
7	Break End	Yes	Yes	All				
8	Break Start	Yes	Yes	All				
9	Overtime - IN	Yes	Yes	All				
10	Overtime - OUT	Yes	Yes	All				
11	Enroll User	Yes	No	All				
12	Enroll Special Card	Yes	No	All				

2. Check the **Active** box to enable the function.
3. Click the **User Group** drop down list and select the *Functional Group* for which this special function will be activated.
4. Specify the Card Serial Number (CSN) or a Comma separated CSN in the **Card** fields which would be registered to activate the special function at the devices. To know about the format of entering the Card details, refer **Access Card 1** in "[Credentials](#)" under *Users > User Configuration > Credentials > Access Card 1*.
5. Click **OK** after all the member cards have been added to save the defined parameters. Administrator can define up to 4 member cards per function. User can also assign cards to the special functions using the *Enrollment* option as explained in the "[Enrolling Special Cards](#)" section.

## Multiple Device Special functions

To configure Special Functions for multiple devices, Select the **Devices module > Multi-Device Options > Special Functions**.

The **Multi-Device Special Function** page opens as follows:

**Device Type:** Select the device type from the dropdown list.

**Function:** Select the special function which needs to be activated on the devices by checking the corresponding **Update** check box.

**Active:** Select the Active check boxes for activating the special function on the selected devices.

**User group:** Some special functions can be assigned to specific user groups. For eg: “Enroll User” special function can be assigned to the desired User group from the drop down list as shown below.

**Card:** Specify the Card Serial Number (CSN) or a Comma separated CSN in the **Card** fields which would be registered to activate the special function at the devices. To know about the format of entering the Card details, refer **Access Card 1** in “[Credentials](#)” under *Users> User Configuration> Credentials> Access Card 1*.

Device Type: Door V3

Update	Function Name	Active	Job Selection	User Group	Card-1	Card-2	Card-3
<input checked="" type="checkbox"/>	Official Work - IN	<input checked="" type="checkbox"/>	<input type="checkbox"/>	No Change	5698		
<input type="checkbox"/>	Official Work - OUT	<input type="checkbox"/>	<input type="checkbox"/>	No Change			
<input checked="" type="checkbox"/>	Short Leave - IN	<input checked="" type="checkbox"/>	<input type="checkbox"/>	No Change	1256		
<input type="checkbox"/>	Short Leave - OUT	<input type="checkbox"/>	<input type="checkbox"/>	No Change			
<input type="checkbox"/>	Regular - IN	<input type="checkbox"/>	<input type="checkbox"/>	No Change			
<input type="checkbox"/>	Regular - OUT	<input type="checkbox"/>	<input type="checkbox"/>	No Change			

Filter

Device Filter: All

Update

Click the **Filter** collapsible panel.

**Device Filter:** Select the desired option — All, Randomly — on which the special functions are to be activated.

If you select **All**, click **Update**.

If you select **Randomly**, you can select particular devices or all the devices at once.

- Click the **Device** picklist. The **Select Device** pop-up appears.

Select Device

Total Selected: 0 Records

Search

Show Selected

☐ Select All

<input type="checkbox"/>	MID ▲	Name	Type
<input type="checkbox"/>	13	Panel	Panel


OK Cancel

To select particular devices, select the check boxes of the desired devices.

**OR**

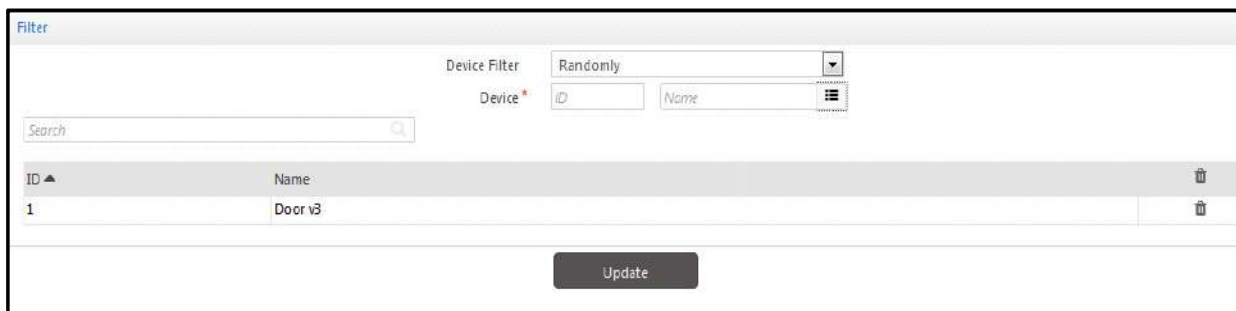
To select all the devices, select the **Select All** check box.

- Click **OK**. The selected devices appear in the grid.

You can also delete the desired devices. To do so, click **Delete**  of the respective device.

- Click **Update**.

Example: If 3 doors of type Door V3 are selected; then Official IN function can be accessed on these doors using the card with number 5698.




The screenshot shows a 'Filter' window with a 'Device Filter' dropdown set to 'Randomly'. Below it, there are input fields for 'Device ID' and 'Name'. A search bar is also present. A table lists devices with columns 'ID' and 'Name'. The first row shows ID '1' and Name 'Door v3'. To the right of the table is a trash icon. At the bottom center is an 'Update' button.

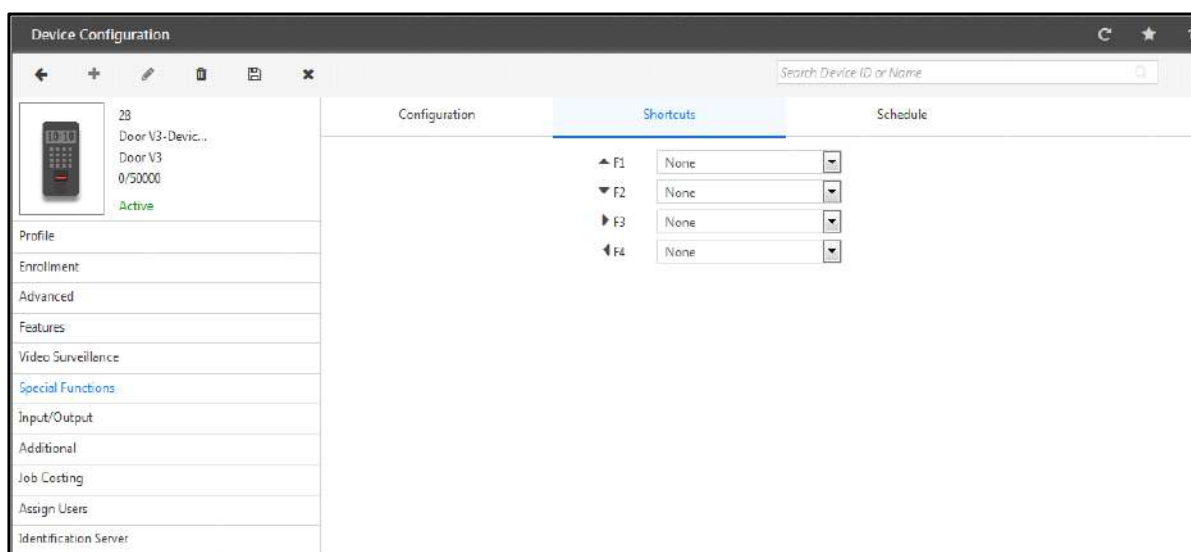
ID	Name
1	Door v3

Click **Update** to save the changes. This will enable the users to punch for “Official IN” function using card (5698) along with their respective credential on the Door V3.

## Special Functions Shortcuts

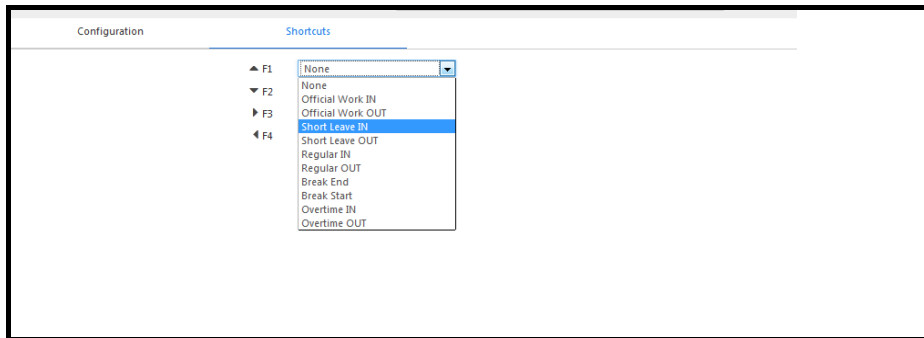
The COSEC application enables the user to map up to 4 special functions to the arrow keys on a Direct Door/Panel Door keypad. To do this,

1. Select a device on which the shortcuts are to be configured.
2. On the **Device Configuration** page, select the **Special Functions** tab.
3. Click **Edit** .
4. Under the **Special Functions** tab, select the **Shortcuts** section as shown below:



The screenshot shows the 'Device Configuration' window. On the left is a sidebar with a list of tabs: Profile, Enrollment, Advanced, Features, Video Surveillance, Special Functions (highlighted), Input/Output, Additional, Job Costing, Assign Users, and Identification Server. The main area has three tabs: Configuration, Shortcuts (highlighted), and Schedule. Under the 'Shortcuts' tab, there are four rows for F1, F2, F3, and F4, each with a dropdown menu set to 'None'.

5. Use the drop down lists for the appropriate arrow keys to assign a special function to each key, as per the site requirements.




6. Click **Save**.



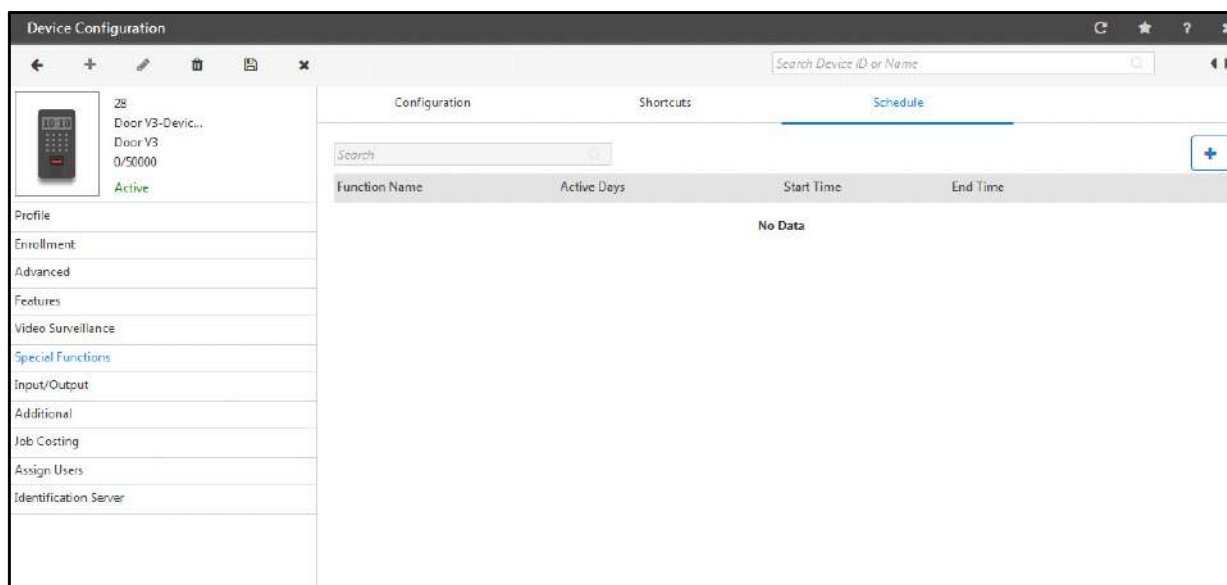
*This option is not available for the NGT DOOR.*

## Special Functions Schedule

The COSEC application enables the user to schedule special functions for specified time range on a Direct Door/ Panel Door keypad. To do this,

1. Select a device on which the scheduling is to be done.
2. On the **Device Configuration** page, select the **Special Functions** tab.
3. Click **Edit** .

Under the **Special Functions** tab, select the **Schedule** section as shown below:



4. Click **Add** .

5. Specify the **Function Name**, **Active Days**, **Start Time** and **End Time** as shown below:

Device Configuration

Search Device ID or Name

28 Door V3-Devic... Door V3 0/50000 Active

Profile Enrollment Advanced Features Video Surveillance Special Functions Input/Output Additional Job Costing Assign Users Identification Server

Configuration Shortcuts Schedule

Search

Function Name	Active Days	Start Time	End Time
Short Leave IN	Select	13:00	14:00

6. Click on the **Tick**  to save the schedule.

7. Click **Save**.

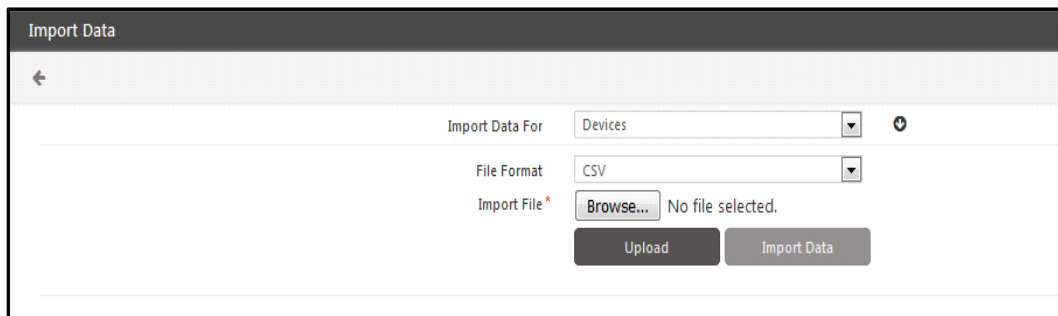
# Import Devices

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The COSEC application has an inbuilt utility for enabling users to import data from excel files with predefined format. This would thus save the end user a lot of time and effort in having to make individual data entries at the application level.

To import device data from a file, select the **Devices module > Multi-Device Options > Import Devices**.

The **Import Data** page appears as shown.



The following options appear for configuration on the **Import Data** page.

- **Import Data For** - The Data is to be imported for Devices by default. You can download the sample import file and enter the data for devices. Then the updated file can be imported here.
- **File Format** - Select the file format to be imported. The options available are XLS or CSV.
- **Import File** - Browse the path of the file from which the data is to be imported.

Click **Upload** button to save the file. The **Preview Data** button enables the administrator to view the data in the respective worksheets to confirm that the data is in order prior to giving the import command.

Click on **Import** to start the import of data.

While importing the data from the User Worksheet, the system enables the administrator to directly assign controllers to the users while importing the user data.

Select the controllers to be assigned to the imported users by checking the boxes against the relevant controllers and click on **Import**. The system will import all the relevant valid entries from the sheet and will display the status in the bottom grid.



*Administrator needs to ensure that the ASP.NET user has full rights on the folder containing the Excel or .csv file for the import data operation.*

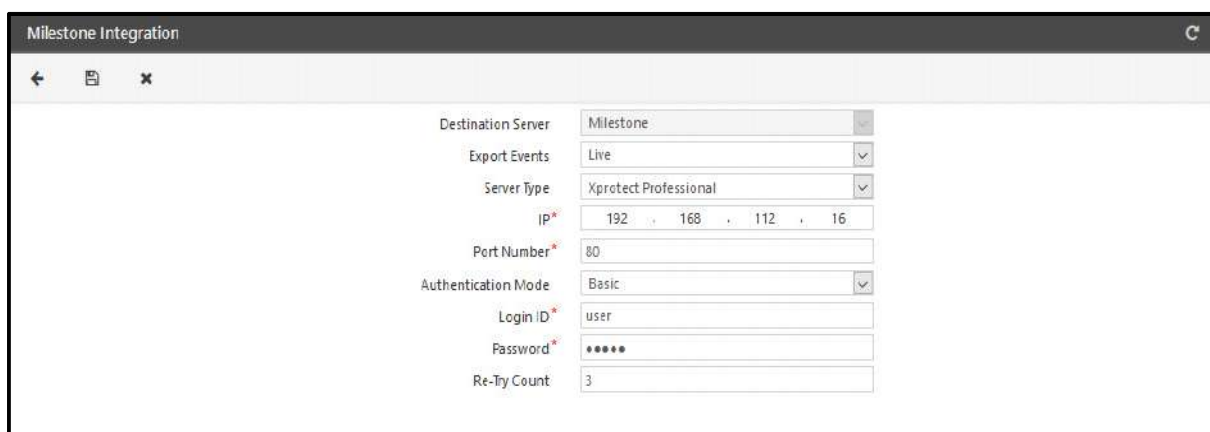
# Milestone Integration

This feature enables the *COSEC Access Control Monitoring System* to be integrated with the *Milestone XProtect Video Management Software*. The integration provides a common platform and supports the following functions:

- Triggering Milestone User-Defined Events based on COSEC Events.
- Retrieving images captured by Milestone Devices.

To set up Milestone Integration, Select the **Devices module > Milestone Integration**

The page will appear as shown:



The screenshot shows the 'Milestone Integration' configuration window. The 'Authentication Mode' is set to 'Basic'. The fields are filled with the following values: Destination Server: Milestone, Export Events: Live, Server Type: Xprotect Professional, IP: 192.168.112.16, Port Number: 80, Login ID: user, Password: (masked with dots), and Re-Try Count: 3.



The screenshot shows the 'Milestone Integration' configuration window with a green 'Saved Successfully' message at the top. The 'Authentication Mode' is now set to 'Windows'. The other fields remain the same: Destination Server: Milestone, Export Events: Live, Server Type: Xprotect Corporate, IP: 192.168.112.16, Port Number: 80, Login ID: user, Password: (masked with dots), and Re-Try Count: 3.

**Export Events:** Select the type of COSEC Events to be exported from the drop-down list. You can select All or Live events.

**Server Type:** Select the Milestone Server Type for integration and enter the Server **IP** address and **Port** Number as configured for the selected Milestone server.

**Authentication Mode:** Select the Authentication mode as **Basic** or **Windows**.

- Enter the Milestone server login credentials (Login ID and Password) for Authentication.



*Windows Authentication Mode has been implemented & verified for Milestone - Corporate edition only.*



**Re-Try Count:** The count must be numeric and will determine the number of times connection request will be renewed in case of failure to establish connection with Milestone server.

Then click **Save** to save the configuration.

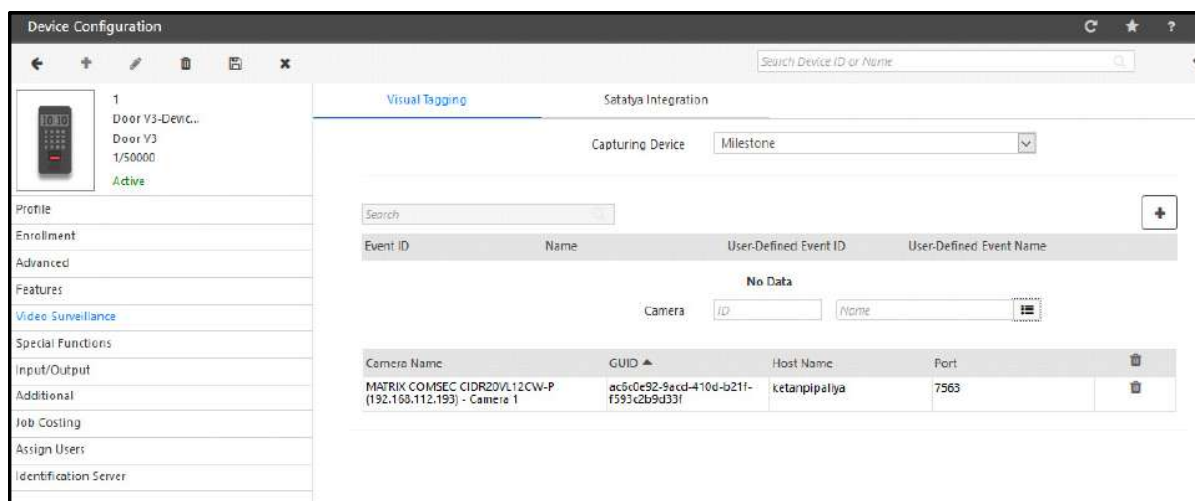
## Mapping Milestone and COSEC events

Using this feature, the administrator can map Milestone user-defined events to be triggered based on COSEC Events. For this, *Manual Events* must first be defined on the *Milestone XProtect Management Application* as shown.



Now, to map these User defined events against COSEC events, go to **Devices > Device Configuration** (Select a Device) > **Video Surveillance > Visual Tagging**.

Select the **Capturing Device** as Milestone.



Select a COSEC Event using the corresponding picklist.

Click on **Add** button. Select the COSEC event and User defined Milestone event which is to be mapped with the selected COSEC Event. Then click OK to save the mapping.

The mapped events will appear in the grid as shown.

Event ID	Name	User-Defined Event	
101	Allowed	Manual Event 1	
104	Allowed - Dead Man Zone	Manual Event 1	

Camera

Camera Name	GUID	Host Name	Port	
Camera 1	1D17801D-7810-4958-B3EF-BC335BADE69F	192.168.153.144	800	

**Camera:** For each door, COSEC can also request images from the Milestone server against the mapped events. To do this, select a camera from a list of Milestone cameras using the **Camera** pick-list.

Picklist For Milestone Device

Total Selected : 0 Records

Search

Show Selected

<input type="checkbox"/>	Camera Name	GUID	Host Name	Port
<input type="checkbox"/>	MATRIX COMSEC CIDR20VL12CW-P (192.168.112.193) - Camera 1	ac6c0e92-9acd-410d-b21f-f593cb9d33f	ketanpipaliya	7563
<input type="checkbox"/>	MATRIX COMSEC MIDR20FL60CWP (192.168.112.61) - Camera 1	d40ca39c-809c-4ce0-9e11-72d471a7abbd	ketanpipaliya	7563

OK Cancel

Click on OK and Save the configuration to complete the integration.

Device Configuration

1

Door Y3-Devic..

Door Y3

1/50000

Active

Profile

Enrollment

Advanced

Features

Video Surveillance

Special Functions

Input/Output

Additional

Job Costing

Assign Users

Identification Server

Visual Tagging

Satarya Integration

Capturing Device Milestone

Search

+





Event ID	Name	User-Defined Event ID	User-Defined Event Name
No Data			

Camera

Camera Name	GUID	Host Name	Port	
MATRIX COMSEC CIDR20VL12CW-P (192.168.112.193) - Camera 1	ac6c0e92-9acd-410d-b21f-f593cb9d33f	ketanpipaliya	7563	

When user punches on door say Access Allowed event is generated; then image captured by camera will be displayed in User Events as shown below:

The screenshot shows the 'User Events' application window. At the top, there are filters for Date (12/09/2018), Filter By (Individual), and User (1320, Shruti Patki). Below the filters is a 'View' button. The main section is titled 'Attendance Events (2)' and contains a search bar and a table of events.

User ID	User Name	Date-Time	Device Name	I/O	Access	Source	Source Details	Location Details	View Image
1320	Shruti Patki	12/09/2018 10:56	Vega Controller-Device-87	Entry	Allowed	Device			 
1320	Shruti Patki	12/09/2018 10:55	Vega Controller-Device-87	Entry	Denied	Device			 

Below the table, there are sections for 'Access Control Events (0)' and 'Visitor Events (0)'.

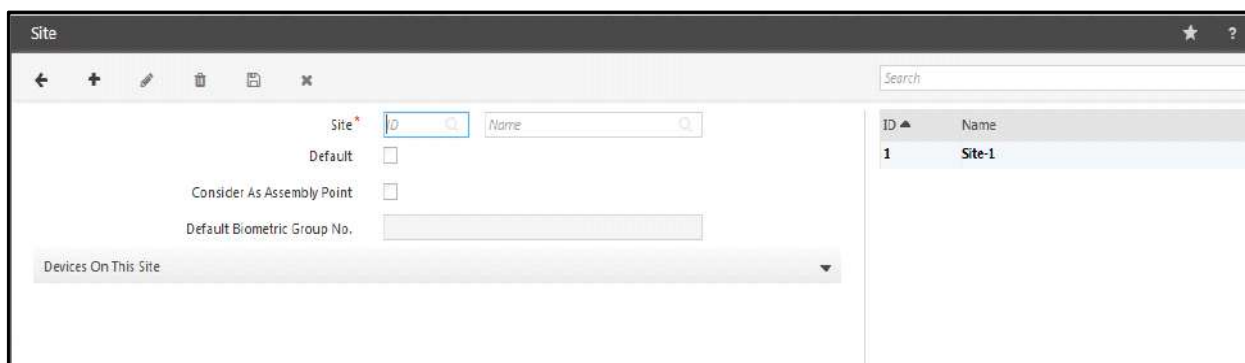
The screenshot shows a 'View Image' dialog box. It contains a user profile section with a placeholder image, the user ID '1320', the name 'Shruti Patki', and the timestamp '12/09/2018 10:56:20'. Below this is a large image area displaying a camera capture of a person in a hallway.

# Managing Sites

A site is a distinct work area or unit within an enterprise with its specific access control and/or attendance marking needs. For instance, in a retail enterprise (say “ABC”), the access system for customers at retail outlets must be different than the access system implemented for warehouse employees. In this case, the administrator can define two separate sites, one for the store (say “ABC-Store”) and one for the warehouse (say “ABC-Warehouse”).

To create a Site, Go to **Devices Module > Masters > Site**.

The following page will appear:



The screenshot shows the 'Site' management window. On the left, there is a form with fields for 'Site ID' (containing '1'), 'Name' (containing 'Site-1'), 'Default' (unchecked), 'Consider As Assembly Point' (unchecked), and 'Default Biometric Group No.' (empty). Below these is a 'Devices On This Site' dropdown. On the right, a table lists existing sites:

ID	Name
1	Site-1

Click **New** button to add a Site.

**Site:** Enter a unique site name ( Eg: “ABC-Store”) in the **Name** field. The ID will be genrated by the system automatically.

**Default:** Select this checkbox to make this site as a default site.

**Consider As Assembly Point:** Enable the checkbox to consider the configured site as assembly point. During an emergency situation, all the users are expected to assemble at this assembly point.

**Default Biometric Group No.:** Specify the Default Biometric Group No. to be assigned to the site. It is a number allotted to the site to be assigned to the devices belonging to that particular site. This enables the Identification Server to match the template against only those devices that belong to the corresponding biometric group site.

Click **Save** button to save the site as shown below.



The screenshot shows the 'Site' management window after saving. The 'Site ID' is now '2' and the 'Name' is 'Matrix- RnD'. The 'Default' checkbox is now checked. The 'Consider As Assembly Point' checkbox remains unchecked. The 'Default Biometric Group No.' is now '0'. The 'Devices On This Site' dropdown is still present. On the right, the table now lists two sites:

ID	Name
1	Site-1
2	Matrix- RnD

An arrow points to the 'Matrix- RnD' entry in the table.

## Adding Devices to a Site

Each COSEC device can be assigned to a site. To do so, click the desired Site from the list on the right side.

Click the **Devices On This Site** collapsible panel.

**Devices:** You can select particular devices or all the devices at once.

To do so, click the **Device** picklist. The **Picklist For Door Master** pop-up appears.

Picklist For Door Master

Total Selected: 0 Records

Search  [Show Selected](#)

☐ Select All

<input type="checkbox"/>	Door No. ▲	Name	Type	Status
<input type="checkbox"/>	1	RnD1 Canteen1 ARGO	ARGO	Disable
<input type="checkbox"/>	2	RnD1 2nd FLR Server Room VEGA	Vega Controller	Enable
<input type="checkbox"/>	3	RnD1 4th FLR Server Room VEGA	Vega Controller	Enable
<input type="checkbox"/>	4	RnD1 GF TRIPOD RIGHT IN	PVR Door	Enable
<input type="checkbox"/>	5	RnD1 Integra ARGO	ARGO	Enable
<input type="checkbox"/>	6	RnD1 Basement Tripod Entry PVR	PVR Door	Enable
<input type="checkbox"/>	7	RnD1 4th Floor FB VEGA OUT	Vega Controller	Enable
<input type="checkbox"/>	8	RnD1 4th Floor FB VEGA IN	Vega Controller	Enable
<input type="checkbox"/>	9	RnD1 GF MODE TRIPOD LEFT IN	MODE	Enable
<input type="checkbox"/>	10	Factory Admin FMX	Door FMX	Enable

1 - 10 of 110 records

« < 1 2 3 ... 11 > »

You can either select particular doors or can select all the doors at once.

To select particular devices, select the check boxes of the desired devices.

Picklist For Door Master

Total Selected: 108 Records

Search  [Show Selected](#)

☐ Select All

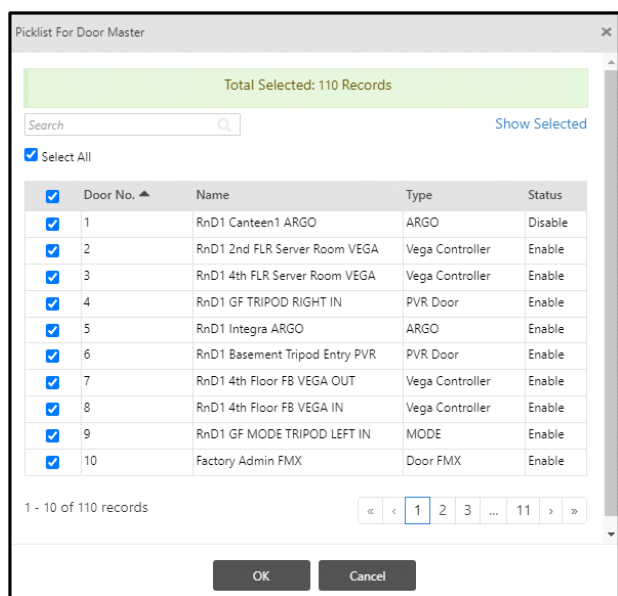
<input type="checkbox"/>	Door No. ▲	Name	Type	Status
<input type="checkbox"/>	1	RnD1 Canteen1 ARGO	ARGO	Disable
<input type="checkbox"/>	2	RnD1 2nd FLR Server Room VEGA	Vega Controller	Enable
<input checked="" type="checkbox"/>	3	RnD1 4th FLR Server Room VEGA	Vega Controller	Enable
<input checked="" type="checkbox"/>	4	RnD1 GF TRIPOD RIGHT IN	PVR Door	Enable
<input checked="" type="checkbox"/>	5	RnD1 Integra ARGO	ARGO	Enable
<input checked="" type="checkbox"/>	6	RnD1 Basement Tripod Entry PVR	PVR Door	Enable
<input checked="" type="checkbox"/>	7	RnD1 4th Floor FB VEGA OUT	Vega Controller	Enable
<input checked="" type="checkbox"/>	8	RnD1 4th Floor FB VEGA IN	Vega Controller	Enable
<input checked="" type="checkbox"/>	9	RnD1 GF MODE TRIPOD LEFT IN	MODE	Enable
<input checked="" type="checkbox"/>	10	Factory Admin FMX	Door FMX	Enable

1 - 10 of 110 records

« < 1 2 3 ... 11 > »

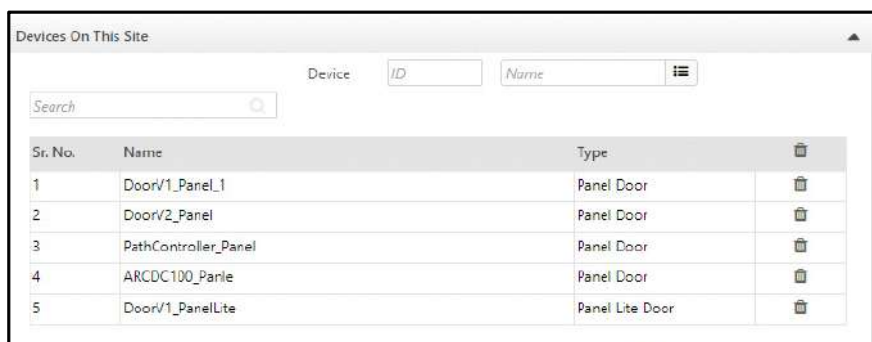
OR

To select all the devices, select the **Select All** check box. The devices on all the pages will be selected.



Click **OK**.

The selected devices assigned to this site appear in the grid.



You can also delete the desired devices. To do so, click **Delete** of the respective device.

On deletion of any device from the device list, the status of the respective site will be automatically changed to “default”. For a “default” site, devices cannot be deleted from the device list.

# Device Group

This option enables the administrator to assign multiple devices to a group. This functionality facilitates assignment of users to a group of devices.

To define a device group, select **Devices Module > Masters > Device Group**.

The **Device Group** page appears as shown below.

ID	Name
No Data	

Click **New** to configure a new device group.

- **ID**: This is a system-generated ID automatically assigned to each new device group.
- **Name**: Enter a unique device group name in this field.
- **Type**: Select the type of device group to be assigned. The options are **Device Group** and **Super Group**.



*A **super group** is a group or collection of multiple device groups.*

Click the **Save** button to save the device group.

A new device group is created successfully. All defined device groups can be viewed in the grid list view on the right-hand side of the page as follows:

ID	Name
1	Device Group-RnD

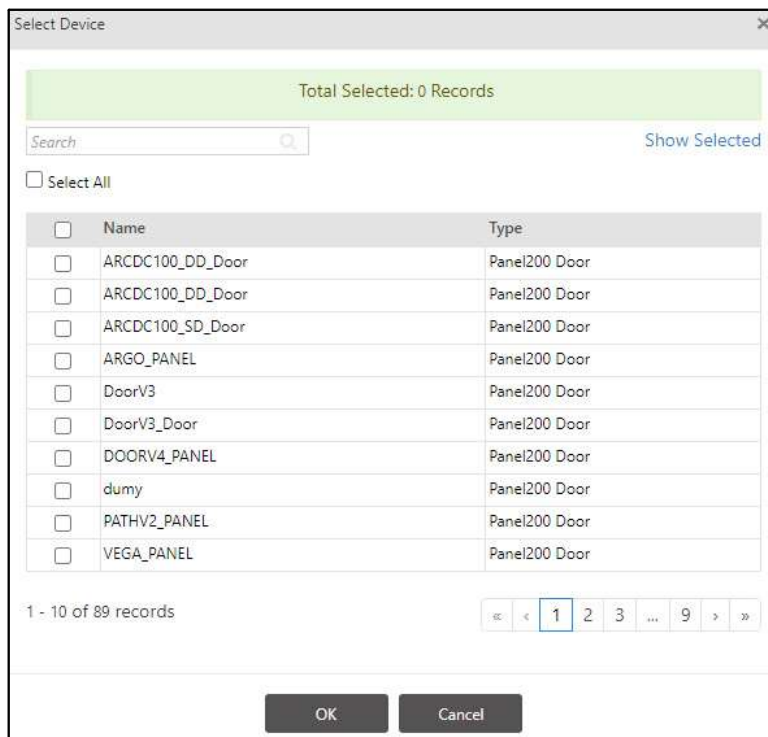
## Assigning Devices to Device Group

Click the desired Device Group (for which the Type is selected as Device Group) from the list on the right.

Click the **Assign Devices** collapsible panel.

You can add particular devices or all the devices to the device group.

To do so, click the **Device** picklist. The **Select Device** pop-up appears.



Select Device

Total Selected: 0 Records

Search  Show Selected

☐ Select All

<input type="checkbox"/>	Name	Type
<input type="checkbox"/>	ARCDC100_DD_Door	Panel200 Door
<input type="checkbox"/>	ARCDC100_DD_Door	Panel200 Door
<input type="checkbox"/>	ARCDC100_SD_Door	Panel200 Door
<input type="checkbox"/>	ARGO_PANEL	Panel200 Door
<input type="checkbox"/>	DoorV3	Panel200 Door
<input type="checkbox"/>	DoorV3_Door	Panel200 Door
<input type="checkbox"/>	DOORV4_PANEL	Panel200 Door
<input type="checkbox"/>	dumy	Panel200 Door
<input type="checkbox"/>	PATHV2_PANEL	Panel200 Door
<input type="checkbox"/>	VEGA_PANEL	Panel200 Door

1 - 10 of 89 records

< 1 2 3 ... 9 > >>

OK Cancel



*The device appearing in the device picklist will be Panel Doors and Direct Doors only.*

You can either select particular devices or can select all the devices at once.



To select particular devices, select the check boxes of the desired devices.

The 'Select Device' dialog box displays a table with 10 rows of device information. The first two rows are selected, indicated by blue checkmarks in the first column. The table has columns for 'Name' and 'Type'. Below the table, a pagination bar shows '1 - 10 of 89 records' and a set of navigation buttons. At the bottom are 'OK' and 'Cancel' buttons.

<input type="checkbox"/>	Name	Type
<input checked="" type="checkbox"/>	ARCDC100_DD_Door	Panel200 Door
<input checked="" type="checkbox"/>	ARCDC100_DD_Door	Panel200 Door
<input type="checkbox"/>	ARCDC100_SD_Door	Panel200 Door
<input type="checkbox"/>	ARGO_PANEL	Panel200 Door
<input type="checkbox"/>	DoorV3	Panel200 Door
<input type="checkbox"/>	DoorV3_Door	Panel200 Door
<input type="checkbox"/>	DOORV4_PANEL	Panel200 Door
<input type="checkbox"/>	dummy	Panel200 Door
<input type="checkbox"/>	PATHV2_PANEL	Panel200 Door
<input type="checkbox"/>	VEGA_PANEL	Panel200 Door


OR

To select all the devices, select the **Select All** check box. The devices on all the pages will be selected.

The 'Select Device' dialog box is shown with the 'Select All' checkbox checked. The table now shows all 10 rows selected, each with a blue checkmark. The 'Total Selected' status at the top has changed to '89 Records'. The pagination bar and navigation buttons remain the same. The 'OK' and 'Cancel' buttons are at the bottom.


<input checked="" type="checkbox"/>	Name	Type
<input checked="" type="checkbox"/>	ARCDC100_DD_Door	Panel200 Door
<input checked="" type="checkbox"/>	ARCDC100_DD_Door	Panel200 Door
<input checked="" type="checkbox"/>	ARCDC100_SD_Door	Panel200 Door
<input checked="" type="checkbox"/>	ARGO_PANEL	Panel200 Door
<input checked="" type="checkbox"/>	DoorV3	Panel200 Door
<input checked="" type="checkbox"/>	DoorV3_Door	Panel200 Door
<input checked="" type="checkbox"/>	DOORV4_PANEL	Panel200 Door
<input checked="" type="checkbox"/>	dummy	Panel200 Door
<input checked="" type="checkbox"/>	PATHV2_PANEL	Panel200 Door
<input checked="" type="checkbox"/>	VEGA_PANEL	Panel200 Door

Click **OK**. The selected devices assigned to this Device Group appear in the grid.



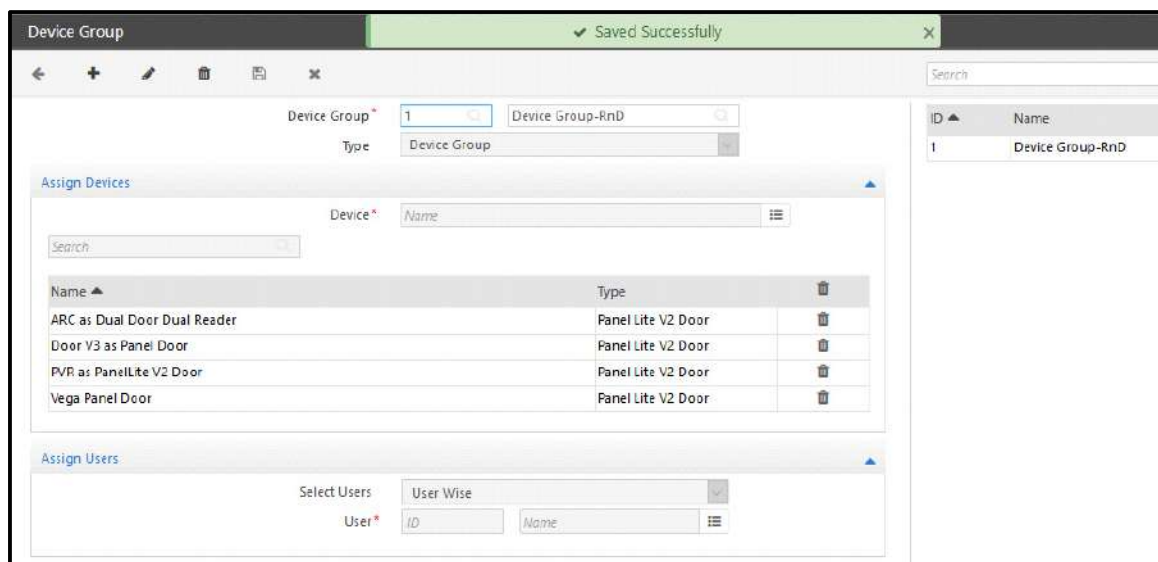
The 'Assign Devices' dialog box shows a search bar and a table of devices. The table has columns for Name, Type, and a delete icon.

Name	Type	
RnD1 Canteen1 ARGO	ARGO	
RnD1 Canteen2 ARGO	ARGO	
FACTORY ACCOUNT	Door V3	
NGT	NGT Direct Door	
ARC200	ARC DC 200	

You can also delete the desired devices. To do so, click **Delete**  of the respective device.

Click **Save** button to save the device group.

The device/devices are assigned to the specified device group successfully.



The 'Device Group' interface shows a 'Saved Successfully' message. It includes a 'Device Group' dropdown set to '1', a 'Type' dropdown set to 'Device Group', and an 'Assign Devices' dialog box. The 'Assign Devices' dialog box shows a table of devices. Below it is an 'Assign Users' section with a 'Select Users' dropdown set to 'User Wise' and a 'User' table.

ID	Name
1	Device Group-RnD

Name	Type	
ARC as Dual Door Dual Reader	Panel Lite V2 Door	
Door V3 as Panel Door	Panel Lite V2 Door	
PVR as Panel Lite V2 Door	Panel Lite V2 Door	
Vega Panel Door	Panel Lite V2 Door	


User	ID	Name
------	----	------

If you have created a **Super Group**, follow the same steps as mentioned above.

## Assigning Users to Device Group

To assign users to a device group, select a device group from the right grid.

Select **Assign Users** section. You can assign the users based on filter options of Userwise, Groupwise or All.



User ID	Name	
1687	Aditi Gupta	
103	Kruti Boghani	
1688	Anu Bhatt	

Click **Save** to save the assignment of users to all devices in the device group.



*The maximum number of device group allowed against a user is 99.*

*Any user/s exceeding the value of maximum allowed device group will not be assigned any device group.*

*Such user/s shall be displayed under the Exceptions tab.*

# Card Formats

All proximity cards store a sequence of numbers which can be read by card reader devices, when a card is swiped. This unique card number sequence is then verified against a user enrolled on the COSEC access control system to allow access to the card-holder. Hence, the pattern or structure of this card number must be compatible with the corresponding card reader format to support identification. This programmable data pattern of a proximity card is known as its *card format*.

Different card manufacturers across the industry provide some standard as well as proprietary card formats. However, organizations may require a format flexibility to match their site requirements. COSEC provides a unique option for users to write their own card formats to be compatible with their access control system.

Users can define upto 99 card profiles in COSEC. Custom Formats allow the user to enhance security by:

- Setting formats of up to 128 bits.
- Providing the option to add Facility Code to the Card Serial Number.
- Adding Parity bits for added accuracy of sent data.

To create a new card format, Select the **Devices Module > Masters > Card Format**.

The page will appear as shown below.

The screenshot shows the 'Card Format' configuration window. It has a top toolbar with icons for back, add, edit, delete, and search. The main area contains several input fields: 'Card Format' with sub-fields for 'ID' and 'Name', 'Max. No. Of Bits' set to '1-128', 'Read Order' set to 'Forward', 'Include FC in Card No.' as an unchecked checkbox, 'Configurable Bits' set to '0-128', and 'Sequence of Operation' set to 'Reading Order then Bit Configuration'. Below these is a 'Bit Configuration' section with a legend on the left: 'Even Parity' (blue), 'Odd Parity' (orange), 'Facility Code' (grey), and 'Card Serial Number' (dark grey). To the right of the legend is a 16x8 grid of bits numbered 1 to 128. A search bar is located in the top right corner.

Click **New** button to configure a card format.

**Card Format:** Enter a suitable name for the card format. The ID will be autogenerated by the system when the format is saved.

**Max No. of bits:** Specify the maximum number of bits that will be allowed for the format. Only the number of bits mentioned here will be considered for further processing. Remaining bits will be truncated. Maximum value can be 128 bits.

**Read Order:** It indicates the sequence in which the card serial number should be read by the card reader. The user should be aware of the reading order of the card reader before configuring this option.

Specify the Read Order as one of the following:

- **Forward** - This implies that the bits should be processed in the order of their arrival.
- **Reverse bitwise** - This implies that all incoming bits will be received and then reversed before processing them further.
- **Reverse byte-wise** - This implies that each incoming byte will be reversed separately and then used for further processing.

**Include FC in Card No.:** Enable this checkbox to ensure that the Card Number or Card ID includes Facility Code as well as Card Serial Number.

**Configurable Bits:** Specify the number of bits that will be configured in the card structure.

Eg: If 32 bits are set as configurable bits; then Bit Configuration grid will display 1 to 32 bits for configuration.



*If the number of bits received at the card reader is greater than the number of configured bits, then default card format applicable for the reader will be used.*

**Sequence of Operation:** Select the sequence of operation based on which operation is to be performed first and then second between Reading Order and Card Format Configuration.

In the **Bit Configuration** section, all configurable bits of the card data will appear numerically in a serial order, from left to right, as boxes. Here, each box represents a bit.

In the **Color Selection** area, click to select a colour that represents the bit type to be added to the card number. Then drag the cursor across boxes where the selected bit type is to be placed and select the box.

Click **Save** button to save the card format. The new format will now appear in the grid list on the right hand side of the page.



*If you have configured Comma separated CSN as Access Card Value for Users, Visitor Profile and/or Worker Profile, make sure in the Card Format you configure Max. No. of bits and Configurable bits as 26 bits. Do not change any other settings. Save and assign this Card Format to the desired device. To know more about Comma separated CSN, refer Access Card 1 under "Credentials" in Users> User Configuration> Credentials> Access Card1.*

*The Card format can be assigned to the device from Device Configuration> Profile> Readers.*

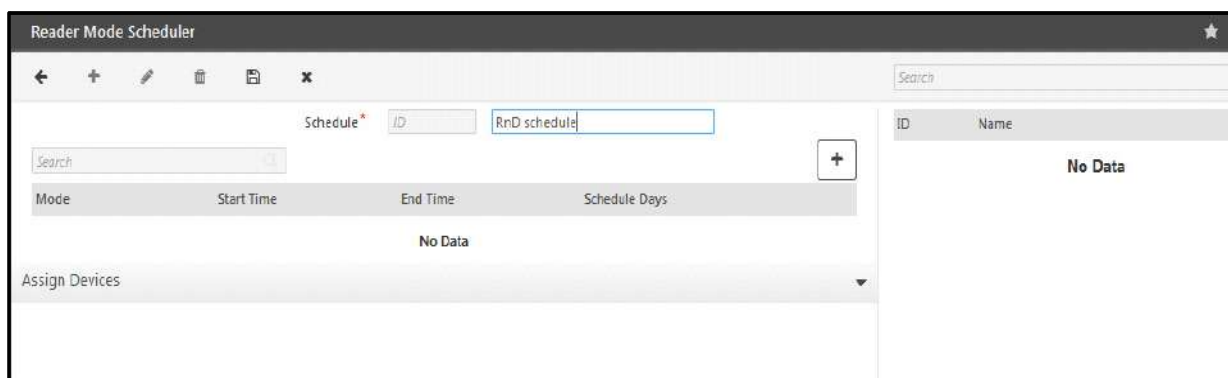
# Reader Mode Scheduler

A device has Internal and External Readers, wherein the Internal Reader is mandatory and in Entry mode by default. The Exit mode is optional and can be replaced with an exit switch also. The **Reader Mode Scheduler** feature enables automated control for the mode of an Internal Reader. Using this feature, the same reader can be configured to function both in Entry as well as Exit mode based on scheduled timings.

User can create maximum 15 schedules in COSEC. To create a new Reader Mode Schedule,

Select the **Devices Module > Masters > Reader Mode Scheduler**.

The page will appear as shown below.

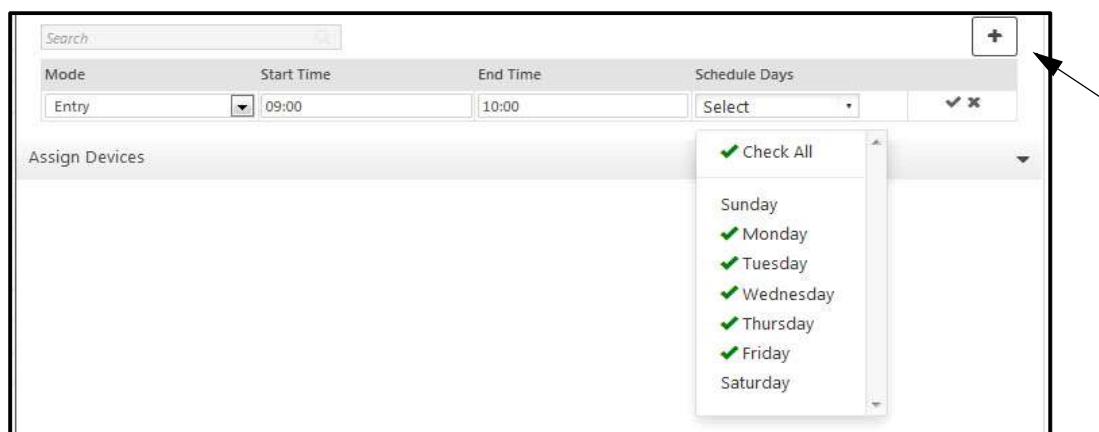


The screenshot shows the 'Reader Mode Scheduler' window. At the top, there's a search bar and a '+ Add' button. Below that, there's a table with columns: Mode, Start Time, End Time, and Schedule Days. The table is currently empty, showing 'No Data'. There's also a 'Schedule\*' field with a dropdown and a text input field containing 'RnD schedule'. At the bottom, there's an 'Assign Devices' section.

Click **New** button to define new reader mode scheduler.

**Schedule:** Enter a user-friendly name for the new schedule. The ID will be generated by the system automatically.

Click **Add** button to define the timing for entry and exit mode as shown below.



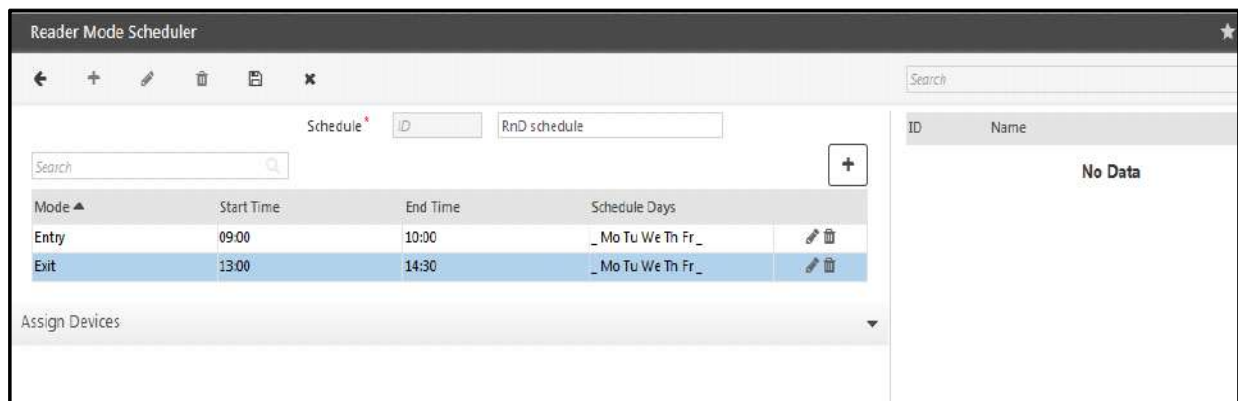
This screenshot shows the 'Add' button highlighted with an arrow. The table below it has columns: Mode, Start Time, End Time, and Schedule Days. The 'Mode' dropdown is set to 'Entry', 'Start Time' is '09:00', 'End Time' is '10:00', and 'Schedule Days' is 'Select'. A dropdown menu is open for 'Schedule Days', showing a list of days with checkboxes: Sunday, Monday, Tuesday, Wednesday, Thursday, Friday, and Saturday. The 'Assign Devices' section is visible at the bottom.

Select the **Mode** for the schedule as *Entry* or *Exit*.

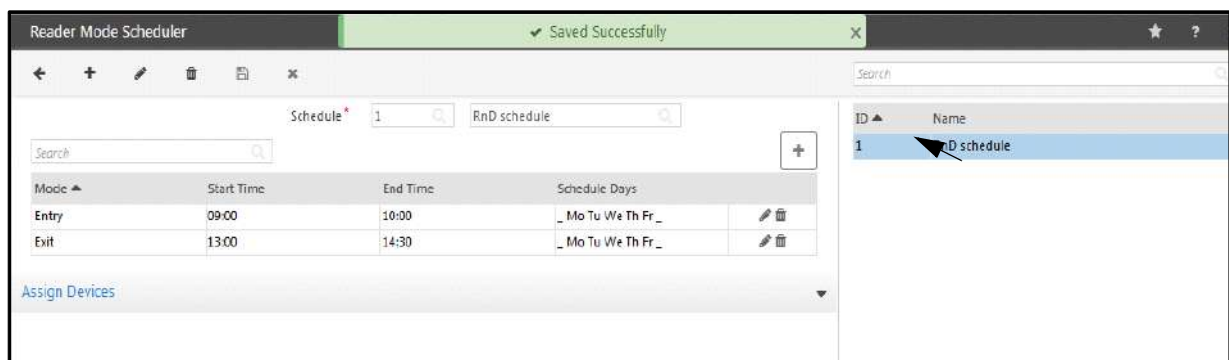
Enter the **Start** and **End** time for the schedule in HH:MM format.

Select the **days** of the week for which the new schedule would be applicable.

Click the **OK** button to create the new schedule as shown below.



Click **Save** to save the new schedule. The schedule now appears in the grid list on the right hand side of the page.



In the above example, a scheduler is set between 13:00 PM and 14:30 PM (break) on all week days (Mon-Fri), during which configured readers would register all punches in Exit Mode only. This will be especially useful when more doors are required in Exit mode at shift end time. Similarly, doors can also be scheduled to turn to Entry mode during shift start hours.

The user can assign a Reader Mode Schedule to particular devices or all the devices configured in COSEC.

To do so, select the desired Schedule from the list on the right.

Click the **Assign Devices** collapsible panel.



**Devices:** You can select particular devices or all the devices at once.

To do so, click the **Device** picklist. The **Picklist for Device** pop-up appears.

Picklist For Device

Total Selected: 0 Records

Search  Show Selected

☐ Select All

<input type="checkbox"/>	MID ▲	Name	Type
<input type="checkbox"/>	50	RnD1 3rd Floor VEGA	Vega Controller
<input type="checkbox"/>	52	Factory Vega Production-2	Vega Controller
<input type="checkbox"/>	57	RnD1 GF TRIPOD LEFT OUT	PVR Door
<input type="checkbox"/>	59	RnD1 BOOM BARRIER IN	Vega Controller
<input type="checkbox"/>	60	RnD1 BOOM BARRIER OUT	Vega Controller
<input type="checkbox"/>	69	FACTORY ACCOUNT	Door V3
<input type="checkbox"/>	70	FACTORY SECURITY GUARD -1	Door V3
<input type="checkbox"/>	71	FACTORY SECURITY GUARD -2	Door V3
<input type="checkbox"/>	72	FACTORY STORE	Door V3
<input type="checkbox"/>	77	RnD1 2nd Floor FB FMX IN	Door FMX

1 - 10 of 56 records

« < 1 2 3 ... 6 > »

OK Cancel


You can either select particular devices or can select all the devices at once.

To select particular devices, click the check boxes of the desired devices.

**OR**

To select all the devices, select the **Select All** check box. Th devices on all the pages will be selected.

Click **OK**.The selected devices appear in the grid.

You can also delete the desired devices. To do so, click **Delete**  of the respective device.

Click **Assign** to save the settings.



*This feature is applicable on the following door controllers (direct doors only) - **Wireless Door, PVR Door, NGT Controller, Vega Controller, Door V3.***



# Wiegand Output Format

In COSEC, Wiegand readers can send outputs not only in the standard formats or the actual information, but also in a custom data format whose structure can be defined. The COSEC administrator can use this page to create and save multiple profiles for different Wiegand Output Formats. Based on the output required, Wiegand output format in the Device Configuration module should be selected for allowed and denied events.

The admin can create maximum 9 Wiegand Output Formats.

To create a new format, Select the **Devices Module > Masters >Wiegand Output Format**.

The page will appear as shown below.

Click **New** button to add a new Weigand format.

**Format:** Enter a suitable **name** for the format. The ID will be autogenerated when the format is saved.

**Output Bits:** Enter the number of bits to be configured in Wiegand Output Format. For eg: If 32 is entered, then the configurable bits will become 32 as shown below.

The following fields can be defined in the Wiegand output format by using different **color** for each of the below mentioned fields:

- Even Parity
- Odd Parity
- Facility Code
- Card No.
- Access Code (indicates to the 3rd party panel whether the user has been allowed or not by the device)

In the **Color Selection** area, click to select a colour that represents the bit type to be added to the new format. Now, click to select the boxes where the selected bit type is to be placed. For e.g. In the above figure, Facility Code is placed across the bits 2-4.

**Facility Code:** If Facility Code is marked in the output bits, you must specify the source from where it must be read i.e. from Card No., from Card Personalization data or as per Device Configuration as shown below.

**Replace with Card No. If FC not found:** When FC is not obtained then you can select the alternate option of card number to send for FC by enabling this check box.

**Read FC from Device:** If access mode is kept as "Biometrics"/"Biometrics + PIN" and if FC is set to be read from card no. then FC will never be obtained, so in such cases which does not have card as any form of access mode, then FC stored in device can be sent by checking this box.

- The applicable devices are PVR, Vega Controller, Panel200

Click to **Save** the output format. The new format will now appear in the grid list on the right side of the page.



- *If a Wiegand Output format is edited and saved, it will be automatically sent to all the devices to which this format is assigned.*
- *The maximum bits of Facility Code and Card No. should be as defined in “**Card Personalization**” page of the Devices module. They should be selected one at a time.*
- *At a time, “Access Code” should be of 1 bit only but user can select it to be of more than 1 bit and till maximum 20 bits.*

# Card Personalization

Card Personalization is used when you want to configure all the fields of the card with your choice.

This page allows users to program the memory mapping of smart cards as per their requirement. Users can configure their own card format by adding user-defined fields as well as modifying length, type and location of pre-defined fields on the different available memory sectors in specific **HID iClass** and **MiFare** cards. A total of maximum **99** fields can be configured for each personalized format.

This feature enables to:

- Add or modify fields such as name, ID, department, shift, fingerprint templates etc. to be written on the Smart Card.
- Add new fields starting from index 1 having pre-defined field as "Facility Code and define upto 99 fields.
- To configure location of pre-defined and the newly added fields.
- To change field type and length of pre-defined fields.
- To configure a field profile based on card type and card mode.

To use this feature, Select the **Devices Module > Card Personalization**.

The page will appear as shown below.

The screenshot shows the 'Card Personalization' window. On the left, there is a sidebar with 'Field List' and 'Configuration' tabs. The main area contains a form to add a new field with fields for 'Field Name' (containing '30 chars'), 'Field Type' (set to 'Text'), and 'Max Field Length (Bytes)'. Below the form is a table of existing fields. The table has columns for Index, Field Name, Field Type, Length (Bytes), and a delete icon. The table lists five fields: Facility Code (Index 1, Numeric, 2 bytes), Additional Security Code (Index 2, Numeric, 2 bytes), User ID (Index 3, Numeric, 4 bytes), Value (Index 4, Numeric, 4 bytes), and User Name (Index 5, Text, 15 bytes). Below the table, there is a pagination control showing '1 - 5 of 22 records' and a set of buttons for navigating between pages (1, 2, 3, 4, 5).

Index	Field Name	Field Type	Length (Bytes)	
1	Facility Code	Numeric	2	
2	Additional Security Code	Numeric	2	
3	User ID	Numeric	4	
4	Value	Numeric	4	
5	User Name	Text	15	

## Field List

On the Card Personalization page, select the **Field List** tab.

Card Personalization

Field List

Configuration

Field Name: Date of Birth

Field Type: Date

Date Type: ASCII

Date Format: ddmmyy

Separator: /

Max Field Length (Bytes): 8

Add Cancel

Search

Index	Field Name	Field Type	Length (Bytes)	
1	Facility Code	Numeric	2	
2	Additional Security Code	Numeric	2	
3	User ID	Numeric	4	
4	Value	Numeric	4	
5	User Name	Text	15	

1 - 5 of 22 records

Save Cancel

The index no. **1 - 50** is reserved for predefined fields. By default predefined fields are available from **1 to 24**. The user defined fields can be added from index no. **51 till 99**. You can add new field as per your requirement.

**Field Name:** Enter a field name for the new field.

**Field Type:** Specify the field type as Text, Numeric or Date.

- For Text and Numeric fields, specify the Max Field Length in bytes.
- For a Date field, specify a date type, format and separator. Based on your selection the maximum field length will be automatically determined.

The maximum length allowed for PIN on card is 3 bytes for numeric format and 6 bytes for text format. Click the **Add** button. The new field will be added to the grid list as shown below:

Card Personalization

Field List

Configuration

Field Name: 30 chars

Field Type: Text

Max Field Length (Bytes): 8

Add Cancel

Search

Index	Field Name	Field Type	Length (Bytes)	
21	User Finger Template 2	Raw	584	
22	Card No.	Numeric	8	
23	Smart Access Route ID	Numeric	1	
24	Max Route Level	Numeric	1	
	Date of Birth	Date	8	

21 - 25 of 25 records

Save Cancel

Click the **Save** button to save the new field.



If some pre-defined field's type is changed from text to numeric, the admin should make sure to have only numeric value in such fields. If any mismatch occurs, then while writing or reading information from card, conversion will not be performed and the field shall remain <Blank>.

## Configuration

On the Card Personalization page, select the **Configuration** tab.

**Card Type:** Select a Card Type from the drop-down list. Hover your mouse on the icon to view information on each card type.

**Card Mode:** Select the Card Mode as **Default** to use the default card format where location of each field is fixed as per card type selected. If **Custom** mode is selected then location of all pre-defined fields will be allowed to be changed as per available memory sectors on the card.

1. **Default:** Select the Card Mode as Default to use the default card format where location of each field is fixed as per card type selected.
  - **Card No.:** If Default Card Mode is selected, you can specify if the Card No. to be used is the original **CSN**, or **UID** (Universal Identifier number).
2. **Custom Mode:** If Custom mode is selected then location of all pre-defined fields will be allowed to be changed as per available memory sectors on the card. Maximum 99 newly created fields will be accepted for such card types.
  - **Card No.:** If Custom Card Mode is selected, you can specify if the Card No. to be used is the original **CSN**, **UID** or **Custom** card no. as is defined at the time of enrollment. While location of CSN is fixed, it is mandatory to define a Field Profile for Custom Card Nos.



UID is supported in HID iClass cards only.



When you have selected Custom card no., you must specify the Card no. from User Configuration> Credentials during enrollment of card. The number specified in Access Card field will get write over the card. See [““Credentials”” on page 472.](#)

**Read CSN:** If Card No. is selected as Custom, then “Read CSN” check-box is activated. Checking this box allows to read CSN number in case custom number is failed to read.

Valid Values	iClass 2K2	iClass 16K2	iClass 16K16	MiFare 1K	MiFare 4K
Available Page	Page0 (Total=1)	Page0 (Total=1)	Page0-Page6	NA	NA
Available Sector	NA	NA	NA	Sector0-Sector15 (Total=16)	Sector0-Sector39 (Total=40)
Available Block	19-31 (for all pages)	19-255 (for all pages)	19-31 (Page0), 6-31 (Page1-Page6)	1-2 (Sector0), 0-2 (Sector1-Sector15)	1-2 (Sector0), 0-2 (Sector1-Sector31), 0-14 (Sector32-Sector39)
Available Byte	0-7	0-7	0-7	0-15	0-15

## Field Profile

For the Custom Card Mode, location on the card memory can be defined for each selected field. For this click the **Add** button and select a **Field** using the picklist button as shown below.



If card number is selected as Custom, then it is must to add the field 22: Card No. in the field profile. If card number is set as CSN, then selecting field 22 is not mandatory.





When Card Mode is selected as "Custom" and Card No. is selected as "UID" then Card No. cannot be configured in field profile grid.

Specify the **Page** and **Block** on the card and number of **Bytes** to be used depending on the field type and the available memory for the selected field. Click the **OK** button. Similarly, add other required fields to card. Then click the **Save** button.

The configured field will appear on the grid list showing the Start and End position as shown below.

Field Profile

Search

Field	Start Position(Page-Block-Byte)	End Position(Page-Block-Byte)	Length(Bytes)	
Facility Code	0-19-1	0-19-2	2	 
Card No.	0-20-0	0-20-7	8	 

Save

Cancel



*If the Custom Card mode is selected, all fields, their length, location and types should be reflected as per Card Personalization across COSEC applications such as COSEC Enroll at the time of card enrollment.*



# Device Status

The COSEC Web application enables the administrator to view the online or offline status of all configured devices as well as to send some basic control commands to the connected devices. This makes it easier for the administrator to keep track of disconnected devices and their respective sites and also to filter out lists of specific devices.

The administrator can view and reset the I/O linked events. It also provides the administrator the authority to Soft Override certain Access Control Features.

To view device status, select the **Device module > Device Status**.

The **Device Status** page will appear as follows.

Name	Status	IP	MAC/UUID	Device Type	Site
Panel200-Device-1	Connected	191.168.11.70	00:18:09:0D:83:35	Panel200	
ARC DC100	Offline	192.168.103.54	AC:65:60:04:46:04	Panel200 Door	Site-1
Panel200-Device-2	Connected	191.168.11.76	00:18:09:07:81:76	Panel200 (SDK)	
pnI_arcdc	Online	191.168.11.28	00:18:09:0F:1A:42	Panel200 Door	Site-1
Pnl_vega	Online	191.168.11.32	00:18:09:0E:CF:66	Panel200 Door	Site-1
Path V2-Device-5	Disconnected	191.168.11.37	00:18:09:0E:CD:06	Path V2	Site-1

There are two tabs displayed namely:

- “Device Status”
- “Features”

## Device Status

Select **Device Status** tab to view the status of all the devices added to the Server. The **Device Status** page lists the devices and shows their **Name**, **Status**, **IP**, **MAC Address/ UUID**, **Device Type** and **Site**.


You can view the devices based on filters of:

- **Device Type**
- **Device Status** (All/Connected/Disconnected)
- **Group By** (None/Site/Device Type)

Once filters are applied, the filtered devices with their current status will appear in the list as shown below.

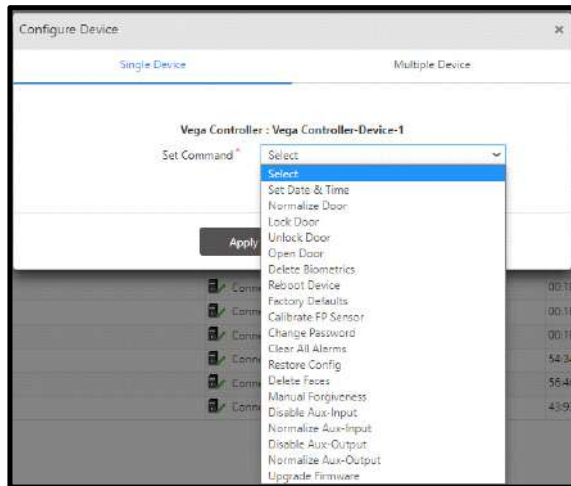
Name	Status	IP	MAC/UUID	Device Type	Site
Panel200-Device-1	Connected	191.168.11.70	00:18:09:0D:83:35	Panel200	
Panel200-Device-2	Connected	191.168.11.76	00:18:09:07:81:76	Panel200 (SDK)	
pnI_arcdc	Online	191.168.11.28	00:18:09:0F:1A:42	Panel200 Door	Site-1

## Sending Commands to Devices

The administrator can send direct commands to the selected device by clicking on  from the **Device Status** page.

The **Configure Device** window appears as shown below.

For a **Single Device**, select the Command from the **Set Command** drop down list and click **Apply** to set the command to the device.



These commands include:

- **Set Date &Time** - Sends the current system date and time to the device.
- **Normalize/Lock/Unlock/Open Door**- Sends the appropriate commands to the DOOR to reset the door lock status and open the door.
- **Delete Biometrics** - Sends command to delete the biometrics from the selected device.
- **Reboot Device** - Sends the reboot command to the device.
- **Factory Defaults** - Sends the command to default the device settings to the default factory settings.
- **Calibrate FP Sensor**- Sends the command to calibrate the finger print sensor.
- **Change Password** - Sends command to change the password of selected user on the COSEC device.
- **Clear All Alarms** - Sends the command to clear all alarms configured on the system.



*For changing the alarm status, the user will be prompted to provide the login password. Also, he may provide an optional remark to justify his action.*

- **Restore Configuration** - For Panel200 door and direct doors, the user configuration /credentials can be restored on the device from the database.
- **Delete Faces (only for Vega/FMX, MODE, ARGO, and ARGO FACE Direct doors)**- Sends command to delete the faces from the selected device.

- **Manual Forgiveness (only for Panel200 and Direct doors PVR, V3, Wireless, Vega, FMX, ARC DC200, ARGO, ARGO FACE, and PATH V2)-** The user who is denied access due to Anti-pass back violation can be reset by giving **Manual Forgiveness** command. With this the user wont have to wait for the timer to expire and he can access the doors again.

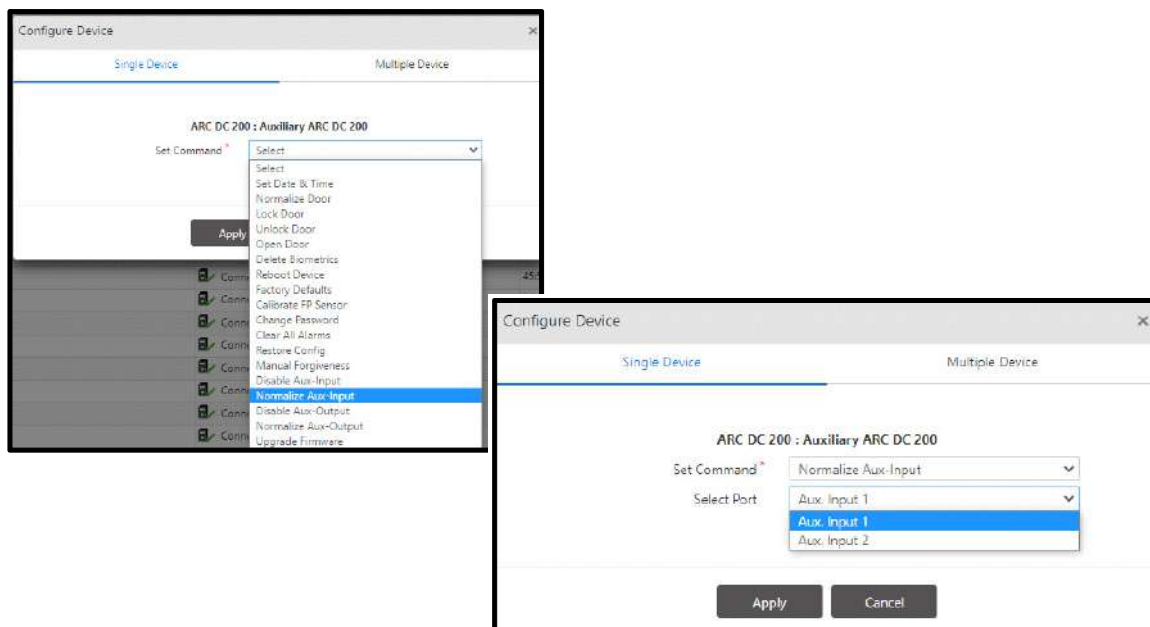
- **Forgiveness For-** Select the option as **Local** or **Global** for which manual forgiveness is to be given.

For **Global**; forgiveness is sent to all the access zones of Panel200.

For **Local**; select the Access Zone from the picklist. In this forgiveness is sent to selected access zone only.

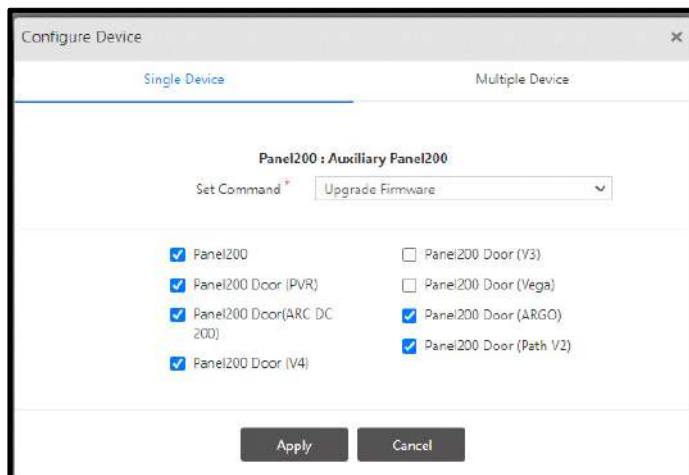
- **User-** Select the user for whom manual forgiveness is to be given.

- **Normalize/Disable Aux-Input (only for VEGA, V4, ARC DC200 Direct doors and ARC DC200 Single Door Dual Reader Panel door)-** Sends the appropriate commands to the DOOR to reset the Aux-Input status.



When **ARC DC200 Direct door/ARC DC200 Single Door Dual Reader Panel** door is selected in the **Device Status** list and **Set Command** is selected as **Disable Aux- Input/Normalize Aux-Input** then only **Select Port** parameter will be visible. You can select the desired port from the **Select Port** dropdown list.

- **Normalize/Disable Aux-Output (only for VEGA, V4, ARC DC200 Direct doors and ARC DC200 Single Door Dual Reader Panel doors)-** Sends the appropriate commands to the DOOR to reset the Aux-Output status.
- **Upgrade Firmware-** Sends the command to upgrade the firmware. When you upgrade the firmware of Panel200; then you can select the checkbox of Panel200 Door (V3), Panel200 Door (PVR) and Panel200 Door (Vega) to upgrade the firmware of selected type of doors of the Panel200.



When **Panel200** device is selected and if few of the components are checked and when you click **Apply** then the **Upgrade Firmware** command will be sent to the **Panel200** for selected components only.

If all the components are selected; then **Upgrade Firmware** command will be sent to the **Panel200** for **Panel door (PVR, ARC DC200, V4, V3, Vega, ARGO, and PATH V2)**.

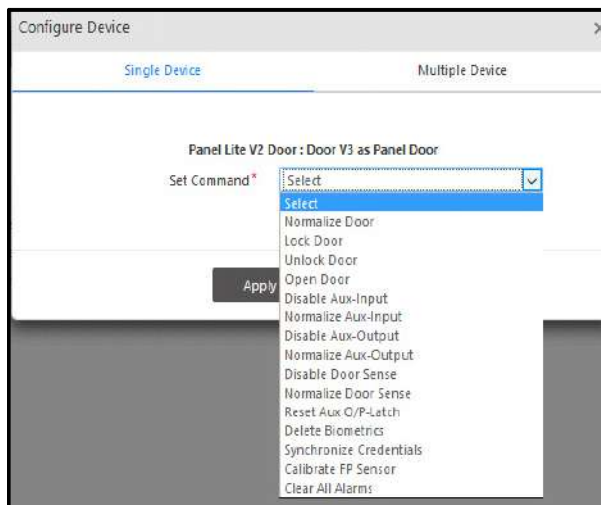
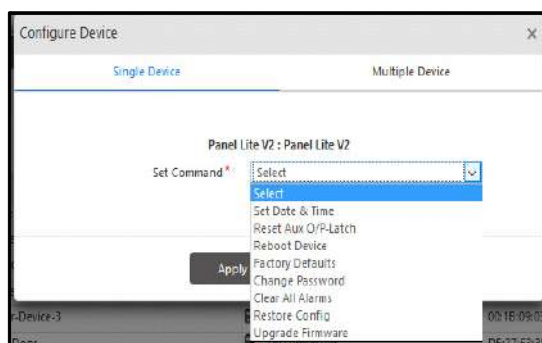
When **Upgrade Firmware** command is sent to direct door; then firmware of selected direct door will be upgraded.

- **Delete Fingerprints/Palms** - Sends command to delete the fingerprints/palm templates from the fingerprint/palm reader module of the selected device.
- **Synchronize Credentials (only for Panel200 Doors)** - Sends command to synchronize the fingerprints/palm templates from the Panel Lite V2 to the Panel Doors. It is recommended to first send the delete fingerprints/palms command to the door before starting the synchronizing process.



*For different doors, there are different sets of **Set Command**.*

The following commands can be sent to the **Panel200** and **Panel200 Door**.



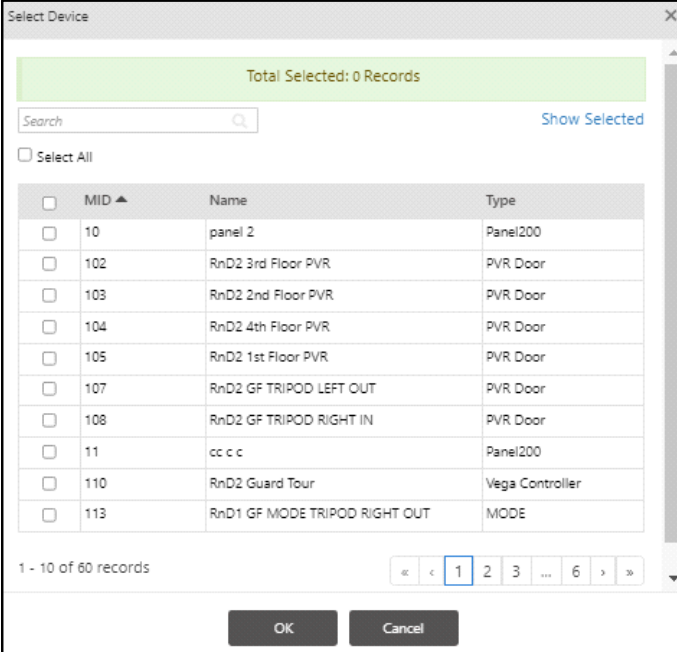


Click the  icon adjacent to a **Panel200** on the **Device Status** list to view the status of all Panel200 Doors assigned under it.

For **Multiple Device**, in the **Configure Device** pop-up


- **Set Command:** Select the desired command from the **Set Command** drop down list;
- **Device:** Select the devices to which the command is to be sent from the **Device** picklist. You can select particular devices or can select all the devices at once.

Click the **Device** picklist. The **Select Device** pop-up appears.



Select Device

Total Selected: 0 Records

Search  [Show Selected](#)

☐ Select All

<input type="checkbox"/>	MID ▲	Name	Type
<input type="checkbox"/>	10	panel 2	Panel200
<input type="checkbox"/>	102	RnD2 3rd Floor PVR	PVR Door
<input type="checkbox"/>	103	RnD2 2nd Floor PVR	PVR Door
<input type="checkbox"/>	104	RnD2 4th Floor PVR	PVR Door
<input type="checkbox"/>	105	RnD2 1st Floor PVR	PVR Door
<input type="checkbox"/>	107	RnD2 GF TRIPOD LEFT OUT	PVR Door
<input type="checkbox"/>	108	RnD2 GF TRIPOD RIGHT IN	PVR Door
<input type="checkbox"/>	11	cc c c	Panel200
<input type="checkbox"/>	110	RnD2 Guard Tour	Vega Controller
<input type="checkbox"/>	113	RnD1 GF MODE TRIPOD RIGHT OUT	MODE

1 - 10 of 60 records

« < 1 2 3 ... 6 > »

**OK** **Cancel**

You can select particular devices or can select all the devices at once.

To select particular devices, select the check boxes of the desired devices.  
OR

To select all the devices, select the **Select All** check box.

Click **OK**. You return to the **Configure Device** pop-up and the device/s appear here.

Configure Device

Single Device Multiple Device


Set Command \* Set Date & Time

Device ID Name

Search

MID	Name	Type
10	panel 2	Panel200

Apply Cancel

You can also delete the desired device/s. To do so, click **Delete**  of the respective device.

- Click **Apply** to save the changes.

To send command as **Disable Aux- Input/Normalize Aux- Input/ Disable Aux- Output/ Normalize Aux- Output** select the desired Command from the **Set Command** dropdown list. Select the desired Port from the **Select Port** dropdown list. Select the desired Device from the **Device** picklist as mentioned above and click **OK**. The selected device(s) appear in the **Configure Device** pop-up. Click **Apply** to send the desired command to the selected Multiple devices.

Configure Device

Single Device Multiple Device

Set Command \* Select

Device: Select

Apply

Disable Aux-Input

Normalize Aux-Input

Disable Aux-Output

Normalize Aux-Output

Disable Door Sense

Normalize Door Sense

Reset Aux Q/P-Latch - Panel Doors

Dieter Biometrics

Synchronize Credentials

Calibrate FP Sensor

Change Password

Configure Device

Single Device Multiple Device

Set Command \* Disable Aux-Input

Select Port Aux. Input 1

Device Aux. Input 1

Apply

Select Device

Total Selected: 1 Records

Search

☐ Select All

MID	Name	Type
110	RND2 Guard Tour	Vega Controller
12	VEGA_DD	Panel200 Door
12	ARCDC200_Door	Panel200 Door
12	ARCDC200_Door_DD	Panel200 Door
12	ARCDC200_Door_DD	Panel200 Door
12	ARCDC200_Door_DS	Panel200 Door
12	ARCDC200_Door_DS	Panel200 Door
12	DoorV4_Door	Panel200 Door
<input checked="" type="checkbox"/> 12	ARCIO800_Door	Panel200 Door
12	ARCDC100_DS_Door	Panel200 Door

1 - 10 of 37 records

OK Cancel

Configure Device

Single Device Multiple Device

Set Command \*

Select Port

Device ID  Name

Search

MID	Name	Type
12	ARCIO800_Door	Panel200 Door

Apply Cancel

## Multiple Device Command

Configure Device

Single Device Multiple Device

Set Command \*

Device ID  Name

MID	Name	Type
12	ARCIO800_Door	Panel200 Door

Apply Cancel

When **Panel200** device is selected in the list of **Multiple Device** selection and command is selected as **Upgrade Firmware** in the **Set Command** picklist, if few firmware components checkbox are selected and when you click **Apply** then the configuration for selected components only will be sent to the **Panel200**.



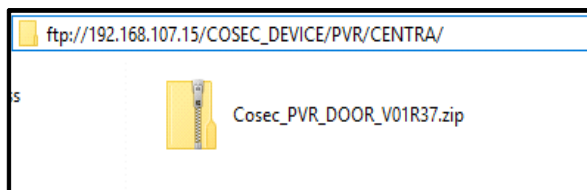
*It is possible that the Firmware Location may have Firmware Update file of lower version then the current version of device firmware and still if the Firmware Update command is triggered then device firmware will get degraded to lower version.*

## Example: Firmware upgrade from FTP

Suppose the current firmware in PVR direct door is V1R37 which was upgraded on 10th May 2018.

Now the FTP path for COSEC CENTRA is configured as shown below:

The new firmware of PVR door is available at FTP path as shown below:



Now the firmware of PVR can be upgraded from Device Status page by selecting the Upgrade Firmware command as shown below.



Device Status						
<div> <div> <div>←</div> <div>↺</div> </div> <div>Search</div> </div>						
Filter List		Device Type	Device Status	Group By		
All		Connected/Online	None			
Name	Status	IP	MAC Address	Device Type	Site	
PVR Door-Device-12	Connected	192.168.104.113	00:1B:09:03:F2:B0	PVR Door	Site-1	
test	Connected	192.168.104.114	00:1B:09:05:3F:E2	Door V3	Site-1	

Configure Device

Single Device Multiple Device

PVR Door : PVR Door-Device-12

Set Command \*

Select

Select

Set Date & Time

Normalize Door

Lock Door

Unlock Door

Open Door

Delete Biometrics

Reboot Device

Factory Defaults

Change Password

Clear All Alarms

Restore Config

Upgrade Firmware

Apply

The Command will be sent to the PVR door.

Device Status						
<div> <div> <div>←</div> <div>↺</div> </div> <div>Search</div> </div>						
Filter List		Device Type	Device Status	Group By		
All		Connected/Online	None			
Name	Status	IP	MAC Address	Device Type	Site	
PVR Door-Device-12	Connected	192.168.104.113	00:1B:09:03:F2:B0	PVR Door	Site-1	
test	Connected	192.168.104.114	00:1B:09:05:3F:E2	Door V3	Site-1	

The door will reboot and firmware will be upgraded with the upgrade date-time as shown below.

MATRIX

PVR Door - PVR Door-Device-12 (12)

Settings

Basic Profile

LAN Settings

Wi-Fi Settings

Mobile Broadband Settings

Server Settings

CCC Settings

Identification Server Settings

Basic Profile

Connectivity Status

via Ethernet

Door Type

Direct Door

Server Connection

COSEC CENTRA

Firmware Version

V01R37 (Apr 30 2018 - 19:12:44)

Firmware Upgrade Time

May 17 2018 - 09:34:44

System Up-Time

0 days 0 hrs 4 mins

Submit

Cancel

## Features

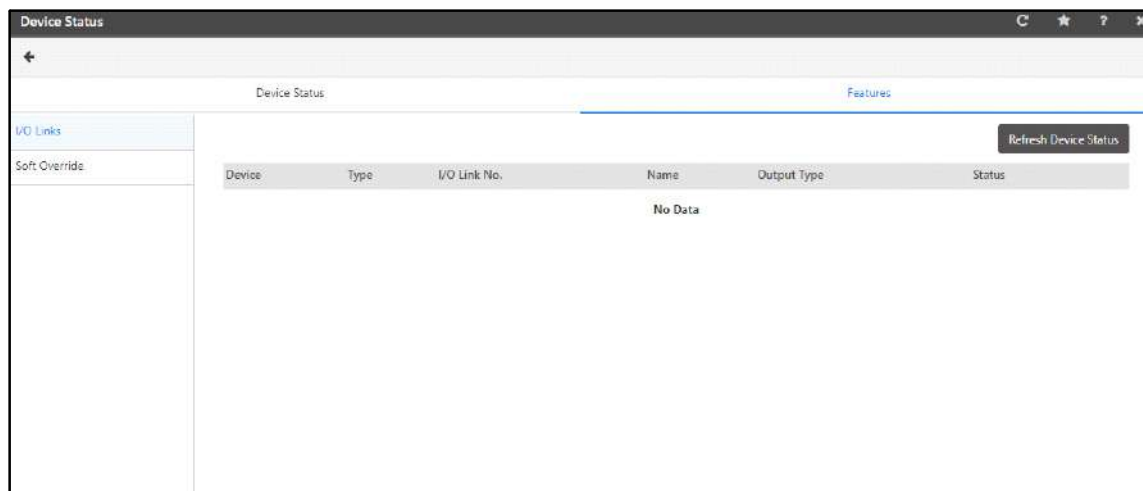
The Features tab consists of two pages — I/O Links and Soft Override.

### I/O Links

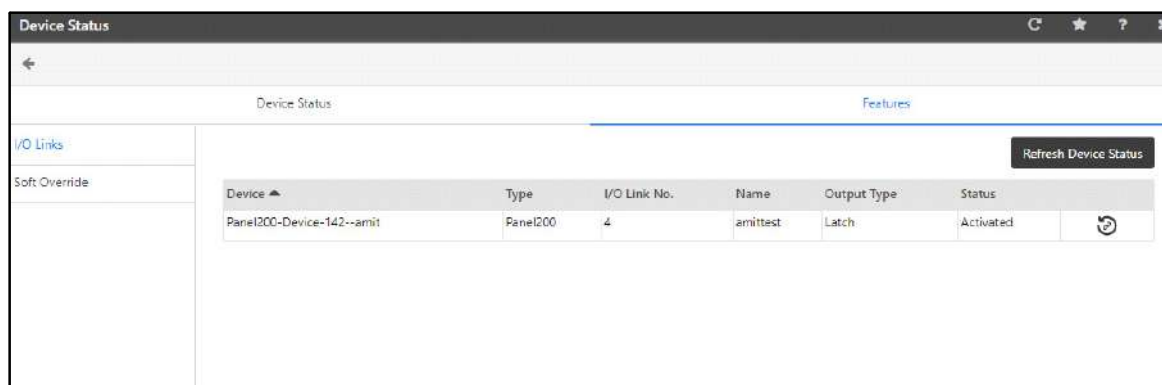
The I/O Links page allows you to view the Events related to I/O links of devices for the connected Panels/Direct Doors.

To view I/O linked events,

- Click **Device module > Device Status > I/O Links**.



- When an I/O Link related event occurs, it appears in a grid.
- Click **Refresh Device Status** to fetch the new events.



The details displayed are — Device Name, Type, I/O Link No., Name, Output Type and Status. If the Output Type is **Latch**, then **Reset** option appears.



*The **Reset** option is applicable only when the Output Type is **Latch**.*

- Click **Reset** to reset the output.

## Soft Override

The Soft Override page allows you to override certain Access Control features for the connected Panel200 on a temporary basis.



Make sure you have selected the **Soft Override** check box from **Device Configuration > Features > Set 1** for Panel200 to enable the Soft Overriding of Access Control features.

To configure Soft Override,

- Click **Device module > Device Status > Soft Override**.

Configure the following parameters:

- Device:** Select the desired device on which you wish to override Access Control features from the drop-down list.
- Override:** Select the desired Access Control feature which you wish to override from the drop-down list and specify the time in minutes.


If you select ACS Policies, the time based access will be overridden if set. This includes Shift Based Access as well as Time Zone Based Access.

To know about the respective feature — 2 Person Rule, First User In, Alarm, Anti-Pass Back, Mantrap, Occupancy Control, Visitor Escort Rule — refer to [“Access Control”](#).

- Click **Submit**. Click **Refresh Device Status**. The overridden Access Control feature appears in the grid.

The details displayed are — Device Name, Feature, Status, Date Time and Duration (Minutes).

You can stop the Soft Overriding of the Access Control feature, if required. To do so,

- Click **Resume**  to stop the overriding of the Access Control feature.

# Device Reports

These reports can be obtained using the **Reports** section under the **Devices** module. The Reports can be categorized as follows:

“Panel”

“Door”

“Invalid Events”

“Device- Wise events”

“Door Offline”

“Intercom Events”

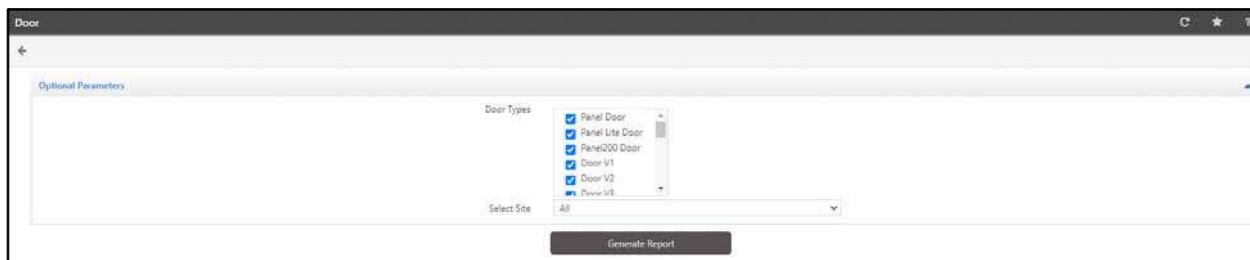
## Panel

This report displays the details of all panel devices on the system.

Panel

## Door

This report displays the details of all the devices on the system.



The screenshot shows a web application interface for a 'Door' report configuration. It features a section titled 'Optional Parameters' with a 'Door Types' list containing several options: Panel Door, Panel Lite Door, Panel200 Door, Door V1, Door V2, and Door V3. Below this is a 'Select Site' dropdown menu set to 'All'. A 'Generate Report' button is located at the bottom.

Click the **Optional Parameters** collapsible panel and configure the following parameters:

- **Door Type:** Select the check boxes of the desired Door Type
- **Select Site:** Select the desired option — **All** or **Selected**.
  - If you select **All**, a report for all the sites will be generated.

- If you select **Selected**, click the selected picklist. The **Select Sites** pop-up appears.

The 'Select Sites' window displays a table with 10 records. The status bar at the top indicates 'Total Selected: 0 Records'. The table has columns for 'ID' and 'Name'.

ID	Name
1	Factory
2	HO
3	RnD1
4	RnD2
5	site5
6	site6
7	site7
8	site8
9	site9
10	site10

At the bottom, it shows '1 - 10 of 11 records' and a pagination control with '1' selected. Buttons for 'OK' and 'Cancel' are at the bottom right.

- You can either select particular site/s or can select all the sites at once.
- To select particular site/s, click the check boxes of the desired sites.

The 'Select Sites' window displays the same table as before, but now with 2 records selected (IDs 1 and 2). The status bar at the top indicates 'Total Selected: 2 Records'.

ID	Name
<input checked="" type="checkbox"/> 1	Factory
<input checked="" type="checkbox"/> 2	HO
<input type="checkbox"/> 3	RnD1
<input type="checkbox"/> 4	RnD2
<input type="checkbox"/> 5	site5
<input type="checkbox"/> 6	site6
<input type="checkbox"/> 7	site7
<input type="checkbox"/> 8	site8
<input type="checkbox"/> 9	site9
<input type="checkbox"/> 10	site10

The rest of the interface, including the pagination and buttons, remains the same.

**OR**

- To select all the sites, select the **Select All** check box. The sites on all the pages will be selected.


Select Sites

Total Selected: 11 Records

☒ Select All

<input checked="" type="checkbox"/>	ID ▲	Name
<input checked="" type="checkbox"/>	1	Factory
<input checked="" type="checkbox"/>	2	H0
<input checked="" type="checkbox"/>	3	RnD1
<input checked="" type="checkbox"/>	4	RnD2
<input checked="" type="checkbox"/>	5	site5
<input checked="" type="checkbox"/>	6	site6
<input checked="" type="checkbox"/>	7	site7
<input checked="" type="checkbox"/>	8	site8
<input checked="" type="checkbox"/>	9	site9
<input checked="" type="checkbox"/>	10	site10

1 - 10 of 11 records

- Click **OK**. The selected sites appear in the grid.
- You can also delete the desired sites. To do so, click **Delete**  of the respective sites.

Click **Generate Report**.

Sample Report

Door

Back

1 of 3

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Door

Page 1 of 3

Run By: System Admin	ID Name	Type	Comm.	IP Address	MAC Address/UID	Status	Alarm	Sense	Tamper
Factory									
1	DoorV1_Panel_1	Panel Door	Ethernet	155.189.175.231	F2:12:F3:D8:1D:F1	Active	Inactive	Inactive	Inactive
2	DoorV2_Panel	Panel Door	Ethernet	162.145.175.159	A1:32:D3:1D:32:1D	Active	Inactive	Inactive	Inactive
3	PathController_Panel	Panel Door	Ethernet	162.142.165.195	AD:1D:2A:D9:D2:1D	Active	Inactive	Inactive	Inactive
4	ARCD100_Panel	Panel Door	Ethernet	162.111.111.111	96:D3:DA:D1:32:1A	Active	Inactive	Inactive	Inactive
1	DoorV1_PanelLite	Panel-Lite Door	Ethernet	162.133.133.133	13:A3:A3:32:32:D3	Active	Inactive	Inactive	Inactive
2	DoorV2_PanelLite	Panel-Lite Door	Ethernet	162.142.165.195	13:32:F3:32:D3:1D	Active	Inactive	Inactive	Inactive
3	PathController_PanelLite	Panel-Lite Door	Ethernet	162.142.152.185	1A:32:A3:A3:D3:1A	Active	Inactive	Inactive	Inactive
4	FVR_PanelLite	Panel-Lite Door	Ethernet	162.142.165.116	AD:D2:DA:DD:D3:A3	Active	Inactive	Inactive	Inactive
5	ARCD100_PanelLite	Panel-Lite Door	Ethernet	162.123.146.123	65:12:32:13:13:13	Active	Inactive	Inactive	Inactive
6	DoorV3_PanelLite	Panel-Lite Door	Ethernet	222.222.222.222	32:32:1A:32:D3:D3	Active	Inactive	Inactive	Inactive
174	NST	NST Direct Door	Ethernet		81:AA:AA:AA:AA:AA	Active	Inactive	Active	Inactive
176	Wireless Door	Wireless Door	Ethernet		51:95:A1:A1:A1:00	Active	Inactive	Inactive	Inactive
177	Path controller	Path Controller	Ethernet		11:A1:A1:A1:A1:00	Active	Inactive	Active	Inactive
97	RnD1 GF TRIPOD LEFT OUT	FVR Door	Ethernet	192.168.4.22	00:1B:09:05:89:86	Active	Inactive	Inactive	Inactive
94	RnD1 GF TRIPOD RIGHT IN	FVR Door	Ethernet	192.168.4.19	00:1B:09:05:44:88	Active	Inactive	Inactive	Inactive
102	RnD2 3rd Floor FVR	FVR Door	Ethernet	192.168.7.23	00:1B:09:05:8A:08	Active	Inactive	Active	Inactive
103	RnD2 2nd Floor FVR	FVR Door	Ethernet	192.168.7.22	00:1B:09:05:8A:06	Active	Inactive	Active	Inactive
104	RnD2 4th Floor FVR	FVR Door	Ethernet	192.168.7.24	00:1B:09:05:89:E4	Active	Inactive	Active	Inactive
105	RnD2 1st Floor FVR	FVR Door	Ethernet	192.168.7.21	00:1B:09:05:8A:09	Active	Inactive	Active	Inactive
107	RnD2 GF TRIPOD LEFT OUT	FVR Door	Ethernet	192.168.7.26	00:1B:09:05:85:27	Active	Inactive	Inactive	Inactive
108	RnD2 GF TRIPOD RIGHT IN	FVR Door	Ethernet	192.168.7.27	00:1B:09:05:85:24	Active	Inactive	Inactive	Inactive
141	RnD1 Basement Tripod Entry	FVR	Ethernet	192.168.4.51	00:1B:09:06:74:04	Active	Inactive	Inactive	Inactive

## Invalid Events

This report displays the details of invalid events on selected doors for a specified period.

The screenshot shows the 'Invalid Events' report configuration window. It includes a 'Date' field with a range from 06/21/2023 to 06/21/2023. Below this is an 'Optional Parameters' section with a dropdown for 'Enterprise Group in Report' set to 'Organization'. The 'Door Selection' section has a 'Select Doors' dropdown set to 'Door-Wise' and a 'Door' field with a search icon. A 'Generate Report' button is at the bottom.

Configure the following parameters:

- **Date:** Select the **To** and **From** date for which the report is to be generated.

### Optional Parameters

- **Enterprise Group in Report:** Select the desired enterprise group — Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1(Association Maps) Custom Group /2/3.

### Door Selection

- **Select Doors:** Select the desired option— **Door-Wise** or **All**.
- If you select **All**, the report will be generated for all the doors.
- If you select **Door-Wise**,
  - Click the **Door** picklist. The **Picklist for Door** pop-up appears.

The screenshot shows the 'Picklist For Door' pop-up window. It has a search bar and a 'Show Selected' button. Below is a table with 10 rows, each with a checkbox, an ID, and a Name. The table shows 10 records out of 107. At the bottom are 'OK' and 'Cancel' buttons.

<input type="checkbox"/>	ID	Name
<input type="checkbox"/>	1	RnD1 Canteen1 ARGO
<input type="checkbox"/>	2	RnD1 2nd FLR Server Room VEGA
<input type="checkbox"/>	3	RnD1 4th FLR Server Room VEGA
<input type="checkbox"/>	4	RnD1 GF TRIPOD RIGHT IN
<input type="checkbox"/>	5	RnD1 Integra ARGO
<input type="checkbox"/>	6	RnD1 Basement Tripod Entry PVR
<input type="checkbox"/>	7	RnD1 4th Floor F8 VEGA OUT
<input type="checkbox"/>	8	RnD1 4th Floor F8 VEGA IN
<input type="checkbox"/>	9	RnD1 GF MODE TRIPOD LEFT IN
<input type="checkbox"/>	10	Factory Admin FMX




- Select the desired check boxes of the desired doors. Click **OK**.
- The selected doors appears in the grid.

Select Doors: Door-Wise

Door: ID: Name:

Search

ID	Name	Group	
1	RnD1 Canteen1 ARGO	Door	
2	RnD1 2nd FLR Server Room VEGA	Door	
3	RnD1 4th FLR Server Room VEGA	Door	
4	RnD1 GF TRIPOD RIGHT IN	Door	

- You can also delete the desired door. To do so, click **Delete**  of the respective door.

Click **Generate Report**.

Sample Report

Invalid Events

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100%

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Invalid Events From 01/01/2000 To 06/20/2023

Run by: System Admin Date: 06/20/2023 20:44

Sr No	Time	IN/OUT	Reason
02/15/2016			
RnD1 GF TRIPOD LEFT OUT			
1	16:17	IN	Denied - Invalid Input
2	16:26	IN	Denied - Invalid Input
3	16:26	IN	Denied - Time Out
4	16:46	IN	Denied - Time Out
5	16:47	IN	Denied - Time Out
6	16:47	IN	Denied - Time Out
7	16:54	IN	Denied - Invalid Input
8	16:54	IN	Denied - Invalid Input
9	16:56	IN	Denied - Invalid Input
10	16:56	IN	Denied - Invalid Input

## Device- Wise events

This report displays the details of device-wise events over a specified period.

Device-Wise Event

Date: 06/21/2023 Time: 00:00

Optional Parameters

Event Type: ☒ User Events ☐ Door Events ☐ Alarm Events ☐ System Events ☐ Cafeteria Events

Filter Devices: All

Organization Name in Header As Per: User Selection

User Selection

Select Users: User-Wise

User: ID: Name:

Generate Report

Configure the following parameters:

- **Date:** Select the **To** and **From** date for which the report is to be generated.
- **Time** Specify the **Start** and **End** time for the device-wise events to be listed.

#### Optional Parameters

- **Event Type:** Select the check boxes of the desired Events.
- **Filter Devices:** Select the desired option — **All**, **Device Group** or **Randomly**.
- If you select **Device Group**,
  - Click the **Device Group** picklist. The **Picklist For Device Group** pop-up appears.

The screenshot shows a dialog box titled "Picklist For Device Group". At the top, it says "Total Selected: 0 Records". Below this is a search bar with the placeholder text "Search" and a magnifying glass icon, and a "Show Selected" button. There is a "Select All" checkbox. The main part of the dialog is a table with two columns: "DGID" and "Name". The table contains 10 rows of data. At the bottom left, it says "1 - 10 of 12 records". At the bottom right, there are pagination controls: "<<", "<", "1", "2", ">", ">>". At the very bottom, there are "OK" and "Cancel" buttons.

<input type="checkbox"/>	DGID ▲	Name
<input type="checkbox"/>	1	ACTA Devices
<input type="checkbox"/>	2	RnD1Visitor
<input type="checkbox"/>	3	Device Group 3
<input type="checkbox"/>	4	Device Group 4
<input type="checkbox"/>	5	Device Group 5
<input type="checkbox"/>	6	Device Group 6
<input type="checkbox"/>	7	Device Group 7
<input type="checkbox"/>	8	Device Group 8
<input type="checkbox"/>	9	Device Group 9
<input type="checkbox"/>	10	Device Group 10

- You can either select particular device groups or can select all the device groups at once.

- To select particular device groups, select the check boxes of the desired device groups.

Picklist For Device Group

Total Selected: 2 Records

☐ Select All

<input type="checkbox"/>	DGID ▲	Name
<input checked="" type="checkbox"/>	1	ACTA Devices
<input checked="" type="checkbox"/>	2	RnD1Visitor
<input type="checkbox"/>	3	Device Group 3
<input type="checkbox"/>	4	Device Group 4
<input type="checkbox"/>	5	Device Group 5
<input type="checkbox"/>	6	Device Group 6
<input type="checkbox"/>	7	Device Group 7
<input type="checkbox"/>	8	Device Group 8
<input type="checkbox"/>	9	Device Group 9
<input type="checkbox"/>	10	Device Group 10

1 - 10 of 12 records

**OR**

- To select all the device groups, select the **Select All** check box. The device groups on all the pages will be selected.

Picklist For Device Group

Total Selected: 12 Records

Search  Show Selected

☒ Select All

<input checked="" type="checkbox"/>	DGID ▲	Name
<input checked="" type="checkbox"/>	1	ACTA Devices
<input checked="" type="checkbox"/>	2	RnD1Visitor
<input checked="" type="checkbox"/>	3	Device Group 3
<input checked="" type="checkbox"/>	4	Device Group 4
<input checked="" type="checkbox"/>	5	Device Group 5
<input checked="" type="checkbox"/>	6	Device Group 6
<input checked="" type="checkbox"/>	7	Device Group 7
<input checked="" type="checkbox"/>	8	Device Group 8
<input checked="" type="checkbox"/>	9	Device Group 9
<input checked="" type="checkbox"/>	10	Device Group 10

1 - 10 of 12 records

OK Cancel

- Click **OK**.
- The selected device groups appear in the grid.

Optional Parameters

Event Type

☒ User Events  
☐ Door Events  
☐ Alarm Events  
☐ System Events  
☐ Safeteria Events


Filter Devices

Device Group

ID Name

1 ACTA Devices

Organization Name in Header As Per User Selection

- You can also delete the desired device groups. To do so, click **Delete**  of the respective device groups.
- If you select **Randomly**, you can select particular devices or can select all the devices at once.

- Click the **Random Devices** picklist. The **Select Random Devices** pop-up appears.

Select Random Devices

Total Selected: 0 Records

Search  [Show Selected](#)

☐ Select All

<input type="checkbox"/>	ID ▲	Name	Site Name
<input type="checkbox"/>	1	RnD1 Canteen1 ARGO	Site 9
<input type="checkbox"/>	2	RnD1 2nd FLR Server Room VEGA	Site 9
<input type="checkbox"/>	3	RnD1 4th FLR Server Room VEGA	Factory
<input type="checkbox"/>	4	RnD1 GF TRIPOD RIGHT IN	Factory
<input type="checkbox"/>	5	RnD1 Integra ARGO	Factory
<input type="checkbox"/>	6	RnD1 Basement Tripod Entry PVR	Factory
<input type="checkbox"/>	7	RnD1 4th Floor FB VEGA OUT	Factory
<input type="checkbox"/>	8	RnD1 4th Floor FB VEGA IN	Factory
<input type="checkbox"/>	9	RnD1 GF MODE TRIPOD LEFT IN	Factory
<input type="checkbox"/>	10	Factory Admin FMX	Factory

1 - 10 of 128 records

« < 1 2 3 ... 13 > »

**OK** **Cancel**

- You can either select particular devices or can select all the devices at once.
- To select particular devices, click the check boxes of the desired devices.  
**OR**
- To select all the devices, select the **Select All** check box. The devices on all the pages will be selected.
- Click **OK**.
- The selected devices appear in the grid.

Optional Parameters

Event Type: ☒ User Events, ☐ Door Events, ☐ Alarm Events, ☐ System Events, ☐ Cafeteria Events

Filter Devices: Randomly

Search

ID ▲	Name	Site Name	
1	RnD1 Canteen1 ARGO	site9	

Organization Name in Header As Per: User Selection

- You can also delete the desired device. To do so, click **Delete** of the respective device.
- Organization Name in Header As Per:** Select the desired option — **User Selection** or **Customized Selection**.
- If you select **Customized Selection**, click **Customize Report Header**.

You can select the desired option from the drop-down list or can also add a new header as per your choice.

## User Selection

- **Select User:** Select the desired option — **User Wise**, **Group Wise**, or **All**.
- If you select **User Wise**,
  - Click the **User** picklist. The **Picklist For All Users** pop-up appears.

Picklist For All Users

Total Selected: 0 Records

Search  Show Selected

<input type="checkbox"/>	User ID ▲	Name
<input type="checkbox"/>	1	SALIM ANSARI
<input type="checkbox"/>	10	RAJENDRA GOSWAMI
<input type="checkbox"/>	1001	ANKITKUMAR SOHLIYA
<input type="checkbox"/>	1002	MEGHA H SHUKLA
<input type="checkbox"/>	1003	UMESH M TALANPURI
<input type="checkbox"/>	1004	DARSHAK B PATEL
<input type="checkbox"/>	1007	DHAVAL I PATEL
<input type="checkbox"/>	1008	MAYANK K KORAT
<input type="checkbox"/>	1009	DIPTI K RATHWA
<input type="checkbox"/>	1010	RAHUL S SHAH

1 - 10 of 2479 records

« < 1 2 3 ... 248 > »

OK Cancel

- Select the desired check boxes of the desired profiles. Click **OK**.
- The selected profiles appears in the grid.

Select Users

User Wise

User \* ID Name

Search

User ID ▲	Name	
1	SALIM ANSARI	
10	RAJENDRA GOSWAMI	
1001	ANKITKUMAR SOHLIYA	
1002	MEGHA H SHUKLA	

1 - 4 of 2479 records

OK Cancel

- You can also delete the desired profile. To do so, click **Delete** of the respective profile.
- If you select **Group Wise** option,
  - Select the desired enterprise group — Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1(Association Maps) Custom Group /2/3.

For each enterprise group — Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1/2/3, click the corresponding picklist to select the desired option/s.

The selected groups appear in the grid.


Select Users: Group Wise

Select Group: Organization

Organization \* ID Name ≡

Q

ID	Name	Group ▲	🗑
1	MATRIX COMSEC PVT. LTD.	Organization	🗑
5	TECH SERVICES	Organization	🗑
6	CONSULTANT	Organization	🗑
7	CANTEEN	Organization	🗑
8	APPRENTICE	Organization	🗑

- You can also delete particular group. To do so, click **Delete**  of the respective group.
- If you select **All** option, then all the profiles will be selected.
- **Generate Report For:** Select the desired option — **All Users, Active Users** or **Inactive Users**.

Click **Generate Report**.

Sample Report

Device-Wise Event
←

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Organization-1
Page 1 of 1

**Device-Wise Events From 21/01/2022 To 21/01/2022**

Run by: System Admin
Date: 21/01/2022 16:36

Sr No	Event Date-Time	Event Type	Event Name	User ID	Name
nk vega					Site-1
1	21/01/2022-14:00:23	User	Allowed	U1	User1
2	21/01/2022-14:01:02	User	Allowed	U1	User1
3	21/01/2022-14:03:05	User	Allowed	U1	User1
4	21/01/2022-14:03:51	User	Allowed	U1	User1
5	21/01/2022-14:09:22	User	Allowed	U1	User1
6	21/01/2022-14:09:45	User	Allowed	U1	User1
7	21/01/2022-14:11:02	User	Allowed - with Duress	U1	User1
8	21/01/2022-14:11:53	User	Allowed - with Duress	U1	User1

## Door Offline

This report displays the details of all Panel and Direct Doors which have gone offline for selected duration.

Configure the following parameters:

- **Date:** Select the **To** and **From** date for which the report is to be generated.
- **Time** Specify the **Start** and **End** time for the device-wise events to be listed.

### Optional Parameters

- **Offline Duration (seconds):** Specify the desired offline duration in seconds for which you wish to view the report.

### Device Selection

- **Filter Devices:** Select the desired option— **All** or **Group Wise**.

If you select **All**, then all the devices will be selected.

If you select **Group Wise**, you need to select the group and the devices of the selected group.

- **Select Group:** Select the desired option— **Panel**, **Direct Door** or **Device Group**.

If you select **Panel**,

- Click the **Panel** picklist. The **Picklist for Panel** pop-up appears.



Picklist For Panel

Total Selected: 0 Records

Search  [Show Selected](#)

<input type="checkbox"/>	ID ▲	Name
<input type="checkbox"/>	9	Panel
<input type="checkbox"/>	10	Panel 2
<input type="checkbox"/>	11	CC2
<input type="checkbox"/>	12	Panel200-Device-12
<input type="checkbox"/>	13	Panel
<input type="checkbox"/>	14	PanelLite
<input type="checkbox"/>	15	Panel200-Device-15
<input type="checkbox"/>	16	Panel200

OK Cancel

- Select the desired check boxes of the desired panel devices. Click **OK**.
- The selected panel appears in the grid.

Filter Devices: Group Wise ▼

Select Group: Panel ▼

Panel \* ID  Name

Search

ID	Name	Group ▲	
9	Panel	Panel	
10	Panel 2	Panel	
12	Panel200-Device-12	Panel	

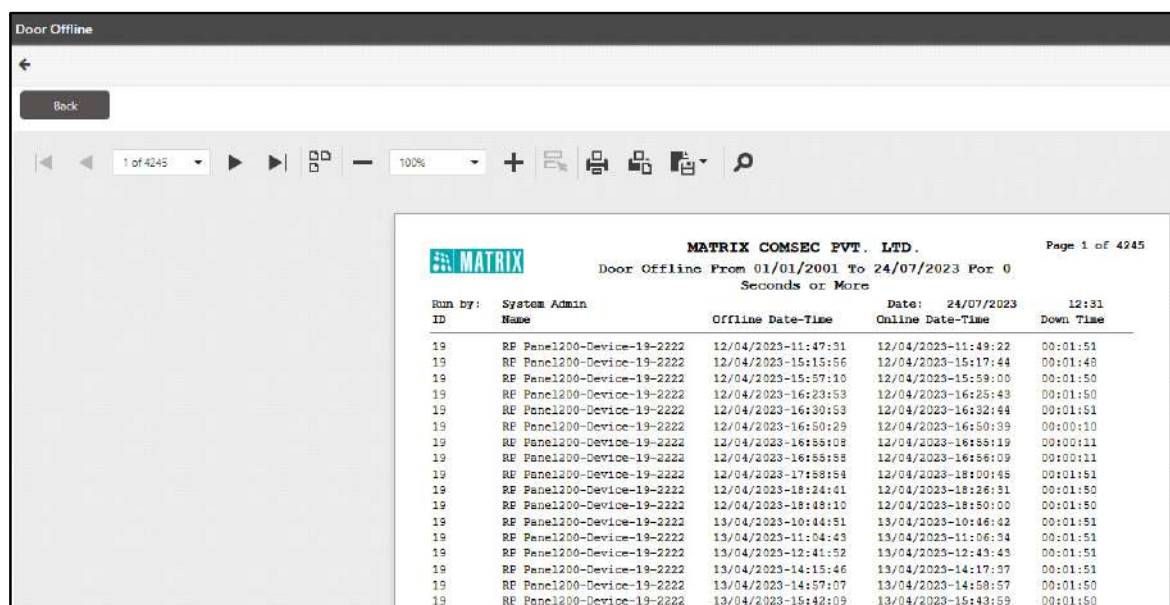
- You can also delete the desired panel. To do so, click **Delete** of the respective panel.

If you select **Direct Door**, follow the same steps as **Panel**.

If you select **Device Group**, follow the same steps as **Panel**.

Click **Generate Report**.

## Sample Report



Run by:	System Admin Name	Offline Date-Time	Date:	Online Date-Time	Down Time
19	RF Panel200-Device-19-2222	12/04/2023-11:47:31	12/04/2023-11:49:22	00:01:51	
19	RF Panel200-Device-19-2222	12/04/2023-15:15:56	12/04/2023-15:17:44	00:01:48	
19	RF Panel200-Device-19-2222	12/04/2023-15:57:10	12/04/2023-15:59:00	00:01:50	
19	RF Panel200-Device-19-2222	12/04/2023-16:23:53	12/04/2023-16:25:43	00:01:50	
19	RF Panel200-Device-19-2222	12/04/2023-16:30:53	12/04/2023-16:32:44	00:01:51	
19	RF Panel200-Device-19-2222	12/04/2023-16:50:29	12/04/2023-16:50:39	00:00:10	
19	RF Panel200-Device-19-2222	12/04/2023-16:55:08	12/04/2023-16:55:19	00:00:11	
19	RF Panel200-Device-19-2222	12/04/2023-16:55:55	12/04/2023-16:56:09	00:00:11	
19	RF Panel200-Device-19-2222	12/04/2023-17:58:54	12/04/2023-18:00:45	00:01:51	
19	RF Panel200-Device-19-2222	12/04/2023-18:24:41	12/04/2023-18:26:31	00:01:50	
19	RF Panel200-Device-19-2222	12/04/2023-18:48:10	12/04/2023-18:50:00	00:01:50	
19	RF Panel200-Device-19-2222	13/04/2023-10:44:51	13/04/2023-10:46:42	00:01:51	
19	RF Panel200-Device-19-2222	13/04/2023-11:04:43	13/04/2023-11:06:34	00:01:51	
19	RF Panel200-Device-19-2222	13/04/2023-12:41:52	13/04/2023-12:43:43	00:01:51	
19	RF Panel200-Device-19-2222	13/04/2023-14:15:46	13/04/2023-14:17:37	00:01:51	
19	RF Panel200-Device-19-2222	13/04/2023-14:57:07	13/04/2023-14:58:57	00:01:50	
19	RF Panel200-Device-19-2222	13/04/2023-15:42:09	13/04/2023-15:43:59	00:01:50	

## Intercom Events

This report displays the event details as well as the resident's details, showing which apartment/user gave the command to the device and caused the visitor allowed/denied event or both events.



Configure the following parameters:

- **Date:** Select the **To** and **From** date for which the report is to be generated.

### Optional Parameters

- **Status:** Select the desired option— **Both**, **Allowed** or **Denied**.

Click **Generate Report**.

## Sample Report

Intercom Events

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MATRIX

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Intercom Events From 01/01/2000 To 06/20/2023

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Run by: System Admin

Date: 06/20/2023 21:38

Sr. No.	Event Date-Time	Intercom No.	User ID	Name	Device Name
1	10/29/2018 14:57	395	33	GOPAL TANK	NO Access VEGA
2	10/31/2018 10:58	5576			RnD1 BOOM BARRIER IN
3	10/31/2018 10:59	5591	505	Rasul Gafur Vohra	RnD1 BOOM BARRIER IN
4	10/31/2018 10:59	5591	505	Rasul Gafur Vohra	RnD1 BOOM BARRIER IN
5	10/31/2018 11:03	5591	505	Rasul Gafur Vohra	RnD1 BOOM BARRIER IN
6	10/31/2018 11:08	5591	505	Rasul Gafur Vohra	RnD1 BOOM BARRIER IN
7	10/31/2018 11:25	301			NO Access VEGA
8	10/31/2018 14:37	5591	505	Rasul Gafur Vohra	RnD1 BOOM BARRIER IN
9	10/31/2018 14:55	5591	505	Rasul Gafur Vohra	RnD1 BOOM BARRIER IN
10	10/31/2018 14:59	5591	505	Rasul Gafur Vohra	RnD1 BOOM BARRIER IN
11	10/31/2018 15:15	5591	505	Rasul Gafur Vohra	RnD1 BOOM BARRIER IN
12	10/31/2018 15:21	5591	505	Rasul Gafur Vohra	RnD1 BOOM BARRIER IN
13	10/31/2018 19:30	5591	505	Rasul Gafur Vohra	RnD1 BOOM BARRIER IN
14	10/31/2018 19:33	5591	505	Rasul Gafur Vohra	RnD1 BOOM BARRIER IN
15	10/31/2018 19:35	5591	505	Rasul Gafur Vohra	RnD1 BOOM BARRIER IN




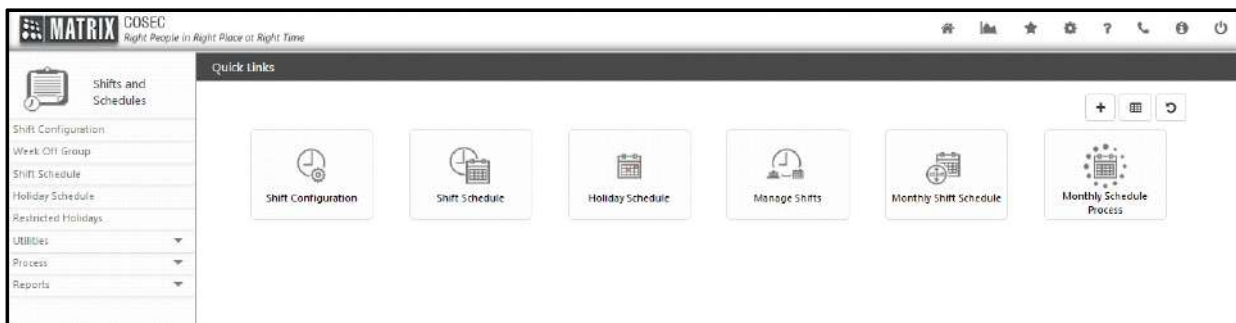
Shift Schedules are detailed chart indicating the working hours for group employees based on the organization's requirement. These display details like no. of days, timing, shift rotation, rotation count etc for each shift schedule.



*This functionality will not be available with the COSEC Application basic platform license.*

*In order to start the configuration of the system the user needs to first define the devices from the **Basic** module and then proceed with the configuration of the Shifts from the **Shifts and Schedules** module.*

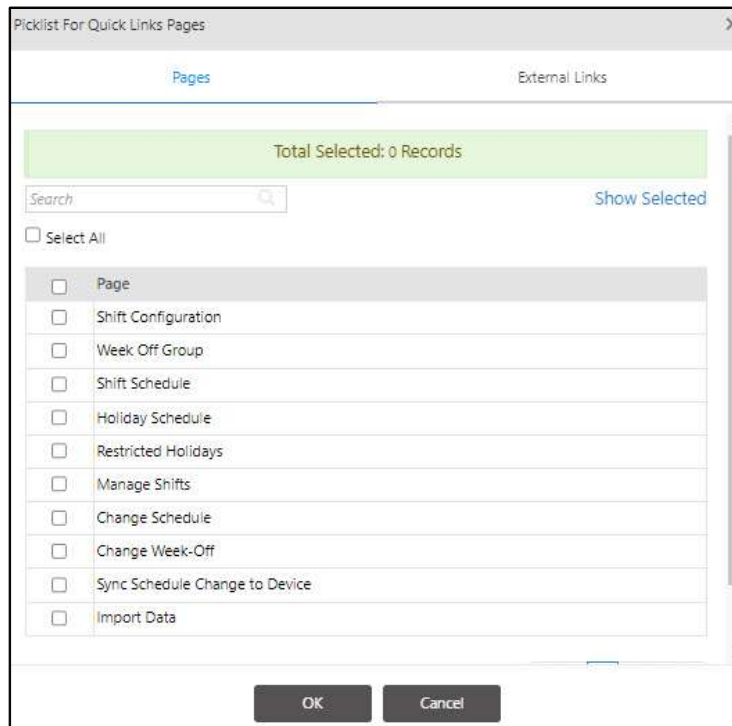
To use the Shift and Schedules functionality, Click on **Shifts and Schedules**  Module. The Shifts and Schedules page will appear on your screen.



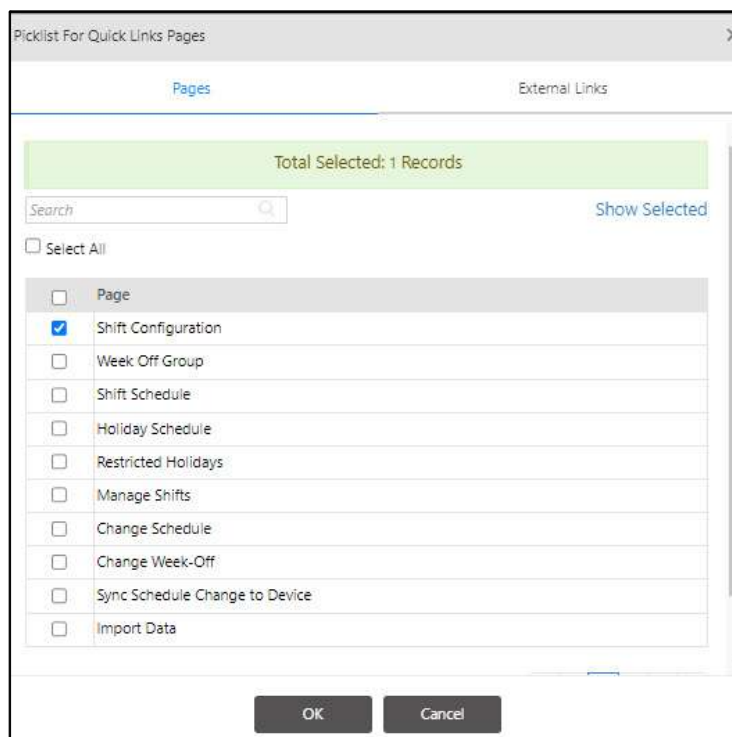
The page displays a menu and **Quick Links** to go to the required page in just one click. Quick Links are shortcuts to reach to a specific page easily. You can configure these options for Quick Links — **Add Quick Link**, **Select Layout** and **Reset to Default**.

### Add Quick Links

- Click **Add**  . The **Picklist For Quick Links Pages** pop-up appears.

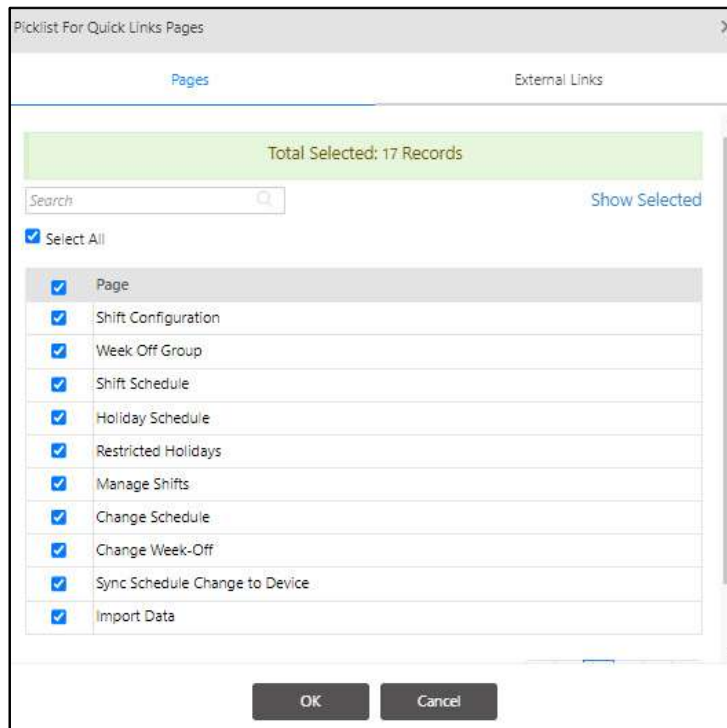


- You can either select particular page or can select all the pages at once. Maximum **20** quick links can be displayed.
- To select particular pages, select the check boxes of the desired pages.




**OR**

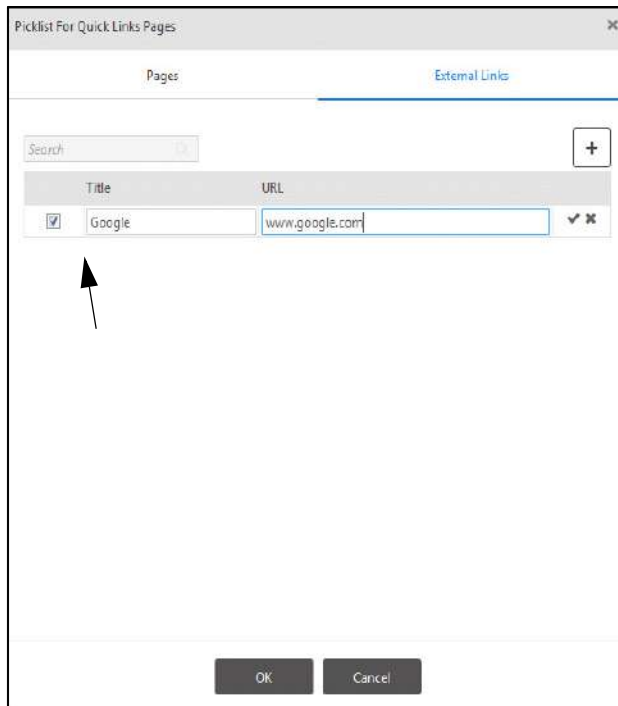
- To select all the pages at once, select the **Select All** check box. All the pages will be selected.





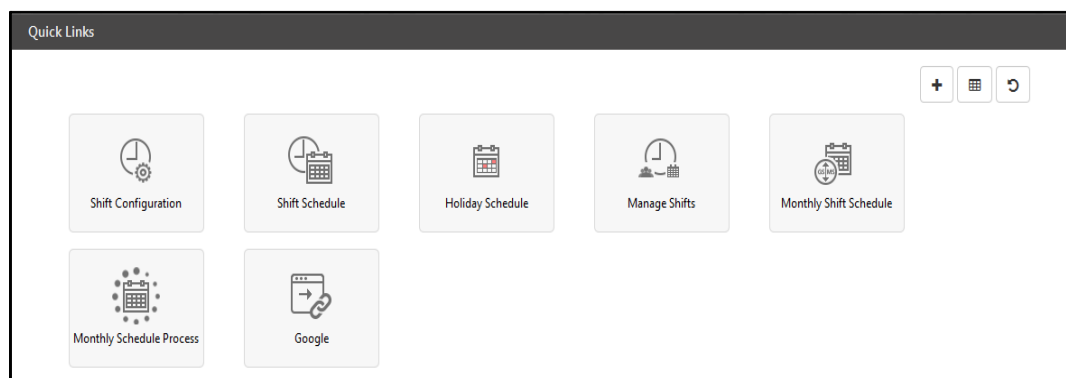
- Click **OK**.
- The Quick Links for selected pages appear on the Quick Link page.

#### Adding External Links,


- Select **External Link** tab and click on  button to add new external link.
- Configure the **Title** and **URL** of the external link under the respective fields. Select the check box to display the Quick Link for the configured link.




- Click **Save**  to save the configuration.
- Once you have saved the configuration, you can edit it. Click **Edit**  to edit the saved configuration.
- Click **OK** to save the configuration of the external link. The Quick Link for the external link appears on the Quick Link page.



## Select Layout

Click **Select Layout**  to select a layout for the quick links. You can select 5x4 or 4x5 layout to manage the quick links.

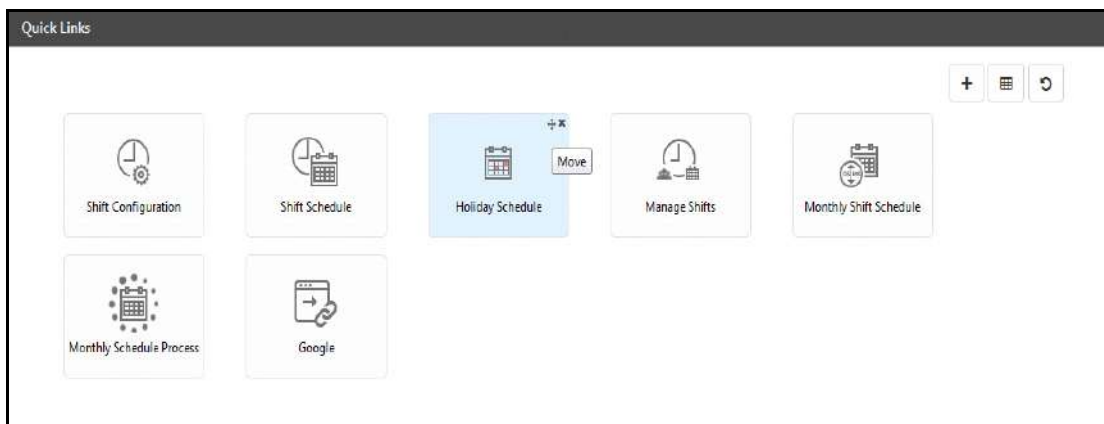
## Reset To Default

Click **Reset To Default**  to reset the quick links to the default quick links.



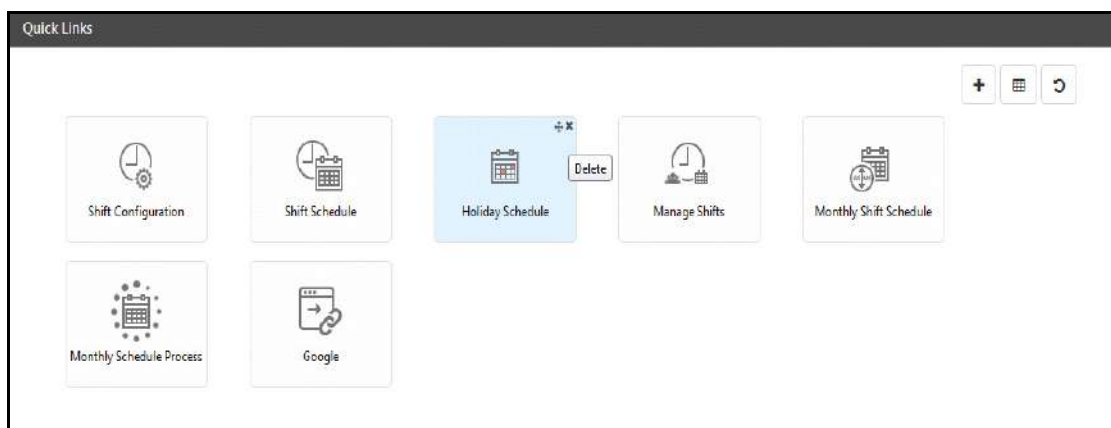
## Move the Link

To move the link from one place to another, hover on the link on top right corner and click **Move** icon as shown below. Then drag the quick link to the desired place. It will be placed at the desired location on the quick links page.




## Delete the Link

To delete a particular link, hover on the link on top right corner and click **Delete** icon as shown below.

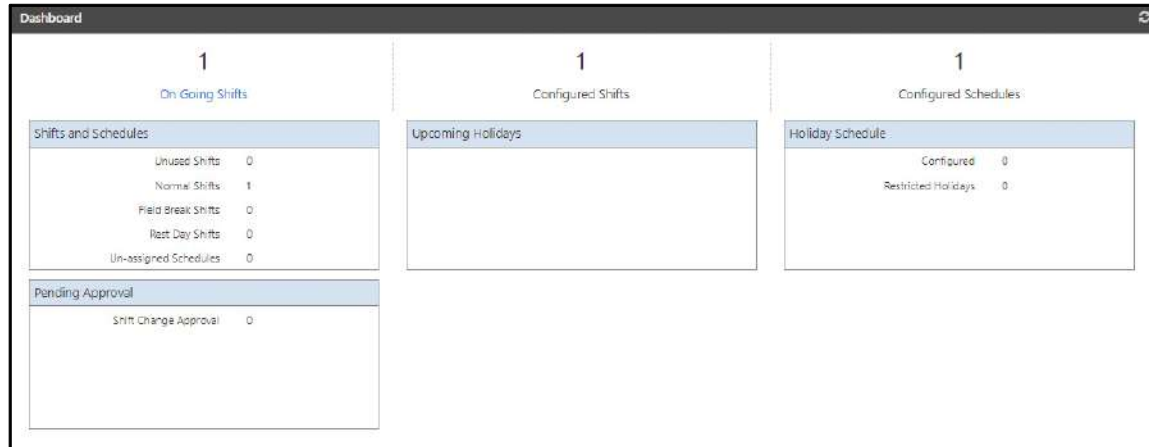


*Quick links are displayed as per rights given to System Account and ESS users.*

## Shifts and Schedules Dashboard

To view the Dashboard, click the Dashboard button  on the **Shifts and Schedules** page.

It displays the basic information on shifts and schedules relating to the COSEC Software under the four groups:



On Going Shifts- Total number of shifts assigned to user.

Configured Shifts- Total number of shifts configured in COSEC.

Configured Schedules- Total number of shift schedules configured in COSEC.

### Shifts and Schedules

- Unused Shifts- Total number of shifts, currently not configured in any Schedule.
- Normal Shifts- Total number of shifts configured as Normal Type Shift.
- Field Break Shifts- Total number of shifts configured as Field Break Type Shift.
- Rest Day Shifts- Total number of shifts configured as Rest Day Type Shift.
- Un-assigned Schedules- Total number of schedules, currently not configured to any user.

### Upcoming Holidays

- The upcoming 5 holidays will be listed in ascending order.

### Holiday Schedule

- Configured- Total number of holiday schedules configured in COSEC.
- Restricted Holidays- Total number of restricted holidays configured in Cosec.

### Pending Approval

- Shift Change Approval - Total number of Shift Change Applications pending for approval.

For more information on the above Dashboard options, click the respective information links on the Dashboard. The

Latest values on Dashboard are updated on clicking the **Refresh**  button.

# Shift Configuration

Shift Configuration enables to define the Shift, Shift Timing details, Break details and Grace Time details. The total number of shifts that can be created in COSEC is 1402.

To access the Shift Configuration, Click on **Shift Configuration** option from the Shift and Schedule page. The page appears as shown below:

The screenshot shows the 'Shift Configuration' window. On the left, there are form fields for: Shift ID (H2), Shift Name (H2 Shift-Based), Shift Description (Factory Workers Shift), Shift Type (Normal), Shift Timings (09:45 to 17:45), Attendance Calculation Type (Shift-Based), Minimum Required Working Hours (03:00 for Half Day, 07:00 for Full Day), Minimum Hours Required Within Shift Duration (checked), Deviation From Shift Start (Min) (0-999), Deviation From Shift End (Min) (0-999), and Shift Allowance (unchecked). On the right, there is a table listing existing shifts:

ID	Name	Timings
A1	A1Shift	10:00 - 19:00
GS	General Shift	09:00 - 18:00
H1	H1 Cust Hrs Shift	09:45 - 17:45
H2	H2 Shift-Based	09:45 - 17:45
SA	sa	09:00 - 02:22

- **Shift:** Specify a User friendly Shift ID and Shift Name.
- **Shift Description:** Specify the description for the Shift.
- **Shift Type:** Select the Shift Type from the drop down options:
  - **Normal:** This is a normal shift with one weekoff within a week.
  - **Field Break:** This is a shift where a break of around 20 days can be given after working period of 2 months.
  - **Rest Day:** This is a like a normal shift with one weekoff given for rest after 10-12 working days.
- **Shift Timings:** Specify the start time and end time of the shift in hh:mm format.

The Shift duration or the total working hours of the shift is automatically calculated based on the start and end time.

- **Attendance Calculation Type:** For calculating attendance you can select Shift Based or Custom Works Hours option.

If you select **Shift Based**, you need to configure the parameters as mentioned in ["Shift Based"](#).

If you select **Custom Work Hours**, you need to configure the parameters as mentioned in ["Custom Work Hours"](#).

## Shift Based

If you have selected Shift Based as the Attendance Calculation Type, configure the following parameters:

### Minimum Required Working Hours

- **For Half Day:** Specify the minimum working hours required for marking half day present for the user. The format is in HH:MM.
- **For Full Day:** Specify the minimum working hours required for marking full day present for the user. The format is in HH:MM.
- **Minimum Hours Required Within Shift Duration:** Select this check the box to enable this option. This specifies the mandatory minimum working hours for full day as well half day that should fall within the shift working time allotted to the user.

This means if the shift duration is from 9:00 to 18:00, then your working hours must be within this shift duration to mark the user present. If you have worked from 17:00 to 23:00, then your 6 hours of work is not in the shift duration. Out of 6 hours only 1 hour fall in the shift duration which is not enough to mark half day present (depends on Minimum Required Working Hours For Half Day= 2 hrs)

If Minimum Hours Required Within Shift is enabled then system will consider **Eligible Hours** for marking user absent due to less work hours. For details, refer to "[Eligible hours calculation](#)".

- **Deviation from Shift Start (Min):** If **Minimum Hours Required Within Shift Duration** is enabled, then you can specify the deviation to be allowed from the shift starting time.
- **Deviation from Shift End (Min):** If **Minimum Hours Required Within Shift Duration** is enabled, then you can specify the deviation to be allowed from the shift ending time.



*Minimum hours fulfillment is checked before the "Normal" type user is marked Absent due to Less work hours.*

### Eligible hours calculation

**Example1:** Shift: 09:00 to 18:00 hrs. Deviation allowed for shift start=1hr, Deviation allowed for shift end=1 hr.

•

IN Punch	Deviated Shift Start	ShiftStart	Shift End	Deviated Shift End	OUT Punch
6:00 hrs	8:00 hrs	9:00hrs	18:00 hrs	19:00 hrs	21:00 hrs
Actual work done= 15 hrs					
Early IN=3hrs				Overstay = 3hrs	
DEI=2hrs					DO=2hrs

- Work hours = 15:00 hrs (6:00 to 21:00 hrs)
- Work hours within Shift= Work hours- Early IN- Overstay  
= 15 -3- 3 = 9:00 hrs
- Eligible Work hours= Work hours- Deviated Early IN(DEI)- Deviated Overstay(DO)

$$= 15 - 2 - 2 = 11 \text{ hrs}$$

### Example2:

IN Punch	Deviated Shift Start	Shift Start	Shift End	Deviated Shift End	OUT Punch
	13:00 hrs	15:00hrs	23:00 hrs	01:00 hrs	
15:00 hrs (5/7/16)					05:00 hrs (16/7/16)
		Actual work done= 14 hrs			
		Work hours within shift= 8 hrs			
Early IN=0hrs				Overstay = 6hrs	
DEI=0hrs					DO=4hrs

- Eligible Work hours= Work hours- Deviated Early IN(DEI)- Deviated Overstay(DO)  
= 14- 0- 4 = 10hrs

- **Shift Allowance:** Select this check to include the shift allowance in the salary calculation.

## Break Details

Click the Break Details collapsible panel and configure the following parameters:

Break Details

Break Timings

HH:MM

HH:MM

00:00

Break Deviation Allowed

☒

Advanced Details

**Break Timings:** Configure the Start and End break time in HH:MM format. The break duration is automatically calculated based on the start and end time and appears in the adjoining box. According to the break duration hours, shift duration will also be updated.

For example: If Break Start time is 13:00 hrs and Break End time is 14:00 hrs, then break duration will be 00:30 hr.

**Shift Configuration**

Shift: SG General Shift

Shift Description: General Shift 1

Shift Type: Normal

Shift Timings: 09:00 18:00 08:00

Attendance Calculation Type: Shift-Based

**Minimum Required Working Hours**

For Half Day: HH:MM

For Full Day: HH:MM

Minimum Hours Required Within Shift Duration: ☐

Deviation From Shift Start (Min): 0-999

Deviation From Shift End (Min): 0-999

Shift Allowance: ☐

**Break Details**

Break Timings: 13:00 14:00 01:00

Break Deviation Allowed: ☒

**Advanced Details**

**Break Deviation Allowed:** Select the check box to allow the break deviation. By enabling this option, the user is allowed to take a break at any time during the day.

## Advanced Details

**Break Details**

Break Timings: 13:00 14:00 01:00

Break Deviation Allowed: ☒

**Advanced Details**

Add Break Late-IN In Total Late-IN: ☐

Add Break Early-OUT In Total Early-OUT: ☐

**Deduct Break From Working Hours**

Deduction Type For 2 Punch: ☐ Configured Break Duration

Deduction Type For 2+ Punch: ☐ Actual Break Duration

You can configure the **Advanced Details** only if **Break Deviation Allowed** is disabled.

- **Add Break Late-IN In Total Late-IN:** Select this check box to add the break late-in to the total late-in of the shift. **For example:** GS (09:00 to 18:00 hrs), your break is from 13:00 to 14:00hrs. After availing break, you are entering office at 14:15 hrs, which is 15 minutes late. So Break Late-IN of 15 minutes will be added in the total Late-IN hours.

- **Add Break Early-OUT In Total Early-Out:** Select this check box to add the break early-out time to the total early-out time of the shift.  
**For example:** GS (09:00 to 18:00 hrs), your break is from 13:00 to 14:00hrs. You are going early for availing break at 12:45. Then 15 minutes of break early out will be considered. If your shift ends at 18:00 hrs. And you leave at 17:30 hrs. So it is 30 minutes Early-out. If this option is enabled then 15min (break early-out) will be added to the total early out (30 minutes) making it 45 minutes.

### Deduct Break From Working Hours

The screenshot shows a 'Break Details' configuration window. It includes fields for 'Break Timings' (13:00 to 14:00, 01:00), a checked 'Break Deviation Allowed' checkbox, and an 'Advanced Details' section with two unchecked checkboxes: 'Add Break Late-IN In Total Late-IN' and 'Add Break Early-OUT In Total Early-OUT'. The 'Deduct Break From Working Hours' section contains two checkboxes, 'Deduction Type For 2 Punch' and 'Deduction Type For 2+ Punch', each followed by a dropdown menu currently set to 'Configured Break Duration' and 'Actual Break Duration' respectively.

You can configure the basis for break hours deduction from the working hours for users of a particular shift. You can figure different options for 2 Punch users and 2+ Punch users.

The options are same for **Deduction Type for 2 Punch** and **Deduction Type For 2+ Punch**, however both can be configured individually.

### Deduction Type for 2 Punch and/or Deduction Type For 2+ Punch

- Select the respective check box and select the desired option — Configured Break Duration, Actual Break Duration, Time Exceeding Break Duration, Configured If Less, Else Actual Break Duration, Custom Break Deduction.
- If you select **Configured Break Duration**, the break duration deduction will be based on break duration as configured from Break Details.
- If you select **Actual Break Duration**, the break duration deduction will be based on user punches, that is actual break taken.
- If you select **Time Exceeding Break Duration**, the break duration deduction will be based on the time exceeding configured break duration.
- If you select **Configured Break If less, Else Actual Break Duration**, if the break availed by the user is less than the configured break duration, then the configured break duration is deducted from the working hours whereas if the break availed by the user is greater than the configured break duration, then the actual break duration availed is deducted from the working hours.

For example, if the configured break duration is 60mins and the user takes a break of 30mins, then the process will set the day's availed break as 60 mins. If the user takes a break of 70 mins, then the process will set the day's availed break as 70 mins.

- If you select **Custom Break Deduction**, you can define a break schedule.





**Deduct Break From Working Hours**

Deduction Type For 2 Punch ☒ Custom Break Deduction

Deduction Type For 2+ Punch ☒ Custom Break Deduction

Search

Break Range (From)	Break Range (To)	Consider Value As	Replace Value	
<input type="text"/>	<input type="text"/>	Actual	<input type="text"/>	✓ ✕

- To do so, click **Add**  and configure the following parameters:
  - **Break Range (From):** Configure the start time (in minutes) of the break range.
  - **Break Range (To):** Configure the end time (in minutes) of the break range.
  - **Replace Value As:** Select the desired option **Fixed** or **Actual** from the drop down list.
    - If you select **Fixed**, define the desired value in **Replace Value**, which will replace the result if the parameter falls in the break range.
    - If you select **Actual**, the parameter value will be the result/output of the rounding function if the parameter value falls in its range.
- Click **OK**  to save. The entry appears in the grid.
- Click **Edit**  to make changes and click **Delete**  to remove the entry from the grid.







**For Example:** If break taken is within 1min to 15min then fixed 15min will be deducted. If break is between 16min to 30min, then fixed 30mins will be deducted. If break is between 31min to 60min then actual break availed will be deducted.

**Deduct Break From Working Hours**

Deduction Type For 2 Punch ☒ Configured Break Duration

Deduction Type For 2+ Punch ☒ Custom Break Deduction

Search

Break Range (From) ▲	Break Range (To)	Consider Value As	Replace Value	
1	15	Fixed	15	 
16	30	Fixed	30	 
31	60	Actual		 



## Grace Time Details

- **Include Grace Time in Working Hours:** Select the check the box to include the grace time in the allotted working hours.
- **Grace Time for Shift Late-IN(Min):** Specify the grace time in minutes as the allowed deviation of timing while punching IN at start of the shift. Refer to [“Late-IN Policy”](#).  
**Example:** Consider shift is from 9:00 to 18:00 hrs and Include Grace Time in Working Hours is enabled.

On 1/7/16: If Grace Time (check box is disabled) and Late-IN both are not applicable for user.

On 4/7/16: If Grace is allowed (check box is enabled), Late-IN not applicable. Then Late-IN column will show nothing.

On 5/7/16: If Late-IN allowed is 10 minutes, Include Grace Time in Working Hours is enabled, Grace Time for Shift Late-IN is 30 mins. IN-punch is 9:20, so due to grace timings, Late-IN will not be displayed.

Date	Shift	First IN	Last OUT	1st Half	2nd Half	Late-IN	Early-OUT	Work Hours	Extra Work	Net Work	Break Hours	Actual Overtime	Authorized Overtime	Remark
01/07/2016	GS	09:05	18:30	PR	PR			08:25	00:30		01:00			
02/07/2016	GS - WO			WO	WO									
03/07/2016	GS - WO			WO	WO									
04/07/2016	GS	09:10	18:30	PR	PR			08:20	00:30		01:00			
05/07/2016	GS	09:20	19:00	PR	PR			08:40	01:00		01:00			
06/07/2016	GS													

- **Overlap Grace Time With Shift Late-IN:** Select this check the box to include the Grace Time With the Shift Late-IN time.

**Example:** Consider Grace Time for Shift Late-IN as 10 mins, Late-IN allowed is 20 mins, Overlap is disabled.

On 1st: IN punch 9:05, within Grace period of 10mins

On 4th: IN punch 9:11, beyond Grace period of 10 mins but within Late-IN allowed of 20mins so Late-In by 1min.

On 5th: IN Punch 9:21, Upto 9:10 is Grace, after that Late-IN, so from 9:11 to 9:21 is 11 min of Late-IN

On 6th: IN Punch 9:15, Upto 9:10 is Grace, after that Late-IN, so from 9:11 to 9:15 is 5 min of Late-IN

On 7th: IN Punch 9:31, Beyond Grace and Late-IN period so user will be marked as Absent: Late-IN



The Absent marking of the user will depend on the option selected in Attendance Policy for Late-IN. For details, refer to [“Absent Marking Rule”](#) in [“Attendance Policy”](#).

Date	Shift	First IN	Last OUT	1st Half	2nd Half	Late-IN	Early-OUT	Work Hours	Extra Work	Net Work	Break Hours	Actual Overtime	Authorized Overtime	Remark
01/07/2016	GS	09:05	18:30	PR	PR			08:25	00:30		01:00			
02/07/2016	GS - WO			WO	WO									
03/07/2016	GS - WO			WO	WO									
04/07/2016	GS	09:11	18:30	PR	PR	00:01		08:19	00:30		01:00			
05/07/2016	GS	09:21	19:00	PR	PR	00:11		08:39	01:00		01:00			
06/07/2016	GS	09:15	18:30	PR	PR	00:05		08:15	00:30		01:00			
07/07/2016	GS	09:31	18:30	AB	PR			07:59	00:30		01:00			AB:Late-IN
08/07/2016	ES			AB	AB									No Punches Available

**Example:** When Overlap is allowed, Grace Time will overlapped with Late-IN

On 6th: IN punch 9:15 am, the user will be marked as 15 min late. The Grace Time will not be considered and it will overlap with Late-IN so total 15 mins will be considered as Late-IN. Similarly will be on 4th.

On 5th: IN Punch 9:21 am, the user will be marked as Absent due to Late-IN as the Late-IN allowed is only 20 mins. Similarly will be on 7th.

Date	Shift	First IN	Last OUT	1st Half	2nd Half	Late-IN	Early-OUT	Work Hours	Extra Work	Net Work	Break Hours	Actual Overtime	Authorized Overtime	Remark
01/07/2016	GS	09:05	18:30	PR	PR			08:25	00:30		01:00			
02/07/2016	GS - WO			WO	WO									
03/07/2016	GS - WO			WO	WO									
04/07/2016	GS	09:11	18:30	PR	PR	00:11		08:19	00:30		01:00			
05/07/2016	GS	09:21	19:00	AB	PR			08:39	01:00		01:00			AB:Late-IN
06/07/2016	GS	09:15	18:30	PR	PR	00:15		08:15	00:30		01:00			
07/07/2016	GS	09:31	18:30	AB	PR			07:59	00:30		01:00			AB:Late-IN

- **Grace Time for Shift Early Out (Min):** Specify the grace time in minutes as the allowed deviation of timing while punching OUT at end of the shift. Refer to [“Early-OUT Policy”](#).
- **Overlap Grace Time With Shift Early-OUT:** Select this check the box to include the Grace Time With the Shift Early-OUT time.
- **Grace Time for Break Late-IN (Min):** Specify the grace time in minutes.
- **Overlap Grace Time With Break Late-IN:** Select this check the box to include the Grace Time too with the break Late-IN time.
- **Grace Time for Break Early-OUT:** Specify the grace time in minutes.
- **Overlap Grace Time With Break Early-OUT:** Select this check the box to include the Grace Time too with the break Early-OUT time.

The functionality of Grace for Early-OUT, Break Late-IN and Break Early-OUT is similar to Late-IN as explained above.

Click on **Save** to save the changes.

Once you have completed the task of creating all the shifts, you need to assign the desired shifts to desired Shift Schedules. Then these Shift Schedules need to be assigned to the users. Refer to [“Shift Schedule”](#) and [“Configuring Users”](#) for details.

If a shift is assigned to any Shift Schedule or used in any Shift Change Application, then the system will not allow you to delete that shift.

**Example:**

**User Configuration**

- Attendance Marking Type: Normal

**Shift configuration**

- Shift Timings: 9:45 to 17:45
- Attendance Calculation Type: Shift-Based
- Minimum Required Working Hours For Half Day: 3.00
- Minimum Required Working Hours For Full Day: 7:00

**Late-IN Policy**

- Late-IN Applicable: Enabled
- Maximum Late-IN Allowed (Min): 30
- Full Day Absent Marking on Exceeding Max Late-IN Allowed (Min): Enabled

**Early-OUT Policy**

- Early-OUT Applicable: Enabled
- Maximum Early-OUT Allowed (Min):10
- Full Day Absent Marking on Exceeding Max Early-OUT Allowed (Min): Enabled

**Attendance Policy Configuration**

- Marking Type As Per: Monthly Count
- Mode: Independent

**Leave Configuration**

- Leave Group with Paid Leave (Auto Debit and Negative Balance Handling enabled) as well as Restricted Holiday as Priority 2.

All the Policies are configured and assigned to U2. In this case the user U2 punches as follows:

Daily Attendance View

View

Template Configuration

User\*

U2

U2

Attendance Period

September

2023

From Date

To Date

Display/View as Per

Default View

Display Summary

Both

Starting Day of the Week

Monday

Date	Shift	First IN	Last OUT	1st Half	2nd Half	Late-IN	Early-OUT	Work Hours	Extra Work	Net-Work	Break Hours	Generated Overtime	Authorized Overtime	Remark
01/09/2023	SG-Normal	10:00	10:55	AS	AS	00:15		00:55						AS Early-OUT
02/09/2023	SG-Normal	10:12	17:10	AS	AS	00:27		06:53						AS Early-OUT
03/09/2023	SG-WO			WO	WO									
Week Total						00:42		13:53						
04/09/2023	SG-Normal	10:30	17:10	AS	AS			06:40						AS Early-OUT
05/09/2023	SG-Normal	10:45	19:00	AS	AS			08:14	01:15					AS Late-IN
06/09/2023	SG-Normal	10:40	17:25	AS	AS		00:10	06:55						AS Late-IN
07/09/2023	SG-Normal	10:30	15:00	AS	AS			04:30						AS Early-OUT
08/09/2023	SG-Normal	09:00	16:00	AS	AS			07:00	00:45					AS Early-OUT
09/09/2023	SG-Normal	09:45	17:45	PR	PR			08:00						
10/09/2023	SG-WO			WO	WO									
Total						00:42	00:10	55:12	02:00					

Since, Full Day Absent Marking on Exceeding Max Early-OUT Allowed (Min) and Full Day Absent Marking on Exceeding Max Late-IN Allowed (Min) is enabled and Marking Type As Per is Independent, U2 is marked Absent for each Late-IN and/or Early-OUT.

#### Example :Break Duration Calculation For Flexible User

To Configure Flexible Type of user, See ["Flexible Working Settings" on page 1855](#).

Consider Break Hours Configuration for Flexible User Attendance Calculation are as follows:

- Shift Start Time: 8:00
- Shift End Time: 19:00
- Shift Duration: 10:30
- Minimum Required Working Hours: Half Day - **4:30** and Full Day - **06:00**
- Break Start Time: **13:00**
- Break End Time: **13:30**
- Break Deviation Allowed: **Checked**
- Advance Detail > Deduct Break From Working Hours: For 2 Punch, For 2+ Punch = **Checked**
  - For 2 Punch = Configured Break Duration
  - For 2+ Punch = Configured Break if less, else Actual Break Duration



Work hours may vary depending upon 'Flexible Work Setting > Consider Work Hours' configuration for flexible user.

#### Cases:

##### Case 1:

Punches [I/P]		Expected [O/P]				
			Flexible for 24 Hours	From Shift Start	Till Shift End	From Shift Start To Shift End
Punch 1	13:30 - IN	Work Hours	07:00	07:00	05:00	05:00
Punch 2	21:00 - OUT	Break Duration	00:30	00:30	00:30	00:30

Punches [I/P]			Expected [O/P]			
		<i>Break Start Time</i>	-	-	-	-
		<i>Break End Time</i>	-	-	-	-

**Case 2:**

Punches [I/P]			Expected [O/P]			
			<b>Flexible for 24 Hours</b>	<b>From Shift Start</b>	<b>Till Shift End</b>	<b>From Shift Start To Shift End</b>
Punch 1	08:00 - IN	Work Hours	04:30	04:30	04:30	04:30
Punch 2	13:00 - OUT	Break Duration	00:30	00:30	00:30	00:30
		<i>Break Start Time</i>	-	-	-	-
		<i>Break End Time</i>	-	-	-	-

**Case 3:**

Punches [I/P]			Expected [O/P]			
			<b>Flexible for 24 Hours</b>	<b>From Shift Start</b>	<b>Till Shift End</b>	<b>From Shift Start To Shift End</b>
Punch 1	08:00 - IN	Work Hours	04:45	04:45	04:45	04:45
Punch 2	12:45 - OUT	Break Duration	00:00	00:00	00:00	00:00
		<i>Break Start Time</i>	-	-	-	-
		<i>Break End Time</i>	-	-	-	-

**Case 4:**

Punches [I/P]			Expected [O/P]			
			<b>Flexible for 24 Hours</b>	<b>From Shift Start</b>	<b>Till Shift End</b>	<b>From Shift Start To Shift End</b>
Punch 1	08:00 - IN	Work Hours	04:49	04:49	04:49	04:49
Punch 2	12:49 - OUT	Break Duration	00:00	00:00	00:00	00:00
		<i>Break Start Time</i>	-	-	-	-
		<i>Break End Time</i>	-	-	-	-

**Case 5:**

Punches [I/P]			Expected [O/P]			
			<b>Flexible for 24 Hours</b>	<b>From Shift Start</b>	<b>Till Shift End</b>	<b>From Shift Start To Shift End</b>
Punch 1	07:00 - IN	Work Hours	05:30	04:30	05:30	04:30

Punches [I/P]			Expected [O/P]			
Punch 2	13:00 - OUT	Break Duration	00:30	00:00	00:30	00:30
		<i>Break Start Time</i>	-	-	-	-
		<i>Break End Time</i>	-	-	-	-

**Case 6:**

Punches [I/P]			Expected [O/P]			
			<b>Flexible for 24 Hours</b>	<b>From Shift Start</b>	<b>Till Shift End</b>	<b>From Shift Start To Shift End</b>
Punch 1	02:00 - IN	Work Hours	04:30	00:00	04:30	00:00
Punch 2	07:00 - OUT	Break Duration	00:30	00:00	00:30	00:00
		<i>Break Start Time</i>	-	-	-	-
		<i>Break End Time</i>	-	-	-	-

**Case 7:**

Punches [I/P]			Expected [O/P]			
			<b>Flexible for 24 Hours</b>	<b>From Shift Start</b>	<b>Till Shift End</b>	<b>From Shift Start To Shift End</b>
Punch 1	18:01 - IN	Work Hours	05:28	05:28	00:59	00:59
Punch 2	23:59 - OUT	Break Duration	00:30	00:30	00:00	00:00
		<i>Break Start Time</i>	-	-	-	-
		<i>Break End Time</i>	-	-	-	-

# Custom Work Hours

If you wish that the attendance calculations should be done as per the **Custom Work Hours**, make sure you have selected **Attendance Marking Type** as **Normal** for users.

Attendance Marking Type is set from User module > User Configuration > T&A. For details refer to [“T&A”](#) in [“Configuring Users”](#).

To select Custom Work Hours as the **Attendance Calculation Type**,

- Click **Shift and Schedule** module > **Shift Configuration** and configure the following parameters:

The screenshot shows the 'Shift Configuration' window. The 'Shift' section includes fields for ID, Name, Description (255 Chars), Type (Normal), and Timings (HH:MM - HH:MM, 00:00). The 'Attendance Calculation Type' is set to 'Custom Work Hours'. The 'Required Working Hours' section includes fields for Minimum Working Hours, Maximum Working Hours, Minimum Hours Required Within Shift Duration, Deviation From Shift Start (Min), Deviation From Shift End (Min), and Shift Allowance. The 'Break Details' and 'Grace Time Details' sections are collapsed.

ID	Name	Timings
GS	General Shift	09:00 - 18:00

- Shift:** Specify a User friendly Shift ID and Shift Name.
- Shift Description:** Specify the description for the Shift.
- Shift Type:** Select the Shift Type from the drop down options:
  - Normal:** This is a normal shift with one weekoff within a week.
  - Field Break:** This is a shift where a break of around 20 days can be given after working period of 2 months.
  - Rest Day:** This is a like a normal shift with one weekoff given for rest after 10-12 working days.
- Shift Timings:** Specify the start time and end time of the shift in hh:mm format.

The Shift duration or the total working hours of the shift is automatically calculated based on the start and end time.

- Attendance Calculation Type:** For calculating attendance you can select Shift Based or Custom Works Hours option.

If you select **Shift Based**, you need to configure the parameters as mentioned in [“Shift Based”](#).

If you select **Custom Work Hours**, you need to configure the parameters as mentioned below.

## Required Working Hours

- **Minimum Working Hours:** Specify the minimum working hours required. The format is in HH:MM. If the work duration is less than the duration configured here, the system will mark full day absent for the user.
- **Maximum Working Hours:** Specify the maximum working hours required. The format is in HH:MM.

If the work duration is between the Minimum Working Hours and Maximum Working Hours, then the system will check the Late-IN duration configured in the Late-IN Policy. The following scenarios are possible:

- If the IN-Punch is within the duration of the Late-IN allowed, the system will mark the user as full day present. This Late-IN occurrence will be considered as a Late-IN Count.
- If the IN-Punch is after the duration of the Late-IN allowed, the system will mark the user as full day absent.

If the work duration is more than the duration configured in Maximum Working Hours, the system will mark full day present for the user.

- **Minimum Hours Required within Shift Duration:** By default this check box is enabled. This specifies the mandatory minimum working hours for full day as well half day that should fall within the shift working time allotted to the user.

This means if the shift duration is from 9:00 to 18:00, then users working hours must be within this shift duration to mark the user present. If user has worked from 17:00 to 23:00, then the 6 hours of work is not in the shift duration. Out of 6 hours only 1 hour fall in the shift duration which is not enough to mark half day present (this depends on **Minimum Working Hours**, in this case we have considered it as 2 hrs)

- **Deviation from Shift Start (Min):** If **Minimum Hours Required within Shift Duration** is enabled, then you can specify the deviation that you wish to allow from the shift's starting time.
- **Deviation from Shift End (Min):** If **Minimum Hours Required within Shift Duration** is enabled, then you can specify the deviation that you wish to allow from the shift's ending time.



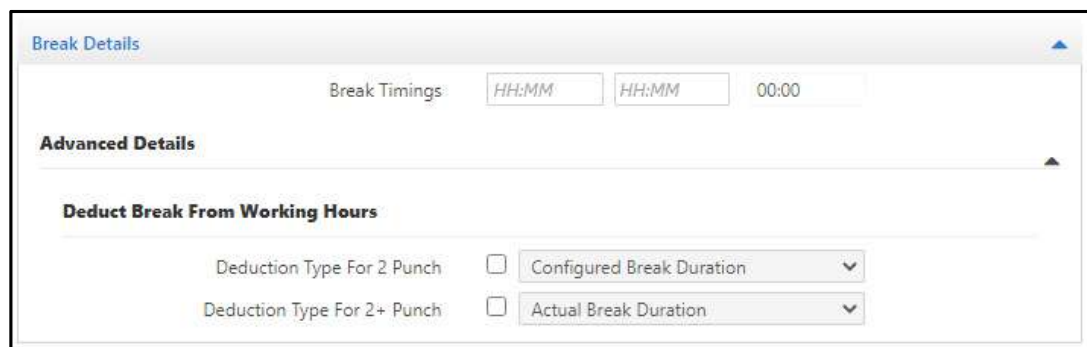
*Minimum hours fulfillment is checked before the Normal type user is marked Absent due to Less work hours.*

- **Shift Allowance:** Select this check box to include the shift allowance in the salary calculation.



## Break Details

Click the **Break Details** collapsible panel and configure the following parameters:



**Break Timings:** Configure the Start and End break time in HH:MM format. The break duration is automatically calculated based on the start and end time and appears in the adjoining box.

For example: If Break Start time is 23:00 hrs and Break End time is 23:30 hrs, then break duration will be 00:30 hr.

### Advanced Details

#### Deduct Break from Working Hours

You can configure the basis for break hours deduction from the working hours for users of a particular shift. You can figure different options for 2 Punch users and 2+ Punch users.

The options are same for **Deduction Type for 2 Punch** and **Deduction Type For 2+ Punch**, however both can be configured individually.

#### Deduction Type for 2 Punch and/or Deduction Type For 2+ Punch

- Select the respective check box and select the desired option — Configured Break Duration, Actual Break Duration, Time Exceeding Break Duration, Configured If Less, Else Actual Break Duration, Custom Break Deduction.
- If you select **Configured Break Duration**, the break duration deduction will be based on break duration as configured from Break Details.
- If you select **Actual Break Duration**, the break duration deduction will be based on user punches, that is actual break taken.
- If you select **Time Exceeding Break Duration**, the break duration deduction will be based on the time exceeding configured break duration.
- If you select **Configured Break If less, Else Actual Break Duration**, if the break availed by the user is less than the configured break duration, then the configured break duration is deducted from the working hours whereas if the break availed by the user is greater than the configured break duration, then the actual break duration availed is deducted from the working hours.

For example, if the configured break duration is 60mins and the user takes a break of 30mins, then the process will set the day's availed break as 60 mins. If the user takes a break of 70 mins, then the process will set the day's availed break as 70 mins.

- If you select **Custom Break Deduction**, you can define a break schedule.

**Deduct Break From Working Hours**





Deduction Type For 2 Punch ☒ Custom Break Deduction

Deduction Type For 2+ Punch ☒ Custom Break Deduction

Search

Break Range (From)	Break Range (To)	Consider Value As	Replace Value
<input type="text"/>	<input type="text"/>	Actual	<input type="text"/>

+

- To do so, click **Add**  and configure the following parameters:
  - **Break Range (From):** Configure the start time (in minutes) of the break range.
  - **Break Range (To):** Configure the end time (in minutes) of the break range.
  - **Replace Value As:** Select the desired option **Fixed** or **Actual** from the drop down list.
    - If you select **Fixed**, define the desired value in **Replace Value**, which will replace the result if the parameter falls in the break range.
    - If you select **Actual**, the parameter value will be the result/output of the rounding function if the parameter value falls in its range.
- Click **OK**  to save. The entry appears in the grid.
- Click **Edit**  to make changes and click **Delete**  to remove the entry from the grid.

**For Example:** If break taken is within 1min to 15min then fixed 15min will be deducted. If break is between 16min to 30min, then fixed 30mins will be deducted. If break is between 31min to 60min then actual break availed will be deducted.

**Deduct Break From Working Hours**

Deduction Type For 2 Punch ☒ Configured Break Duration

Deduction Type For 2+ Punch ☒ Custom Break Deduction

Search

Break Range (From)	Break Range (To)	Consider Value As	Replace Value
1	15	Fixed	15
16	30	Fixed	30
31	60	Actual	

## Grace Time Details

**Grace Time Details**

Include Grace Time In Working Hours ☐

Grace Time for Shift Late-IN (Min)

Overlap Grace Time With Shift Late-IN ☐

- **Include Grace Time in Working Hours:** Select this check the box to include the grace time in the allotted working hours.

- **Grace Time for Shift Late-IN (Min):** Configure the grace time in minutes as the allowed deviation of timing while punching IN at the start of the shift. Refer to [“Late-IN Policy”](#).

**Example:** Consider shift is from 9:00 to 18:00 hrs and Include Grace Time in Working Hours is enabled.

On 1/7/16: If Grace Time (check box is disabled) and Late-IN, both are not applicable to the user.

On 4/7/16: If Grace is allowed (check box is enabled), Late-IN not applicable. Then Late-IN column will not display anything.

On 5/7/16: If Late-IN allowed is 10 minutes, Include Grace Time in Working Hours is enabled, Grace Time for Shift Late-IN is 30 mins. IN-punch is 9:20, so due to grace timings, Late-IN will not be displayed.

Date	Shift	First IN	Last OUT	1st Half	2nd Half	Late-IN	Early-OUT	Work Hours	Extra Work	Net Work	Break Hours	Actual Overtime	Authorized Overtime	Remark
01/07/2016	GS	09:05	18:30	PR	PR			08:25	00:30		01:00			
02/07/2016	GS - WO			WO	WO									
03/07/2016	GS - WO			WO	WO									
04/07/2016	GS	09:10	18:30	PR	PR			08:20	00:30		01:00			
05/07/2016	GS	09:20	19:00	PR	PR			08:40	01:00		01:00			
06/07/2016	GS													

- **Overlap Grace Time With Shift Late-IN:** Select this check box to include the Grace Time With the Shift Late-IN time.

**Example:** Consider Grace Time for Shift Late-IN as 10 mins, Late-IN allowed is 20 mins, Overlap is disabled.

On 1st: IN punch 9:05, within Grace period of 10mins

On 4th: IN punch 9:11, beyond Grace period of 10 mins but within Late-IN allowed of 20mins so Late-IN by 1min.

On 5th: IN Punch 9:21, Upto 9:10 is Grace, after that Late-IN, so from 9:11 to 9:21 is 11 min of Late-IN.

On 6th: IN Punch 9:15, Upto 9:10 is Grace, after that Late-IN, so from 9:11 to 9:15 is 5 min of Late-IN.

On 7th: IN Punch 9:31, Beyond Grace and Late-IN period so user will be marked as Absent: Late-IN.



The Absent marking of the user will depend on the option selected in Attendance Policy for Late-IN. For details, refer to [“Absent Marking Rule”](#) in [“Attendance Policy”](#).

Date	Shift	First IN	Last OUT	1st Half	2nd Half	Late-IN	Early-OUT	Work Hours	Extra Work	Net Work	Break Hours	Actual Overtime	Authorized Overtime	Remark
01/07/2016	GS	09:05	18:30	PR	PR			08:25	00:30		01:00			
02/07/2016	GS - WO			WO	WO									
03/07/2016	GS - WO			WO	WO									
04/07/2016	GS	09:11	18:30	PR	PR	00:01		08:19	00:30		01:00			
05/07/2016	GS	09:21	19:00	PR	PR	00:11		08:39	01:00		01:00			
06/07/2016	GS	09:15	18:30	PR	PR	00:05		08:15	00:30		01:00			
07/07/2016	GS	09:31	18:30	AB	PR			07:59	00:30		01:00			AB:Late-IN
08/07/2016	ES			AB	AB									No Punches Available

**Example:** When Overlap is allowed, Grace Time will overlapped with Late-IN

On 6th: IN punch 9:15 am, the user will be marked as 15 min late. The Grace Time will not be considered and it will overlap with Late-IN so total 15 mins will be considered as Late-IN. Similarly will be on 4th.

On 5th: IN Punch 9:21am, the user will be marked as Absent due to Late-IN as the Late-IN allowed is only 20 mins. Similarly will be on 7th.

Date	Shift	First IN	Last OUT	1st Half	2nd Half	Late-IN	Early-OUT	Work Hours	Extra Work	Net Work	Break Hours	Actual Overtime	Authorized Overtime	Remark
01/07/2016	GS	09:05	18:30	PR	PR			08:25	00:30		01:00			
02/07/2016	GS - WO			WO	WO									
03/07/2016	GS - WO			WO	WO									
04/07/2016	GS	09:11	18:30	PR	PR	00:11		08:19	00:30		01:00			
05/07/2016	GS	09:21	19:00	AB	PR			08:39	01:00		01:00			AB:Late-IN
06/07/2016	GS	09:15	18:30	PR	PR	00:15		08:15	00:30		01:00			
07/07/2016	GS	09:31	18:30	AB	PR			07:59	00:30		01:00			AB:Late-IN

Click on **Save** to save the changes.

Once you have completed the task of creating all the shifts, you need to assign the desired shifts to desired Shift Schedules. Then these Shift Schedules need to be assigned to the users. Refer to [“Shift Schedule”](#) and [“Configuring Users”](#) for details.

### Example:1

#### User Configuration

- Attendance Marking Type: Normal

#### Shift configuration

- Shift Timings: 9:45 to 17:45
- Attendance Calculation Type: Custom Work Hours
- Minimum Working Hours: 3.00
- Maximum Working Hours: 7:00

#### Late-IN Policy

Late-IN Applicable: Enabled

Maximum Late-IN Allowed (Min): 30

Full Day Absent Marking on Exceeding Max Late-IN Allowed (Min): Enabled

#### Early-OUT Policy

Early-OUT Applicable: Enabled

Maximum Early-OUT Allowed (Min):420

Full Day Absent Marking on Exceeding Max Early-OUT Allowed (Min): Enabled

#### Attendance Policy Configuration

- Marking Type As Per: Monthly Count
- Mode: Combined
- Maximum Late-IN/Early-OUT Allowed Count: 2
- Calculation Basis: Slab Wise
- Action on Exceeding Max Late-IN Allowed: Debit Full Day Leave
- Action on Exceeding Max Early-OUT Allowed: Debit Full Day Leave

#### Leave Configuration

- Leave Group with Paid Leave (Auto Debit and Negative Balance Handling enabled)

All the Policies are configured and assigned to U1.

In this case the user U1 punches as follows:

Date	Shift	First IN	Last OUT	1st Half	2nd Half	Late-IN	Early-OUT	Work Hours	Extra Work	Net-Work	Break Hours	Generated Overtime	Authorized Overtime	Remark
01/08/2023	CS-Normal	10:00	10:55	PR	PR		00:05	00:55						
02/08/2023	CS-Normal	10:12	17:10	PR	PR		00:02	06:58						
03/08/2023	CS-Normal	10:20	17:10	PR	PR	00:15		06:40						
04/08/2023	CS-Normal	10:45	19:30	AB	AB			08:14	01:15					ABLate-IN
05/08/2023	CS-Normal	10:40	17:35	PR	PR	00:25		06:55						
06/08/2023	CS-W/O			W/O	W/O									
Week Total						00:40	00:07	35:42	01:15					
07/08/2023	CS-Normal	10:30	19:30	PR	PR	00:15		04:20						
08/08/2023	CS-Normal	09:00	18:00	PR	PR		00:45	07:00	00:45					
09/08/2023	CS-Normal			AB	AB									No Punches Available
10/08/2023	CS-Normal			AB	AB									No Punches
Total						00:55	00:52	47:12	02:00					

Since combined count of Early-OUT and Late-IN allowed is 2, hence on the 3 Early-OUT/Late-IN a Leave will be debited to the user.

In this case on 03/08/2023 it is a third count, hence a Leave is debited.

Leave Balance											
<div> <div>User ID: U1 U1</div> <div> <div>Period: Monthly</div> <div>Balance Month-Year: August 2023</div> </div> </div>											
Year	Month	Code	Name	Opening	Credit	Debit	Encashment	Availed	Closing	Overflow	
2023	Aug	PL	Paid Leave	0.00	0.00	1.00	0.00	0.00	-1.00	0.00	
C-OFF											

U1 has not leave balance, hence after debiting a leave the closing balance displays negative balance.

Now the count will be reset as the option Slab Wise is selected for Calculation Basis. Hence, again on 08/08/2023 a leave will be debited.

Leave Balance											
<div> <div>User ID: U1 U1</div> <div> <div>Period: Monthly</div> <div>Balance Month-Year: August 2023</div> </div> </div>											
Year	Month	Code	Name	Opening	Credit	Debit	Encashment	Availed	Closing	Overflow	
2023	Aug	PL	Paid Leave	0.00	0.00	2.00	0.00	0.00	-2.00	0.00	
C-OFF											

## Example:2

### User Configuration

- Attendance Marking Type: Normal

### Shift configuration

- Shift Timings: 9:45 to 17:45
- Attendance Calculation Type: Custom Work Hours
- Minimum Working Hours: 3.00

- Maximum Working Hours: 7:00
- Grace Time for Shift Late-IN (Min): 30minutes

#### **Late-IN Policy**

- Late-IN Applicable: Disabled

#### **Early-OUT Policy**

- Early-OUT Applicable: Enabled
- Maximum Early-OUT Allowed (Min):30
- Full Day Absent Marking on Exceeding Max Early-OUT Allowed (Min): Disabled

#### **Attendance Policy Configuration**

- Marking Type As Per: Monthly Count
- Mode: Combined
- Maximum Late-IN/Early-OUT Allowed Count: 2
- Calculation Basis: Slab Wise
- Action on Exceeding Max Late-IN Allowed: Debit Full Day Leave
- Action on Exceeding Max Early-OUT Allowed: Debit Full Day Leave

#### **Leave Configuration**

- Leave Group with Paid Leave (Auto Debit and Negative Balance Handling enabled)

All the Policies are configured and assigned to U1.

**IN-Punch Time:**10:30

**OUT-Punch Time:** 17:15

**Total Working Hours:**6 hrs 45min

In this case since Late-IN Policy is disabled the system will check the working hours and then check if the time shortfall, if it falls within Early-OUT. Hence, in this case U1 will be marked PR in first as well as second half, with 15 minutes considered as Early-OUT.

#### **Example: 3**

#### **User Configuration**

- Attendance Marking Type: Normal

#### **Shift configuration**

- Shift Timings: 9:45 to 17:45
- Attendance Calculation Type: Custom Work Hours
- Minimum Working Hours: 3.00
- Maximum Working Hours: 7:00
- Grace Time for Shift Late-IN (Min): 30minutes

#### **Late-IN Policy**

- Late-IN Applicable: Disabled

#### **Early-OUT Policy**

- Early-OUT Applicable: Enabled
- Maximum Early-OUT Allowed (Min):30
- Full Day Absent Marking on Exceeding Max Early-OUT Allowed (Min): Enabled

#### **Attendance Policy Configuration**

- Marking Type As Per: Monthly Count

- Mode: Combined
- Maximum Late-IN/Early-OUT Allowed Count: 2
- Calculation Basis: Slab Wise
- Action on Exceeding Max Late-IN Allowed: Debit Full Day Leave
- Action on Exceeding Max Early-OUT Allowed: Debit Full Day Leave

#### **Leave Configuration**

- Leave Group with Paid Leave (Auto Debit and Negative Balance Handling enabled)

All the Policies are configured and assigned to U1.

**IN-Punch Time:**10:46

**OUT-Punch Time:** 13:46

**Total Working Hours:** 3 hrs

In this case since Late-IN Policy is disabled the system will check the working hours and then check if the time shortfall, if it falls within Early-OUT. Hence, in this case as Full Day Absent Marking on Exceeding Max Early-OUT Allowed (Min) is enabled, U1 will be marked AB in first as well as second half with Remark as AB: Early-OUT.

#### **Example: 4**

#### **User Configuration**

- Attendance Marking Type: Normal

#### **Shift configuration**

- Shift Timings: 9:45 to 17:45
- Attendance Calculation Type: Custom Work Hours
- Minimum Working Hours: 3.00
- Maximum Working Hours: 7:00
- Grace Time for Shift Late-IN (Min): 30minutes

#### **Late-IN Policy**

- Late-IN Applicable: Disabled

#### **Early-OUT Policy**

- Early-OUT Applicable: Enabled
- Maximum Early-OUT Allowed (Min):30
- Full Day Absent Marking on Exceeding Max Early-OUT Allowed (Min): Disabled

#### **Attendance Policy Configuration**

- Marking Type As Per: Monthly Count
- Mode: Combined
- Maximum Late-IN/Early-OUT Allowed Count: 2
- Calculation Basis: Slab Wise
- Action on Exceeding Max Late-IN Allowed: Debit Full Day Leave
- Action on Exceeding Max Early-OUT Allowed: Debit Full Day Leave

#### **Leave Configuration**

- Leave Group with Paid Leave (Auto Debit and Negative Balance Handling enabled)

All the Policies are configured and assigned to U1.

**IN-Punch Time:**10:46

**OUT-Punch Time:** 13:46

**Total Working Hours:** 3 hrs

In this case since Late-IN Policy is disabled the system will check the working hours and then check if the time shortfall, if it falls within Early-OUT. Hence, in this case as Full Day Absent Marking on Exceeding Max Early-OUT Allowed (Min) is disabled, U1 will be marked PR in first and AB in the second half with Remark as AB: Early-OUT.



# Week Off Group

Week Off Group enables to define the Week Off group which can be assigned to the user. The maximum 99 week off groups can be created.

To create WO group, select **Shift and Schedule module > Week Off Group**. The page appears as shown below:

The screenshot shows the 'Week Off Group' form. It has a header with navigation icons and a search bar. The main form area contains the following fields and sections:

- Week Off Group**: ID (text input), Name (text input with search icon).
- Auto Week Off Assignment**: ☐ Weekly Basis (dropdown menu).
- Off Day 1**: Sunday (dropdown menu).
- Off Day 2**: None (dropdown menu).
- Off Day 2 On Weeks**: ☐ W1, ☐ W2, ☐ W3, ☐ W4, ☐ W5, ☐ Last.
- Week Off Rotation**: ☐ Enable.
- Rotation Count**: 7.99 (text input).

On the right side, there is a table with columns 'ID' and 'Name', and a message 'No Data'.

To create a new Week Off Group, click on **New** button.

**Week Off Group:** Specify a user friendly Name for the Week Off Group. The ID will be auto generated by the system while saving the group.

**Auto Week Off Assignment:** You can assign WOs on days on which user was found absent but eventually the number of WOs in a month will be as per schedule only. So enable Auto week off assignment on weekly or monthly basis. *For details See Shift Schedule> Auto Week Off Assignment*

This screenshot shows the 'Week Off Group' form with the 'Auto Week Off Assignment' checkbox checked. The 'Weekly Basis' dropdown is now set to 'Monthly Basis'. The 'Rotation Count' is still 7.99. The other fields remain the same as in the previous screenshot.

**Off Day 1:** Select the Off Day 1 from the drop down list of Weekdays.

**Off Day 2:** If 2 week-offs are to be assigned in the week off group, then select the Off Day 2 from drop down list of Weekdays, else you can select None.

**Off Day2 on Weeks:** The second week-off can be assigned for the selected week by cheking the boxes against the respective weeks as shown below. Eg: Off day2: Tuesday is assigned for 2nd and 4th week.


## Week Off Rotation

**Enable:** Week Off rotation can be enabled by checking the box.

**Rotation Count:** Specify the Rotation Count of up to 99 for the rotation of week-off days. However, **Rotation Count** can not be less than 7.

**Example:** If Off Day 1 and Off Day 2 are assigned on Sunday and Tuesday respectively as shown below. And week off rotation is enabled for count 8 days, then both the week offs will be rotated after 8 days.

As shown below, the Week off on 2nd, tuesday will be rotated after 8 days and shifted to wednesday. After 8 days it will be shifted to thursday and will continue to repeat. Similarly the week off sunday will rotate to monday after 8 days and will continue.

User  Resham 

Attendance Period

Mon	Tue	Wed	Thu	Fri	Sat	Sun
1 GS	2 GS WO	3 GS	4 GS	5 GS	6 GS	7 GS WO
8 1R	9 GS	10 GS WO	11 GS	12 GS	13 GS	14 GS
15 GS WO	16 GS	17 GS	18 GS WO	19 1F	20 1F	21 1F
22 GS	23 GS WO	24 GS	25 GS	26 GS WO	27 GS	28 GS
29 1R	30 GS					

PH - Public Holiday
WO - Week Off
WO - Week Off & Public Holiday On Same Day



*If some week off group is assigned to user, then it will override the off days configured in shift schedule assigned to that user, though it is not mandatory to assign some week off group to user.*

# Holiday Schedule

Holiday Schedule is a list of non-working days in a calendar year which are user defined. The user can define up to 9999 holiday schedules. In each schedule you can configure holidays and maximum 32 holidays can be synced to the device.

To access the Holiday Schedule, Click on **Holiday Schedule** option from the Shift and Schedule page. The page appears as shown below:

The screenshot shows the 'Holiday Schedule' interface. On the left, there are configuration fields: 'ID' (1), 'Name' (Schedule 1), 'Default' (Select), 'Holiday List' (All), and 'Total No. Of Days'. Below these is a 'Configure Holidays' section with a table header: 'No.', 'From', 'To', 'Holiday', 'Days'. The table currently shows 'No Data'. On the right, there is a list of 10 schedules, each with an ID and a Name. The list is paginated, showing '1 - 10 of 30 records'.

ID	Name
1	Schedule 1
2	Schedule 2
3	Schedule 3
4	Schedule 4
5	Schedule 5
6	Schedule 6
7	Schedule 7
8	Schedule 8
9	Schedule 9
10	Schedule 10

There are pre-defined 30 schedules. You can create a new schedule by clicking New button.

To define holidays in your holiday schedule, select a schedule from the right grid. Click Edit button and configure the holidays in it.

This screenshot shows the 'Holiday Schedule' interface with 'Schedule 1' selected. The configuration fields on the left now show 'ID' (1), 'Name' (Schedule 1), 'Default' (Default 1), 'Holiday List' (All), and 'Total No. Of Days' (0). The 'Configure Holidays' section shows a table with headers: 'No.', 'From', 'To', 'Holiday', 'Days'. The table is currently empty, showing 'No Data'. On the right, the list of 10 schedules is shown, with 'Schedule 1' highlighted. The pagination shows '1 - 10 of 30 records'.

No.	From	To	Holiday	Days
No Data				

**ID/Name:** For new schedule specify the name for the schedule. The ID will be auto-generated by the system. For existing schedule you can edit and specify the name to your schedule as shown below.

**Default:** The schedules 1 to 4 are default holiday schedules. To make other holiday schedule as default you can select the Default option.



*When new user is added in COSEC; the holiday schedule which is Default1 will get assigned to the user.*

*The 4 default holiday schedules can be assigned to the device from Device Configuration> Access Settings.*

## Configure Holidays

**Holiday List:** It is the filter which will allow to view the configured holidays for **Previous year, Current year, Next year**. The **Device synced** filter will show those holidays for which Device Synced checkbox is enabled i.e. holidays are synced to device. The **Inactive holidays** filter will show those holidays for which Device Synced checkbox is disabled.

To configure the holidays into holiday schedule; click **Add** button.

Then select the **From** and **To** date by clicking the Calendar button on which holiday is to be given.



*The date for which holiday is declared; will not be allowed to declare as Restricted holiday. The Restricted holiday for the same schedule can be configured from "Shift and Schedule> Restricted Holidays."*

Specify the name of the **holiday** as shown below.

Enable the **Device Synced** checkbox for the holiday which is to be synced to the device. You can sync maximum 32 holidays in a schedule to the device. Then click **OK** to save the holiday.

No.	From	To	Holiday	Days
	15/01/2018	15/01/2018	Makar Sakranti	

OK

No.	From	To	Holiday	Days
1	15/01/2018	15/01/2018	Makar Sakranti	1

Similarly you can add other holidays in the schedule.

**Days** shows the number of days for which a holiday is configured. For eg: Holi-Dhuleti is configured as one holiday. But it includes 2days so 2 separate days will be counted.

**Configure Holidays**

Holiday List: All

Total No. Of Days: 4

No.	From	To	Holiday	Days
1	15/01/2018	15/01/2018	Makar Sakranti	1
2	13/02/2018	13/02/2018	Basant Panchmi	1
3	01/03/2018	02/03/2018	Holi-Dhuleti	2

**Total No. of days:** It shows the sum of all the days configured as holidays in the selected schedule.

After configuring all holidays; click **Save** button to save the holiday schedule.

**Holiday Schedule** ✓ Saved Successfully

ID: 1 RnD Schedule

Default: Default 1

**Configure Holidays**

Holiday List: All

Total No. Of Days: 4

No.	From	To	Holiday	Days
1	15/01/2018	15/01/2018	Makar Sakranti	1
2	13/02/2018	13/02/2018	Basant Panchmi	1
3	01/03/2018	02/03/2018	Holi-Dhuleti	2

1 - 10 of 30 records

1 2 3

## Copy Holiday

You can create a copy of existing holiday by clicking **Copy Holiday** button of that holiday row. A new row will appear with the same holiday for next year.

No. ▲	From	To	Holiday	Days			
1	15/01/2018	15/01/2018	Makar Sakranti	1	Yes		
2	13/02/2018	13/02/2018	Basant Panchmi	1	No		
3	01/03/2018	02/03/2018	Holi-Dhuleti	2	Yes		

No. ▲	From	To	Holiday	Days			
	15/01/2019	15/01/2019	Makar Sakranti				
1	15/01/2018	15/01/2018	Makar Sakranti	1	Yes		
2	13/02/2018	13/02/2018	Basant Panchmi	1	No		
3	01/03/2018	02/03/2018	Holi-Dhuleti	2	Yes		

You can also change the date for holiday from calender button.

Then click **OK** to save the new holiday.

No. ▲	From	To	Holiday	Days			
1	15/01/2018	15/01/2018	Makar Sakranti	1	Yes		
2	13/02/2018	13/02/2018	Basant Panchmi	1	No		
3	01/03/2018	02/03/2018	Holi-Dhuleti	2	Yes		
4	15/01/2019	15/01/2019	Makar Sakranti	1	No		

Now this holiday will appear in **Next Year** holiday list as shown below.

**Configure Holidays**

Holiday List

Next Year

Total No. Of Days 1

No. ▲	From	To	Holiday	Days			
4	15/01/2019	15/01/2019	Makar Sakranti	1	No		

Click on **Save** to save the holidays to the schedule.

Similarly, when you want to configure holiday list for current year. You can take the already configured list of previous year. And edit the changes with new date or new name of holiday.

Eg: If Rakshabandhan in year 2017 was on 26 August. And for current year 2018, it is on 22 August. Then You can edit the date from 26 Aug 2017 to 22 Aug 2018. The holiday 26 Aug 2017 can be viewed from the **Previous holidays** list.

Once defined, the Holiday schedules can then be assigned to the users.

*Read Restricted Holidays > Assigning Holiday schedule to user.*



# Shift Schedule

Shift Schedules are detailed chart indicating the working hours for group employees based on the organisation's requirement. It defines the details like timing, no. of days, shift rotation, rotation count etc for each shift configured.

The Shift Schedule enables the user to group multiple shifts into a single entity which can then be assigned to the employees. This option enables the administrator to assign different working hours and off days for each user by defining different schedules. For Assigning Shift Schedule to user See *User Configuration> Access Control*.

A maximum of **999** shift schedules can be configured and each Shift Schedule can have up to 32 different shifts as members.

To configure Shift Schedule, Select **Shift and Schedule module > Shift Schedule**. The page appears as shown below:

Shift Schedule

Shift Schedule\* ID Name

Default ☐

Start Date\* From Date

Preview Schedule

Off Day Configuration

Shift Based Access Rules

ID	Name
1	Schedule Group
2	Schedule- EO

To create a new Shift Schedule click on **New** button. The Schedule ID will be generated by the system and cannot be edited by the user.

**Name:** Specify a user friendly Name for Shift schedule.

**Default:** Check the box to set the shift schedule to default.

**Start Date:** Select the Start Date from the calendar from which the Shift Schedule will be started.

Shift Schedule

Shift Schedule\* 3 RnD Schedule

Default ☒

Start Date\* 06/03/2017

Preview Schedule

Search

Shift No.	Active Shift	Name	Timings	Type	Repeat Shift (Days)
Shift 1	<input checked="" type="checkbox"/>	ID Name			
Shift 2	No				
Shift 3	No				
Shift 4	No				
Shift 5	No				

1 - 5 of 32 records

1 2 3 7 10

To add the shifts to the schedule, click on Shift No. The grid will be enabled as shown above.

**Active:** Check the Active box to enable the shift.

**Shift:** Then select the Shift from the picklist to be added to the schedule. The Name of the shift, Timings and Type of the shift will be displayed.

**Repeat Days:** Enter the number of days for which shift will be continued. Suppose GS is repeated for 7 days and NS is repeated for 10 days so GS will continue for 7 days and then NS will continue for 10 days.

The first shift of the schedule is to be selected from the User configuration> Access Control> Basic> Start Shift.

Then click OK to save the shifts.

Shift No.	Active	Shift	Name	Timings	Type	Repeat Shift (Days)
Shift 1	Yes	GS	General Shift	09:00 - 18:00	Normal	7
Shift 2	Yes	NS	Night Shift	21:00 - 05:00	Normal	10
Shift 3	No					
Shift 4	No					
Shift 5	No					

Click **Save** button to save the Shift Schedule.

You can edit or delete the shift from the schedule by clicking on Edit button. In edit mode the preview of schedule can be viewed by clicking **Preview Schedule** button.

Mar 2017

Sun	Mon	Tue	Wed	Thu	Fri	Sat
26	27	28	1	2	3	4
5	6 GS	7 GS	8 GS	9 GS	10 GS	11 GS
12 GS WO	13 NS	14 NS	15 NS	16 NS	17 NS	18 NS
19 NS WO	20 NS	21 NS	22 NS	23 GS	24 GS	25 GS
26 GS WO	27 GS	28 GS	29 GS	30 NS	31 NS	1
2	3	4	5	6	7	8

PH - Public Holiday WO - Week Off WO - Week Off & Public Holiday On Same Day

Click here to change the Month

## Off Day Configuration

Click on the Off Day Configuration section to set the Off Days and Week Off Rotation as shown below:

The screenshot shows the 'Off Day Configuration' window. It has a title bar and a main content area. The 'Auto Week Off Assignment' section has a checked checkbox and a dropdown menu set to 'Weekly Basis'. Below this, 'Off Day 1' is set to 'Sunday' and 'Off Day 2' is set to 'Saturday'. The 'Off Day 2 On Weeks' section has checkboxes for W1, W2, W3, W4, W5, and W6, with W2 and W4 checked. The 'Week Off Rotation' section has an 'Enable' checkbox (unchecked) and a 'Rotation Count' field with the value '7-99'. At the bottom, there is a 'Shift Based Access Rules' section with a dropdown arrow.

### Auto Week Off Assignment:

You can assign WOs on days on which user was found absent but eventually the number of WOs in a month should be as per schedule only. So enable Auto week off assignment on weekly or monthly basis.



*Only the Week-Offs assigned via Shift Schedule Process will be considered for movement or auto assignment; not the manually assigned Week-Offs.*

**For eg:** WO on 7th is shifted on 4th as shown below. As the user is present on 7th so it is considered as working day and the same week off is given on the absent day marking as Week Off.

Date	Shift	First IN	Last OUT	1st Half	2nd Half	Late-IN	Early-OUT	Work Hours	Extra Work	Net Work	Break Hours	Actual Overtime	Authorized Overtime	Remark
01/08/2016	GS	09:05	17:45	PR	AB			07:40			01:00			AB:Early-OUT
02/08/2016	GS	09:15	18:16	PR	PR			08:01	00:16		01:00			
03/08/2016	GS	09:30	18:30	PR	PR			08:00	00:30		01:00			
04/08/2016	GS	14:00	17:45	PR	AB			07:00			01:00			AB:Early-OUT
05/08/2016	GS	11:30	17:30	PR	AB			05:00			01:00			AB:Early-OUT
06/08/2016	GS	08:45	18:00	PR	PR			08:15	00:15		01:00			
07/08/2016	GS - WO	09:00	18:15	WO	WO			08:15	00:15		01:00			

After Monthly Attendance Process of the user, the Punches and WO will become as shown below:

Date	Shift	First IN	Last OUT	1st Half	2nd Half	Late-IN	Early-OUT	Work Hours	Extra Work	Net Work	Break Hours	Actual Overtime	Authorized Overtime	Remark
01/08/2016	GS	09:05	17:45	PR	AB			07:40			01:00			AB:Early-OUT
02/08/2016	GS	09:15	18:16	PR	PR			08:01	00:16		01:00			
03/08/2016	GS	09:30	18:30	PR	PR			08:00	00:30		01:00			
04/08/2016	GS - WO	14:00	17:45	WO	WO			03:45						
05/08/2016	GS	11:30	17:30	PR	AB			05:00			01:00			AB:Early-OUT
06/08/2016	GS	08:45	18:00	PR	PR			08:15	00:15		01:00			
07/08/2016	GS	09:00	18:15	PR	PR			08:15	00:15		01:00			

If you have assigned two week offs in the schedule with Auto week off enabled, then WO will be shifted on 2 absent days.

**Off Day1 & Off Day2:** Select the Off Day 1 from the drop down list of Weekdays (eg: Sunday). For configuring second week off, select the Off Day 2 from the drop down list(eg: Saturday). If only one week off is to be given, then select “None” for Off Day2.

**Off Day2 on Weeks:** You can select the week for which Off Day2 is to be assigned. For eg: Saturday is assigned as week off on 2nd and 4th saturday.

#### Week Off Rotation

**Enable:** Off Day rotation can be enabled by checking the box. If Auto Week Off Assignment is enabled, Week Off Rotation will be disabled.

**Rotation Count:** Specify the Rotation Count for rotating single or both week offs as configured. The Rotation Count can not be less than 7.

Here as specied in below figure, The off day on sunday will rotate to monday after the count of 15 days. Similarly it will continue to rotate further to Tuesday and so on.

The screenshot shows the 'Off Day Configuration' window. Under 'Auto Week Off Assignment', 'Weekly Basis' is selected. 'Off Day 1' is set to 'Sunday' and 'Off Day 2' is set to 'None'. The 'Off Day 2 On Weeks' section has checkboxes for W1 through W6, all of which are currently unchecked. In the 'Week Off Rotation' section, the 'Enable' checkbox is checked, and the 'Rotation Count' is set to 15.

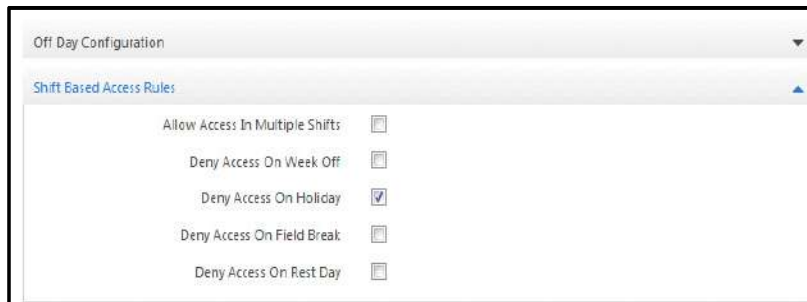
If both the off days are assigned for rotation, then both will rotate similarly.

Eg: Sunday will rotate to Monday and Tuesday will rotate to Wednesday after 15 days.

This screenshot shows the 'Off Day Configuration' window with 'Off Day 1' set to 'Sunday' and 'Off Day 2' set to 'Tuesday'. In the 'Off Day 2 On Weeks' section, all checkboxes for W1, W2, W3, W4, W5, and W6 are checked. The 'Week Off Rotation' section shows 'Enable' checked and 'Rotation Count' set to 15.

## Shift Based Access Rules

Click on the Shift Based Access Rules section to configure access based on shifts/ WO/ holidays as shown below:



The screenshot shows a configuration window titled "Off Day Configuration" with a dropdown arrow. Below the title bar, the "Shift Based Access Rules" section is expanded, indicated by a blue upward arrow. This section contains five settings, each with a label and a checkbox:

- Allow Access In Multiple Shifts ☐
- Deny Access On Week Off ☐
- Deny Access On Holiday ☒
- Deny Access On Field Break ☐
- Deny Access On Rest Day ☐

**Allow Access in Multiple Shifts:** Check this box to allow the User to work in multiple or any of the shifts from the schedule.

**Deny Access on Week Off:** Check the box to deny access on week off days.

**Deny Access on Holiday:** Check the box to deny access on holidays.

**Deny Access on Field Break:** Check the box to deny access on field break days.

**Deny Access on Rest Day:** Check the box to deny access on Rest day.

Click on **Save** button to save the changes to the shift schedule.

# Restricted Holidays

The COSEC application allows the administrator to define restricted holidays which can be availed by the users in addition to the regular holidays as defined in the system. However, these are optional for the users and the individuals may choose a limited number of holidays from this category as per the organizational policies.

To access the Restricted Holidays, select **Shift and Schedule module > Restricted Holidays**. The page appears as shown below:

Restricted Holidays

Search

Schedule  Name

Configure Holidays

Search

Date Restricted Holiday

No Data

ID	Name	No. Of Restricted Holidays
1	Schedule 1	0
2	Schedule 2	0
3	Schedule 3	0
4	Schedule 4	0
5	Schedule 5	0
6	Schedule 6	0
7	Schedule 7	0
8	Schedule 8	0
9	Schedule 9	0
10	Schedule 10	0
11	Schedule 11	0
12	Schedule 12	0
13	Schedule 13	0
14	Schedule 14	0
15	Schedule 15	0

1 - 15 of 31 records

The schedules in the right grid are those defined in ["Holiday Schedule"](#).

Select the Schedule from the grid wherein the restricted holidays are to be added.

**Schedule:** The Schedule ID and Name will be displayed as defined in Holiday Schedule.

**Configure Holidays:** To configure the Restricted holidays, click Add button as shown below.

Configure Holidays

Search

Date Restricted Holiday

03/03/2017  Maha Shivratri

+

**Date:** Select the date from the Calendar on which the restricted holiday is to be configured. The system ensures that the date of the Restricted Holiday does not coincide with a holiday date as defined in the Holiday schedules.

**Holiday Name:** Specify the name for the restricted holiday.

Click on **OK** to add the list of holidays. Then click **Save** button to save the Restricted Holidays to the holiday schedule.

**Restricted Holidays**

← ✎ 📄 ✕

Schedule 1 Schedule 1

Search

Configure Holidays

Search

Date ▲	Restricted Holiday	
03/03/2017	Maha Shivratri	✎ ✕
04/06/2017	Akhatrij	✎ ✕

ID ▲	Name	No. Of Restricted Holidays
1	Schedule 1	2
2	Schedule 2	0
3	Schedule 3	0
4	Schedule 4	0
5	Schedule 5	0
6	Schedule 6	0
7	Schedule 7	0
8	Schedule 8	0

### Assigning holiday schedule to user

Now this holiday schedule with 15 holidays and 3 restricted holidays will be assigned to the user from the Access Control tab of **User configuration** as shown below:

**User Configuration**

← + ✎ ✕ 📄 🖨️ ⚙️ ↺

NR Naman Active

Profile

Devices

Credentials

T&A

Access Control

ESS

Cafeteria

Job Costing

Field Visit Management

Basic Advance

Bypass Finger ☐

Bypass Palm ☐

Access Validity ☐

Access Validity Date

Access Level 8

Shift Schedule Schedul Group 1

Start Shift HO RnD General Shift

Holiday Schedule HO-RnDSchedule

Access Cluster Checking ☐

After the schedule has been assigned to the user, the user must have the leave balance before applying for the leave( If the balance check is enabled for the leave).

### Crediting RH leave

Then administrator must credit the leave to the employee from Leave Management module as shown below:

**Leave Management**

**Credit/Debit/Encashment**

Period: Monthly  
 Entry Type: Credit  
 Month-Year: July 2016  
 Leave: RH Restricted Leave  
 Credit Mode: Fixed  
 Credit Value: 2  
 Apply Pro-rata: ☐  
 Remark:   
 User Filter: Randomly  
 User: 

User ID	Name
NR	Naman

 Apply

Here 2 Restricted leave is credit to the employee for the month July 2016.

### Applying RH leave

Now the user can apply for the restricted holiday from his ESS account which will be then approved by the reporting incharge. Also the leave can be applied for the user through Leave Application module by system account user.

The user is applying the second half leave on 8 July as restricted holiday through ESS. As there is available balance so he can apply.

**Leave Application**

Application Date: 2016/07/08  
 Half Day Consideration: Both  
 From Date: 2016/07/08  
 To Date: 2016/07/08  
 Applied Days: 0.5  
 Posted Days:   
 Leave: RH - Restricted Leave  
 Current Balance: 2.00  
 Reason And Contact Info  
 Reason: 50 Char  
 Address: 30 Char  
 Contact Number: 20 Char  
 Apply For Cancellation  
 Apply For Modification



If he applies RH leave on some other day which is not declared as restricted holiday then he will not be allowed to apply for the leave.



Leave Application Leave Approval is pending

Application Date: 2016/07/08

Half Day Consideration: Both

From Date: 2016/07/08 Second Half

To Date: 2016/07/08 Second Half

Applied Days: 0.5

Posted Days: 0.5

Leave: RH - Restricted Leave

Current Balance: 1.50

Reason And Contact Info

Reason: 50 Char

From	To	Leave	Application Date	Application Type	Status
2016/07/08	2016/07/08	RH	2016/07/08	New	Pending

## Approving RH leave

1220 SHEETAL RAVAL

Time Attendance

Leave Management

Group Details

Approval/Authorization

Short Leave/Official In-Out Authorization

Attendance Correction Authorization

Leave Application Approval

Tour Application Approval

Award/Penalty Authorization

Field Visit Correction Authorization

Cafeteria

Job Costing

FYM

Reports

Leave Approval

Show All Pending Applications: ☐

Leave Date: 2016/06/08 to 2016/07/08

Authorization For: Leave Application

Filter Users: All

Group/User: ID Name

View

Pending (1)

User ID	Name	From Date	To Date	Leave	Application Date	Posted Days	Approve <input checked="" type="checkbox"/>	Reject <input type="checkbox"/>	Details
NR	Naman	2016/07/08	2016/07/08	RH-Restricted Leave	2016/07/08	0.5	<input checked="" type="checkbox"/>	<input type="checkbox"/>	

Approved (0)

Rejected (0)

The Reporting Incharge of the user can view the pending leave applications and approve or reject the leave by checking the respective box. Also the administrator can authorize the leave from Leave Approval section of Leave module.

There can be 1 or 2 reporting incharges depending on the configuration [See "Reporting In-Charge" on page 620.](#)

The **Daily Attendance View** for User Naman shows RH in second half of 8th july.

2016/07/07	GS	08:45	19:45	PR	PR	
2016/07/08	GS	09:00		IN	RH	
2016/07/09	GS - WO					

# Manage Shift

---

Manage Shifts allows you to:

- view/change shifts of a single/multiple users
- view/change a user's schedule
- check the shift-wise user count
- import/export shift data

The shifts can be changed by:

- System Account User
- On Behalf System Account User
- Using the ESS Self Service login

COSEC Web enables all *System Account users* with appropriate page rights to make Shift Change applications using the *Shift and Schedule* module. All applications made by the System Account user are *pre-approved* by default.

COSEC Web also enables all On Behalf System Account User with appropriate page rights to make Shift Change applications using the *Shift and Schedule* module. If you wish to send all the applications made by the On Behalf System Account User for approval, make sure you have disabled the **Auto Approve** check box for Manage Shifts page in the Roles and Rights assigned. For creating and assigning the roles and rights to the On Behalf System Account User. Refer to [“On Behalf System Account User”](#) as well as configure the Shift Change Alert parameters. For details refer to [“Configuring Alert Messages”](#).

For Shift Change Applications can be applied using the *Employee Self Service* login, the Shift Change Application approvals/rejections have to be done by the respective supervisors of the reporting group by logging into their ESS login. However, such applications can also be approved by the System Account user from the *Shift and Schedule* module of the COSEC Web Application.



*For SA users, make sure you have enabled Manage Shifts page Rights from Admin> System Accounts> Role and Rights Configuration and have disabled the Auto Approve check box. For details, refer to [“Roles and Rights Configuration”](#).*

*For ESS users, make sure you have enabled Shift Change Application page in ESS Rights from Users> Utilities> ESS Role Rights and for the RIC in In-Charge Permission, Shift Change Approval is enabled. For details refer to [“ESS Role Rights”](#) and [“In-Charge Permissions”](#)*

The authorization is dependent on the number of Reporting In-charge in the Reporting Group, the Authorization Mode as well as the Approval Policy assigned by the system administrator. For details refer to [“Reporting In-Charge”](#), [“Approval Policy”](#) and [“Configuring Users”](#).

For Shift Change Application Approvals, refer to [“Shift Change Approval”](#).

When the shifts are changed from Manage Shifts, alerts can be triggered, if configured:

- Shift Change Application alert when there is an application for shift change. For this alert, in Alert Message Configuration, select the Alert Filter as Time and Attendance and Event as Shift Change Application.
- Shift Change alert after the verdict is given by RIC, that is the Shift Change Application is approved and the shift is updated. For this alert, in Alert Message Configuration, select the Alert Filter as Time and Attendance and Event as Shift Change.

The ESS Users will also receive ESS Notifications when the final verdict for the application is provided.

- If the verdict for the Shift Change Application is pending then the Pending Applications For Approval Alert will include the count of these applications also.

For details refer to [“Configuring Alert Messages”](#).

You can change shifts from:

- **Shift Change Application:** When shifts are changed from this page then Shift Change Application requests will be generated only if the Auto Approve check box is disabled. For details, refer to [“Shift Change Application/Approval”](#).
- **Manage Attendance:** When shifts are changed from this page then Shift Change Application requests will not be generated. For details, refer to [“Manage Attendance”](#).
- **Attendance Correction Application:** When shifts are changed from this page then Shift Change Application requests will not be generated, however Attendance Correction requests will be generated. For details, refer to [“Attendance Correction”](#).
- **Import from:**
  - Admin Module > System Utilities > Import Data > Import Data For (Shift Schedule)
  - Shift and Schedules Module > Utilities > Manual Schedule Import
  - In Shift and Schedules Module > Utilities > Manage Shift > Import > Change Shift with Import File

From Import the Shift Change Application requests will be generated only if the Auto Approve check box of the respective page is disabled. For details, refer to [“Importing Data”](#), [“Manual Schedule Import”](#) and [“Manage Shift”](#).



*If Shifts are changed from multiple places, then in such cases the last approved shift change request will be taken into consideration.*

## View/Manage Shifts

Click **Shift Schedule module > Utilities > Manage Shift**. The Manage Shifts page appears.

- **Date:** Select the From and To Date to view the shift details for the selected date range.

## User Selection

You can select the a user directly or can also select multiple users.

For select a user refer to “Single User”.

For selecting multiple users, refer to “Multiple Users”.

### Single User

- **User:** Click the picklist. The **Picklist For All Users** pop-up appears. Click to select the desired user.

Click **View** to view the details of the user's shifts in the defined date range. The shift details are displayed on the left and the selected user's summary is displayed on the right side as shown below.

The screenshot shows the 'Manage Shifts' window. At the top, there are date pickers for 'Date' (04/01/2017 to 04/26/2017) and a 'User' picklist showing '2 Chirag'. Below these are 'View' and 'Export' buttons. The main area is divided into two sections: 'Shift Details' on the left and 'User's Summary' on the right. The 'Shift Details' section contains a table with columns for User ID, Name, and shifts for each day from 01 Apr to 07 Apr. The 'User's Summary' section shows a profile picture of Chirag, his name, and a table of shift statistics.

User ID	Name	01 Apr Sat	02 Apr Sun	03 Apr Mon	04 Apr Tue	05 Apr Wed	06 Apr Thu	07 Apr Fri
2	Chirag	GS	GS   WO	GS	GS	GS	GS	GS

Shifts	Days
GS	26
WO	4
PH	0
Leave	0
Tour	2

You can copy a shift from a date and paste the same to another date also.



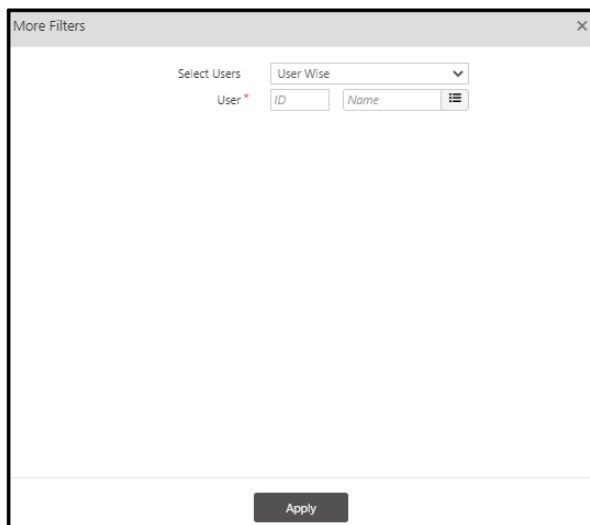
*If you wish to send all the applications made by the On Behalf System Account User for approval, make sure you have disabled the **Auto Approve** check box for Manage Shifts page in the Roles and Rights assigned. For Shift Changes done via Copy and Paste, Shift Change Applications will be sent to the RIC for Approval.*

To do so,

- Press right-click of the mouse on the Shift under the desired date. The cursor arrow icon appears with a plus (+) sign.
- Place the cursor over the date where you wish to paste the copied shift and press the left-click of the mouse. The shift is pasted.

### Multiple Users

If you wish to select multiple user, click **Filter**  .

The image shows a 'More Filters' pop-up window. At the top, it has a title bar with 'More Filters' and a close button. Below the title bar, there is a section labeled 'Select Users' with a dropdown menu currently set to 'User Wise'. Underneath this, there is a label 'User \*' followed by two input fields: 'ID' and 'Name'. The 'Name' field has a small icon of three horizontal lines with a square, likely representing a picklist. At the bottom of the window, there is an 'Apply' button.

The **More Filters** pop-up appears.

- **Select User:** You can select particular user or multiple users. Select the desired option — User Wise, Group Wise, All.
  - If you select **User Wise**,
    - Click the **User** picklist. The **Picklist For All Users** pop-up appears. Select the check boxes of the desired users and click OK.
    - The selected users appear in a grid in the **More Filters** pop-up.
    - Click **Apply**.
  - If you select **Group Wise**,
    - In **Select Group**, select the desired enterprise group from the drop-down list—Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1/2/3. For each enterprise group — Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1/2/3, click the corresponding picklist to select the desired option/s.
    - Click **Apply**.
  - If you select **All**, all the active users can be selected.

More Filters

Select Users

User Wise

User\*

ID

Name

Search

User ID ▲	Name	
101	Khushbu	
1567	Sheetal	
2	Chirag	

Apply

If multiple users are selected, click **View**.

The grid on the left displays the list of shifts assigned (fetched as per the "T&A> Utilities> Shift-Wise Management" page). The right side of the page displays the filtered user's Summary Count as shown below.

Manage Shifts

←

⬆

⬇

Date \*

04/01/2017

04/26/2017

User \*

ID

Name

View

Export

Summary Count

Shifts Assigned

04/01/2017

Scheduled	3
Reported	1
Not Reported	2
On Leave/Tour	0
On Week-Off	0
On Holiday	0

Shifts

04/01/2017

Shift ID ▲	Name	Scheduled	Reported	Not Reported	On Leave/Tour	On Week-Off	On Holiday
GS	General Shift	3	1	2	0	0	0

Not Scheduled 0

To view the details of users in each shift, that is number of users in **Scheduled, Reported, Not Reported** etc, click on the respective number. For example, click on the number under Scheduled. The user details will be displayed as shown below.

Manage Shifts

←

⬆

⬇

Date \*

04/01/2017

04/26/2017

User \*

ID

Name

View

Export

Scheduled

04/01/2017 - 04/07/2017

User ID ▲	Name	01 Apr Sat	02 Apr Sun	03 Apr Mon	04 Apr Tue	05 Apr Wed	06 Apr Thu	07 Apr Fri
101	Khushbu	GS	GS   WO	GS	GS	GS	GS	GS
2	Chirag	GS	GS   WO	GS	GS	GS	GS	GS
1567	Sheetal	GS	GS   WO	GS	GS	GS	GS	GS

04/01/2017

Scheduled	3
Reported	1
Not Reported	2
On Leave/Tour	0
On Week-Off	0
On Holiday	0

## Right-click Options

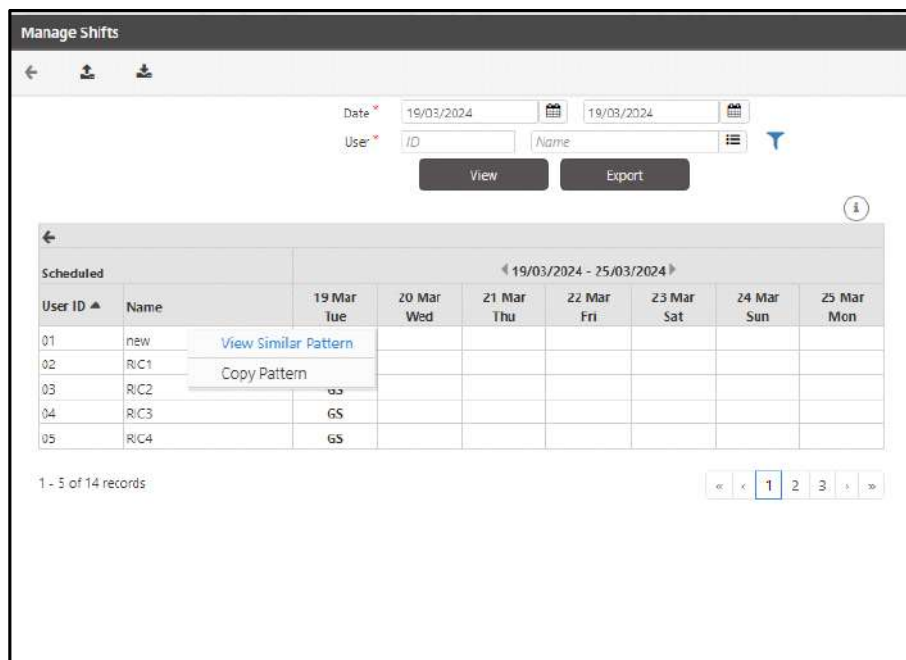
There are two options that appear when you right-click on any user's Name or ID;

- View Similar Pattern
- Copy Pattern

## View Similar Pattern

To filter the users as per a particular users shift assignment pattern,

- Press left-click of the mouse on the user whose pattern you wish to select.
- The options **View Similar Pattern** and **Copy Pattern** appear.



The screenshot shows the 'Manage Shifts' interface. At the top, there are filters for 'Date' (19/03/2024) and 'User' (ID and Name). Below these are 'View' and 'Export' buttons. The main table displays shift patterns for users 01 to 05. A right-click context menu is open over the first row (User ID 01, Name new), showing 'View Similar Pattern' and 'Copy Pattern' options. The table columns are: User ID, Name, 19 Mar Tue, 20 Mar Wed, 21 Mar Thu, 22 Mar Fri, 23 Mar Sat, 24 Mar Sun, 25 Mar Mon. The data rows show patterns like 'new', 'R/C1', 'R/C2', 'R/C3', and 'R/C4'.

Scheduled		19/03/2024 - 25/03/2024						
User ID	Name	19 Mar Tue	20 Mar Wed	21 Mar Thu	22 Mar Fri	23 Mar Sat	24 Mar Sun	25 Mar Mon
01	new							
02	R/C1							
03	R/C2	GS						
04	R/C3	GS						
05	R/C4	GS						

1 - 5 of 14 records

- Click **View Similar Pattern**.

All the users who have a same pattern as the selected user are displayed.

**Manage Shifts**

Date: 19/03/2024 19/03/2024

User: ID Name

View Export

**Similar Pattern** x

19/03/2024 - 25/03/2024

User ID	Name	19 Mar Tue	20 Mar Wed	21 Mar Thu	22 Mar Fri	23 Mar Sat	24 Mar Sun	25 Mar Mon
01	new	GS						
02	RIC1	GS						
03	RIC2	GS						
04	RIC3	GS						
05	RIC4	GS						

1 - 5 of 14 records

Click here to clear

1 2 3

- Click **Clear Filter** to view all the users.

### Copy Pattern

Press left-click of the mouse on the user within the selected shift from which you wish to copy the Shift.

- The options **View Similar Pattern** and **Copy Pattern** appear.

**Manage Shifts**

Date: 19/03/2024 19/03/2024

User: ID Name

View Export

**Scheduled**

19/03/2024 - 25/03/2024

User ID	Name	19 Mar Tue	20 Mar Wed	21 Mar Thu	22 Mar Fri	23 Mar Sat	24 Mar Sun	25 Mar Mon
06	RIC5	GS						
2	new1	GS						
Fieldworker1	Fieldworker1	GS						
KK	Kalpesh							
nirali	nirali							

6 - 10 of 14 records

View Similar Pattern

Copy Pattern

1 2 3



- Click **Copy Pattern**. The **Copy Pattern** pop-up appears.



If you wish to send all the applications made by the On Behalf System Account User for approval, make sure you have disabled the Auto Approve check box for Manage Shifts page in the Roles and Rights assigned. For Shift Changes done via Copy Pattern, Shift Change Applications will be sent to the RIC for Approval.

If in the selected date range multiple shifts are covered, for example Night Shift (NS) as well as General Shift (GS), then for each shift type Shift Change Application request will be sent to the RIC. For example dates selected are 10-03-2024 to 15-03-2024, for 10 and 12 NS is assigned and for 11, 13, 14 and 15 GS is assigned. Then two Shift Change Application requests will be sent, one for NS (for dates 10 and 12) and the other for GS (for dates 11, 13, 14, 15).

### Copy From

- **User ID:** This displays the user which you selected, that the user from which you wish to copy the Shift.
- **Date Range:** Select the From and To date from which the shift is to be copied.




The date span here will be as per the **Date** range set on the Manage Shift page.

### Copy To

- **Date Range:** Select the From and To date range for which the shift is to be copied.
- **Select Users:** Select the desired option — User Wise, Group Wise, All — for whom the shift is to be copied. For details refer to ["Multiple Users"](#).

The selected users appear in the grid.

If required you can delete any user. To do so, click **Delete**  of the desired user.

Copy Pattern

Copy From

User ID

KK

Kalpesh

Date Range \*

05/03/2024

11/03/2024

Copy To

Date Range \*

05/03/2024

11/03/2024

Select Users

User Wise

User \*

ID

Name

Search

User ID ▲	Name	
User2	User2	

Update

Cancel

- Click **Update**. The shifts are copied for the selected date range for the selected users.

If the shift is not copied, the reason for the same is displayed in the **Error List**.

Click the **Error List** collapsible panel to view the reason.

Copy Pattern

Check Process Error ...

Date Range

05/03/2024

11/03/2024

Copy To

Date Range \*

05/03/2024

11/03/2024

Select Users

User Wise

User \*

ID

Name

Search

User ID ▲	Name	
User2	User2	

Update

Cancel

Error List

Search

User ID ▲	Date	Status
User2	05/03/2024	Attendance Calculation for User is not enabled
User2	06/03/2024	Attendance Calculation for User is not enabled
User2	07/03/2024	Attendance Calculation for User is not enabled
User2	08/03/2024	Attendance Calculation for User is not enabled
User2	09/03/2024	Attendance Calculation for User is not enabled

1 - 5 of 7 records

<<

<

1

>

>>

1552


Matrix COSEC System Manual


## Export & Import

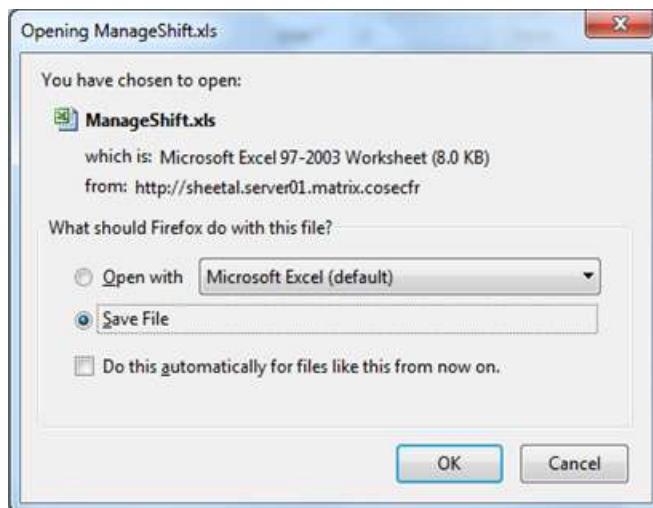
You can export the shifts of multiple users in XLS format to the local drive of a computer. This data can then be manually added/corrected/updated and the same file can be imported into the system.

### Export

You can set the filters according to which the data is required. To set the filter:

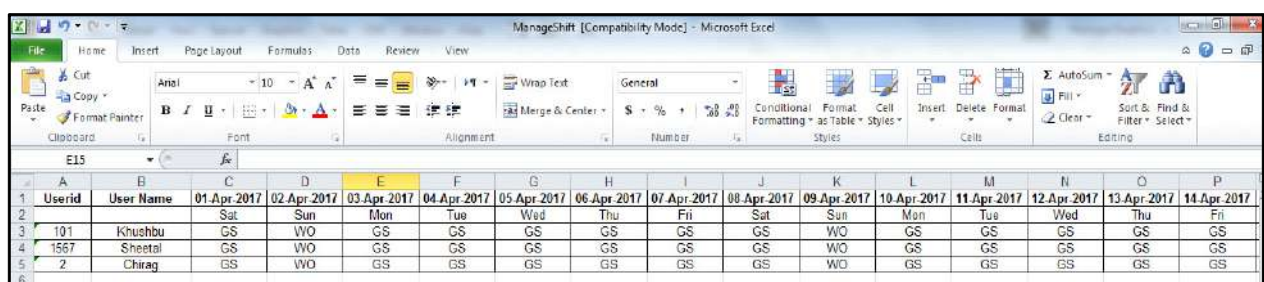
- **Date:** Select the from and to date. The data will be filtered for the set date range.
- **User:** You can select the desired users directly or by clicking the **Filter** . For details refer to "[User Selection](#)".

Click **Export** . The following pop-up appears prompting you to save the file on a local drive.



After saving the file, navigate to the path where you saved the file and open the file.

The exported shift file appears.



	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P
	Userid	User Name	01 Apr 2017	02 Apr 2017	03 Apr 2017	04 Apr 2017	05 Apr 2017	06 Apr 2017	07 Apr 2017	08 Apr 2017	09 Apr 2017	10 Apr 2017	11 Apr 2017	12 Apr 2017	13 Apr 2017	14 Apr 2017
1			Sat	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon	Tue	Wed	Thu	Fri
3	101	Khushbu	GS	WO	GS	GS	GS	GS	GS	GS	WO	GS	GS	GS	GS	GS
4	1567	Sheetal	GS	WO	GS	GS	GS	GS	GS	GS	WO	GS	GS	GS	GS	GS
5	2	Chirag	GS	WO	GS	GS	GS	GS	GS	GS	WO	GS	GS	GS	GS	GS


## Import

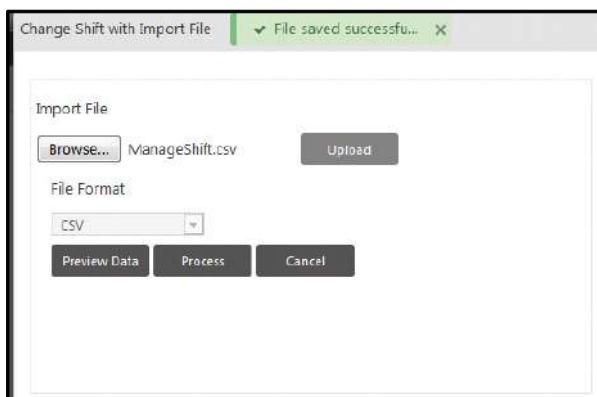
You can make the necessary manual changes in the exported file. Save the file and note down the file location.

For Shift Changes made via Import by On Behalf System Account User, Shift Change Applications will be sent to the RIC for approvals. Only after the verdict from the RIC (that is if the Shift Change application is approved) then the shift will be updated. To know the status of the shift application, refer to [“Monthly Shift Schedule”](#).

If the shift changes are done by the SA then the Shift Changes will be auto-approved.

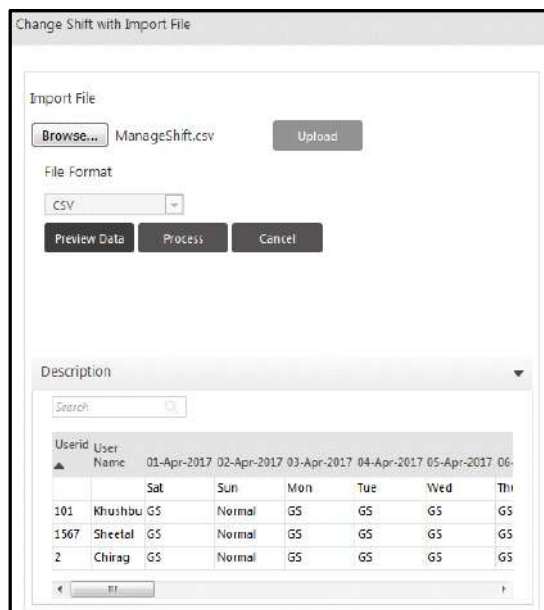
Shifts are changed from multiple locations, then in such cases the last approved shift change request will be taken into consideration. To know more refer to [“Shift Change Application/Approval”](#).

Click **Import**  to import the file with changes in shift.



**Browse** and select the file from the location you stored it at. Click **Upload** to upload the modified shift file.

Select a **File Format** (XLS or CSV) for uploading. Click **Preview Data** to view the preview of updated data.



Userid	User Name	01-Apr-2017	02-Apr-2017	03-Apr-2017	04-Apr-2017	05-Apr-2017	06-Apr-2017
		Sat	Sun	Mon	Tue	Wed	Thu
101	Khushbu	GS	Normal	GS	GS	GS	GS
1567	Sheetal	GS	Normal	GS	GS	GS	GS
2	Chirag	GS	Normal	GS	GS	GS	GS

Click **Process** to import the file and update the shift changes.

To view the status of the imported data, click the **Description** collapsible panel.

Description

Search

22-Apr-2017	23-Apr-2017	24-Apr-2017	25-Apr-2017	26-Apr-2017	Success	Description
Sat	Sun	Mon	Tue	Wed		
GS	WO	GS	GS	GS	Yes	Shift assigned successfully
GS	WO	GS	GS	GS	Yes	Shift assigned successfully
GS	WO	GS	GS	GS	Yes	Shift assigned successfully



*If WO is to be changed to other shift, then Normal must be typed in place of WO in excel sheet, then is imported. Once the WO is changed to Normal, then you can assign other shift to it.*

For example: The GS WO shift on 2nd April is changed to GS shift as shown below. Now this shift can be changed as per requirement.

To view the updated shift data,

- Click **Schedule Group** on the left to and then click **View Schedule**.

Manage Shifts

Date

04/01/2017

04/26/2017

User

2

Chirag

View

Export

04/01/2017 - 04/01/2017

User ID	Name	01 Apr Sat	02 Apr Sun	03 Apr Mon	04 Apr Tue	05 Apr Wed	06 Apr Thu	07 Apr Fri
2	Chirag	GS	GS	GS	GS	GS	GS	GS

2

Chirag

Shift Schedule

Schedule Group

Starting Shift

GS - General S

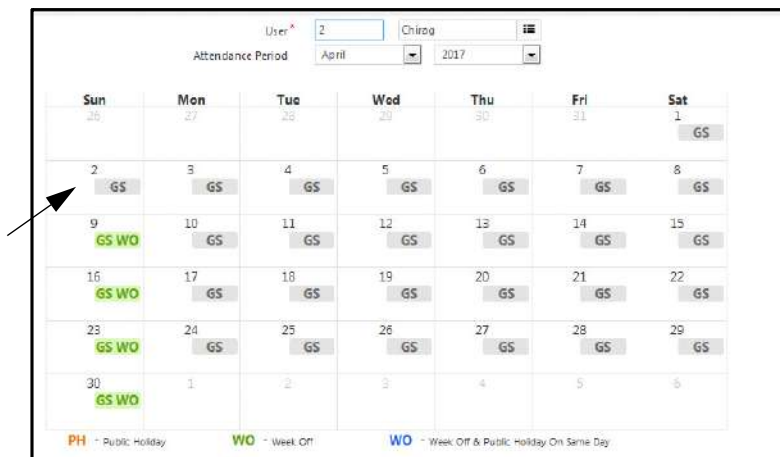
View Schedule

Change Schedule

04/01/2017 - 04/26/2017

Shifts	Days
GS	26
WO	3
PH	0
Leave	0
Tour	2

The Shift Schedule details appear.



User \* 2 Chirag  
Attendance Period April 2017

Sun	Mon	Tue	Wed	Thu	Fri	Sat
26	27	28	29	30	31	1 GS
2 GS	3 GS	4 GS	5 GS	6 GS	7 GS	8 GS
9 GS WO	10 GS	11 GS	12 GS	13 GS	14 GS	15 GS
16 GS WO	17 GS	18 GS	19 GS	20 GS	21 GS	22 GS
23 GS WO	24 GS	25 GS	26 GS	27 GS	28 GS	29 GS
30 GS WO	1	2	3	4	5	6

PH - Public Holiday WO - Week Off WO - Week Off & Public Holiday On Same Day

## Change Shift

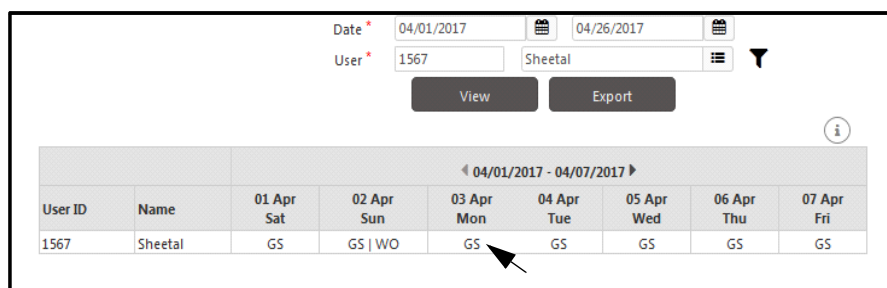
If Shift Changes done by On Behalf System Account User (Auto Approved check box disabled for Manage Shifts in Roles and Rights), Shift Change Applications will be sent to the RIC for approvals as well as to the SA. In this case the Shift will be visible in red and on hover the message "Shift Change Request pending for approval" will be displayed. Only after the verdict from the RIC (that is if the Shift Change application is approved) then the shift will be updated and the red color will not be visible. For Shift Change Application Approval and to know the status of the updated shift, refer to ["Shift Change Approval"](#).

If shifts have been changed from Attendance Correction or Manage Attendance and the verdict for the application is pending, then for the same date/date range the change request cannot be made from Manage Shifts. But if the verdict has been provided then for the same date/date range the request can be made.

If the shift changes are done by the SA then the Shift Changes will be auto-approved.

To change a shift,

Click on the shift assigned to the user which is to be changed.



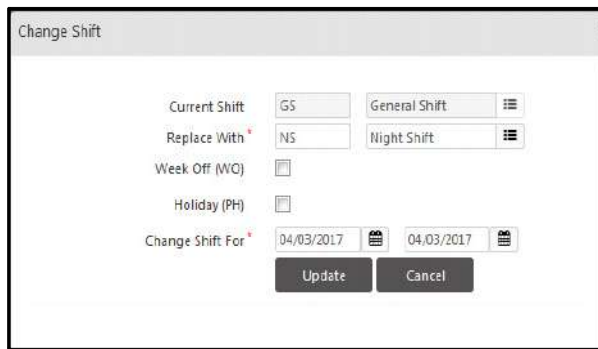
Date \* 04/01/2017 04/26/2017  
User \* 1567 Sheetal

View Export

04/01/2017 - 04/07/2017

User ID	Name	01 Apr Sat	02 Apr Sun	03 Apr Mon	04 Apr Tue	05 Apr Wed	06 Apr Thu	07 Apr Fri
1567	Sheetal	GS	GS   WO	GS	GS	GS	GS	GS

The **Change Shift** pop-up appears.



The 'Change Shift' pop-up form contains the following fields and controls:

- Current Shift:** A text box containing 'GS' and a 'General Shift' picklist button.
- Replace With:** A text box containing 'NS' and a 'Night Shift' picklist button.
- Week Off (WO):** A checkbox.
- Holiday (PH):** A checkbox.
- Change Shift For:** Two date pickers showing '04/03/2017'.
- Buttons:** 'Update' and 'Cancel' buttons at the bottom.

- **Current Shift:** This displays the current shift assigned to the user.
- **Replace With:** Click the picklist. The **Picklist For Shift Masters** pop-up appears. Click to select the desired shift. The current shift will be replaced with this shift.
- **WO/PH:** You can select the desired check box — Week-off or Holiday — to be assigned to the user.
- **Change Shift for:** The shift can be changed for a single day or multiple days by selecting the from and to dates.



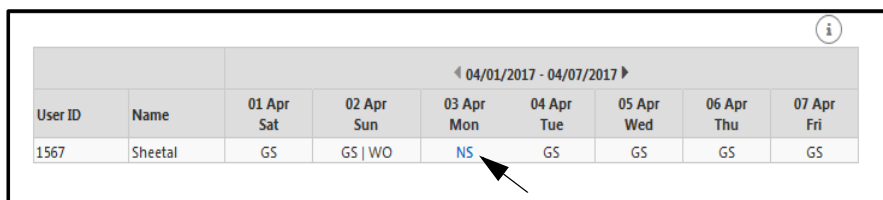
*The WO/PH will also be updated according to the date range selected and the change request will always be auto-approved.*

*If the shift is assigned for the selected date range, then a single Shift Change Application will be sent to the RIC.*

*If a Shift Change Application request is pending for approval and if On Behalf System Account User tries to update the shift for the same date, the system will not allow and an error message will be displayed: "Shift Change request already exist or overlaps with another existing entry for selected date range which is pending for approval".*

- Click **Update**.

Shift is changed from GS to NS.



The table displays a shift schedule for User ID 1567 (Sheetal) from 04/01/2017 to 04/07/2017. The selected date range is 04/01/2017 - 04/07/2017. The shift is changed from GS to NS on 03 Apr Mon.

User ID	Name	01 Apr Sat	02 Apr Sun	03 Apr Mon	04 Apr Tue	05 Apr Wed	06 Apr Thu	07 Apr Fri
1567	Sheetal	GS	GS   WO	NS	GS	GS	GS	GS

## View Schedule

To view the shift schedule of the user, click **Schedule Group** of the user and then select **View Schedule**.

Manage Shifts

Date: 04/01/2017 to 04/26/2017  
User: 2 Chirag  
View Export

User ID	Name	01 Apr Sat	02 Apr Sun	03 Apr Mon	04 Apr Tue	05 Apr Wed	06 Apr Thu	07 Apr Fri
2	Chirag	GS	GS	GS	GS	GS	GS	GS

Shift Schedule: GS - General S  
Starting Shift: GS - General S  
View Schedule  
Change Schedule

04/01/2017 - 04/26/2017

Shifts: GS  
Days: 26

WO: 3  
PH: 0  
Leave: 0  
Tour: 2

PH - Public Holiday WO - Week Off WO - Week Off & Public Holiday On Same Day

Monthly Shift Schedule

Apr 2017

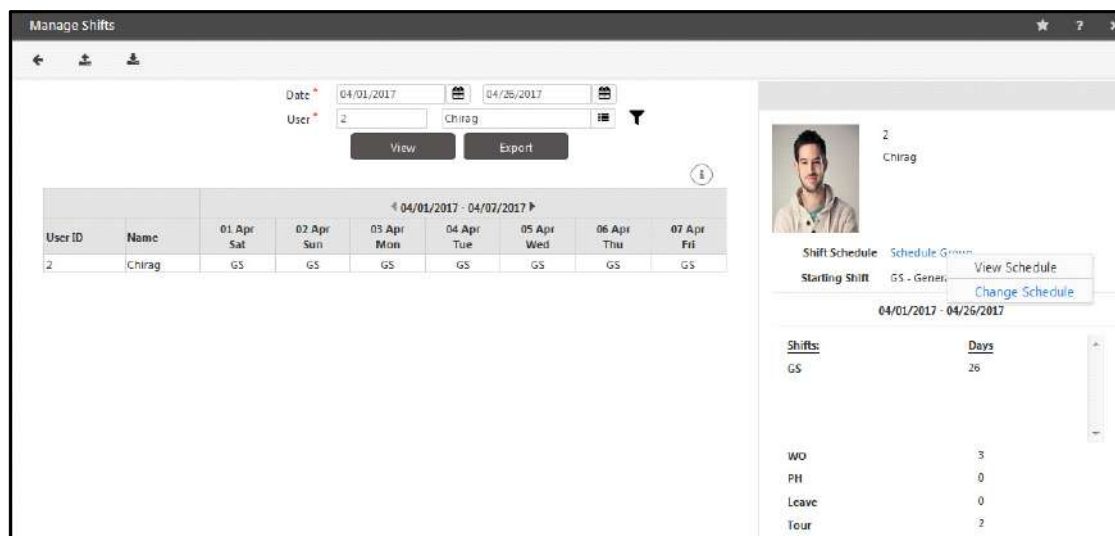
Sun	Mon	Tue	Wed	Thu	Fri	Sat
26	27	28	29	30	31	1 GS
2 GS	3 GS	4 GS	5 GS	6 GS	7 GS	8 GS
9 GS WO	10 GS	11 GS	12 GS	13 GS	14 GS	15 GS
16 GS WO	17 GS	18 GS	19 GS	20 GS	21 GS	22 GS
23 GS WO	24 GS	25 GS	26 GS	27 GS	28 GS	29 GS
30 GS WO	1	2	3	4	5	6

PH - Public Holiday WO - Week Off WO - Week Off & Public Holiday On Same Day



## Change Schedule

To change the schedule assigned to the user, click **Schedule Group** and then select **Change Schedule**.



The **Change Schedule** pop-up appears.

The 'Change Schedule' pop-up form contains the following fields and options:

- User:** 2, Chirag
- Change Type:** Temporary
- Change From:**
  - Existing Schedule: 1, Schedule Group
  - Start Shift: GS, General Shift
- Change To:**
  - New Schedule: 3, RnD Schedule
  - Start Shift: GS, General Shift
  - Attendance Period: 04/01/2017 to 04/28/2017
- Buttons:** Update, Cancel

- **User:** It displays the name of the selected user.
- **Change Type:** Select the desired type of change — Temporary, Permanent.

### Change From

- Displays the Existing Schedule and Start Shift details.

### Change To

You can make the changes by configuring the following:

- **New Schedule:** Click the picklist. The **Picklist For Schedule Group Masters** pop-up appears. Click to select the desired schedule. The existing schedule will be replaced with this schedule.
- **Start Shift:** Click the picklist. The **Picklist For Shifts of Shift Schedule** pop-up appears. Click to select the desired shift.
- **Attendance Period:** If you have selected **Temporary** as the **Change Type**, select the From and To date for which the schedule is to be changed.  
If you have selected **Permanent** as the **Change Type**, select the desired date.
- Click **Update** to change the schedule.

# Change Schedule

This option enables the HR user to change the currently effective Schedule Group for a user or multiple users to another Schedule Group. This becomes essential in cases where the employee needs to be temporarily or permanently moved to a new shift based on certain considerations. The system maintains a record of the previous Schedule Groups which had been assigned to the users.

To use the Change Schedule feature, select **Shift and Schedule module > Utilities > Change Schedule**. The page appears as shown below:

The screenshot shows the 'Change Schedule' form. At the top, there is a title bar with a back arrow and a star icon. Below the title bar, the form is divided into several sections. The first section contains a 'Change Type' dropdown menu set to 'Temporary'. Below this is a 'Date' section with 'From Date' and 'To Date' fields, each with a calendar icon. The 'Schedule' section has 'ID' and 'Name' fields, with a list icon next to the 'Name' field. The 'Start Shift' section has 'ID' and 'Name' fields, with a list icon next to the 'Name' field. Below these sections is a 'Preview' button. The second section contains a 'Select Users' dropdown menu set to 'User Wise'. Below this is a 'User' section with 'ID' and 'Name' fields, with a list icon next to the 'Name' field. At the bottom is an 'Apply' button.

**Change Type:** Select the Change Type which needs to be changed for the user from the drop down list. The options available are

- **Temporary:** For the Temporary change, click on the **Date** selection button and select the date range from the pop up calendar.
- **Permanent:** For the Permanent Change, only administrator can select the **Start Date**.

**Schedule:** Click on the Schedule Group Master Picklist button and select the **New Schedule Group** to which the user is to be assigned for this period.

**Start Shift:** Click on the Shift selection button and Select the Start Shift from which the new schedule is to be started.

The screenshot shows the 'Change Schedule' form with example data. The 'Change Type' dropdown is set to 'Temporary'. The 'Date' section has 'From Date' set to '02/01/2017' and 'To Date' set to '02/25/2017'. The 'Schedule' section has 'ID' set to '2' and 'Name' set to 'Schedule- EO'. The 'Start Shift' section has 'ID' set to '12' and 'Name' set to 'Early Out Shift'. Below these sections is a 'Preview' button. The second section contains a 'Select Users' dropdown menu set to 'User Wise'. Below this is a 'User' section with 'ID' and 'Name' fields, with a list icon next to the 'Name' field. At the bottom is an 'Apply' button.

**Select Users:** Select the User from the drop down list. The options to filter the user are:

- **User Wise:** It enables the administrator to randomly select users from the user Picklist.
- **Group Wise:** It enables the administrator to select all users belonging to a particular group.
- **All:** It enables the administrator to select all active users in the database.

Select the user by clicking on the box and Click on **Apply** to save the changes.

Change Schedule

Change Type: Temporary

Date: 02/01/2017 to 02/25/2017

Schedule: 2

Start Shift: 12

Preview

Select Users: Group Wise

Select Group: Organization

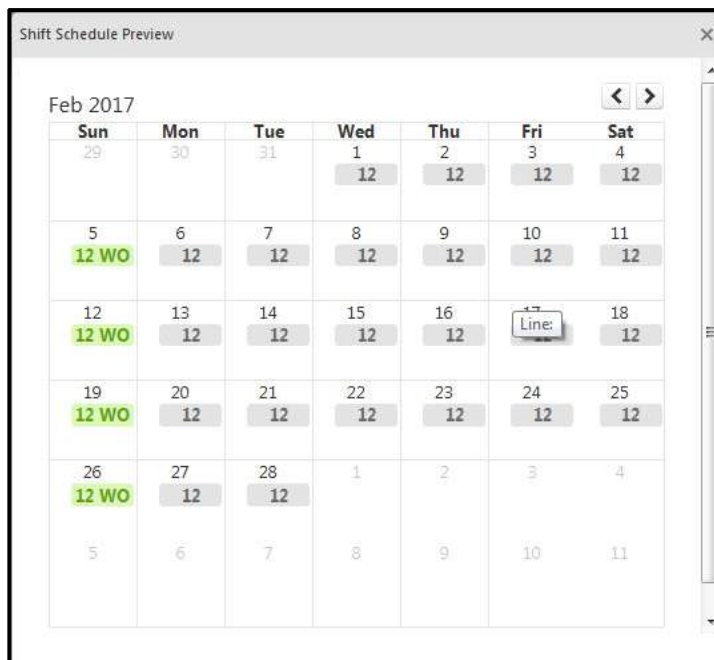
Organization: ID, Name

Search

ID	Name	Group
1	Organization-1	Organization

Apply

The user can also view a graphical representation of the schedule in the case of a single user by clicking on the **Preview** button.



Thus, for the selected users, the shift schedule will be changed either temporary or permanent for the defined time period.

# Change Week-Off

This functionality enables the administrator to swap a week off day as and when required. This is normally used when an employee or group of employees work on a week off and have to be given an off day on another day of the week.

To use the Change Week-off feature, select **Shifts and Schedule > Utilities > Change Week-off**. The page appears as shown below:

The screenshot shows the 'Change Week-Off' form. It has a title bar with a back arrow and a star icon. The form contains two date selection fields: 'Current Week-Off Date' with the value '16/04/2017' and 'New Week-Off Date' with the value '17/04/2017'. Below these is a 'Select Users' dropdown menu set to 'User Wise'. Underneath is a 'User' section with 'ID' and 'Name' input fields. At the bottom is an 'Apply' button.

**Current Week-Off Date:** Select the current weekoff date from the date selection button which is required to be changed.

**New Week-Off Date:** Select the new weekoff date from the date selection button to replace the current weekoff date.

**User Filter:** Select the user from the filter options of User Wise, Group Wise or All. The options to filter the user are:

- **User Wise:** Enables administrator to randomly select users from the user Picklist window.
- **Select Group:** Enables the administrator to select all users belonging to a particular group.
- **All:** Enables administrator to select all active users in the database.

This screenshot shows the 'Change Week-Off' form with a list of users. It includes a search bar with the text 'Search'. Below the search bar is a table with columns 'User ID', 'Name', and a delete icon. The table contains one entry: User ID '03' and Name 'Arushi'. At the bottom is an 'Apply' button.

User ID	Name	
03	Arushi	

Click on **Apply** to change the week-off.

The Week-off on 16th will be changed to 17th as shown below.

User \*

03

Arushi

Attendance Period

April

2017

Sun	Mon	Tue	Wed	Thu	Fri	Sat
26	27	28	29	30	31	1 GS
2 GS WO	3 GS PH	4 GS	5 GS	6 GS	7 GS	8 D2
9 GS WO	10 PP WO	11 GS	12 GS	13 GS	14 GS	15 GS
16 GS	17 GS WO	18 GS	19 GS	20 GS	21 GS	22 GS
23 GS WO	24 GS	25 GS	26 GS	27 GS	28 GS	29 GS
30 GS WO	1	2	3	4	5	6

PH - Public Holiday

WO - Week Off

WO - Week Off & Public Holiday On Same Day

# Sync Change to Device

Sync Change to Device is a feature which is used to manually send and update the shift schedule(Exceptions list) on the devices with shift based access control feature.

To use the Sync Schedule change to Device feature, Click on **Shift and Schedule > Utilities > Sync Change to Device**. The page appears as shown below:

The screenshot shows a web application window titled "Sync Schedule Change To Device". It features a navigation bar with a back arrow. The main form contains several input fields and dropdown menus: "Schedule Date" with a calendar icon, "Device Filter" set to "Randomly", "Device" with "ID" and "Name" sub-fields, "Sync Type" set to "Only Exceptions", "User Filter" (a blue link), "Select Users" set to "User Wise", and "User" with "ID" and "Name" sub-fields. A "Sync" button is located at the bottom center.

**Schedule Date:** Select the current or future date from the calendar whose updated schedule is to be synchronized to the device.

**Device Filter:** Select the device filter as **Randomly** or **All** on which the changed schedule is to be synchronized.

**Device:** For Randomly option click the picklist and select the Panel200 to sync the change to the respective Panel doors. For All option, all the Panel200 will be selected.

**Sync Type:** Select the Sync type options to synchronize the change to device.

- **Only Exceptions:** An exception record for the particular changed schedule i.e. the shift schedule change for a particular day will be generated and sent to the device.
- **All Shifts:** An exception record for all the selected user will be generated and sent to the device irrespective of any particular shift change.

The exception record will be generated only if the corresponding user has shift based access enabled and at least one Panel200 assigned to the user

Schedule Date\* 04/14/2017

Device Filter Randomly

Device\* ID Name

Sync Type Only Exceptions

User Filter

Select Users User Wise

User\* ID Name

Search

User ID	Name
07	Aditi
101	Khushbu

Sync

**User Filter:** Select the User from the drop down list for whom the shift schedule exceptions are to be synced to the device. The options to filter the user are:

- **Use Wise:** Enables administrator to randomly select users from the user Picklist window.
- **Group Wise:** Enables the administrator to select all users belonging to a particular group.
- **All:** Enables administrator to select all active users in the database.

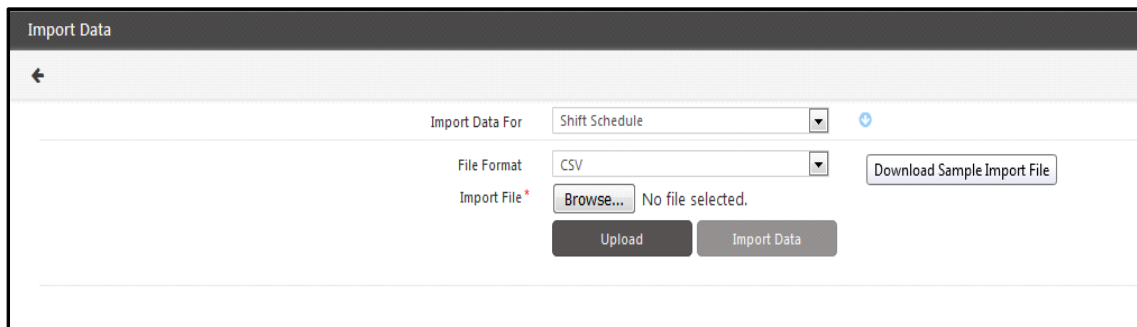
Select the user and Click on **Sync** to send the changes to the device.



# Manual Schedule Import

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To Import the Manual Schedule, select **Shifts and Schedules > Utilities > Manual Schedule Import**. The page appears as shown below:



The screenshot shows a web form titled "Import Data". It has a back arrow icon in the top left. The form contains the following fields and buttons:

- Import Data For:** A dropdown menu with "Shift Schedule" selected and a blue plus icon to its right.
- File Format:** A dropdown menu with "CSV" selected.
- Download Sample Import File:** A button to the right of the File Format dropdown.
- Import File:** A label followed by a "Browse..." button and the text "No file selected."
- Upload:** A button below the "Import File" section.
- Import Data:** A button to the right of the "Upload" button.



*If in Admin Module > System Accounts > Roles and Rights Configuration > Shift and Schedules Module > Utilities > Page Rights - Manual Schedule Import, if Auto Approve check box is disabled, and if you are Importing data for Shift Schedule with changes in shifts for users, then the Shift Change Applications will be sent to the RIC for approval.*

*Shifts are changed from multiple locations, then in such cases the last approved shift change will be taken into consideration. To know more refer to ["Shift Change Application/Approval"](#).*

**Import Data For:** The Data is to be imported for Shift Schedule by default

You can download the sample import file and enter the data for Shift and Schedules. Then the updated file can be imported here.

**File Format** - Select the format for the file to be imported. The options available are XLS or CSV.

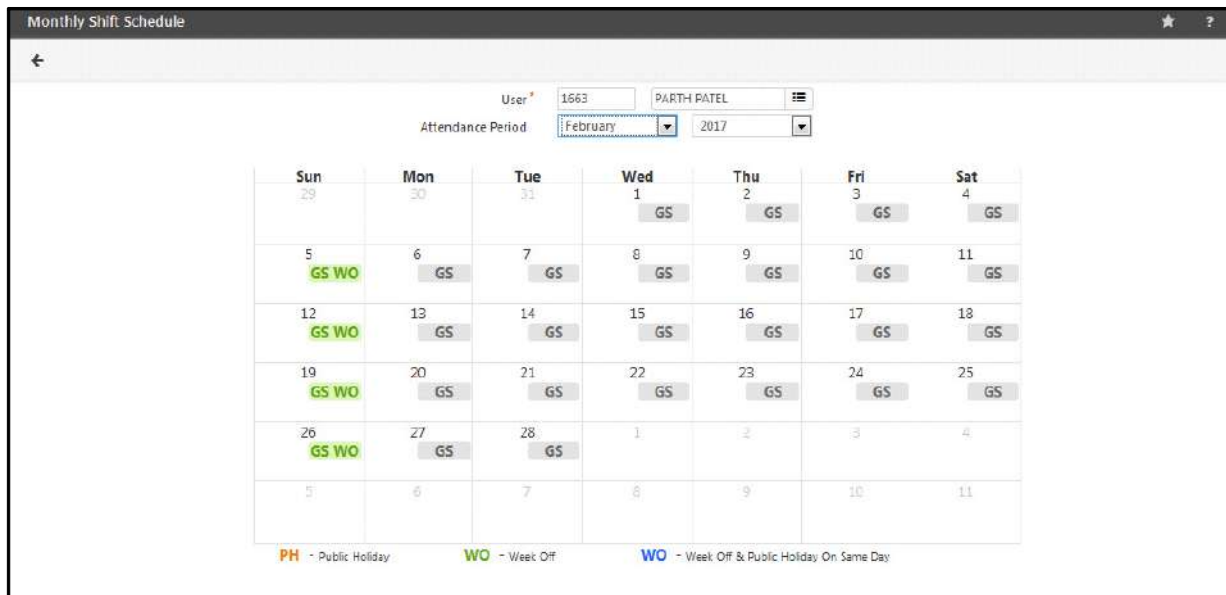
**Import File** - Browse the path of the file and select the file from which the data is to be imported.

Click **Upload** button to save the file. The **Preview Data** button enables the administrator to view the data in the respective worksheets to confirm that the data is in order prior to giving the import command.

Click on **Import Data** to start the import of data.

# Monthly Shift Schedule

To view the monthly shift schedule assigned to the user, Click on **Monthly Shift Schedule** option under **Utilities** from the Shifts and Schedule page. The page appears as shown below:



Monthly Shift Schedule

User: 1663 PARTH PATEL

Attendance Period: February 2017

Sun	Mon	Tue	Wed	Thu	Fri	Sat
29	30	31	1 GS	2 GS	3 GS	4 GS
5 GS WO	6 GS	7 GS	8 GS	9 GS	10 GS	11 GS
12 GS WO	13 GS	14 GS	15 GS	16 GS	17 GS	18 GS
19 GS WO	20 GS	21 GS	22 GS	23 GS	24 GS	25 GS
26 GS WO	27 GS	28 GS	1	2	3	4
5	6	7	8	9	10	11

PH - Public Holiday WO - Week Off WO - Week Off & Public Holiday On Same Day

**User:** Select the user from the picklist whose shift schedule is to be viewed.

**Attendance Period** - Select the month and year for which the schedule is to be viewed.

The shift details for the selected user is shown in the grid as shown above. The week-off is shown by green colour. The other colour codes are mentioned below the grid.



The Shift Schedule is assigned to the user from **Shift and Schedules> Process> Monthly Schedule**.

# Shift Change Application/Approval

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Shifts can be changed from:

- **Shift Change Application:** When shifts are changed from this page then Shift Change Application requests will be generated only if the Auto Approve check box is disabled. For details, refer to [“Shift Change Application”](#).
- **Manage Shift:** When shifts are changed from this page then Shift Change Application requests will be generated only if the Auto Approve check box is disabled. For details, refer to [“Manage Shift”](#).
- **Manage Attendance:** When shifts are changed from this page then Shift Change Application requests will not be generated. For details, refer to [“Manage Attendance”](#).
- **Attendance Correction Application:** When shifts are changed from this page then Shift Change Application requests will not be generated, however Attendance Correction requests will be generated. For details, refer to [“Attendance Correction”](#).
- **Import** from:
  - Admin Module > System Utilities > Import Data > Import Data For (Shift Schedule)
  - Shift and Schedules Module > Utilities > Manual Schedule Import
  - In Shift and Schedules Module > Utilities > Manage Shift > Import > Change Shift with Import File

From Import the Shift Change Application requests will be generated only if the Auto Approve check box of the respective page is disabled. For details, refer to [“Importing Data”](#), [“Manual Schedule Import”](#) and [“Manage Shift”](#).

- **COSEC Integrate:** Shifts can be changes done from Integrate, but no Shift Change Application will be generated.
- **Shift Change API:** Shifts can be changed by SA as well as ESS User using API. However, Shift Change Application requests will only be generated when the ESS User changes shifts using API. For details, refer to the WEB API V2.0 Guide.



*If Shifts are changed from multiple places, then in such cases the last approved shift change request will be taken into consideration.*

## Shift Change Application

Shift Change Application is a formal mode of requesting a change in shift. It enables an organization to keep a track of all requested and approved Shift Changes and enables the HR administrator or reporting in-charge to address issues such as handling work overload, shortage of resources in a shift etc.

The Shift Change applications can be made by:

- System Account User
- On Behalf System Account User
- Using the ESS Self Service Module

COSEC Web enables all System Account users with appropriate page rights to make Shift Change applications using the Shifts and Schedules module. All applications made by the System Account user are pre-approved by default.

COSEC Web also enables all On Behalf System Account User with appropriate page rights to make Shift Change applications using the *Shift and Schedule* module. If you wish to send all the applications made by the On Behalf System Account User for approval, make sure you have disabled the **Auto Approve** check box for Shift Change Application page in the Roles and Rights assigned. For creating and assigning the roles and rights to the On Behalf System Account User. Refer to [“On Behalf System Account User”](#). To receive a notification alert once the final verdict for such application is provided by RIC, make sure you have configured the desired Mobile Number/Email ID in [“Optional”](#) as well as configure the Shift Change Alert parameters. For details refer to [“Configuring Alert Messages”](#).

For Shift Change Applications can be applied using the *Employee Self Service* login, the Shift Change Application approvals/rejections have to be done by the respective supervisors of the reporting group by logging into their ESS login. However, such applications can also be approved by the System Account user from the *Shift and Schedule* module of the COSEC Web Application.



*For SA users, make sure you have enabled Shift Change Application page Rights from Admin> System Accounts> Role and Rights Configuration and have disabled the Auto Approve check box. For details, refer to [“Roles and Rights Configuration”](#).*

*For Approvals of Shift Change Applications, makes sure you have enabled Shift Change Approval page Rights from Admin> System Accounts> Role and Rights Configuration. For details, refer to [“Roles and Rights Configuration”](#).*

*For ESS users, make sure you have enabled Shift Change Application page in ESS Rights from Users> Utilities> ESS Role Rights and for the RIC in In-Charge Permission, Shift Change Approval is enabled. For details refer to [“ESS Role Rights”](#) and [“In-Charge Permissions”](#)*

The authorization is dependent on the number of Reporting In-charge in the Reporting Group, the Authorization Mode as well as the Approval Policy assigned by the system administrator. For details refer to [“Reporting In-Charge”](#), [“Approval Policy”](#) and [“Configuring Users”](#).

For Shift Change Application Approvals, refer to [“Shift Change Approval”](#).

When the shifts are changed, alerts can be triggered, if configured:

- Shift Change Application alert when there is an application for shift change. For this alert, in Alert Message Configuration, select the **Alert Filter** as Time and Attendance and **Event** as Shift Change Application.
- Shift Change alert after the verdict is given by RIC, that is the Shift Change Application is approved and the shift is updated. For this alert, in Alert Message Configuration, select the **Alert Filter** as Time and Attendance and **Event** as Shift Change.

The ESS Users will also receive ESS Notifications when the final verdict for the application is provided.

- If the verdict for the Shift Change Application is pending then the Pending Applications For Approval Alert will include the count of these applications also.

For details refer to [“Configuring Alert Messages”](#).

## Applying for a Shift Change Application

This section describes how to apply for a Shift Change Application using the Shifts and Schedules module.

To apply for a Shift Change, click on **Shifts and Schedules Module > Application/Approval > Shift Change Application** and the following screen appears.

The page displays configurations on the left side and in the right grid the Shift Change Application details of a particular user for a particular month. It also displays the total number of Pending, Approved as well as Rejected Applications.

To apply for a Shift Change, click **New**  and configure the following parameters:

- **User:** Click the picklist. The **Picklist For User** pop-up appears.  
Click to select the desired user for whom the Shift Change application is to be made.
- **Change Shift For:** The Shift Change application can be made for a single day or for multiple days.

If you wish to change the shift of a particular day, select the same date in From and To.

If you wish to change the shift for multiple days, in To select the date from which you wish to start and in From select the end date. The shift will be changed for all the dates.

- **Replace Shift With:** Click the picklist. The **Picklist For Shift Masters** pop-up appears.

The screenshot shows the 'Shift Change Application' window. It has a header with navigation icons. Below, there are two 'User' fields, both containing 'User1'. A 'Change Shift For' field shows the date '2024/04/10'. A 'Replace Shift With' field shows 'MS'. At the bottom are 'Submit' and 'Cancel' buttons.

Click to select the desired shift with which you wish to replace the existing shift.

- Click **Submit**.



*If shifts have been changed from Manage Shifts and the verdict for the application is pending, then for the same date/date range the change request cannot be made from Shift Change Application. But if the verdict has been provided then for the same date/date range the request can be made.*

Once the Shift Change Application request has been made and the verdict is pending, then the same appears in red in Mange Shifts and on hover a message “Shift Change Request pending for approval” is displayed. After the verdict has been provided, that is approved the shift is updated and the red color changes to black. If rejected then the shift is not updated and the color changes to black. For details, refer to [“Manage Shift”](#).

The applied Shift Change Application appears in the right grid.

The screenshot shows the 'Shift Change Application' window with a split view. The left pane contains the application form. The right pane shows a list of applications. At the top of the right pane, there are tabs for 'Mar 2024' and 'May 2024'. Below them is a summary bar with counts: 1 Pending, 2 Approved, 1 Rejected. A 'Show All' link is present. The main table lists applications with columns: From, To, New Shift, Application Date, Status, and Approval Details.

From	To	New Shift	Application Date	Status	Approval Details
2024/04/15	2024/04/15	NS - 22:00 - 07:00	2024/04/22	Pending	
2024/04/12	2024/04/12	NS - 22:00 - 07:00	2024/04/22	Rejected	
2024/04/11	2024/04/11	MS - 01:00 - 10:00	2024/04/22	Approved	
2024/04/10	2024/04/10	MS - 01:00 - 10:00	2024/04/22	Approved	

From this page you can also view the details of the Shift Change Applications which have been applied for from the ESS module, once they get approved or rejected.

Shift Chang Applications applied by the SA will always be auto-approved.

To view the Shift Change Application approved details, select a the desired Shift Change Application from the grid on the right grid and the data will be displayed in the left grid.

Shift Change Application

User \*

User1

User1

Change Shift For \*

2024/04/10

2024/04/10

Replace Shift With \*

MS

Morning Shift

Mar 2024

May 2024

1

2

1

Pending

Approved

Rejected

Application Details

Show All

From	To	New Shift	Application Date	Status	Approval Details
2024/04/15	2024/04/15	NS- 22:00 - 07:00	2024/04/22		
2024/04/12	2024/04/12	NS- 22:00 - 07:00	2024/04/22		
2024/04/11	2024/04/11	MS- 01:00 - 10:00	2024/04/22		
2024/04/10	2024/04/10	MS- 01:00 - 10:00	2024/04/22		

Click **Details** from the right grid to view the Approval Details of the Shift Change Applications.

Mar 2024

May 2024

1

2

1

Pending

Approved

Rejected

Application Details

Show All

From	To	New Shift	Application Date	Status	Approval Details
2024/04/15	2024/04/15	NS- 22:00 - 07:00	2024/04/22		
2024/04/12	2024/04/12	NS- 22:00 - 07:00	2024/04/22		
2024/04/11	2024/04/11	MS- 01:00 - 10:00	2024/04/22		
2024/04/10	2024/04/10	MS- 01:00 - 10:00	2024/04/22		

**Approval Details** window appears as shown below:

The image shows three overlapping screenshots of the 'Shift Change Details' window, illustrating the 'Approval Details' section in different states.

**Top Screenshot (Pending):**

- Application Details:** Application Date: 2024/04/22
- Shift Change Date:** 2024/04/15
- Previous Shift:** GS - 09:00 - 18:00
- New Shift:** NS - 22:00 - 07:00
- Approval Details:** Pending (⌚ icon)
- Incharge:** RIC - RIC
- Status:** Pending (⌚ icon)
- Remark:**

**Middle Screenshot (Approved):**

- Approval Details:** Approved (✅ icon)
- Incharge:** RIC - RIC
- Status:** Approved (2024/04/22 15:59) (✅ icon)
- Remark:** Approved Shift Change

**Bottom Screenshot (Rejected):**

- Approval Details:** Rejected (❌ icon)
- Incharge:** RIC - RIC
- Status:** Rejected (2024/04/22 15:59) (❌ icon)
- Remark:** Rejected Shift Change

It displays the status of the application under **Approval Details**, that is, whether it is — pending, approved or rejected.

The application's status is displayed in the **Status** column as Pending ⌚ , Approved ✅ or Rejected ❌ .

**Remark** displays the comments provided by the Admin/ RIC/ System.

System can auto approve / reject an application if the Reporting In-charge or SA fails to authorize it as per the Approval Policy assigned to the Reporting Groups. To know more about the Approval Policy, refer [“Approval Policy”](#).



## Shift Change Approval

The Shift Change Application requests will be sent for authorization. The authorization is dependent on the number of Reporting In-charge in the Reporting Group, the Authorization Mode as well as the Approval Policy assigned by the system administrator. For details refer to [“Reporting In-Charge”](#), [“Approval Policy”](#) and [“Configuring Users”](#).



*Shift Change Applications by System Account user will always be auto-approved.*

*Shift Change Applications by On Behalf System Account user will be sent to the respective Reporting Group In-charges for approval. These can be approved by the RIC from their ESS application.*

*Shift Change Applications by users from their ESS application are also sent to their respective Reporting Group In-charges for approval. These can be approved by the RIC from their ESS application.*

*For Approvals, makes sure you have enabled Shift Change Approval page Rights from Admin> System Accounts> Role and Rights Configuration. For details, refer to [“Roles and Rights Configuration”](#).*

*For Approvals by RIC, makes sure in In-Charge Permission, Shift Change Approval check box is enabled. For details refer to [“ESS Role Rights”](#) and [“In-Charge Permissions”](#)*

SA will be able to view all the Shift Change Application requests from this page and if required these can also be approved by the SA.

To view/authorize Shift Change Application requests, click **Shifts and Schedules > Authorization/Approval > Shift Change Approval**.

The **Shift Change Approval** page appears as follows:

You can either:

- view all the Shift Change applications pending for approval, refer to [“All Pending Applications”](#).
- set the filters — Date, Filter Users — to view the desired applications, refer to [“Applications according to Set Filters”](#).

### All Pending Applications

To view only Pending Applications,

- **Show All Pending Applications:** By default this option is selected.
- Click the **Pending** collapsible panel. All the applications in pending state appear.

To approve the application, select the **Approve** check box of the desired entry.

To reject the application, select the **Reject** check box of the desired entry.

To know more refer to [“Pending Applications”](#).



*The population on this page depends on the server's database. It might take time to load all pending applications.*

## Applications according to Set Filters

To Set the Filters according to which you wish the applications,

- **Date:** Select this option to enable the date filter. Select the start and end dates by clicking the respective date selection buttons. This defines the period for which Shift Change Applications are to be viewed. The end date is by default set to the current date and authorization is not allowed for any later date.
- **Filter Users:** You can filter records according to the desired Enterprise Group, All or for an Individual.

Select **All**, to view authorization status of the applications of all the active users on the system.

Select **Individual**, to view authorization status of the applications of a single user. Click the picklist to select the desired User ID/Name.

Select the desired Enterprise Group — Organization, Branch, Department, Section, Category, Grade, Designation, Custom Group1/2/3 and then click the picklist to select the desired group's ID/Name, to view authorization status of these applications.

Click **View** to view all pending, approved and rejected Shift Change Applications and their details.

## Pending Applications

Click the **Pending** collapsible panel.

The **Pending** section lists all the Shift Change Applications from users/On Behalf System Account User waiting to be sanctioned by the System Administrator/RIC as shown.


Pending (1)									
Search									
User ID	User Name	Application Date	From Date	To Date	New Shift	Approve	Reject	Remark	Details
User1	User1	2024/04/22	2024/04/15	2024/04/15	NS - 22:00 - 07:00	<input type="checkbox"/>	<input type="checkbox"/>		

When any application is in the Pending state it can be authorized by the System Admin or RIC.

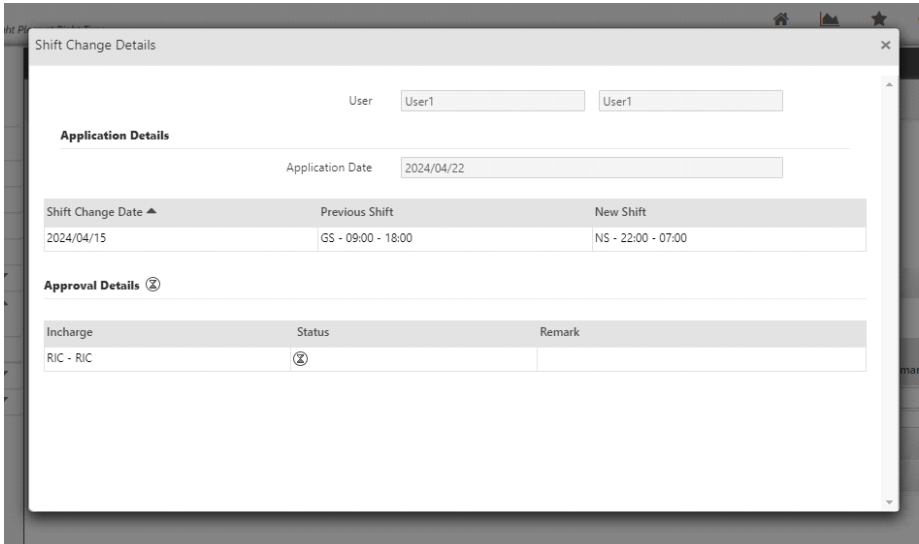
- To approve/reject applications selectively, click the respective application check box against the user.
- To approve/reject all the applications simultaneously, click the Approve/Reject check box in the header column.

Once the applications are approved/ rejected, the record will be moved from the **Pending** section to the **Approved/ Rejected** section respectively.

The default **Remark** for the Approved and Rejected application will appear in the respective fields. You can enter your Remark while authorizing the application.

Click **Details**  to view the Shift Change details of the corresponding user.

**Shift Change Details** window appears.



Under **Application Details**, it displays the Shift Change Application details — Application Date, Shift Change Date, Previous Shift, New Shift under Application Details.

Under **Approval Details**, it displays the status of user’s Shift Change Application. The application’s status is displayed in the **Status** column.

System can auto approve / reject an application if the Reporting In-charge (RIC) or SA fails to authorize it as per the Approval Policy assigned to the Reporting Groups. To know more about the Approval Policy, refer [“Approval Policy”](#).


**Remarks** displays the comments provided by the Admin/ RIC/ System.


Click **Save** to save the authorization.

**Approved Applications**

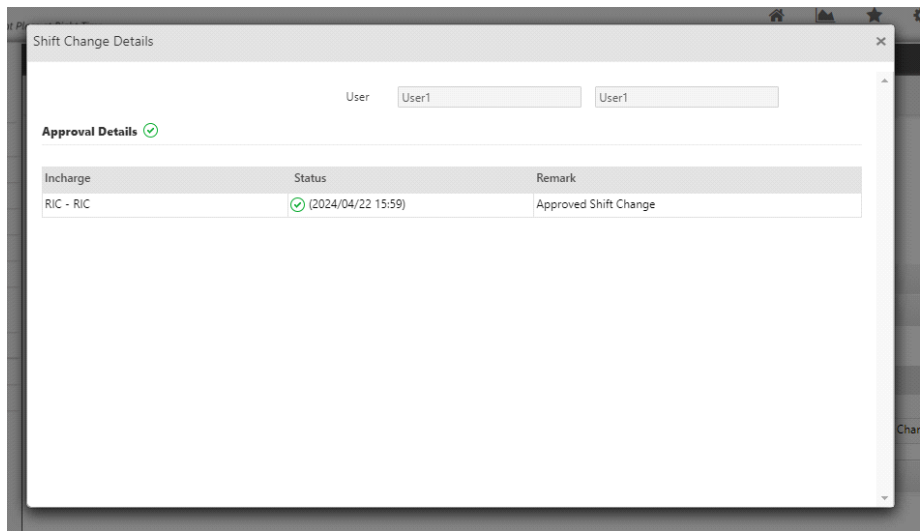
Click the **Approved** collapsible panel.

The **Approved** section displays all the Shift Change Applications that have been approved by the RIC or the System Administrator. The following screen displays the **Approved** section.

Approved (2)							
Search							
User ID	User Name	Application Date	From Date	To Date	New Shift	Remark	Details
User1	User1	2024/04/22	2024/04/10	2024/04/10	MS - 01:00 - 10:00		
User1	User1	2024/04/22	2024/04/11	2024/04/11	MS - 01:00 - 10:00	Approved Shift Change	

Click **Details**  to view the Shift Change details of the corresponding user.

**Shift Change Details** window appears.



Under **Approval Details**, it displays the status of user's Shift Change Application. The application's status is displayed in the **Status** column.

System can auto approve / reject an application if the Reporting In-charge (RIC) or SA fails to authorize it as per the Approval Policy assigned to the Reporting Groups. To know more about the Approval Policy, refer ["Approval Policy"](#).

**Remarks** displays the comments provided by the Admin/ RIC/ System.

### Rejected Applications

Click the **Rejected** collapsible panel.

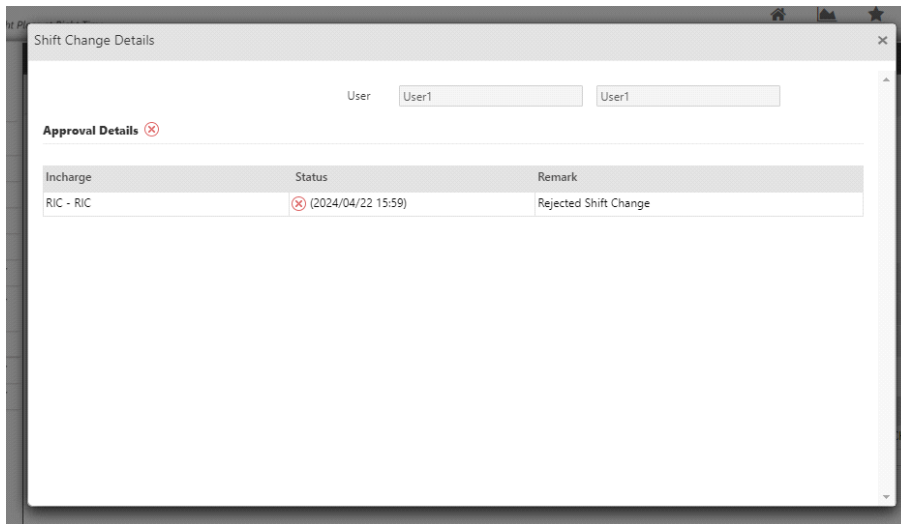
This section lists all Shift Change Application that have been rejected. The following screen is an example of an **Rejected** list of Shift Change Application requests for a specific date range:



User ID	User Name	Application Date	From Date	To Date	New Shift	Remark	Details
User1	User1	2024/04/22	2024/04/12	2024/04/12	NS - 22:00 - 07:00	Rejected Shift Change	

Click **Details**  to view the Shift Change details of the corresponding user.

**Shift Change Details** window appears.



Under **Approval Details**, it displays the status of user's Shift Change Application. The application's status is displayed in the **Status** column.

System can auto approve / reject an application if the Reporting In-charge (RIC) or SA fails to authorize it as per the Approval Policy assigned to the Reporting Groups. To know more about the Approval Policy, refer ["Approval Policy"](#).

**Remarks** displays the comments provided by the Admin/ RIC/ System.

# Monthly Schedule

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Shift Schedule generation for the month will create data for each day of the month for all users. Apart from the shift it will also mark weekly offs and holidays applicable to the users during the month. This process assigns shift for each day of the month as per the schedule group allotted to user. This process needs to be run at the end of the previous calendar month.

To use the Monthly Schedule Process, Select **Shifts and Schedule > Process > Monthly Schedule**. The page appears as shown below:

The screenshot shows the 'Monthly Schedule' process interface. At the top, there's a title bar 'Monthly Schedule'. Below it, a navigation bar with a back arrow. The main form area contains several sections: 'Month-Year' with dropdowns for 'May' and '2017'; 'Overwrite Existing Schedule' with a checkbox; 'Select Users' with a dropdown set to 'User Wise'; and a 'User \*' section with 'ID' and 'Name' input fields. Below these is a search bar. A table lists users with columns 'User ID' and 'Name'. One user is listed: '1320' and 'SHRUTI SAGAR PATKI'. There are delete icons for each user. At the bottom center is a 'Process' button.

User ID	Name
1320	SHRUTI SAGAR PATKI

**Month-Year:** Select the month and the year for which the process is to be run.

**Overwrite Existing Schedule:** Check the box to overwrite the shift schedule data already generated by an earlier process.

**User Filter:** Select the User from the drop down list. The options to filter the user are:

- **User Wise:** Enables administrator to randomly select users from the user Picklist window.
- **Select Group:** Enables the administrator to select all users belonging to a particular group.
- **All:** Enables administrator to select all active users in the database.

Select the user and Click on the **Process** button to start the process of Schedule Generation. The system starts processing the data and displays the process completion status.

*Example:* Suppose the current shift schedule for the user Aditi has GS shift as shown below.

Monthly Shift Schedule

User\* 1687 Aditi Gupta

Attendance Period May 2017

Sun	Mon	Tue	Wed	Thu	Fri	Sat
30	1 GS	2 GS	3 GS	4 GS	5 GS	6 GS
7 GS WO	8 RS	9 GS	10 GS	11 GS	12 GS	13 GS
14 GS WO	15 GS	16 GS	17 GS	18 GS	19 GS	20 GS
21 GS WO	22 GS	23 GS	24 GS	25 GS	26 GS	27 GS
28 GS WO	29 GS	30 GS	31 GS	1	2	3
4	5	6	7	8	9	10

PH - Public Holiday WO - Week Off WO - Week Off & Public Holiday On Same Day

Now the new schedule with NS shift is assigned to the user. So it must be processed again with “Overtime Existing Schedule” enabled.

Monthly Schedule

Process Completed.

Month-Year May 2017

Overwrite Existing Schedule ☒

Select Users User Wise

User\* ID Name

Search

User ID	Name
1687	Aditi Gupta

Process

After the successful process, the schedule will be updated as shown below:

Monthly Shift Schedule

User\* 1687 Aditi Gupta

Attendance Period May 2017

Sun	Mon	Tue	Wed	Thu	Fri	Sat
30	1 NS PH	2 NS PH	3 NS	4 NS	5 NS	6 NS
7 NS WO	8 NS	9 NS	10 NS	11 NS	12 NS	13 NS
14 NS WO	15 NS	16 NS	17 NS	18 NS	19 NS	20 NS
21 NS WO	22 NS	23 NS	24 NS	25 NS	26 NS	27 NS
28 NS WO	29 NS	30 NS	31 NS	1	2	3
4	5	6	7	8	9	10

PH - Public Holiday WO - Week Off WO - Week Off & Public Holiday On Same Day

# Shifts & Schedule Reports

These reports are available only with the Access Control or the Time and Attendance modules. Reports available under this option are as follows.

[“Shifts”](#)

[“Schedule Groups”](#)

[“Holiday Schedules”](#)

[“Shift Schedules”](#)

[“Week-Off Change”](#)

## Shifts

This report provides a list of the shifts as defined in the system along with their configuration parameters.

Sample Report



The screenshot shows a web application window titled "Shifts". Inside, there's a header for "MATRIX COMSEC PVT. LTD." and "Shifts". It indicates the report was run by "System Admin" on "05/23/2023" at "20:35". The table lists shifts with columns: Sr No, ID, Name, Start, End, BreakStart, Break End, Full Day, and Half Day. The data includes shifts like SE Support Evening, SF Saturday First, SN Support Night, SS Saturday 0900-1330, SU Support US, TS 1100 to 1930, U1 USA 1820-0300, U2 US 17.30-02.30, and U3 USA 14.30-00.00.

Sr No	ID	Name	Start	End	BreakStart	Break End	Full Day	Half Day
52	SE	Support Evening	18:00	03:30	20:30	21:00	09:00	04:30
53	SF	Saturday First	14:10	18:30			04:20	00:30
54	SN	Support Night	23:30	09:00	03:00	03:30	09:00	04:30
55	SS	Saturday 0900-1330	09:00	13:30			04:20	00:30
56	SU	Support US	20:00	05:00			09:00	04:30
57	TS	1100 to 1930	11:00	19:30			08:30	04:15
58	U1	USA 1820-0300	18:20	03:00			08:40	04:20
59	U2	US 17.30-02.30	17:30	02:30	22:00	22:30	09:00	04:30
60	U3	USA 14.30-00.00	14:30	00:00	17:00	17:30	09:00	04:30

## Schedule Groups

This report provides a list of the defined schedule groups along with the details of the member shifts.

Sample Report



The screenshot shows a web application window titled "Schedule Groups". Inside, there's a header for "MATRIX COMSEC PVT. LTD." and "Schedule Groups". It indicates the report was run by "System Admin" on "05/23/2023" at "20:38". The table lists schedule groups with columns: ID, Name, Shift, Shift Start, Shift End, Break Start, Break End, Shift Count, Off Day 1, and Off Day 2. The data includes groups like 1 HO Rnd ShiftSch, 2 HO Rnd Guards, 3 MUSEM SCH, 4 JASWANT SCH, 5 SWEEPERS SCH, 6 HOUSE KEPIN SCH, 7 Security Guards, 8 Rnd Guards, 9 Support Evening, 10 Consultant Sch, 11 Support Night, 12 Satish sch 2, 13 Field Employees, and 14 Europe1230-.

ID	Name	Shift	Shift Start	Shift End	Break Start	Break End	Shift Count	Off Day 1	Off Day 2
1	HO Rnd ShiftSch	G8	09:00	18:30	13:00	13:30	10	Sunday	None
2	HO Rnd Guards	M1	08:30	18:00	13:00	13:30	9	Sunday	None
3	MUSEM SCH	M2	08:30	18:00	13:00	13:30	20	Sunday	None
4	JASWANT SCH	S1	06:00	20:00			7	Sunday	None
5	SWEEPERS SCH	S2	20:00	08:00			7	Sunday	None
6	HOUSE KEPIN SCH	G1	10:00	19:30	13:00	13:50	7	Sunday	None
7	Security Guards	G3	08:00	17:30	12:00	12:50	7	Sunday	None
8	Rnd Guards	G4	07:30	19:00			7	Sunday	None
9	Support Evening	G5	07:30	16:30	13:00	13:50	7	Sunday	None
10	Consultant Sch	H8	09:30	18:30			7	Sunday	None
11	Support Night	S3	07:00	15:00			7	Sunday	None
12	Satish sch 2	S4	15:00	23:00			7	Sunday	None
13	Field Employees	S5	23:00	07:00			7	Sunday	None
14	Europe1230-	S1	08:00	20:00			7	Sunday	None



## Holiday Schedules

This report provides a list of holidays as defined in the selected schedule.

Set the filters as per your requirement:

The screenshot shows a web application window titled "Holiday Schedules". It features a "Schedule Selection" section with a "Select Schedules" dropdown menu set to "Holiday Schedule Wise". Below this, there is a "Holiday Schedule" section with input fields for "ID" and "Name". A "Generate Report" button is located at the bottom of the form.

### Schedule Selection

**Select Schedule:** Select the desired option — All or Holiday Schedule Wise.

- If you select **All**, all Holiday Schedules will be included.
- If you select **Holiday Schedule Wise**, click the **Holiday Schedule** picklist. The **Picklist For Holiday Schedule** pop-up appears.

The screenshot shows a pop-up window titled "Picklist For Holiday Schedule". It has a green header bar that says "Total Selected: 0 Records". Below the header is a search bar and a "Show Selected" link. The main area contains a table with columns "ID" and "Name". The table lists 10 records, each with a checkbox in the "ID" column. The records are:

ID	Name
1	HO-RnDSchedule
2	FactorySchedule
3	Schedule 3
4	Schedule 4
5	Schedule 5
6	Schedule 6
7	Schedule 7
8	Schedule 8
9	Schedule 9
10	Schedule 10

At the bottom of the table, it says "1 - 10 of 30 records". There are navigation buttons for "OK" and "Cancel".

Select the desired check boxes from the list. Click **OK**.

The selected Holiday Schedules appear in the grid.

search			
ID	Name	Group	
1	HO-RnDSchedule	Holiday Schedule	
2	FactorySchedule	Holiday Schedule	
3	Schedule 3	Holiday Schedule	
Generate Report			

Click **Generate Report**.

Sample Report

Holiday Schedules				
Back				
MATRIX COMSEC PVT. LTD. Holiday Schedules				
Run by: System Admin			Page 1 of 1	
Sr No	Start Date	End Date	Holiday	Date: 05/23/2023 21:04
HO-RnDSchedule				
1	01/14/2019	01/14/2019	Uttarayan	
2	01/15/2019	01/15/2019	Makar Sankranti-Pongal	
3	03/21/2019	03/21/2019	Holi-Dhuleti	
4	08/15/2019	08/15/2019	Independence Day	
5	09/12/2019	09/12/2019	Ganesha Visarjan	
6	10/02/2019	10/02/2019	Gandhi Jayanti	
7	10/28/2019	10/28/2019	Diwali (New Year)	
8	10/29/2019	10/29/2019	Diwali (Bhaiduj)	
9	10/30/2019	10/30/2019	Diwali (Connecting)	
10	01/13/2020	01/13/2020	Uttarayan Connecting	
11	01/14/2020	01/14/2020	Uttarayan	
12	01/15/2020	01/15/2020	Makar Sankranti	
13	03/10/2020	03/10/2020	Holi-Dhuleti	
14	08/03/2020	08/03/2020	Raksha Bandhan	
15	09/01/2020	09/01/2020	Ganesha Visarjan	
16	10/02/2020	10/02/2020	Gandhi Jayanti	
17	11/16/2020	11/16/2020	Diwali (Bhaiduj)	
18	11/17/2020	11/17/2020	Diwali (Connecting)	

## Shift Schedules

This report provides a list of the shift schedule for the selected user for the selected month-year.

Set the filters as per your requirement

Shift Schedule	
For Month-Year: June 2023	
Optional Parameters	
Organization Name in Header As Per: User Selection	
User Selection	
Select Users: User Wise	
User ID Name	
Generate Report For: All Users	
Generate Report	

**For Month Year:** Select the month year to specify the time period for which the data is to be generated.

**Organization Name in Header As Per:** Select the desired option — **User Selection** or **Customized Selection**.

If you select **Customized Selection**, click on **Customize Report Header**.

You can select the desired option from the drop-down list or can also add a new header according to your choice.

## User selection

**Select User:** Select the desired option — **User Wise**, **Group Wise**, or **All**.

- If you select **User Wise**, click on **User** picklist. The **Picklist for All Users** pop-up appears.

Picklist For All Users

Total Selected: 0 Records

Search  Show Selected

<input type="checkbox"/>	User ID ▲	Name
<input type="checkbox"/>	1	SALIM ANSARI
<input type="checkbox"/>	10	RAJENDRA GOSWAMI
<input type="checkbox"/>	1001	ANKITKUMAR SOHLIYA
<input type="checkbox"/>	1002	MEGHA H SHUKLA
<input type="checkbox"/>	1003	UMESH M TALANPURI
<input type="checkbox"/>	1004	DARSHAK B PATEL
<input type="checkbox"/>	1007	DHAVAL I PATEL
<input type="checkbox"/>	1008	MAYANK K KORAT
<input type="checkbox"/>	1009	DIPTI K RATHWA
<input type="checkbox"/>	1010	RAHUL S SHAH

1 - 10 of 2480 records

<< < 1 2 3 ... 248 > >>

OK Cancel

Select check boxes of the desired users. Click **OK**.

The selected Users appear in the grid.

Select User: User Wise


User: ID Name

Search

ID	Name
1	SALIM ANSARI
10	RAJENDRA GOSWAMI
1001	ANKITKUMAR SOHLIYA
1002	MEGHA H SHUKLA
SwapnaT	Swapna

Generate Report For: All Users

Generate Report

You can also delete the desired User. To do so, click **Delete**  of the respective user.

- If you select **Group Wise** option, select the desired enterprise group from the drop-down list— Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1/2/3.

For each enterprise group — Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1/2/3, click the corresponding picklist to select the desired option/s.

The selected Group appear in the grid.


Select Users: Group Wise

Select Group: Organization

Organization: ID Name

Search

ID	Name	Group
1	MATRIX COMSEC PVT. LTD.	Organization
2	SAMARTH	Organization
3	AVDHOT	Organization

You can also delete particular group. To do so, click **Delete**  of the respective group.

- If you select **All**, then All User will be selected.

**Generate Report For:** Select the desired option from the drop down list— **All Users, Active Users or Inactive Users.**

Click **Generate Report.**

ample Report

Shift Schedule

Back

MATRIX COMSEC PVT. LTD.

Shift Schedule For FEBRUARY-2013

Run by: System Admin

Date: 05/23/2023 21:42

	01	02	03	04	05	06	07	08	09	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28
1 - SATHI ANSARI	Shift	23	22	22	23	23	23	23	23	22	22	23	23	23	23	22	22	23	23	23	23	23	22	22	23	23	23	23
	Status				WO						WO						WO											
10 - RAJENDRA GOSWAMI	Shift	23	22	22	23	23	23	23	23	22	22	23	23	23	23	22	22	23	23	23	23	23	22	22	23	23	23	23
	Status				WO						WO						WO											
1001 - ANKITINDRA SOHLIVA	Shift	05	05	05	05	05	05	05	05	05	05	05	05	05	05	05	05	05	05	05	05	05	05	05	05	05	05	05
	Status				WO						WO	WO					WO							WO	WO			

## Week-Off Change

This report provides week-off change details of the selected or all users or users in the different enterprise groups.

Set the filters as per your requirements:

Week-Off Change

Date: 06/21/2023 06/21/2023

Optional Parameters

Group By: Organization

Organization Name In Header As Per: User Selection

User Selection

Select Users: User Wise

User: ID Name

Generate Report For: All Users

Generate Report

**Date:** Select the to and from date for which the report is to be generated.

### Optional Parameter

**Group By:** Select the desired enterprise group from the drop-down list — Organization, Branch, Department, Section, Category, Grade, Designation, Custom Group1/2/3.

**Organization Name in Header As Per:** Select the desired option — **User Selection** or **Customized Selection**. If you select **Customized Selection**, click on **Customize Report Header**.

You can select the desired option from the drop down list or can also add header according to your choice.

### User selection

**Select User:** Select the desired option — **User Wise**, **Group Wise**, or **All**.

- If you select **User Wise**, click on **User** picklist. The **Picklist for All Users** pop-up appears.

Picklist For All Users

Total Selected: 0 Records

Search  [Show Selected](#)

<input type="checkbox"/>	User ID ▲	Name
<input type="checkbox"/>	1	SALIM ANSARI
<input type="checkbox"/>	10	RAJENDRA GOSWAMI
<input type="checkbox"/>	1001	ANKITKUMAR SOHLIYA
<input type="checkbox"/>	1002	MEGHA H SHUKLA
<input type="checkbox"/>	1003	UMESH M TALANPURI
<input type="checkbox"/>	1004	DARSHAK B PATEL
<input type="checkbox"/>	1007	DHAVAL I PATEL
<input type="checkbox"/>	1008	MAYANK K KORAT
<input type="checkbox"/>	1009	DIPTI K RATHWA
<input type="checkbox"/>	1010	RAHUL S SHAH

1 - 10 of 2480 records

« < 1 2 3 ... 248 > »

OK Cancel

Select check boxes of the desired users. Click **OK**.

The selected Users appear in the grid.

Select User: User Wise


User:  ID:  Name:

Search

ID	Name
1	SALIM ANSARI
10	RAJENDRA GOSWAMI
1001	ANKITKUMAR SOHLIYA
1002	MEGHA H SHUKLA
Swapna	Swapna

Generate Report For: All Users


Generate Report

You can also delete the desired User. To do so, click **Delete**  of the respective user.

- If you select **Group Wise** option, select the desired enterprise group from the drop-down list— Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1/2/3.

For each enterprise group — Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1/2/3, click the corresponding picklist to select the desired option/s.

The selected Groups appear in the grid.

You can also delete particular group. To do so, click **Delete**  of the respective group.

- If you select **All**, then All User will be selected.

**Generate Report For:** Select the desired option from the drop down list— All Users, Active Users or Inactive Users.

Click **Generate Report**.

Sample Report

Run by:	System Admin				Date:	05/23/2023	21:56
User ID	Name	Department	Old Date	New Date	Changed By	Change Date	
<b>MATRIX COMSEC PVT. LTD.</b>							
1	SALIM ANSARI	MANUFACTURING	11/08/2015	11/14/2015	Subin	11/29/2015	
1	SALIM ANSARI	MANUFACTURING	04/21/2019	04/23/2019	Subin	04/22/2019	
1	SALIM ANSARI	MANUFACTURING	09/24/2017	10/02/2017	Subin	10/03/2017	
1	SALIM ANSARI	MANUFACTURING	06/25/2017	07/01/2017	Subin	07/31/2017	
1	SALIM ANSARI	MANUFACTURING	10/25/2015	11/02/2015	Subin	11/29/2015	
1	SALIM ANSARI	MANUFACTURING	02/28/2016	03/01/2016	Subin	03/03/2016	
1	SALIM ANSARI	MANUFACTURING	01/29/2017	02/01/2017	Subin	02/10/2017	
1	SALIM ANSARI	MANUFACTURING	05/29/2016	06/01/2016	Subin	06/29/2016	
1	SALIM ANSARI	MANUFACTURING	09/29/2019	10/08/2019	Subin	10/08/2019	
1	SALIM ANSARI	MANUFACTURING	10/29/2017	11/01/2017	Subin	11/13/2017	
1	SALIM ANSARI	MANUFACTURING	04/30/2017	05/01/2017	Subin	05/30/2017	
1	SALIM ANSARI	MANUFACTURING	07/30/2017	08/01/2017	Subin	07/31/2017	
1	SALIM ANSARI	MANUFACTURING	12/31/2017	01/01/2018	Subin	01/11/2018	
10	RAJENDRA GOSWAMI	MANUFACTURING	11/08/2015	11/14/2015	Subin	11/29/2015	
10	RAJENDRA GOSWAMI	MANUFACTURING	04/21/2019	04/23/2019	Subin	04/22/2019	
10	RAJENDRA GOSWAMI	MANUFACTURING	09/24/2017	10/02/2017	Subin	10/03/2017	
10	RAJENDRA GOSWAMI	MANUFACTURING	06/25/2017	07/01/2017	Subin	07/31/2017	
10	RAJENDRA GOSWAMI	MANUFACTURING	10/25/2015	11/02/2015	Subin	11/29/2015	
10	RAJENDRA GOSWAMI	MANUFACTURING	09/29/2019	10/08/2019	Subin	10/08/2019	
10	RAJENDRA GOSWAMI	MANUFACTURING	10/29/2017	11/01/2017	Subin	11/13/2017	
10	RAJENDRA GOSWAMI	MANUFACTURING	04/30/2017	05/01/2017	Subin	05/30/2017	
10	RAJENDRA GOSWAMI	MANUFACTURING	09/30/2018	10/01/2018	Subin	10/30/2018	
10	RAJENDRA GOSWAMI	MANUFACTURING	12/31/2017	01/01/2018	Subin	01/11/2018	

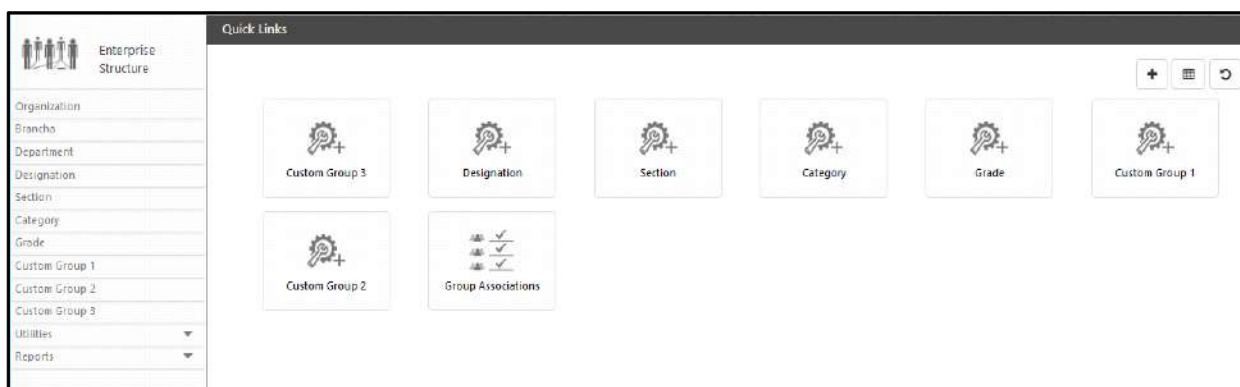
Every business, irrespective of size, needs to be structurally organized for smooth and efficient operability. This structural organization is effective at two levels, at functional level and personnel level. COSEC allows an enterprise to identify distinct functional and personnel units as groups which can be configured independently by system administrators.

To access the **Enterprise Structure** module with COSEC Web Application, click on **Enterprise Structure**



on the Module selection page.

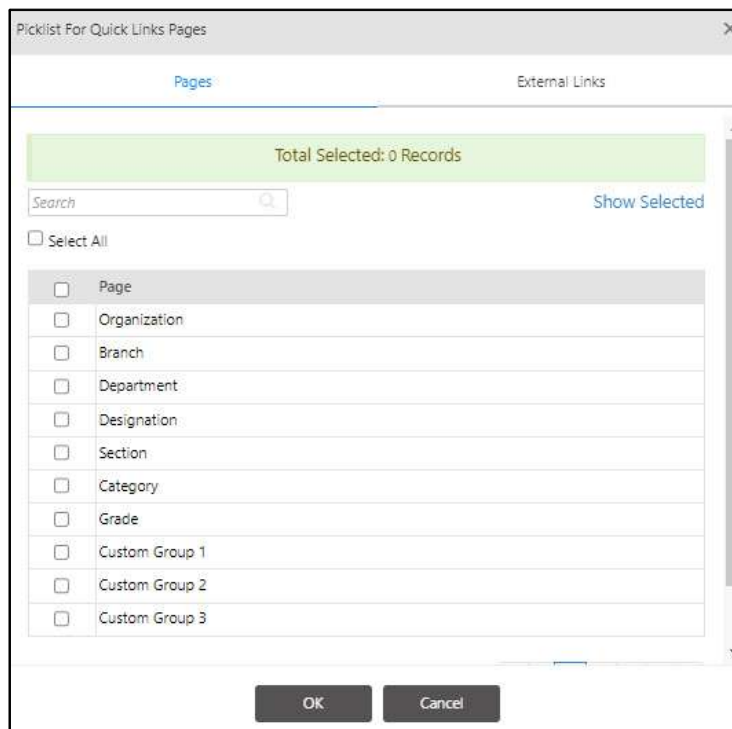
The **Enterprise Structure** page appears on the screen as shown below.



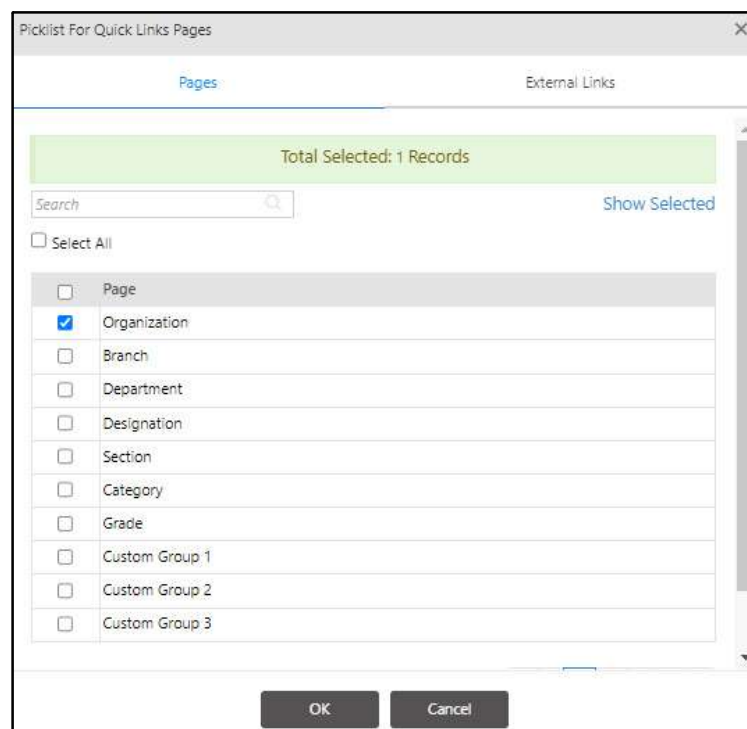
The page displays a menu and **Quick Links** to go to the required page in just one click. Quick Links are shortcuts to reach to a specific page easily. You can configure these options for Quick Links — **Add Quick Link**, **Select Layout** and **Reset to Default**.

### Add Quick Links

- Click **Add** . The **Picklist For Quick Links Pages** pop-up appears.



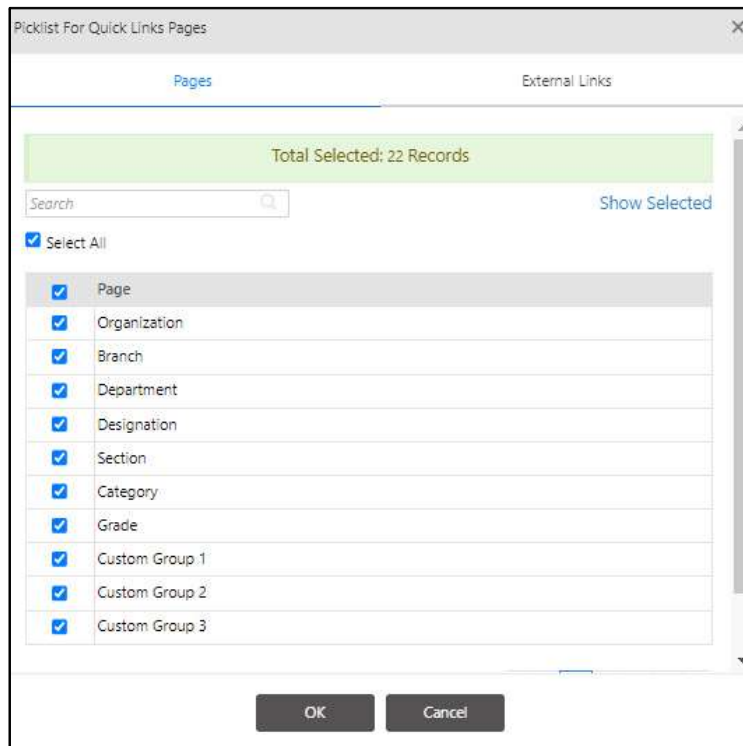
- You can either select particular page or can select all the pages at once. Maximum **20** quick links can be displayed.
- To select particular pages, select the check boxes of the desired pages.



OR


- To select all the pages at once, select the **Select All** check box. All the pages will be selected.

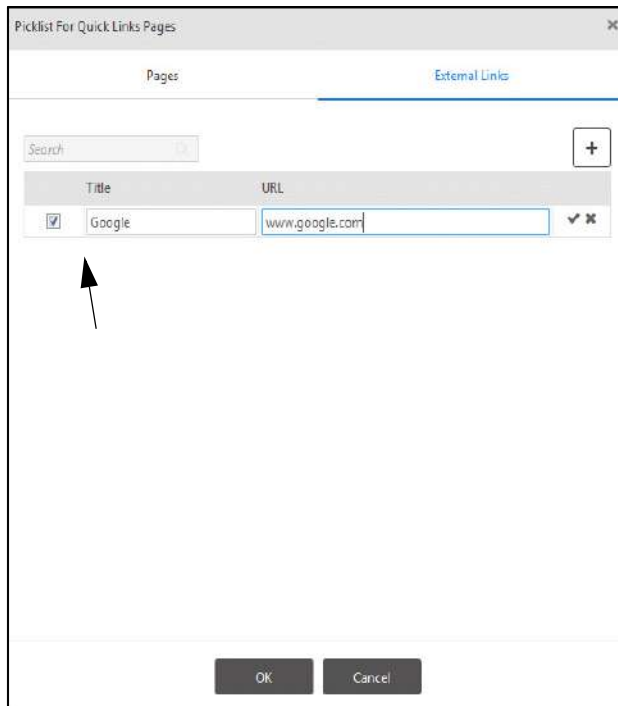






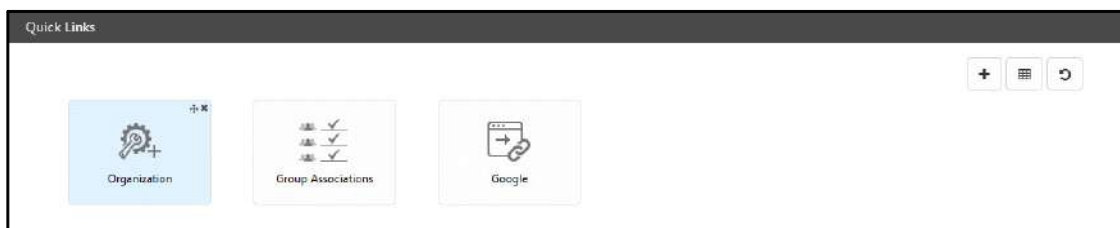
- Click **OK**.
- The Quick Links for selected pages appear on the Quick Link page.

#### **Adding External Links,**


- Select **External Link** tab and click on  button to add new external link.
- Configure the **Title** and **URL** of the external link under the respective fields. Select the check box to display the Quick Link for the configured link.




- Click **Save**  to save the configuration.
- Once you have saved the configuration, you can edit it. Click **Edit**  to edit the saved configuration.
- Click **OK** to save the configuration of the external link. The Quick Link for the external link appears on the Quick Link page.



## Select Layout

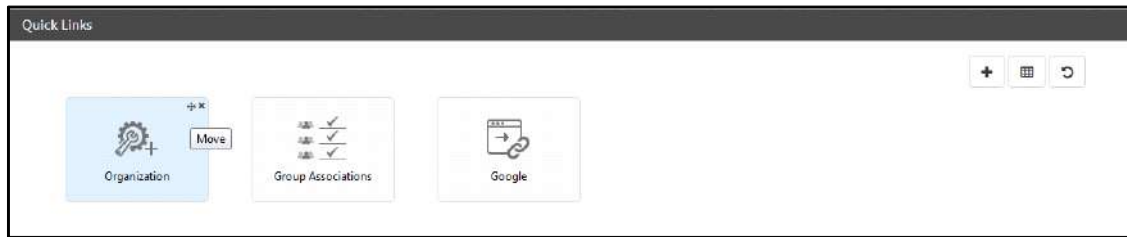
Click **Select Layout**  to select a layout for the quick links. You can select 5x4 or 4x5 layout to manage the quick links.

## Reset To Default

Click **Reset To Default**  to reset the quick links to the default quick links.

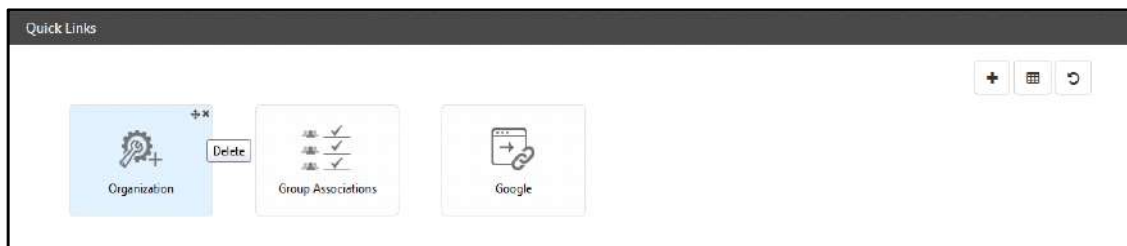
## Move the Link

To move the link from one place to another, hover on the link on top right corner and click **Move** icon as shown below. Then drag the quick link to the desired place. It will be placed at the desired location on the quick links page.



## Delete the Link

To delete a particular link, hover on the link on top right corner and click **Delete** icon as shown below.



## Enterprise Groups

The following groups are defined under the *Enterprise Structure* module in COSEC:

- **Organization**
- **Branch**
- **Department**
- **Designation**
- **Section**
- **Category**
- **Grade**
- **Custom Group1**
- **Custom Group2**
- **Custom Group3**



All enterprise groups in COSEC are predefined and the user cannot define any new group types. The user can however, rename group labels as per business requirement. To know more, refer to [“Renaming Groups”](#).

An **organization** is a business unit that comprises of an individual or a collaborating group of people working towards a common commercial goal. Therefore, a business enterprise may have the need to identify multiple organizations. COSEC allows the creation of upto 9,99,999 organizations in its database. COSEC identifies organization as the broadest structural unit in a business environment.

An organization that operates across different geographical locations may be sub-divided structurally into branches. A **branch** may be further categorized into smaller functional units called **departments** which handle a specific aspect of the business, such as development, research, quality control, logistics and so on. Departments may have further sub-divisions in the form of **sections** which handle specific responsibilities or activities under the scope of their respective departments.

Hence, in terms of structure and function, an enterprise may be identified into the following hierarchical groups:

- Organization
- Branch
- Department
- Section

In terms of personnel structure, an enterprise may be classified into the following groups based on criteria such as function, responsibility, skill-sets, expertise, position, benefits, organizational rights and so on. These groups are:


- Category
- Grade
- Designation

Let us consider an example of how an Enterprise Structure can be classified into Enterprise Groups:

- Say, an enterprise operates two business organizations, namely *Company-1* and *Company-2*.
- *Company-1* operates across five branches world-wide, *Company-1- New York*, *Company-1- London*, *Company-1- Beijing*, *Company-1-Tokyo* and *Company-1- New Delhi*.
- The New Delhi branch runs two departments - *Sales* and *Customer-Support*.
- The Sales department for Company-1 further operates two sections or divisions, each for a product, say, *Product-1* and *Product-2*.
- For every product, employees are hired under two categories - *Contract-based* and *Permanent*.
- All the customer-support staff are classified either into *technical-support* or *commercial-support* teams, each team comprising *team managers*, *team leaders*, *engineers* and *executives*.

To know how to configure the structure of an enterprise, read the next section [“Configuring Groups”](#).

## Enterprise Structure Dashboard

To view the **Enterprise Structure** Dashboard, select the Dashboard button  on the **Enterprise Structure** page. The Dashboard displays the basic information on *Enterprise Structure* under the following categories:

Dashboard				
Structure Summary		Default Group Summary		Group Associations
Organization	75	Default Organization	1	Total Parameters 41
Brancha	77	Default Brancha	1	Associated Parameters 34
Department	58	Default Department	1	
Designation	58	Default Designation	1	
Section	62	Default Section	1	
Category	52	Default Category	1	
Grade	47	Default Grade	1	
Custom Group 1	12	Default Custom Group 1	1	
Custom Group 2	11	Default Custom Group 2	1	
Custom Group 3	7	Default Custom Group 3	1	

### Structure Summary


- This section displays the total number for each enterprise group configured on the system.

### Default Group Summary

- This section displays the group ID for default groups configured for each enterprise group type.

### Group Associations

- Total Parameters - Total number of parameters available for group association.
- Associated Parameters - Total number of parameters actually associated with groups.

For more information on the above Dashboard options, click the respective information links on the Dashboard. The Latest values on Dashboard are updated on clicking the Refresh  button.

# Configuring Groups

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The COSEC **Enterprise Structure** module has been specially designed to allow flexibility for policy-makers in operating COSEC across all business units based on operational convenience. COSEC enables the HR administrator to configure each Enterprise group individually and assign users to them.

Users added to a particular enterprise group will inherit the configuration of this group automatically. Hence, it becomes easier to associate specific group properties with selected users.

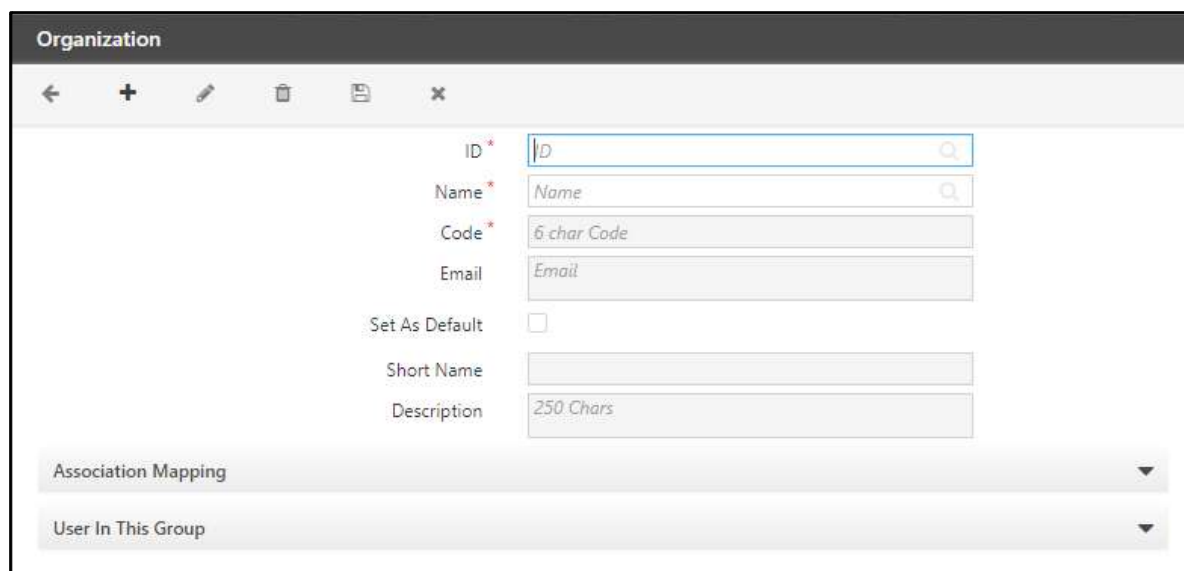
Following are the enterprise groups:

- *“Organization”*
- *“Branch”*
- *“Department”*
- *“Designation”*
- *“Section”*
- *“Category”*
- *“Grade”*

# Organization

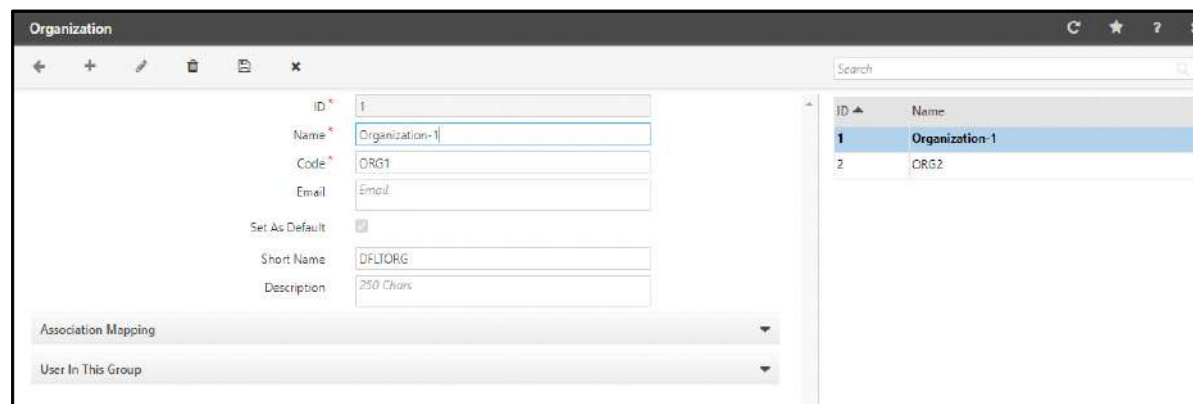
Organization tab enables to create and manage organizations. It helps to group users in a particular organization and assign policies accordingly. You can add 999999 organizations.

To view organization tab, click **Enterprise Structure > Organization** and the following screen appears.



The page displays configurations on the left side and to the right is the grid containing created organizations.

To configure an organization click the **New** button and the following screen appears.



Enter the following details:

- **ID:** The ID field auto-generates a new ID for every new group defined on the system.
- **Name:** Specify the group name to be created. The supported values are: **A-Z, a-z, 0-9, ( ) , [ ] , \_ (underscore), - (Hyphen), . (full Stop), /, &, , (comma), @, ' (single quote), [space]**. The invalid characters for Multi-language character set are Set3 which includes ` ~ # % ^ \* = + { } | \ : ; " < > ?
- **Email:** Enter the Email address of the group.

- **Code:** Enter a max 6 character code for the new group. For example, the code for “Research and Development” can be “RND” or for “Vice President” can be “VP”.
- **Set As Default:** Enable to set the organization to be created as the default group.



Both default groups and groups that are already in use cannot be deleted from the system. In case all groups configured on the system are deleted, the system will automatically apply the settings of the default group on the concerned users.

- **Short Name:** Provide short name for the organization to be created.
- **Description:** Enter description for the organization. It can be maximum of 250 characters.

## Association Mapping

The parameters under Association Mapping panel are known as Associated parameters as they are linked with the organization from the “[Group Associations](#)” page of **Utilities** tab. Only the enabled parameters become available for configuration in the **Association Mapping** panel of Organization page as shown below.

All the parameters configured here are applicable to all the users in the group as well as to the new users to whom the group will be assigned.



A single associated parameter can be linked with only one group, i.e. if a parameter is enabled for one group from the Group Associations page, then it becomes disabled for other enterprise groups.

*PIN Authentication For Door Access will be only displayed here, when Allow Door Access through API is enabled in Group Association> ESS> Allow Door Access Through API.*

*Reason For Punch From Unassigned Location will only be displayed when Location Mandatory For Punch is enabled from Group Association> ESS> Location Mandatory For Punch as well as Location Mandatory For Punch = None/Any Location.*

If you have enabled Access Profile, all the Panels appear in the grid. You can select the check box of the desired Panels and assign the desired Access Profiles to these Panels. The same will be assigned to the users. Make sure the devices/device groups are assigned after the configurations have been done in the Enterprise Group. You can also change the Access Profile Groups manually later if required. Refer to “[Devices](#)” in “[Configuring Users](#)”.




If you have enabled Job Costing, you can assign Jobs manually or you can assign Job Schedulers through which Jobs will be assigned when the Scheduler runs. To assign Jobs, refer [“Default Jobs”](#) under [“Job Costing”](#) and to assign Job Schedulers, refer [“Select Users”](#) under [“Job Scheduler”](#).

If you wish to create Job Schedulers, refer to [“Job Scheduler”](#). If a Job Scheduler is assigned to any Enterprise Group Type, then only the Scheduler will be assigned to the users of that group. The Jobs in the Scheduler will be assigned to the users when the Scheduler runs as per its set schedule.

If you have enabled Capture Photo, refer [“ESS”](#) for details.

Select the organization from the grid to be edited and click **Edit**.

- In the **Association Mapping** panel, configure the associated parameters as required.
- Click **Save** .

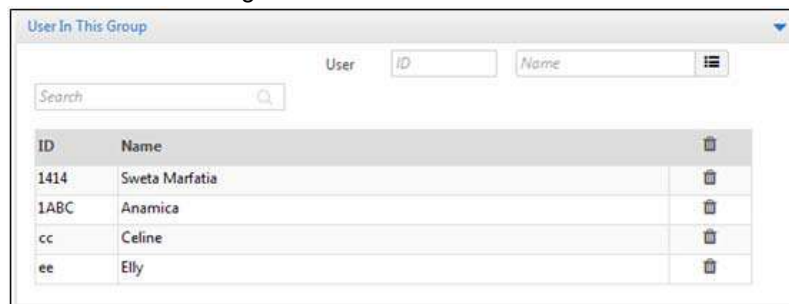


*If Association Mapping is changed from one Enterprise Group Type to other (eg. From Organization to Branch), all current default jobs records (Assignment End Date  $\geq$  Current Date) will be deleted. Previous default job records (Assignment End Date  $<$  Current Date) will still be retained.*

*If Enterprise Group is deleted then all job assignment records current as well as previous will be deleted.*

## User In This Group

This section enables to add users to the organization to be created.



ID	Name	
1414	Sweta Marfatia	
1ABC	Anamica	
cc	Celine	
ee	Elly	

- Select users to be added using the picklist button. The selected users get displayed in the grid as shown above. One can also delete the selected users from the list or search a particular user using the **Search** field.




*The picklist options that appear will be as per the rights assigned to the SA. For details, refer to [“Assigning Group-Wise Rights”](#) under [“System Accounts”](#).*

Once a user is deleted from a group, it gets restored to the default group and inherits all configurations assigned to the default group.

Click **Save** button and the created organization gets displayed in the grid on the right hand side.

You can edit or delete the organization if required. To do so,

- Click on the desired organization from the grid on the right hand side.
- To edit, click **Edit** .

- To delete, click **Delete**  .



*Only those organizations can be deleted that are not assigned to any user/worker/visitor.*

# Branch

Branch tab enables to create and manage branches. It helps to group users in a particular branch and assign policies accordingly. You can add 999999 branches.

To view branch tab, click **Enterprise Structure > Branch** and the following screen appears.

The screenshot shows the 'Branch' configuration window. On the left, there are input fields for 'ID', 'Name', 'Code' (6 char Code), 'Set As Default' (checkbox), 'Short Name', and 'Description' (250 chars). Below these is a 'User In This Group' dropdown. On the right, there is a table with columns 'ID' and 'Name'. The table contains one entry: ID 1, Name Branch-1.

The page displays configurations on the left side and to the right is the grid containing created branches.

To configure a branch click the **New** button and the following screen appears.

The screenshot shows the 'Branch' configuration window with the 'New' button clicked. The 'ID' field is auto-generated as 1414. The 'Name' field is 'Research And Development'. The 'Code' field is 'RND'. The 'Set As Default' checkbox is checked. The 'Short Name' field is 'Research And De'. The 'Description' field is '250 chars'. Below the 'User In This Group' dropdown, a user selection dialog is open. It has a search bar and a table with columns 'ID', 'Name', and a delete icon. The table contains two entries: ID 1414, Name Sweta Marfatia, and ID rutu, Name rutu.

Provide the following details:

- **ID:** The ID field auto-generates a new ID for every new group defined on the system.
- **Name:** Specify the branch name to be created. The supported values are: **A-Z, a-z, 0-9, ( ) , [ ] , \_ (underscore), - (Hyphen), . (full Stop), / , & , , (comma), @ , ' (single quote), [space]**. The invalid characters for Multi-language character set are Set3 which includes ` ~ # % ^ \* = + { } | \ : ; " < > ?
- **Code:** Enter a 6 character code for the new branch. For example, the code for "Research and Development" can be "RND" or for "Vice President" can be "VP".
- **Set As Default:** Enable to set the branch to be created as the default branch.



Both default branch and branches that are already in use cannot be deleted from the system. In case all groups configured on the system are deleted, the system will automatically apply the settings of the default group on the concerned users.

- **Short Name:** Provide short name for the branch to be created.
- **Description:** Enter description for the branch. It can be maximum of 250 characters.

### User In This Group

This section enables to add users to the branch to be created.

- Select users to be added using the picklist button. The selected users get displayed in the grid as shown above. One can also delete the selected users from the list or search a particular user using the **Search** field.





The picklist options that appear will be as per the rights assigned to the SA. For details, refer to [“Assigning Group-Wise Rights”](#) under [“System Accounts”](#).

Once a user is deleted from a branch, it gets restored to the default group and inherits all configurations assigned to the default group.

- Click **Save** button and the created branch gets displayed in the grid on the right hand side.

You can edit or delete the branch if required. To do so,

- Click on the desired branch from the grid on the right hand side.
- To edit, click **Edit** .
- To delete, click **Delete** .



Only those branches can be deleted that are not assigned to any user/worker/visitor.

Now, one can also associate parameters to the created branch. To do so [See “Association Mapping” on page 1602.](#)

### Association Mapping

The parameters under Association Mapping panel are known as Associated parameters as they are linked with the branch from the **Group Associations** page of **Utilities** tab. Only the enabled parameters become available for configuration in the **Association Mapping** panel of Branch page as shown below.

All the parameters configured here are applicable to all the users in the group as well as to the new users to whom the group will be assigned.



A single associated parameter can be linked with only one group, i.e. if a parameter is enabled for one group from the Group Associations page, then it becomes disabled for other enterprise groups.

If you have enabled Access Profile, all the Panels appear in the grid. You can select the check box of the desired Panels and assign the desired Access Profiles to these Panels. The same will be assigned to the users. Make sure the devices/device groups are assigned after the configurations have been done in the Enterprise Group. You can also change the Access Profile Groups manually later if required. Refer to [“Devices”](#) in [“Configuring Users”](#).

If you have enabled Job Costing, you can assign Jobs manually or you can assign Job Schedulers through which Jobs will be assigned when the Scheduler runs. To assign Jobs, refer [“Default Jobs”](#) under [“Job Costing”](#) and to assign Job Schedulers, refer [“Select Users”](#) under [“Job Scheduler”](#).

If you wish to create Job Schedulers, refer to [“Job Scheduler”](#). If a Job Scheduler is assigned to any Enterprise Group Type, then only the Scheduler will be assigned to the users of that group. The Jobs in the Scheduler will be assigned to the users when the Scheduler runs as per its set schedule.

- Select the branch from the grid to be edited and click **Edit**.
- In the **Association Mapping panel**, configure the associated parameters as required. For example, in the above screen, Enable Account has been enabled for all employees of the “Research And Development” branch.
- Click **Save**.



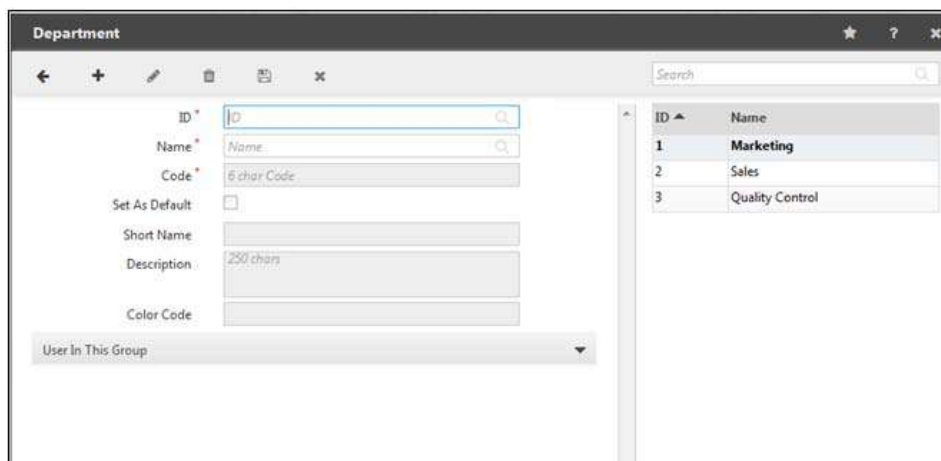
If Association Mapping is changed from one Enterprise Group Type to other (eg. From Organization to Branch), all current default jobs records (Assignment End Date  $\geq$  Current Date) will be deleted. Previous default job records (Assignment End Date  $<$  Current Date) will still be retained.

If Enterprise Group is deleted then all job assignment records current as well as previous will be deleted.

# Department

Department tab enables to create and manage department. It helps to group users in a particular department and assign policies accordingly. You can add 999999 departments.

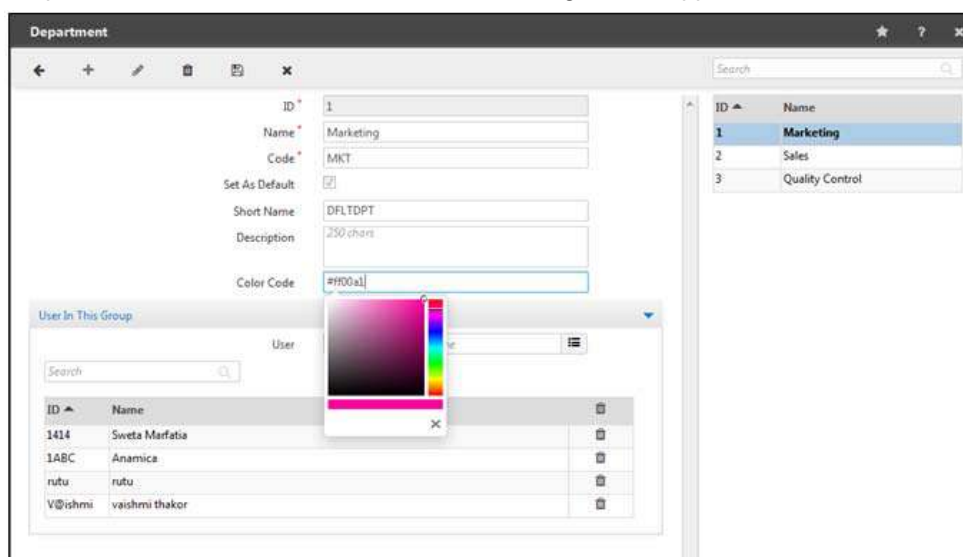
To view Department tab, click **Enterprise Structure > Department** and the following screen appears.



ID	Name
1	Marketing
2	Sales
3	Quality Control

The page displays configurations on the left side and to the right is the grid containing created departments.

To configure a department click the **New** button and the following screen appears.



ID	Name
1	Marketing
2	Sales
3	Quality Control

Provide the following details:

- **ID:** The ID field auto-generates a new ID for every new group defined on the system.
- **Name:** Specify the department name to be created. The supported values are: **A -Z, a-z, 0 - 9, ( ) , [ ] , \_ (underscore), - (Hyphen), . (full Stop), /, &, , (comma), @, ' (single quote), [space]**. The invalid characters for Multi-language character set are Set3 which includes ` ~ # % ^ \* = + { } | \ : ; " ' < > ?
- **Code:** Enter a 6 character code for the new department. For example, the code for “Marketing” can be “MKT”.

- **Set As Default:** Enable to set the department to be created as the default department.



*Both default department and departments that are already in use cannot be deleted from the system. In case all groups configured on the system are deleted, the system will automatically apply the settings of the default group on the concerned users.*

- **Short Name:** Provide short name for the department to be created.
- **Description:** Enter description for the department. It can be maximum of 250 characters.
- **Color Code** - One can assign a color code to each department using color picklist as shown above.

### User In This Group

This section enables to add users to the department to be created.

- Select users to be added using the picklist button. The selected users get displayed in the grid as shown above. One can also delete the selected users from the list or search a particular user using the **Search** field.





*The picklist options that appear will be as per the rights assigned to the SA. For details, refer to [“Assigning Group-Wise Rights”](#) under [“System Accounts”](#).*

Once a user is deleted from a department, it gets restored to the default group and inherits all configurations assigned to the default group.

- Click **Save** button and the created department gets displayed in the grid on the right hand side.

You can edit or delete the department if required. To do so,

- Click on the desired department from the grid on the right hand side.
- To edit, click **Edit** .
- To delete, click **Delete** .



*Only those departments can be deleted that are not assigned to any user/worker/visitor.*

Now, one can also associate parameters to the created department. To do so [See “Association Mapping” on page 1606.](#)

## Association Mapping

The parameters under Association Mapping panel are known as Associated parameters as they are linked with the department from the **Group Associations** page of **Utilities** tab. Only the enabled parameters become available for configuration in the **Association Mapping** panel of department page as shown below.

All the parameters configured here are applicable to all the users in the group as well as to the new users to whom the group will be assigned.

ID	Name
1	Marketing
2	Sales
3	Quality Control



A single associated parameter can be linked with only one group, i.e. if a parameter is enabled for one group from the Group Associations page, then it becomes disabled for other enterprise groups.

If you have enabled Access Profile, all the Panels appear in the grid. You can select the check box of the desired Panels and assign the desired Access Profiles to these Panels. The same will be assigned to the users. Make sure the devices/device groups are assigned after the configurations have been done in the Enterprise Group. You can also change the Access Profile Groups manually later if required. Refer to [“Devices”](#) in [“Configuring Users”](#).

If you have enabled Job Costing, you can assign Jobs manually or you can assign Job Schedulers through which Jobs will be assigned when the Scheduler runs. To assign Jobs, refer [“Default Jobs”](#) under [“Job Costing”](#) and to assign Job Schedulers, refer [“Select Users”](#) under [“Job Scheduler”](#).

If you wish to create Job Schedulers, refer to [“Job Scheduler”](#). If a Job Scheduler is assigned to any Enterprise Group Type, then only the Scheduler will be assigned to the users of that group. The Jobs in the Scheduler will be assigned to the users when the Scheduler runs as per its set schedule.

- Select the department from the grid to be edited and click **Edit**.
- In the **Association Mapping panel**, configure the associated parameters as required. E.g. in the above screen, Access Validity has been enabled for all employees of the “Marketing” department.
- Click **Save**.



If Association Mapping is changed from one Enterprise Group Type to other (eg. From Organization to Branch), all current default jobs records (Assignment End Date  $\geq$  Current Date) will be deleted. Previous default job records (Assignment End Date  $<$  Current Date) will still be retained.

If Enterprise Group is deleted then all job assignment records current as well as previous will be deleted.



# Designation

Designation tab enables to create and manage designations. It helps to group users in a particular designation and assign policies accordingly. You can add 999999 designations.

To view designation tab, click **Enterprise Structure > Designation** and the following screen appears.

The screenshot shows the 'Designation' management window. On the left, there are input fields for 'ID', 'Name', 'Code' (6 char Code), 'Set As Default' (checkbox), 'Short Name', 'Description' (250 chars), and 'Wage Level' (with sub-fields for ID and Name). At the bottom left is a 'User In This Group' dropdown. On the right, a table lists existing designations:

ID	Name
1	Engineer
2	Team Leader
3	Business Manager

The page displays configurations on the left side and to the right is the grid containing created designations.

To configure a designation click the **New** button and the following screen appears.

This screenshot shows the 'Designation' configuration window with the following details filled in:

- ID: 1
- Name: Engineer
- Code: EG
- Set As Default: ☒
- Short Name: Engineer
- Description: (empty)
- Wage Level: LVL1

Below the configuration fields is a 'User In This Group' section with a search bar and a table of users:

ID	Name
rutu	rutu
V@ishmi	vaishmi thakor

Provide the following details:

- **ID:** The ID field auto-generates a new ID for every new group defined on the system.
- **Name:** Specify the designation name to be created. The supported values are: **A-Z, a-z, 0-9, ( ) , [ ], \_ (underscore), - (Hyphen), . (full Stop), /, &, , (comma), @, ' (single quote), [space]**. The invalid characters for Multi-language character set are Set3 which includes ` ~ # % ^ \* = + { } | \ : ; " < > ?
- **Code:** Enter a 6 character code for the new designation. For example, the code for "Engineer" can be "EG".

- **Set As Default:** Enable to set the designation to be created as the default designation.



*Both default designation and designations that are already in use cannot be deleted from the system. In case all groups configured on the system are deleted, the system will automatically apply the settings of the default group on the concerned users.*

- **Short Name:** Provide short name for the designation to be created.
- **Description:** Enter description for the designation. It can be maximum of 250 characters.

### User In This Group

This section enables to add users to the designation to be created.

- Select users to be added using the picklist button. The selected users get displayed in the grid as shown above. One can also delete the selected users from the list or search a particular user using the **Search** field.





*The picklist options that appear will be as per the rights assigned to the SA. For details, refer to [“Assigning Group-Wise Rights”](#) under [“System Accounts”](#).*

Once a user is deleted from a designation, it gets restored to the default group and inherits all configurations assigned to the default group.

- Click **Save** and the created designation gets displayed in the grid on the right hand side.

You can edit or delete the designation if required. To do so,

- Click on the desired designation from the grid on the right hand side.
- To edit, click **Edit** .
- To delete, click **Delete** .



*Only those designations can be deleted that are not assigned to any user/worker/visitor.*

Now, one can also associate parameters to the created designation. To do so [See “Association Mapping” on page 1608.](#)

### Association Mapping

The parameters under Association Mapping panel are known as Associated parameters as they are linked with the designation from the **Group Associations** page of **Utilities** tab. Only the enabled parameters become available for configuration in the **Association Mapping** panel of designation page as shown below.

All the parameters configured here are applicable to all the users in the group as well as to the new users to whom the group will be assigned.



A single associated parameter can be linked with only one group, i.e. if a parameter is enabled for one group from the Group Associations page, then it becomes disabled for other enterprise groups.

If you have enabled Access Profile, all the Panels appear in the grid. You can select the check box of the desired Panels and assign the desired Access Profiles to these Panels. The same will be assigned to the users. Make sure the devices/device groups are assigned after the configurations have been done in the Enterprise Group. You can also change the Access Profile Groups manually later if required. Refer to [“Devices”](#) in [“Configuring Users”](#).

If you have enabled Job Costing, you can assign Jobs manually or you can assign Job Schedulers through which Jobs will be assigned when the Scheduler runs. To assign Jobs, refer [“Default Jobs”](#) under [“Job Costing”](#) and to assign Job Schedulers, refer [“Select Users”](#) under [“Job Scheduler”](#).

If you wish to create Job Schedulers, refer to [“Job Scheduler”](#). If a Job Scheduler is assigned to any Enterprise Group Type, then only the Scheduler will be assigned to the users of that group. The Jobs in the Scheduler will be assigned to the users when the Scheduler runs as per its set schedule.

- Select the designation from the grid to be edited and click **Edit**.
- In the **Association Mapping panel**, configure the associated parameters as required. E.g. in the above screen, Enable Attendance Calculation has been enabled for all employees of the “Engineer” designation.
- Click **Save**.



If Association Mapping is changed from one Enterprise Group Type to other (eg. From Organization to Branch), all current default jobs records (Assignment End Date  $\geq$  Current Date) will be deleted. Previous default job records (Assignment End Date  $<$  Current Date) will still be retained.

If Enterprise Group is deleted then all job assignment records current as well as previous will be deleted.

# Section

Section tab enables to create and manage sections. It helps to group users in a particular section and assign policies accordingly. You can add 999999 sections.

To view Section tab, click **Enterprise Structure > Section** and the following screen appears.

ID	Name
1	SAMAS Writers
2	COSEC Writers

The page displays configurations on the left side and to the right is the grid containing a list of created sections.

To configure a section, click the **New** button and the following screen appears.

ID	Name
1414	Sweta Marfatia
Rosy	Rosy

Provide the following details:

- **ID:** The ID field auto-generates a new ID for every new group defined on the system.
- **Name:** Specify the section name to be created. The supported values are: **A-Z, a-z, 0-9, ( ) , [ ] , \_ (underscore), - (Hyphen), . (full Stop), /, &, , (comma), @, ' (single quote), [space]**. The invalid characters for Multi-language character set are Set3 which includes ` ~ # % ^ \* = + { } | \ : ; " < > ?
- **Code:** Enter a 6 character code for the new section. For example, the code for “Engineer” can be “EG”.
- **Set As Default:** Enable to set the section to be created as the default section.



Both default section and sections that are already in use cannot be deleted from the system. In case all groups configured on the system are deleted, the system will automatically apply the settings of the default group on the concerned users.

- **Short Name:** Provide short name for the section to be created.
- **Description:** Enter description for the section. It can be maximum of 250 characters.

### User In This Group

This panel enables to add users to the section to be created.

- Select users to be added using the picklist button. The selected users get displayed in the grid as shown above. One can also delete the selected users from the list or search a particular user using the **Search** field.





The picklist options that appear will be as per the rights assigned to the SA. For details, refer to [“Assigning Group-Wise Rights”](#) under [“System Accounts”](#).

Once a user is deleted from a section, it gets restored to the default group and inherits all configurations assigned to the default group.

- Click **Save** and the created section gets displayed in the grid on the right hand side.

You can edit or delete the section if required. To do so,

- Click on the desired section from the grid on the right hand side.
- To edit, click **Edit** .
- To delete, click **Delete** .



Only those sections can be deleted that are not assigned to any user/worker/visitor.

Now, one can also associate parameters to the created section. To do so [See “Association Mapping” on page 1611.](#)

### Association Mapping

The parameters under Association Mapping panel are known as Associated parameters as they are linked with the section from the **Group Associations** page of **Utilities** tab. Only the enabled parameters become available for configuration in the **Association Mapping** panel of section page as shown below.

All the parameters configured here are applicable to all the users in the group as well as to the new users to whom the group will be assigned.



A single associated parameter can be linked with only one group, i.e. if a parameter is enabled for one group from the Group Associations page, then it becomes disabled for other enterprise groups.

If you have enabled Access Profile, all the Panels appear in the grid. You can select the check box of the desired Panels and assign the desired Access Profiles to these Panels. The same will be assigned to the users. Make sure the devices/device groups are assigned after the configurations have been done in the Enterprise Group. You can also change the Access Profile Groups manually later if required. Refer to [“Devices”](#) in [“Configuring Users”](#).

If you have enabled Job Costing, you can assign Jobs manually or you can assign Job Schedulers through which Jobs will be assigned when the Scheduler runs. To assign Jobs, refer [“Default Jobs”](#) under [“Job Costing”](#) and to assign Job Schedulers, refer [“Select Users”](#) under [“Job Scheduler”](#).

If you wish to create Job Schedulers, refer to [“Job Scheduler”](#). If a Job Scheduler is assigned to any Enterprise Group Type, then only the Scheduler will be assigned to the users of that group. The Jobs in the Scheduler will be assigned to the users when the Scheduler runs as per its set schedule.

- Select the section from the grid to be edited and click **Edit**.
- In the **Association Mapping panel**, configure the associated parameters as required. E.g. in the above screen, Enable Attendance Calculation has been enabled for all employees of the “Engineer” section.
- Click **Save**.



If Association Mapping is changed from one Enterprise Group Type to other (eg. From Organization to Branch), all current default jobs records (Assignment End Date  $\geq$  Current Date) will be deleted. Previous default job records (Assignment End Date  $<$  Current Date) will still be retained.

If Enterprise Group is deleted then all job assignment records current as well as previous will be deleted.

# Category

Category tab enables to create and manage categories. It helps to group users in a particular category and assign policies accordingly. You can add 999999 categories.

To view Category tab, click **Enterprise Structure > Category** and the following screen appears.

The screenshot shows the 'Category' configuration window. On the left, there are input fields for 'ID', 'Name', 'Code' (with a '6 char Code' hint), a 'Set As Default' checkbox, 'Short Name', and 'Description' (with a '250 chars' hint). Below these is a 'User In This Group' dropdown. On the right, a table lists existing categories. The table has two columns: 'ID' and 'Name'. It contains one row with '1' in the ID column and 'Category-1' in the Name column.

The page displays configurations on the left side and to the right is the grid containing a list of created categories.

To configure a new category, click the **New** button and the following screen appears.

This screenshot shows the same 'Category' configuration window, but with the 'User In This Group' dropdown menu expanded. The dropdown contains a search bar and a table with two columns: 'ID' and 'Name'. It lists one user: 'Jerry' with ID 'Jerry'. The main configuration fields on the left are now populated with 'COSEC' for Name, Code, Short Name, and Description. The 'Set As Default' checkbox is checked.

Provide the following details:

- **ID:** The ID field auto-generates a new ID for every new group defined on the system.
- **Name:** Specify the category name to be created. The supported values are: **A -Z, a-z, 0 - 9, ( ) , [ ] , \_ (underscore), - (Hyphen), . (full Stop), /, &, , (comma), @, ' (single quote), [space]**. The invalid characters for Multi-language character set are Set3 which includes ` ~ # % ^ \* = + { } | \ : ; " < > ?
- **Code:** Enter a 6 character code for the new category.
- **Set As Default:** Enable to set the category to be created as the default category.



Both default category and categories that are already in use cannot be deleted from the system. In case all categories configured on the system are deleted, the system will automatically apply the settings of the default category on the concerned users.

- **Short Name:** Provide short name for the category to be created.
- **Description:** Enter description for the category. It can be maximum of 250 characters.

### User In This Group

This panel enables to add users to the category to be created.

- Select users to be added using the picklist button. The selected users get displayed in the grid as shown above. One can also delete the selected users from the list or search a particular user using the **Search** field.





The picklist options that appear will be as per the rights assigned to the SA. For details, refer to [“Assigning Group-Wise Rights”](#) under [“System Accounts”](#).

Once a user is deleted from a category, it gets restored to the default category and inherits all configurations assigned to the default category.

- Click **Save** and the created category gets displayed in the grid on the right hand side.

You can edit or delete the category if required. To do so,

- Click on the desired category from the grid on the right hand side.
- To edit, click **Edit** .
- To delete, click **Delete** .



Only those categories can be deleted that are not assigned to any user/worker/visitor.

Now, one can also associate parameters to the created category. To do so [See “Association Mapping” on page 1614.](#)

### Association Mapping

The parameters under Association Mapping panel are known as Associated parameters as they are linked with the category from the **Group Associations** page of **Utilities** tab. Only the enabled parameters become available for configuration in the **Association Mapping** panel of category page as shown below.

All the parameters configured here are applicable to all the users in the group as well as to the new users to whom the group will be assigned.



ID	Name
1	Category-1
2	COSEC



A single associated parameter can be linked with only one group, i.e. if a parameter is enabled for one group from the Group Associations page, then it becomes disabled for other enterprise groups.

If you have enabled Access Profile, all the Panels appear in the grid. You can select the check box of the desired Panels and assign the desired Access Profiles to these Panels. The same will be assigned to the users. Make sure the devices/device groups are assigned after the configurations have been done in the Enterprise Group. You can also change the Access Profile Groups manually later if required. Refer to [“Devices”](#) in [“Configuring Users”](#).

If you have enabled Job Costing, you can assign Jobs manually or you can assign Job Schedulers through which Jobs will be assigned when the Scheduler runs. To assign Jobs, refer [“Default Jobs”](#) under [“Job Costing”](#) and to assign Job Schedulers, refer [“Select Users”](#) under [“Job Scheduler”](#).

If you wish to create Job Schedulers, refer to [“Job Scheduler”](#). If a Job Scheduler is assigned to any Enterprise Group Type, then only the Scheduler will be assigned to the users of that group. The Jobs in the Scheduler will be assigned to the users when the Scheduler runs as per its set schedule.

- Select the category from the grid to be edited and click **Edit**.
- In the **Association Mapping panel**, configure the associated parameters as required. E.g. in the above screen, Enable Account has been enabled for all employees of the “COSEC” category.
- Click **Save**.



If Association Mapping is changed from one Enterprise Group Type to other (eg. From Organization to Branch), all current default jobs records (Assignment End Date  $\geq$  Current Date) will be deleted. Previous default job records (Assignment End Date  $<$  Current Date) will still be retained.

If Enterprise Group is deleted then all job assignment records current as well as previous will be deleted.

# Grade

Grade tab enables to create and manage grades. It helps to group users in a particular grade and assign policies accordingly. You can add 999999 grades.

To view Grade tab, click **Enterprise Structure > Grade** and the following screen appears.

ID	Name
1	Grade-1

The page displays configurations on the left side and to the right is the grid containing a list of created grades.

To configure a new grade, click the **New** button and the following screen appears.

ID	Name
Jerry	Jerry
V@ishmi	vaishmi thakor

Provide the following details:

- **ID:** The ID field auto-generates a new ID for every new grade defined on the system.
- **Name:** Specify the grade name to be created. The supported values are: **A-Z, a-z, 0-9, ( ) , [ ] , \_ (underscore), - (Hyphen), . (full Stop), /, &, , (comma), @, ' (single quote), [space]**. The invalid characters for Multi-language character set are Set3 which includes ` ~ # % ^ \* = + { } | \ : ; " < > ?
- **Code:** Enter a 6 character code for the new grade.
- **Set As Default:** Enable to set the grade to be created as the default grade.



Both default grade and grades that are already in use cannot be deleted from the system. In case all grades configured on the system are deleted, the system will automatically apply the settings of the default grade on the concerned users.

- **Short Name:** Provide short name for the grade to be created.
- **Description:** Enter description for the grade. It can be maximum of 250 characters.

### User In This Group

This panel enables to add users to the grade to be created.

- Select users to be added using the picklist button. The selected users get displayed in the grid as shown above. One can also delete the selected users from the list or search a particular user using the **Search** field.





The picklist options that appear will be as per the rights assigned to the SA. For details, refer to [“Assigning Group-Wise Rights”](#) under [“System Accounts”](#).

Once a user is deleted from a grade, it gets restored to the default grade and inherits all configurations assigned to the default grade.

- Click **Save** and the created grade gets displayed in the grid on the right hand side.

You can edit or delete the grade if required. To do so,

- Click on the desired grade from the grid on the right hand side.
- To edit, click **Edit** .
- To delete, click **Delete** .



Only those grades can be deleted that are not assigned to any user/worker/visitor.

Now, one can also associate parameters to the created grade. To do so [See “Association Mapping” on page 1617.](#)

### Association Mapping

The parameters under Association Mapping panel are known as Associated parameters as they are linked with the grade from the **Group Associations** page of **Utilities** tab. Only the enabled parameters become available for configuration in the **Association Mapping** panel of grade page as shown below.

All the parameters configured here are applicable to all the users in the group as well as to the new users to whom the group will be assigned.



A single associated parameter can be linked with only one group, i.e. if a parameter is enabled for one group from the Group Associations page, then it becomes disabled for other enterprise groups.

If you have enabled Access Profile, all the Panels appear in the grid. You can select the check box of the desired Panels and assign the desired Access Profiles to these Panels. The same will be assigned to the users. Make sure the devices/device groups are assigned after the configurations have been done in the Enterprise Group. You can also change the Access Profile Groups manually later if required. Refer to [“Devices”](#) in [“Configuring Users”](#).

If you have enabled Job Costing, you can assign Jobs manually or you can assign Job Schedulers through which Jobs will be assigned when the Scheduler runs. To assign Jobs, refer [“Default Jobs”](#) under [“Job Costing”](#) and to assign Job Schedulers, refer [“Select Users”](#) under [“Job Scheduler”](#).

If you wish to create Job Schedulers, refer to [“Job Scheduler”](#). If a Job Scheduler is assigned to any Enterprise Group Type, then only the Scheduler will be assigned to the users of that group. The Jobs in the Scheduler will be assigned to the users when the Scheduler runs as per its set schedule.

- Select the grade from the grid to be edited and click **Edit**.
- In the **Association Mapping panel**, configure the associated parameters as required. E.g. in the above screen, Enable Attendance Calculation has been enabled for all employees of the “Grade 1”.
- Click **Save**.



If Association Mapping is changed from one Enterprise Group Type to other (eg. From Organization to Branch), all current default jobs records (Assignment End Date  $\geq$  Current Date) will be deleted. Previous default job records (Assignment End Date  $<$  Current Date) will still be retained.

If Enterprise Group is deleted then all job assignment records current as well as previous will be deleted.

# Custom Group1

Custom Group1 tab enables to create and manage custom group. It helps to group users in a particular custom group and assign policies accordingly. You can add 999999 custom group1.

To view Custom Group tab, click **Enterprise Structure > Custom Group1** and the following screen appears.

ID	Name
1	Custom Group 1
2	Cadre

The page displays configurations on the left side and to the right is the grid containing a list of created custom groups.

To configure a new custom group, click the **New** button and enter the following details:

- **ID:** The ID is auto generated by the system.
- **Name:** Specify the name of the custom group. The supported values are: **A-Z, a-z, 0-9, ( ) , [ ], \_ (underscore), - (Hyphen), . (full Stop), /, &, , (comma), @, ' (single quote), [space]**. The invalid characters for Multi-language character set are Set3 which includes ` ~ # % ^ \* = + { } | \ : ; " < > ?
- **Code:** Enter a code of maximum 6 characters for the new custom group.
- **Set As Default:** Enable to set the created custom group as the default group.



*Both default custom group and custom group that are already in use cannot be deleted from the system. In case all custom group configured on the system are deleted, the system will automatically apply the settings of the default custom group on the concerned users.*

- **Short Name:** Enter short name for the custom group to be created.
- **Description:** Enter description for the custom group. It can be maximum of 250 characters.

## User In This Group

This section enables to add users to the custom group.

- Select users to be added using the picklist button. The selected users get displayed in the grid. You can also delete the selected users from the list or search a particular user using the **Search** field.

**Custom Group 1**

ID\* 1

Name\* Custom Group 1

Code\* CG1

Set As Default ☒

Short Name DFLT CG1

Description 250 chars

**User In This Group**

Search

ID	Name	
12	12	
1551	Shalini Fefar	
1690	admin	
555	555	
apta	apta user	
cafe	cafeteria	

Grid on the right:

ID	Name
1	Custom Group 1
2	Cadre





The picklist options that appear will be as per the rights assigned to the SA. For details, refer to [“Assigning Group-Wise Rights”](#) under [“System Accounts”](#).

Once a user is deleted from a custom group, it gets restored to the default custom group and inherits all configurations assigned to the default custom group.

- Click **Save** and the created custom group gets displayed in the grid on the right hand side.

You can edit or delete the custom group if required. To do so,

- Click on the desired custom group from the grid on the right hand side.
- To edit, click **Edit** .
- To delete, click **Delete** .



Only those custom groups can be deleted that are not assigned to any user/worker/visitor.

Now, you can also associate parameters to the created custom group. To do so See [“Association Mapping”](#) on page 1621.

## Association Mapping

The parameters under Association Mapping section are known as Associated parameters as they are linked with the custom group from the **Utilities > Group Associations**. Once the parameters are enabled, they will be available for configuration in the **Association Mapping** section of Custom Group page as shown below.

All the parameters configured here are applicable to all the users in the group as well as to the new users to whom the group will be assigned.

The screenshot shows the 'Custom Group 1' configuration page. The 'Association Mapping' section is expanded, showing three categories: ESS, Attendance, and Policy. Under ESS, there are three checkboxes: 'Enable Account' (unchecked), 'Edit Basic Details' (unchecked), and 'Punch Marking Via ESS' (unchecked). Under Attendance, there is one checkbox: 'Enable Attendance Calculation' (unchecked). Under Policy, there is a section for 'Attendance Policy' with fields for 'ID' and 'Name'. To the right of the configuration form, there is a table with two columns: 'ID' and 'Name'. The table contains two rows: '1 Custom Group 1' and '2 Cadre'.

ID	Name
1	Custom Group 1
2	Cadre



A single associated parameter can be linked with only one group, i.e. if a parameter is enabled for one enterprise group from the Group Associations page, then it becomes disabled for other enterprise groups.

Eg: IF ESS> Enable Account is selected for Custom Group1 from Group Association page, then Enable Account will be disabled for other enterprise groups.

If you have enabled Access Profile, all the Panels appear in the grid. You can select the check box of the desired Panels and assign the desired Access Profiles to these Panels. The same will be assigned to the users. Make sure the devices/device groups are assigned after the configurations have been done in the Enterprise Group. You can also change the Access Profile Groups manually later if required. Refer to ["Devices"](#) in ["Configuring Users"](#).

If you have enabled Job Costing, you can assign Jobs manually or you can assign Job Schedulers through which Jobs will be assigned when the Scheduler runs. To assign Jobs, refer ["Default Jobs"](#) under ["Job Costing"](#) and to assign Job Schedulers, refer ["Select Users"](#) under ["Job Scheduler"](#).

If you wish to create Job Schedulers, refer to ["Job Scheduler"](#). If a Job Scheduler is assigned to any Enterprise Group Type, then only the Scheduler will be assigned to the users of that group. The Jobs in the Scheduler will be assigned to the users when the Scheduler runs as per its set schedule.

- Select the custom group from the grid to be edited and click **Edit**.
- In the **Association Mapping panel**, configure the associated parameters as required. E.g. In the below screen, Enable Attendance Calculation has been enabled for all users of the "Custom Group 1".

Custom Group 1

ID: 1

Name: Custom Group 1

Code: CG1

Set As Default: ☒

Short Name: DFLT CG1

Description: 250 chars

Association Mapping

**ESS**

Enable Account: ☐

Edit Basic Details: ☐

Punch Marking Via ESS: ☐

**Attendance**

Enable Attendance Calculation: ☒

**Policy**

Attendance Policy: 1

Attendance Policy-1

- Click **Save** to save the settings.



*If Association Mapping is changed from one Enterprise Group Type to other (eg. From Organization to Branch), all current default jobs records (Assignment End Date  $\geq$  Current Date) will be deleted. Previous default job records (Assignment End Date  $<$  Current Date) will still be retained.*

*If Enterprise Group is deleted then all job assignment records current as well as previous will be deleted.*



# Custom Group2

Custom Group2 tab enables to create and manage custom group. It helps to group users in a particular custom group and assign policies accordingly. You can add 999999 custom group2.

To view Custom Group tab, click **Enterprise Structure > Custom Group2** and the following screen appears.

ID	Name
1	Custom Group 2

The page displays configurations on the left side and to the right is the grid containing a list of created custom groups.

To configure a new custom group, click the **New** button and enter the following details:

- **ID:** The ID is auto generated by the system.
- **Name:** Specify the name of the custom group. The supported values are: **A-Z, a-z, 0-9, ( ) , [ ], \_ (underscore), - (Hyphen), . (full Stop), /, &, , (comma), @, ' (single quote), [space]**. The invalid characters for Multi-language character set are Set3 which includes ` ~ # % ^ \* = + { } | \ : ; " < > ?
- **Code:** Enter a code of maximum 6 characters for the new custom group.
- **Set As Default:** Enable to set the created custom group as the default group.



*Both default custom group and custom group that are already in use cannot be deleted from the system. In case all custom group configured on the system are deleted, the system will automatically apply the settings of the default custom group on the concerned users.*

- **Short Name:** Enter short name for the custom group to be created.
- **Description:** Enter description for the custom group. It can be maximum of 250 characters.

## User In This Group

This section enables to add users to the custom group.

- Select users to be added using the picklist button. The selected users get displayed in the grid. You can also delete the selected users from the list or search a particular user using the **Search** field.





The picklist options that appear will be as per the rights assigned to the SA. For details, refer to [“Assigning Group-Wise Rights”](#) under [“System Accounts”](#).

Once a user is deleted from a custom group, it gets restored to the default custom group and inherits all configurations assigned to the default custom group.

- Click **Save** and the created custom group gets displayed in the grid on the right hand side.

You can edit or delete the custom group if required. To do so,

- Click on the desired custom group from the grid on the right hand side.
- To edit, click **Edit** .
- To delete, click **Delete** .



Only those custom groups can be deleted that are not assigned to any user/worker/visitor.

Now, you can also associate parameters to the created custom group. To do so See [“Association Mapping”](#) on [page 1625](#).

## Association Mapping

The parameters under Association Mapping section are known as Associated parameters as they are linked with the custom group from the **Utilities > Group Associations**. Once the parameters are enabled, they will be available for configuration in the **Association Mapping** section of Custom Group page as shown below.

All the parameters configured here are applicable to all the users in the group as well as to the new users to whom the group will be assigned.

The screenshot shows the 'Custom Group 2' configuration window. The top section contains fields for ID (1), Name (Custom Group 2), Code (CG2), Set As Default (checked), Short Name (DLTCG2), and Description (250 chars). The 'Association Mapping' section is expanded, showing three sub-sections: 'Attendance' with 'OT/C-Off Eligibility' set to 'None' and 'Authorize C-Off On' with checkboxes for WO, PH, WO/PH, FB, RD, and Normal Day; 'Policy' with 'Overtime Policy' set to 'ID' and 'Name'; and 'Access Details' with 'Shift Based Access' unchecked.



A single associated parameter can be linked with only one group, i.e. if a parameter is enabled for one enterprise group from the Group Associations page, then it becomes disabled for other enterprise groups.

Eg: If Policy > Overtime Policy is selected for Custom Group2 from Group Association page, then Overtime Policy will be disabled for other enterprise groups.

If you have enabled Access Profile, all the Panels appear in the grid. You can select the check box of the desired Panels and assign the desired Access Profiles to these Panels. The same will be assigned to the users. Make sure the devices/device groups are assigned after the configurations have been done in the Enterprise Group. You can also change the Access Profile Groups manually later if required. Refer to [“Devices”](#) in [“Configuring Users”](#).

If you have enabled Job Costing, you can assign Jobs manually or you can assign Job Schedulers through which Jobs will be assigned when the Scheduler runs. To assign Jobs, refer [“Default Jobs”](#) under [“Job Costing”](#) and to assign Job Schedulers, refer [“Select Users”](#) under [“Job Scheduler”](#).

If you wish to create Job Schedulers, refer to [“Job Scheduler”](#). If a Job Scheduler is assigned to any Enterprise Group Type, then only the Scheduler will be assigned to the users of that group. The Jobs in the Scheduler will be assigned to the users when the Scheduler runs as per its set schedule.

- Select the custom group from the grid to be edited and click **Edit**.
- In the **Association Mapping panel**, configure the associated parameters as required. E.g. In the below screen, Shift Based Access has been enabled for all users of the “Custom Group 2”.

Custom Group 2

ID \* 1

Name \* Custom Group 2

Code \* CG2

Set As Default ☒

Short Name DFLTCG2

Description 250 chars

Association Mapping

**Attendance**

OT/C-OFF Eligibility None

Authorize C-OFF On ☐ WO ☐ PH ☐ WO/PH ☐ FB ☐ RD ☐ Normal Day

**Policy**

Overtime Policy ID Name

**Access Details**

Shift Based Access ☒

- Click **Save** to save the settings.



*If Association Mapping is changed from one Enterprise Group Type to other (eg. From Organization to Branch), all current default jobs records (Assignment End Date  $\geq$  Current Date) will be deleted. Previous default job records (Assignment End Date  $<$  Current Date) will still be retained.*

*If Enterprise Group is deleted then all job assignment records current as well as previous will be deleted.*

# Custom Group3

Custom Group3 tab enables to create and manage custom group. It helps to group users in a particular custom group and assign policies accordingly. You can add 999999 custom group3.

To view Custom Group tab, click **Enterprise Structure > Custom Group3** and the following screen appears.

ID	Name
1	Custom Group 3

The page displays configurations on the left side and to the right is the grid containing a list of created custom groups.

To configure a new custom group, click the **New** button and enter the following details:

- **ID:** The ID is auto generated by the system.
- **Name:** Specify the name of the custom group. The supported values are: **A-Z, a-z, 0-9, ( ) , [ ], \_ (underscore), - (Hyphen), . (full Stop), /, &, , (comma), @, ' (single quote), [space]**. The invalid characters for Multi-language character set are Set3 which includes ` ~ # % ^ \* = + { } | \ : ; " < > ?
- **Code:** Enter a code of maximum 6 characters for the new custom group.
- **Set As Default:** Enable to set the created custom group as the default group.



*Both default custom group and custom group that are already in use cannot be deleted from the system. In case all custom group configured on the system are deleted, the system will automatically apply the settings of the default custom group on the concerned users.*

- **Short Name:** Enter short name for the custom group to be created.
- **Description:** Enter description for the custom group. It can be maximum of 250 characters.

## User In This Group

This section enables to add users to the custom group.

- Select users to be added using the picklist button. The selected users get displayed in the grid. You can also delete the selected users from the list or search a particular user using the **Search** field.

Custom Group 3

ID: 1

Name: Custom Group 3

Code: CG3

Set As Default: ☒

Short Name: DFLTCG3

Description: 250 chars

User In This Group

Search

ID	Name	
12	12	
1551	Shalini Fefar	
1690	admin	
555	555	
apta	apta user	
cafe	cafeteria	
Device1	device1	

Grid on the right:

ID	Name
1	Custom Group 3





The picklist options that appear will be as per the rights assigned to the SA. For details, refer to [“Assigning Group-Wise Rights”](#) under [“System Accounts”](#).

Once a user is deleted from a custom group, it gets restored to the default custom group and inherits all configurations assigned to the default custom group.

- Click **Save** and the created custom group gets displayed in the grid on the right hand side.

You can edit or delete the custom group if required. To do so,

- Click on the desired custom group from the grid on the right hand side.
- To edit, click **Edit** .
- To delete, click **Delete** .



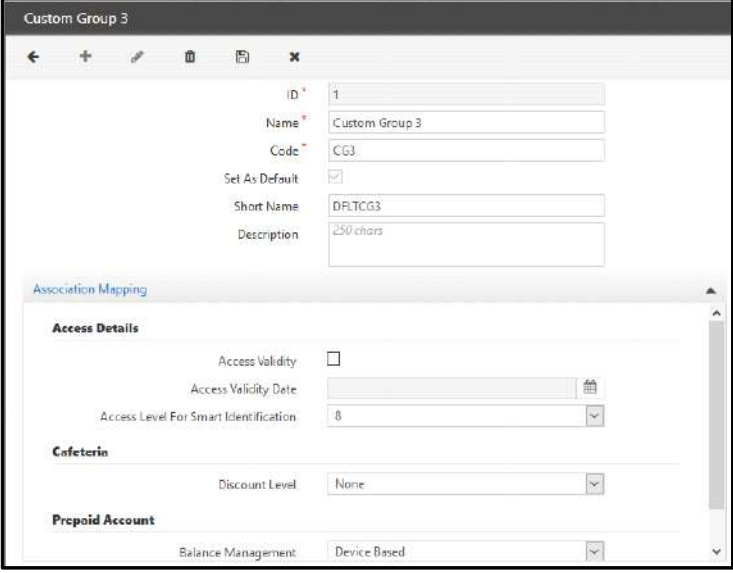
Only those custom groups can be deleted that are not assigned to any user/worker/visitor.

Now, you can also associate parameters to the created custom group. To do so See [“Association Mapping”](#) on page 1629.

## Association Mapping

The parameters under Association Mapping section are known as Associated parameters as they are linked with the custom group from the **Utilities > Group Associations**. Once the parameters are enabled, they will be available for configuration in the **Association Mapping** section of Custom Group page as shown below.

All the parameters configured here are applicable to all the users in the group as well as to the new users to whom the group will be assigned.



The screenshot shows the 'Custom Group 3' configuration window. The top section contains fields for ID (1), Name (Custom Group 3), Code (CG3), Set As Default (checked), Short Name (DRLTCG3), and Description (250 chars). The 'Association Mapping' section is expanded, showing three sub-sections: 'Access Details' with fields for Access Validity (unchecked), Access Validity Date, and Access Level For Smart Identification (8); 'Cafeteria' with a Discount Level dropdown set to 'None'; and 'Prepaid Account' with a Balance Management dropdown set to 'Device Based'.



A single associated parameter can be linked with only one group, i.e. if a parameter is enabled for one enterprise group from the Group Associations page, then it becomes disabled for other enterprise groups.

Eg: IF ESS> Enable Account is selected for Custom Group1 from Group Association page, then Enable Account will be disabled for other enterprise groups.

If you have enabled Access Profile, all the Panels appear in the grid. You can select the check box of the desired Panels and assign the desired Access Profiles to these Panels. The same will be assigned to the users. Make sure the devices/device groups are assigned after the configurations have been done in the Enterprise Group. You can also change the Access Profile Groups manually later if required. Refer to [“Devices”](#) in [“Configuring Users”](#).

If you have enabled Job Costing, you can assign Jobs manually or you can assign Job Schedulers through which Jobs will be assigned when the Scheduler runs. To assign Jobs, refer [“Default Jobs”](#) under [“Job Costing”](#) and to assign Job Schedulers, refer [“Select Users”](#) under [“Job Scheduler”](#).

If you wish to create Job Schedulers, refer to [“Job Scheduler”](#). If a Job Scheduler is assigned to any Enterprise Group Type, then only the Scheduler will be assigned to the users of that group. The Jobs in the Scheduler will be assigned to the users when the Scheduler runs as per its set schedule.

- Select the custom group from the grid to be edited and click **Edit**.
- In the **Association Mapping panel**, configure the associated parameters as required. E.g. In the below screen, Cafeteria- Discount Level1 has been set for all users of the “Custom Group 3”.

- Click **Save** to save the settings.



*If Association Mapping is changed from one Enterprise Group Type to other (eg. From Organization to Branch), all current default jobs records (Assignment End Date  $\geq$  Current Date) will be deleted. Previous default job records (Assignment End Date  $<$  Current Date) will still be retained.*

*If Enterprise Group is deleted then all job assignment records current as well as previous will be deleted.*



# Group Associations

Group Association refers to the process of associating certain system parameters with an enterprise group, such that the configurations of these parameters will apply uniformly to all users within the group. These configurations also apply to the new users when they are added in the group. For example, this function may be used to associate the *Attendance Policy* parameter with the *Designation* group so that different Attendance Policies can be applied to different designations within an organization.

The *Group Associations* feature in COSEC enables the system administrator to determine which parameters should be available for *Association Mapping* for an enterprise group.

To define *Group Associations* for each enterprise group, click **Enterprise Structure module > Utilities > Group Associations** and the following screen appears.

The screenshot shows the 'Group Associations' interface. On the left, under the 'ESS' group, parameters like 'Enable Account', 'Punch Marking Via API', and 'Manual Punch Marking' are listed with checkboxes. Under the 'Attendance' group, parameters like 'Enable Attendance Calculation' and 'Restrict Half Day Considerations' are listed. On the right, the 'Associations' table shows the mapping of these parameters to various groups. The 'Organization' group is associated with the 'ESS' group, and the 'Designation' group is associated with the 'Attendance' group.

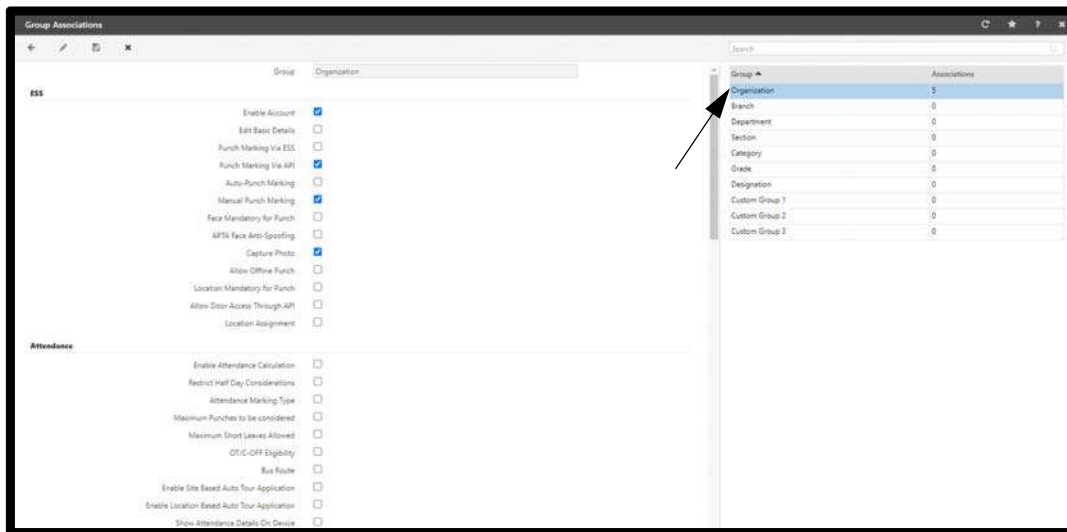
Group	Associations
Organization	ESS
Branch	
Department	
Section	
Category	
Grade	
Designation	
Custom Group 1	
Custom Group 2	
Custom Group 3	

The Group Association can be done for the parameters of **ESS, Attendance, Policy, Access Details, Cafeteria, Prepaid Account, Postpaid Account, Job Costing, Field Visit Management, Face Recognition and Visitor Management.**

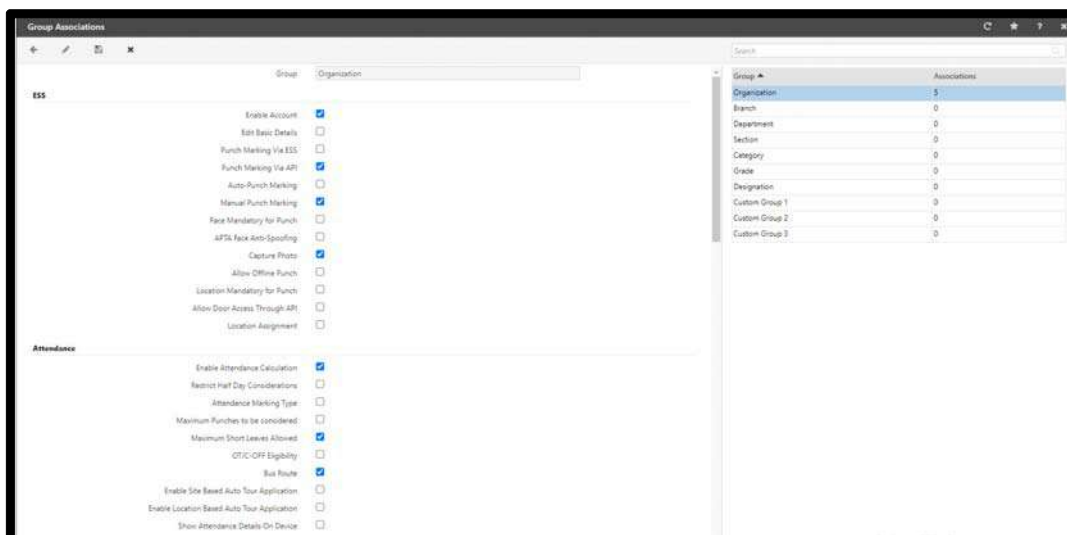


The ESS Assignment check box under Job Costing will not be displayed if the **Show All Jobs while Punching** check box is enabled. For details, refer to [“Job Costing”](#) in [“Defining Global Policies”](#).

1. Select a **Group** from the grid on the right hand side of the page as shown below.



2. Select the appropriate parameter check-boxes which are to be associated with the selected group as shown above.



3. Click **Save** to apply the associations to the selected group. The number of the association will be updated accordingly. These parameters will now appear on the particular group page for **Association Mapping**.

## Example:

Suppose **Group** is selected as **Organization**.

Select **Enable Account**, **Punch Marking via API**, **Manual Punch Marking**, **Capture Photo**, and **Max Short Leaves Allowed** options as shown below:

The screenshot shows the 'Group Associations' window with the 'Organization' tab selected. The 'ESS' section has the following options checked: 'Enable Account', 'Punch Marking Via API', 'Manual Punch Marking', and 'Capture Photo'. The 'Attendance' section has 'Maximum Short Leaves Allowed' checked. The right sidebar shows a list of groups with 'Organization' selected, showing 5 associations.

Group	Associations
Organization	5
Branch	0
Department	0
Section	0
Category	0
Grade	0
Designation	0
Custom Group 1	0
Custom Group 2	0
Custom Group 3	0

Then the Organization tab on Enterprise Structure page will appear as shown below.

**Enable Account**, **Punch Marking via API**, **Manual Punch Marking**, **Capture Photo**, and **Max Short Leaves Allowed** will get associated with "Organization". You can enable the options for the particular organization by selecting it from the list and enabling the options for it.

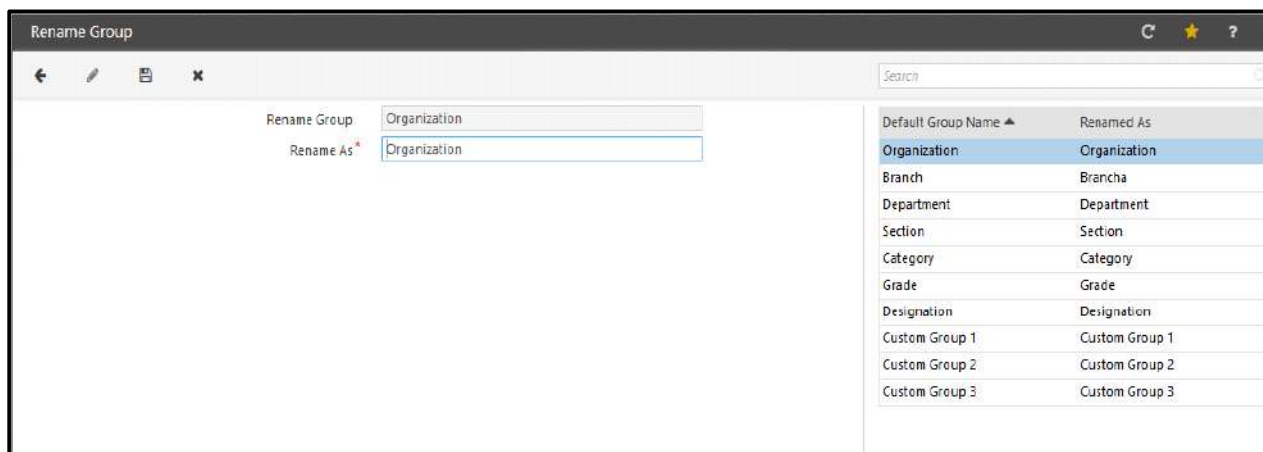
The screenshot shows the 'Organization' window with the 'Organization 1' tab selected. The 'ESS' section has the following options checked: 'Enable Account', 'Punch Marking Via API', 'Manual Punch Marking', and 'Capture Photo'. The 'Attendance' section has 'Maximum Short Leaves Allowed' checked. The right sidebar shows a list of organizations with 'Organization 1' selected, showing 1 association.

Organization	Associations
Organization 1	1

# Renaming Groups

COSEC enables the system administrator to decide how *Enterprise Groups* can be labelled to best represent a business structure. This can be done by renaming the existing groups predefined on the system.

To rename a group, Go to **Enterprise Structure > Utilities > Rename Groups** and the following screen appears.




Default Group Name	Renamed As
Organization	Organization
Branch	Brancha
Department	Department
Section	Section
Category	Category
Grade	Grade
Designation	Designation
Custom Group 1	Custom Group 1
Custom Group 2	Custom Group 2
Custom Group 3	Custom Group 3

Select a Group from the list view that is to be renamed. The selected *Default Group Name* appears in the **Group Name** field.

Enter the new Group Name/label in the **Rename As** field.

Click the **Save** button.

The new Group name/label will appear in the list view under the **Renamed As** column as shown below.



Default Group Name	Renamed As
Organization	Company
Branch	Brancha
Department	Department
Section	Section
Category	Category
Grade	Grade
Designation	Designation
Custom Group 1	Custom Group 1
Custom Group 2	Custom Group 2
Custom Group 3	Custom Group 3



The user can also perform the **Rename Groups** function using the **Admin** module. To know more see [Renaming Group in Admin Module](#).

# Enterprise Group Reports

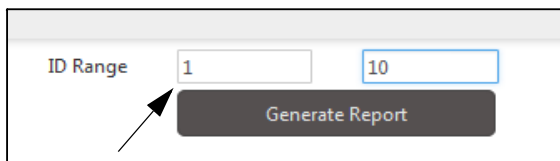
The COSEC user can easily access and generate individual and detailed reports on enterprise groups related to a business. Enterprise Structure reports can be generated using the **Reports** section under the **Enterprise Structure** module. The following reports can be viewed under this section:

- Organization Report
- Branch Report
- Department Report
- Designation Report
- Section Report
- Category Report
- Grade Report
- Custom Group 1
- Custom Group 2
- Custom Group 3

To generate an Enterprise Group report, set the filters as per your requirement.

1. On the respective group page,

- **ID Range:** Enter the start and end IDs. The data for the specified range of IDs will be retrieved for the particular group.




2. Click **Generate Report**.

Follow the same steps as mentioned above for any Enterprise Group.

Sample Reports of each Enterprise Groups are as follow:

Organization



Sr No	ID	System Admin	Name	Description	Email	Short Name	Default
1	1	MATRIX	MATRIX COMSEC PVT. LTD.			MATRIX	Yes
2	2	SAMART	SAMARTH			SAMARTH	No
3	3	AVDHOO	AVDHOOT			AVDHOOT	No
4	4	ELSENG	ELSENGARD			ELSENGARD	No
5	5	TECHSE	TECH SERVICES			TECH SERVICES	No
6	6	CONSUL	CONSULTANT			CONSULTANT	No
7	7	CANTEEN	CANTEEN			CANTEEN	No
8	8	APPREN	APPRENTICE			APPRENTICE	No
9	9	TRAINEE	TRAINEE			TRAINEE	No
10	10	6565	or10			or10	No


## Branch

Branch									
←									
Back									
<div>  <div> <div>MATRIX COMSEC PVT. LTD.</div> <div>Branch</div> </div> <div>Page 1 of 1</div> </div>									
Run by: System Admin									
Sr No	ID	Code	Name	Description	Email	Date: 05/23/2023	Short Name	Default	22:06
1	1	HO	HEAD OFFICE				HEAD OFFICE	Yes	
2	2	RNDI	RND I				RND I	No	
3	3	RNDII	RND II				RND II	No	
4	4	FACTORY	FACTORY				FACTORY	No	
5	5	FIELDE	FIELD EMPLOYEE				FIELD EMPLOYEE	No	
6	6	FIELDS	FIELD EMPLOYEE BMGM				FIELD EMPLOYEE	No	
7	7	5435	br7				br7	No	
8	8	54656	br8				br8	No	
9	9	78686	br9				br9	No	
10	10	676	br10				br10	No	

## Department

Department									
←									
Back									
<div>  <div> <div>MATRIX COMSEC PVT. LTD.</div> <div>Department</div> </div> <div>Page 1 of 1</div> </div>									
Run by: System Admin									
Sr No	ID	Code	Name	Description	Email	Date: 05/23/2023	Short Name	Default	22:07
1	1	ACTFIN	ACCOUNTS & FINANCE				ACTFIN	Yes	
2	2	ADMIN	ADMINISTRATION				ADMINISTRATION	No	
3	3	CARPEN	CARPENTER				CARPENTER	No	
4	4	DIRECT	DIRECTOR				DIRECTOR	No	
5	5	DRIVER	DRIVER				DRIVER	No	
6	6	ELECT	ELECTRICIAN				ELECTRICIAN	No	
7	7	HOUSE	HOUSE KEEPING				HOUSE KEEPING	No	
8	8	HR	HUMAN RESOURCES				HUMAN RESOURCES	No	
9	9	IT	IT				IT	No	
10	10	MANU	MANUFACTURING				MANUFACTURING	No	


## Designation

Designation									
←									
Back									
<div>  <div> <div>MATRIX COMSEC PVT. LTD.</div> <div>Designation</div> </div> <div>Page 1 of 1</div> </div>									
Run by: System Admin									
Sr No	ID	Code	Name	Description	Email	Date: 05/23/2023	Short Name	Default	22:09
1	1	DSG1	Designation 1				DFLTDGG	Yes	
2	2	324	d2				d2	No	
3	3	343	d3				d3	No	
4	4	322	d4				d4	No	
5	5	34334	d5				d5	No	
6	6	D6	d6				d6	No	
7	7	D7	d7				d7	No	
8	8	D8	d8				d8	No	
9	9	D9	d9				d9	No	
10	10	D10	d10				d10	No	


## Section

Section							
←							
Back							
<div>  <div> <div>MATRIX COMSEC PVT. LTD.</div> <div>Section</div> </div> <div>Page 1 of 1</div> </div>							
Run by: System Admin				Date: 05/23/2023		22:10	
Sr No	ID	Code	Name	Description	Email	Short Name	Default
1	1	SEC1	Section-1			DFLTSEC	Yes
2	2	2342	s1			s1	No
3	3	43	s2			s2	No
4	4	S3	s3			s3	No
5	5	S4	s4			s4	No
6	6	S5	s5			s5	No
7	7	S6	s6			s6	No
8	8	S7	s7			s7	No
9	9	S8	s8			s8	No
10	10	S9	s9			s9	No

## Category

Category							
←							
Back							
<div>  <div> <div>MATRIX COMSEC PVT. LTD.</div> <div>Category</div> </div> <div>Page 1 of 1</div> </div>							
Run by: System Admin				Date: 05/23/2023		22:12	
Sr No	ID	Code	Name	Description	Email	Short Name	Default
1	1	CTG1	Category-1			DFLTCTG	Yes
2	2	C1	c1			c1	No
3	3	C2	c2			c2	No
4	4	C3	c3			c3	No
5	5	C4	c4			c4	No
6	6	C5	c5			c5	No
7	7	C6	c6			c6	No
8	8	C7	c7			c7	No
9	9	C8	c8			c8	No
10	10	C9	c9			c9	No

## Grade

Grade							
←							
Back							
<div>  <div> <div>MATRIX COMSEC PVT. LTD.</div> <div>Grade</div> </div> <div>Page 1 of 1</div> </div>							
Run by: System Admin				Date: 05/23/2023		22:13	
Sr No	ID	Code	Name	Description	Email	Short Name	Default
1	1	GRD1	Grade-1			DFLTGRD	Yes
2	2	R43	g1			g1	No
3	3	323	g2			g2	No
4	4	43	g3			g3	No
5	5	433	g4			g4	No
6	6	45	g5			g5	No
7	7	3234	g6			g6	No
8	8	34354	g7			g7	No
9	9	65657	g9			g9	No
10	10	56546	g10			g10	No

## Custom Group 1/2/3

Custom Group 1

Back

1 of 1 114%

MATRIX

MATRIX COMSEC PVT. LTD.  
Custom Group 1

Page 1 of 1

Run by: System Admin Date: 05/23/2023 22:14

Sr No	ID	Code	Name	Description	Email	Short Name	Default
1	1	CG1	Custom Group 1			DPLTCG1	Yes
2	2	32	cg1			cg1	No
3	3	2332	cg2			cg2	No
4	4	4354	cg3			cg3	No
5	5	43	cg4			cg4	No
6	6	CG5	cg5			cg5	No
7	7	CG6	cg6			cg6	No
8	8	CG7	cg7			cg7	No
9	9	CG8	cg8			cg8	No
10	10	CG9	cg9			cg9	No




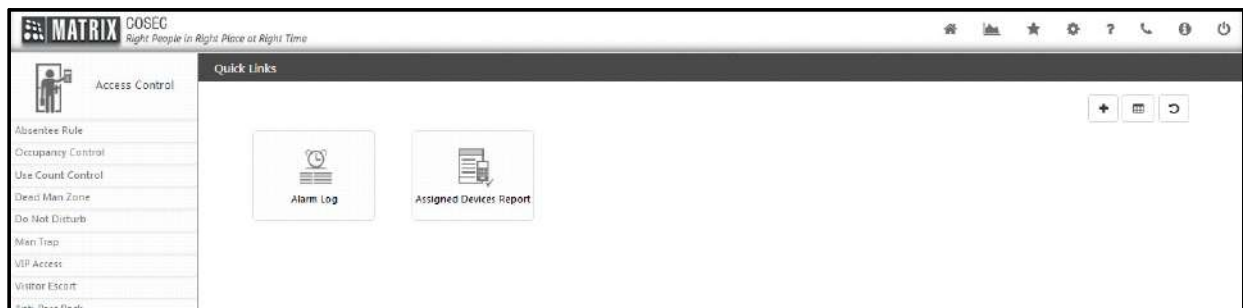
Access Control System can detect and report intrusion, access to sensitive places like warehouse, cash rooms in banks, R&D departments in corporate offices, troubled conditions, any other place, where unauthorized access needs to be monitored.

Access control systems can grant, record, deny, detect and report access to facilities, services, information and other assets that need to be protected from mass access.

In order to start the configuration of the system, the user needs to first define the devices from the **Device** module and then proceed with the configuration of the access control policies from the **Access Control** module.

To use the Access Control functionality,

- Click on **Access Control**  module. The **Access Control** page appears.



The page displays a menu and **Quick Links** to go to the required page in just one click. Quick Links are shortcuts to reach to a specific page easily. You can configure these options for Quick Links — **Add Quick Link**, **Select Layout** and **Reset to Default**.

### Add Quick Links

- Click **Add**  . The **Picklist For Quick Links Pages** pop-up appears.

Picklist For Quick Links Pages

Pages External Links

Total Selected: 0 Records

Search  Show Selected

☐ Select All

<input type="checkbox"/>	Page
<input type="checkbox"/>	Absentee Rule
<input type="checkbox"/>	Occupancy Control
<input type="checkbox"/>	Use Count Control
<input type="checkbox"/>	Dead Man Zone
<input type="checkbox"/>	Do Not Disturb
<input type="checkbox"/>	Man Trap
<input type="checkbox"/>	VIP Access
<input type="checkbox"/>	Visitor Escort
<input type="checkbox"/>	Anti-Pass Back
<input type="checkbox"/>	Guard Tour

OK Cancel

- You can either select particular page or can select all the pages at once. Maximum **20** quick links can be displayed.
- To select particular pages, select the check boxes of the desired pages.

Picklist For Quick Links Pages

Pages External Links

Total Selected: 1 Records

Search  Show Selected

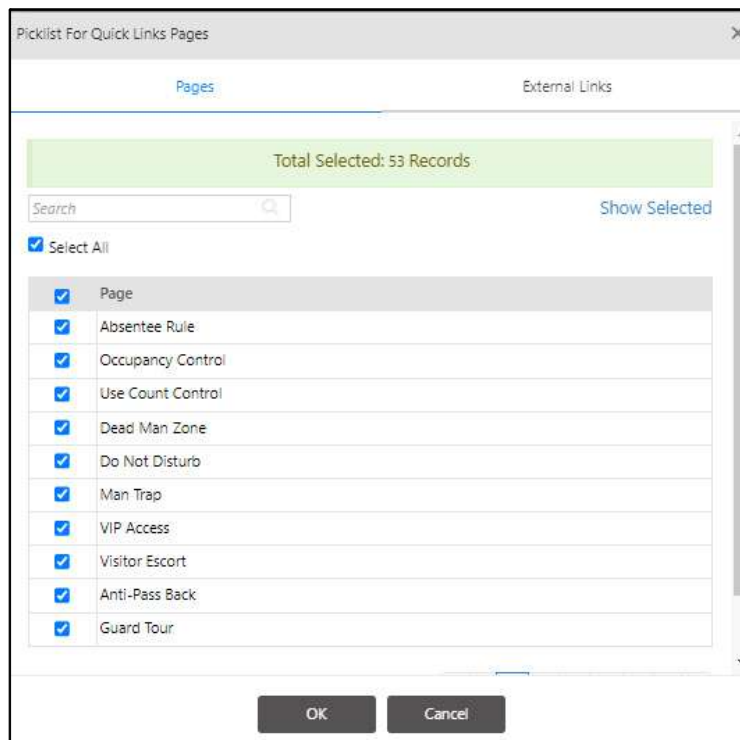
☐ Select All

<input type="checkbox"/>	Page
<input checked="" type="checkbox"/>	Absentee Rule
<input type="checkbox"/>	Occupancy Control
<input type="checkbox"/>	Use Count Control
<input type="checkbox"/>	Dead Man Zone
<input type="checkbox"/>	Do Not Disturb
<input type="checkbox"/>	Man Trap
<input type="checkbox"/>	VIP Access
<input type="checkbox"/>	Visitor Escort
<input type="checkbox"/>	Anti-Pass Back
<input type="checkbox"/>	Guard Tour

OK Cancel


**OR**

- To select all the pages at once, select the **Select All** check box. All the pages will be selected.



- Click **OK**.
- The Quick Links for selected pages appear on the Quick Link page.

#### Adding External Links,

- Select **External Link** tab and click on  button to add new external link.
- Configure the **Title** and **URL** of the external link under the respective fields. Select the check box to display the Quick Link for the configured link.



Picklist For Quick Links Pages

Pages External Links

Search

Title	URL
<input checked="" type="checkbox"/> Google	www.google.com


OK Cancel

- Click **Save**  to save the configuration.
- Once you have saved the configuration, you can edit it. Click **Edit**  to edit the saved configuration.
- Click **OK** to save the configuration of the external link. The Quick Link for the external link appears on the Quick Link page.


Quick Links

Alarm Log Assigned Devices Report Google

## Select Layout

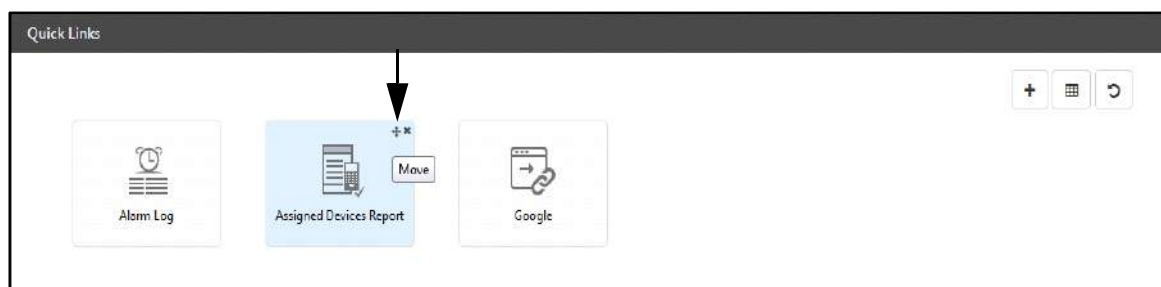
Click **Select Layout**  to select a layout for the quick links. You can select 5x4 or 4x5 layout to manage the quick links.

## Reset To Default

Click **Reset To Default**  to reset the quick links to the default quick links.

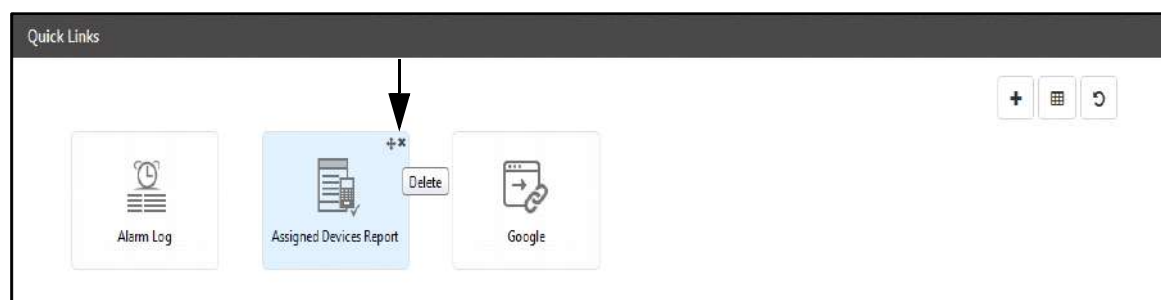
## Move the Link

To move the link from one place to another, hover on the link on top right corner and click **Move** as shown below. Then drag the quick link to the desired place. It will be placed at the desired location on the quick links page.




## Delete the Link

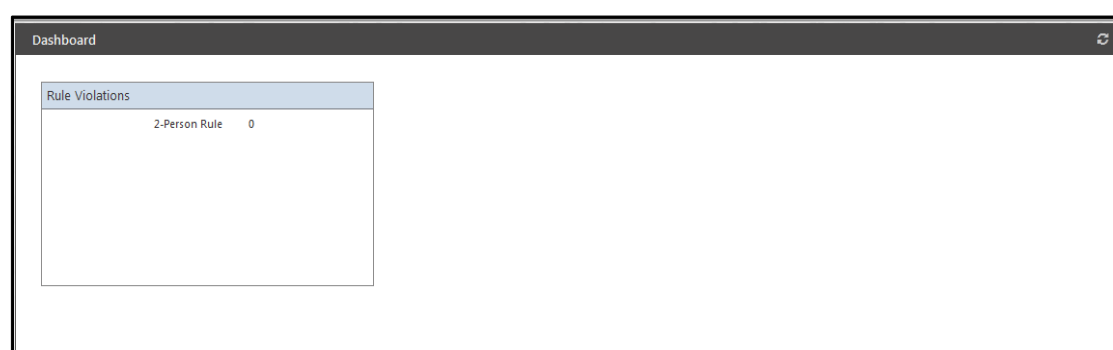
To delete a particular link, hover on the link on top right corner and click **Delete** as shown below.



*Quick links are displayed as per rights given to System Account and ESS users.*

## Access Control Dashboard

To view the Dashboard, click **Dashboard**  on the **Access Control** page. It displays the total number of violations on the current day for the 2-Person Rule:



For more information on the above Dashboard option, click the respective information link on the Dashboard. The

Latest values on Dashboard are updated on clicking **Refresh**



# Absentee Rule

Absentee Rule feature enables the system to set the maximum number of days for non-usage of a credential (**1-99Days**). On expiration (no credential usage - for the maximum number of days set) the User will be automatically blocked.



*This functionality can also be enabled from the **Device Module > Device Configuration > Features** option.*

To set the Absentee Rule,

- Click **Access Control > Absentee Rule**. The **Absentee Rule** page appears.

The screenshot shows the 'Absentee Rule' configuration interface. On the left, there is a sidebar with two tabs: 'Device - Wise' (selected) and 'User - Wise'. The main content area for 'Device - Wise' contains a 'Device' field with two sub-inputs: 'ID' and 'Name'. Below these is an 'Enable Rule' checkbox. At the bottom right of the main area is an 'Update Device' button.

The Absentee Rule can be configured in two forms:

- Device-Wise
- User-Wise

## Device-Wise

In Device-Wise Absentee Rule, the rule will be applicable to the door as well as the users assigned to it.


To configure Device-Wise Absentee Rule,

- Click the **Device-Wise** tab.


The screenshot shows the 'Absentee Rule' configuration interface with the 'Device - Wise' tab selected. The 'Device' field is set to '2' and 'PVR Direct Door'. The 'Enable Rule' checkbox is checked. Below the form is a table with columns: 'User ID', 'Name', 'Rule Enabled', 'Days Count', and an edit icon.






User ID	Name	Rule Enabled	Days Count	
07	Aditi	No	60	
1	Shalini	No	60	
101	Khushbu	No	60	
2	Chirag	No	60	

Configure the following parameters:

- **Device:** Select the required device using the **Device**  picklist. A list of all users on the selected device appear in the grid.
- **Enable Rule:** Select the check box to enable the rule on the selected device.
- Click **Update Device** to save the device selection.

The grid displays all the users assigned to the selected device. The following details appear — User ID, Name, Rule Enabled and Days Count. You can edit the rule for a particular user.

- Click **Edit**  corresponding to the user you wish to edit the rule.

Search <input type="text"/>				
User ID ▲	Name	Rule Enabled	Days Count	
07	Aditi	No	60	
1	Shalini	<input checked="" type="checkbox"/>	60	 
101	Khushbu	No	60	
2	Chirag	No	60	








- **Rule Enabled:** Select the check box to enable the rule for the selected user.
- **Days Count:** Specify the absent days count after which the selected user should be blocked.
- Click **OK** to update the details or click **Cancel** to discard.

## User Wise

In User-Wise Absentee Rule, the rule will be applicable to the user as well as the doors assigned to the user.

To configure User-Wise Absentee Rule,


- Click the **User-Wise** tab.









Absentee Rule					
<div> <div>Device - Wise</div> <div>User - Wise</div> </div>					
<div> <div>User <sup>*</sup> 07 Aditi </div> <div>Search <input type="text"/></div> </div>					
Device ID ▲	Name	Rule Active	Rule Applicable	Days Count	
1	Door v3	No	No	60	
2	PVR Direct Door	Yes	No	60	
3	NGT Ground Floor	No	No	60	
4	Vega Direct Door	No	No	60	
5	Wireless Door 1st Floor	Yes	No	60	
6	PVR Door-Device-6	No	No	60	

Configure the following parameters:

- **User:** Select the required user using the **User**  picklist. A list of all devices on the selected user appear in the grid.

The grid displays all the devices assigned to the selected user. The following details appear — Device ID, Name, Rule Active, Rule Applicable and Days Count. You can edit the rule for a particular device.

- Click **Edit**  corresponding to the device you wish to edit the rule.

Search <input type="text"/>					
Device ID ▲	Name	Rule Active	Rule Applicable	Days Count	
1	Door v3	No	No	60	
2	PVR Direct Door	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	60	  
3	NGT Ground Floor	No	No	60	
4	Vega Direct Door	No	No	60	
5	Wireless Door 1st Floor	Yes	No	60	
6	PVR Door-Device-6	No	No	60	

- **Rule Active:** Select the check box to activate the rule for the selected device.
- **Rule Applicable:** Select the check box to enable the rule for the selected device.
- **Days Count:** Specify the absent days count after which the user will be blocked for the selected device.
- Click **OK** to update the details or click **Cancel** to discard.

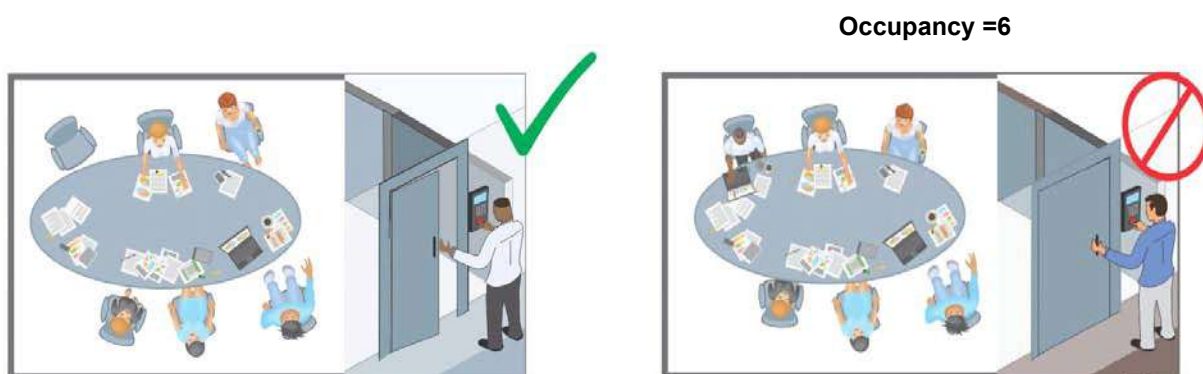


# Occupancy Control

Occupancy Control feature enables the system to monitor and control the number of users permitted within a secured area or controlled zone. This feature can be useful for high security bank vaults, research organizations where a single person cannot be trusted.

The access to secured zone can be restricted by specifying Maximum and Minimum Occupancy limit for direct door as well as for Panel200 and Zones.

Occupancy Control functionality requires **Entry** and **Exit** readers on the controlled area.



This functionality can also be enabled from the **Device Module > Device Configuration > Features** option.

- 1.If Dead Man and Occupancy Control feature both are enabled then Occupancy Control feature will not work.
- 2.If Duress feature is enabled then user will be allowed directly. Occupancy Control feature will not be checked.
3. SI user will be restricted to enter the Occupancy Control enabled Zone.


To set the Occupancy Control,

- Click **Access Control > Occupancy Control**. The **Occupancy Control** page appears.

ID	Name
2	NGT Direct Door-Device-2
3	Panel Lite V2
4	Panel Lite
4	Wireless Door
5	Door V3
5	Door FMX
8	ARC as Direct Door
9	Path as direct door
10	Vega as Direct Door

The grid on the right hand side of the page shows the list of the devices configured with Advance Access Control System.

Configure the following parameters:

- **Device:** Select the required device using the **Device**  picklist.
- **Enable Rule:** Select the check box to enable the rule on the selected device.
- Click **Update Device** to enable the rule on the device.

Once you update the device, you can configure the following parameters:

- **Zone:** Select the Zone on which you want to enable the rule.



*This parameter is applicable only when the selected device is Panel/Panel Lite/Panel200.*

- **Enable Rule on Zone:** Select the check box to enable the rule on the Zone.



*This parameter is applicable only when the selected device is Panel/Panel Lite/Panel200.*

- **Occupants Limit:** Specify the value for Occupants Limit to control the number of persons in a secured area. Maximum Occupancy Limit can vary from **1 to 999** users for any direct door. If the user count exceeds the maximum limit and a VIP user accesses the door then access will be granted.
- Click on **Update Zone** to save the changes.

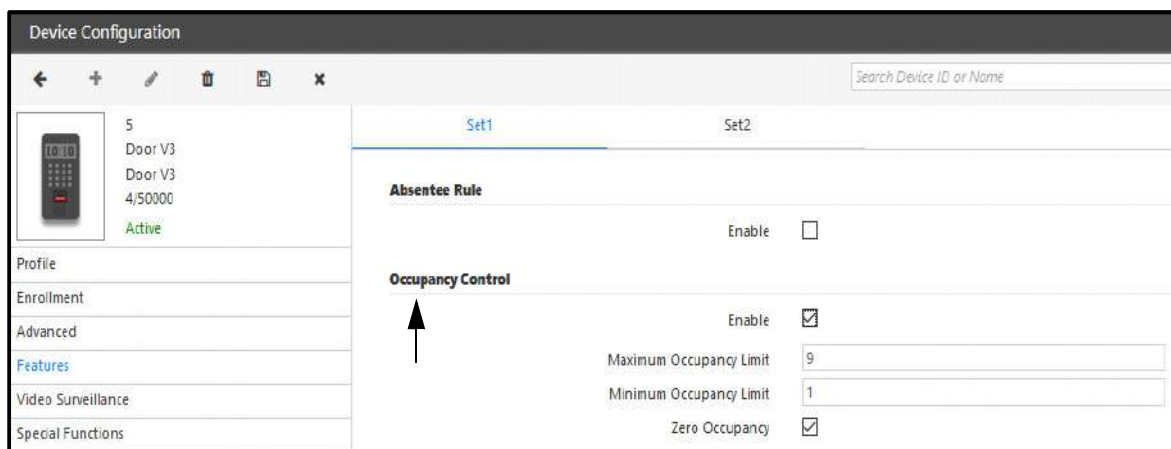
## For Direct Doors


The occupancy count should be affected on each entry (made through entry reader) and on each exit (made through exit reader). Occupancy control is verified even if the First-in-User or 2-Person Rule is enabled.



*Occupancy count shall be stored in RAM and on reboot, this value will be reset to zero.*

You can configure **Minimum Occupancy Limit** and **Zero Occupancy** in Direct doors from **Device Configuration > Features**.



Device Configuration	
 <p>5 Door V3 Door V3 4/50000 Active</p>	<div>Set1 Set2</div> <div><b>Absentee Rule</b> Enable <input type="checkbox"/></div> <div><b>Occupancy Control</b> Enable <input checked="" type="checkbox"/> Maximum Occupancy Limit 9 Minimum Occupancy Limit 1 Zero Occupancy <input checked="" type="checkbox"/></div>

- **Maximum Occupancy Limit:** It is the maximum number of users that can be present in the zone/area at a time. For example: If Maximum Occupancy Limit is set as 9, 10th individual will not be allowed to enter the zone. Users are allowed to enter until the Maximum Occupancy Limit is reached.

- **Minimum Occupancy Limit:** It is the minimum number of users that need to be present in the zone/area at a time. For example: If Minimum Occupancy Limit is set as 2, a single user is not allowed to enter. At least 2 users must enter together. After that, individual users can enter till the Maximum Occupancy Limit is reached.

When 1st user punches on the door, the device will wait for the 2nd user to punch. If second user does not come before the time out duration, the first user will not be allowed to enter.

- **Zero Occupancy:** Enable this check box if the zone is allowed to be empty or have zero occupancy which will be checked when user exists from the zone.

**Case1:** If Minimum Occupancy Limit is set as 2 and Zero Occupancy is enabled;

- If there are only 2 users left in the zone, so both users can exit the zone together leaving the zone vacant. But, users cannot exit one after another.

**Case2:** If Minimum Occupancy Limit is set as 2 and Zero Occupancy is disabled;

- If there are only 2 users left in the zone and as the zone cannot be empty; so the 2 users cannot exit from the zone maintaining the minimum limit.

**Device Configuration**

24 Door V3-Device-24 Door V3 0/50000 Active

Profile Enrollment Advanced Features Video Surveillance Special Functions

**Absentee Rule** Enable ☐

**Occupancy Control** Enable ☒


Maximum Occupancy Limit 5

Minimum Occupancy Limit 2

Zero Occupancy ☒

**Example:** Consider a scenario where the Minimum Occupancy Limit is configured as 2 and the Maximum Occupancy Limit is 4. The following possibilities can occur.

- If User 1 punches and User 2 does not punch; the minimum occupancy condition will be violated and User 1 will be denied access as shown below.



User ID: 1

Chirag

Denied - Minimum Occupancy

Device:

Door V3-Device-24

Event Date & Time:

19/06/2018 06:07:00 PM

Deparments:


DFLDTPT

Designation:


DFLDSG

Sr No.	Date Time	Type	Device	Category	Detail
576	19/06/2018 06:06:16 PM	Door V3	Door V3-Device-24	Other	→ External Reader Configuration Sent. TID: 1806190040000729
577	19/06/2018 06:06:16 PM	Door V3	Door V3-Device-24	ACK	← External Reader Configuration Successful.
578	19/06/2018 06:06:16 PM	Door V3	Door V3-Device-24	Other	→ External Reader Configuration Sent. TID: 1806190040000730
579	19/06/2018 06:06:16 PM	Door V3	Door V3-Device-24	ACK	← External Reader Configuration Successful.
580	19/06/2018 06:06:16 PM	Door V3	Door V3-Device-24	Other	→ External Reader Configuration Sent. TID: 1806190040000731
581	19/06/2018 06:06:16 PM	Door V3	Door V3-Device-24	ACK	← External Reader Configuration Successful.
582	19/06/2018 06:06:16 PM	Door V3	Door V3-Device-24	Other	→ External Reader Configuration Sent. TID: 1806190040000732
583	19/06/2018 06:06:16 PM	Door V3	Door V3-Device-24	ACK	← External Reader Configuration Successful.
584	19/06/2018 06:06:16 PM	Door V3	Door V3-Device-24	Other	→ MultiLanguage Configuration Sent. TID: 1806190040000733
585	19/06/2018 06:06:16 PM	Door V3	Door V3-Device-24	ACK	← MultiLanguage Configuration Successful.
586	19/06/2018 06:06:16 PM	Door V3	Door V3-Device-24	Other	→ Identification Server Configuration Sent. TID: 1806190040000734
587	19/06/2018 06:06:16 PM	Door V3	Door V3-Device-24	ACK	← Identification Server Configuration Successful.
588	19/06/2018 06:06:16 PM	Door V3	Door V3-Device-24	Other	→ Special Function Configuration Sent. Special Function No: 11 TID: 1806190040000735
589	19/06/2018 06:06:16 PM	Door V3	Door V3-Device-24	ACK	← Special Function Configuration Successful. Special Function No: 11
590	19/06/2018 06:06:16 PM	Door V3	Door V3-Device-24	Other	→ End Of Message
591	19/06/2018 06:07:01 PM	Door V3	Door V3-Device-24	User	→ Denied - Minimum Occupancy with Finger. User ID: 1 Event Date Time: 19/06/2018 06:07:00 PM
592	19/06/2018 06:07:01 PM	Door V3	Door V3-Device-24	ACK	→ Event Ack for RollOver: 0 Event Seq. No: 42

- 2 users will be allowed when they enter together, that is, they punch one after another which maintains Minimum Occupancy Limit as shown below.

User Details		Events					
 <b>User ID:</b> 101 <b>Khushbu</b> <b>Allowed</b> <b>Devices:</b> Door V3-Device-24 <b>Event Date &amp; Time:</b> 19/06/2018 06:09:46 PM <b>Department:</b> DLTDPT <b>Designation:</b> DLTDSG		Sr No.	Date Time	Type	Device	Category	Detail
		580	19/06/2018 06:06:16 PM	Door V3	Door V3-Device-24	Other	→ External Reader Configuration Sent. TID: 1806190040000731
		581	19/06/2018 06:06:16 PM	Door V3	Door V3-Device-24	ACK	← External Reader Configuration Successful.
		582	19/06/2018 06:06:16 PM	Door V3	Door V3-Device-24	Other	→ External Reader Configuration Sent. TID: 1806190040000732
		583	19/06/2018 06:06:16 PM	Door V3	Door V3-Device-24	ACK	← External Reader Configuration Successful.
		584	19/06/2018 06:06:16 PM	Door V3	Door V3-Device-24	Other	→ MultiLanguage Configuration Sent. TID: 1806190040000733
		585	19/06/2018 06:06:16 PM	Door V3	Door V3-Device-24	ACK	← MultiLanguage Configuration Successful.
		586	19/06/2018 06:06:16 PM	Door V3	Door V3-Device-24	Other	→ Identification Server Configuration Sent. TID: 1806190040000734
		587	19/06/2018 06:06:16 PM	Door V3	Door V3-Device-24	ACK	← Identification Server Configuration Successful.
		588	19/06/2018 06:06:16 PM	Door V3	Door V3-Device-24	Other	→ Special Function Configuration Sent. Special Function No: 11 TID: 1806190040000735
		589	19/06/2018 06:06:16 PM	Door V3	Door V3-Device-24	ACK	← Special Function Configuration Successful. Special Function No: 11
		590	19/06/2018 06:06:16 PM	Door V3	Door V3-Device-24	Other	→ End Of Message
		591	19/06/2018 06:07:01 PM	Door V3	Door V3-Device-24	User	→ Denied - Minimum Occupancy with Finger. User ID: 1 Event Date Time: 19/06/2018 06:07:00 PM
		592	19/06/2018 06:07:01 PM	Door V3	Door V3-Device-24	ACK	→ Event Ack for RollOver: 0 Event Seq. No: 42
		593	19/06/2018 06:09:47 PM	Door V3	Door V3-Device-24	User	→ Allowed with Finger. User ID: 1 Event Date Time: 19/06/2018 06:09:46 PM
		594	19/06/2018 06:09:47 PM	Door V3	Door V3-Device-24	ACK	→ Event Ack for RollOver: 0 Event Seq. No: 43
		595	19/06/2018 06:09:47 PM	Door V3	Door V3-Device-24	User	→ Allowed with Finger. User ID: 101 Event Date Time: 19/06/2018 06:09:46 PM
		596	19/06/2018 06:09:47 PM	Door V3	Door V3-Device-24	ACK	→ Event Ack for RollOver: 0 Event Seq. No: 44

- When a single user tries to exit from the door, he/she will not be allowed as occupancy of 1 is not allowed. So, both users must punch to exit which will satisfy zero occupancy.
- The Maximum Occupancy Limit will be violated if more than 5 occupants try to access the door, however VIP user will be granted access.

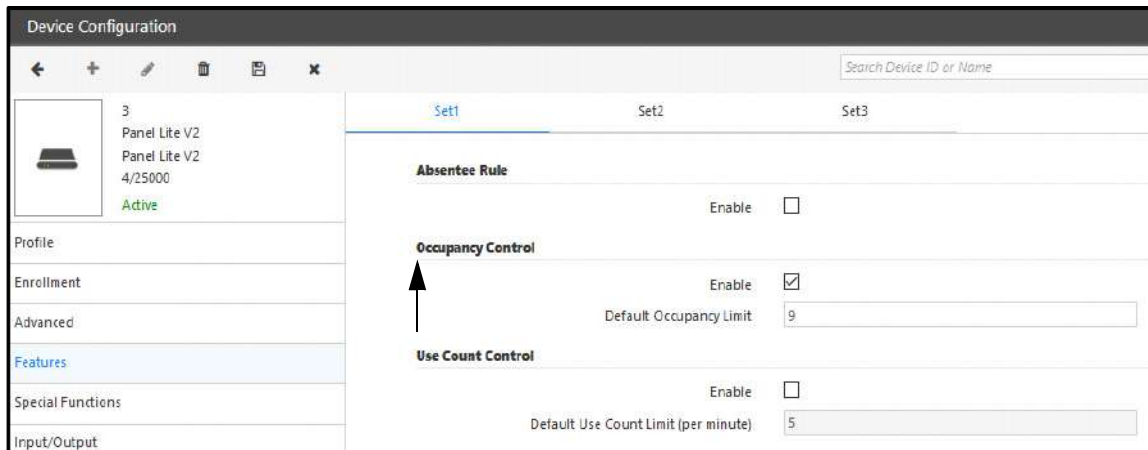
User Details		Events					
 <b>User ID:</b> HRL <b>Ronald</b> <b>Denied - Occupancy Control</b> <b>Device:</b> Door V3-Device-24 <b>Event Date &amp; Time:</b> 19/06/2018 06:22:14 PM <b>Department:</b> DLTDPT <b>Designation:</b> DLTDSG		Sr No.	Date Time	Type	Device	Category	Detail
		994	19/06/2018 06:21:45 PM	Door V3	Door V3-Device-24	Other	→ Identification Server Configuration Sent. TID: 1806190040000904
		995	19/06/2018 06:21:45 PM	Door V3	Door V3-Device-24	ACK	← Identification Server Configuration Successful.
		996	19/06/2018 06:21:45 PM	Door V3	Door V3-Device-24	Other	→ Special Function Configuration Sent. Special Function No: 11 TID: 1806190040000905
		997	19/06/2018 06:21:45 PM	Door V3	Door V3-Device-24	ACK	← Special Function Configuration Successful. Special Function No: 11
		998	19/06/2018 06:21:45 PM	Door V3	Door V3-Device-24	Other	→ End Of Message
		999	19/06/2018 06:21:54 PM	Door V3	Door V3-Device-24	User	→ Allowed with Finger. User ID: 1 Event Date Time: 19/06/2018 06:21:53 PM
		1000	19/06/2018 06:21:54 PM	Door V3	Door V3-Device-24	ACK	→ Event Ack for RollOver: 0 Event Seq. No: 66
		1001	19/06/2018 06:21:54 PM	Door V3	Door V3-Device-24	User	→ Allowed with Finger. User ID: 101 Event Date Time: 19/06/2018 06:21:53 PM
		1002	19/06/2018 06:21:54 PM	Door V3	Door V3-Device-24	ACK	→ Event Ack for RollOver: 0 Event Seq. No: 67
		1003	19/06/2018 06:21:59 PM	Door V3	Door V3-Device-24	User	→ Allowed with Finger. User ID: 4 Event Date Time: 19/06/2018 06:21:58 PM
		1004	19/06/2018 06:21:59 PM	Door V3	Door V3-Device-24	ACK	→ Event Ack for RollOver: 0 Event Seq. No: 68
		1005	19/06/2018 06:22:05 PM	Door V3	Door V3-Device-24	User	→ Allowed with Finger. User ID: 102 [1689] Event Date Time: 19/06/2018 06:22:04 PM
		1006	19/06/2018 06:22:05 PM	Door V3	Door V3-Device-24	ACK	→ Event Ack for RollOver: 0 Event Seq. No: 69
		1007	19/06/2018 06:22:10 PM	Door V3	Door V3-Device-24	User	→ Allowed with Finger. User ID: 1687 Event Date Time: 19/06/2018 06:22:09 PM
		1008	19/06/2018 06:22:10 PM	Door V3	Door V3-Device-24	ACK	→ Event Ack for RollOver: 0 Event Seq. No: 70
		1009	19/06/2018 06:22:15 PM	Door V3	Door V3-Device-24	User	→ Denied - Occupancy Control with Finger. User ID: HRL [1693] Event Date Time: 19/06/2018 06:22:14...
		1010	19/06/2018 06:22:15 PM	Door V3	Door V3-Device-24	ACK	→ Event Ack for RollOver: 0 Event Seq. No: 71

## For Panel Doors

The Occupancy Control rule for Panel Doors can be configured by enabling the rule for Panel200 and the specific Zones. Once the rule is updated on Zone, it is applicable to all the doors of the respective zones.

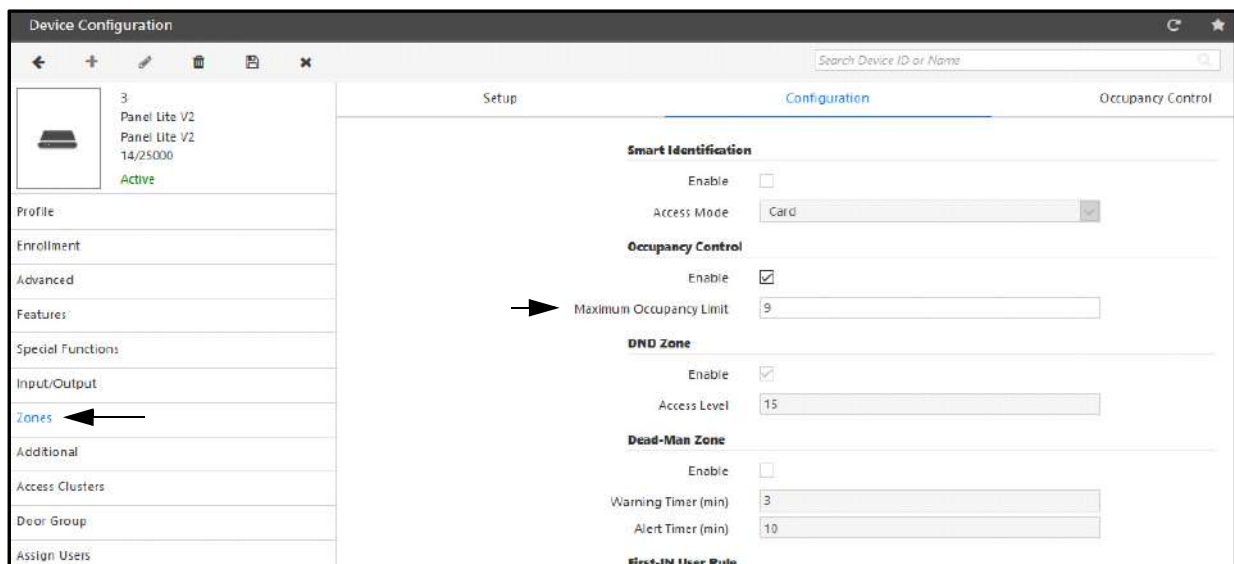
In Panel200, the **Maximum Occupancy Limit** is the Default Occupancy Limit.

When you create new zones of Panel200, the Maximum Occupancy Limit for that zone will be set to the default value as set in the Panel200. If the Default Occupancy Limit for Panel200 is 9, so all the newly created zones will have the default value as 9.



You can change the Maximum Occupancy Limit for the specific zone from

- **Panel200 > Zones > Configuration> Occupancy Control**  
OR
- **Access Control > Occupancy Control**



## For Single Zone

Consider the following example to understand the functioning of Occupancy Control feature for a single zone.

- The Occupancy Control is enabled on Zone-2 of Panel200 and the Maximum Occupants is configured as 2.



**Access Control**

**Occupancy Control** ✓ Saved Successfully

Device: 3 Panel Lite V2

Enable Rule: ☒

Update Device

Zone: Zone-2

Enable Rule On Zone: ☒

Occupants Limit: 2

Update Zone

ID	Name
2	NGT Direct Door-Device-2
3	Panel Lite V2
4	Panel Lite
4	Wireless Door
5	Door V3
6	Door FMX
8	ARC as Direct Door
9	Path as direct door
10	Vega as Direct Door
21	PVR_Ground Floor
22	Vega Controller-Device-22
24	Door V3-Device-24
25	Door V3-Device-25

- Now, the PVR door of Zone2 is set with Mode as Entry.

**Device Configuration**

10 PVR as Panel...  
Panel Lite V2 Door  
PVR Door  
Panel Lite V2  
Active

Profile

Advanced

Video Surveillance

Special Functions

Input/Output

Job Costing

Basic

Readers

General

Internal Readers

Mode: Entry

Card Reader Type: MiFare Reader

Member No	Card Format	Configurable Bits
1	Default Format	0

Palm Reader Type: Palm Vein Reader

External Readers


Mode: Exit

External Reader Type: None

Member No	Card Format	Configurable Bits
1	Default Format	0

Exit Switch: ☒

- When User1 and User2 punch on the PVR door, they will be allowed access.
- When User3 punches on PVR door, he/she will be denied access due to occupancy violation as shown below.

User Details	Events																																																																																																												
<div></div> <div>User ID: 101 khushbu</div> <div>Denied - Occupancy Control</div> <div>Devices: Panel Lite V2 -&gt; PVR as Panel</div> <div>Event Date &amp; Time: 19/06/2018 05:32:46 PM</div> <div>Department: DRLDPT</div> <div>Designation: DRLDPTSG</div>	<table><thead><tr><th>Sr No.</th><th>Date Time</th><th>Type</th><th>Device</th><th>Category</th><th>Detail</th></tr></thead><tbody><tr><td>574</td><td>19/06/2018 05:32:10 PM</td><td>Panel Lite V2</td><td>Panel Lite V2</td><td>Other</td><td>→ Access Zone Configuration Sent. Access Zone No: 2 TID: 1806190040000522</td></tr><tr><td>575</td><td>19/06/2018 05:32:10 PM</td><td>Panel Lite V2</td><td>Panel Lite V2</td><td>ACK</td><td>← Access Zone Configuration Successful. Access Zone No: 2</td></tr><tr><td>576</td><td>19/06/2018 05:32:10 PM</td><td>Panel Lite V2</td><td>Panel Lite V2</td><td>Other</td><td>→ Access Zone Configuration Sent. Access Zone No: 3 TID: 1806190040000523</td></tr><tr><td>577</td><td>19/06/2018 05:32:10 PM</td><td>Panel Lite V2</td><td>Panel Lite V2</td><td>ACK</td><td>← Access Zone Configuration Successful. Access Zone No: 3</td></tr><tr><td>578</td><td>19/06/2018 05:32:10 PM</td><td>Panel Lite V2</td><td>Panel Lite V2</td><td>Other</td><td>→ Access Cluster Configuration Sent. TID: 1806190040000524</td></tr><tr><td>579</td><td>19/06/2018 05:32:10 PM</td><td>Panel Lite V2</td><td>Panel Lite V2</td><td>ACK</td><td>← Access Cluster Configuration Successful.</td></tr><tr><td>580</td><td>19/06/2018 05:32:10 PM</td><td>Panel Lite V2</td><td>Panel Lite V2</td><td>Other</td><td>→ End Of Message</td></tr><tr><td>581</td><td>19/06/2018 05:32:21 PM</td><td>Panel Lite V2</td><td>Panel Lite V2 -&gt; PVR as...</td><td>User</td><td>→ Allowed with Palm. User ID: 1 Event Date Time: 19/06/2018 05:32:20 PM</td></tr><tr><td>582</td><td>19/06/2018 05:32:21 PM</td><td>Panel Lite V2</td><td>Panel Lite V2</td><td>ACK</td><td>→ Event Ack for RollOver: 0 Event Seq. No: 1675</td></tr><tr><td>583</td><td>19/06/2018 05:32:26 PM</td><td>Panel Lite V2</td><td>Panel Lite V2 -&gt; PVR as...</td><td>Door</td><td>→ Door Open/Close - NotOperated. User ID: 1 Event Date Time: 19/06/2018 05:32:25 PM</td></tr><tr><td>584</td><td>19/06/2018 05:32:26 PM</td><td>Panel Lite V2</td><td>Panel Lite V2</td><td>ACK</td><td>→ Event Ack for RollOver: 0 Event Seq. No: 1676</td></tr><tr><td>585</td><td>19/06/2018 05:32:42 PM</td><td>Panel Lite V2</td><td>Panel Lite V2 -&gt; PVR as...</td><td>User</td><td>→ Allowed with Card. User ID: 1687 Event Date Time: 19/06/2018 05:32:41 PM</td></tr><tr><td>586</td><td>19/06/2018 05:32:42 PM</td><td>Panel Lite V2</td><td>Panel Lite V2</td><td>ACK</td><td>→ Event Ack for RollOver: 0 Event Seq. No: 1677</td></tr><tr><td>587</td><td>19/06/2018 05:32:47 PM</td><td>Panel Lite V2</td><td>Panel Lite V2 -&gt; PVR as...</td><td>Door</td><td>→ Door Open/Close - NotOperated. User ID: 1687 Event Date Time: 19/06/2018 05:32:46 PM</td></tr><tr><td>588</td><td>19/06/2018 05:32:47 PM</td><td>Panel Lite V2</td><td>Panel Lite V2</td><td>ACK</td><td>→ Event Ack for RollOver: 0 Event Seq. No: 1678</td></tr><tr><td>589</td><td>19/06/2018 05:32:49 PM</td><td>Panel Lite V2</td><td>Panel Lite V2 -&gt; PVR as...</td><td>User</td><td>→ Denied - Occupancy Control with Palm. User ID: 101 Event Date Time: 19/06/2018 05:32:46 PM</td></tr><tr><td>590</td><td>19/06/2018 05:32:49 PM</td><td>Panel Lite V2</td><td>Panel Lite V2</td><td>ACK</td><td>→ Event Ack for RollOver: 0 Event Seq. No: 1679</td></tr></tbody></table>	Sr No.	Date Time	Type	Device	Category	Detail	574	19/06/2018 05:32:10 PM	Panel Lite V2	Panel Lite V2	Other	→ Access Zone Configuration Sent. Access Zone No: 2 TID: 1806190040000522	575	19/06/2018 05:32:10 PM	Panel Lite V2	Panel Lite V2	ACK	← Access Zone Configuration Successful. Access Zone No: 2	576	19/06/2018 05:32:10 PM	Panel Lite V2	Panel Lite V2	Other	→ Access Zone Configuration Sent. Access Zone No: 3 TID: 1806190040000523	577	19/06/2018 05:32:10 PM	Panel Lite V2	Panel Lite V2	ACK	← Access Zone Configuration Successful. Access Zone No: 3	578	19/06/2018 05:32:10 PM	Panel Lite V2	Panel Lite V2	Other	→ Access Cluster Configuration Sent. TID: 1806190040000524	579	19/06/2018 05:32:10 PM	Panel Lite V2	Panel Lite V2	ACK	← Access Cluster Configuration Successful.	580	19/06/2018 05:32:10 PM	Panel Lite V2	Panel Lite V2	Other	→ End Of Message	581	19/06/2018 05:32:21 PM	Panel Lite V2	Panel Lite V2 -> PVR as...	User	→ Allowed with Palm. User ID: 1 Event Date Time: 19/06/2018 05:32:20 PM	582	19/06/2018 05:32:21 PM	Panel Lite V2	Panel Lite V2	ACK	→ Event Ack for RollOver: 0 Event Seq. No: 1675	583	19/06/2018 05:32:26 PM	Panel Lite V2	Panel Lite V2 -> PVR as...	Door	→ Door Open/Close - NotOperated. User ID: 1 Event Date Time: 19/06/2018 05:32:25 PM	584	19/06/2018 05:32:26 PM	Panel Lite V2	Panel Lite V2	ACK	→ Event Ack for RollOver: 0 Event Seq. No: 1676	585	19/06/2018 05:32:42 PM	Panel Lite V2	Panel Lite V2 -> PVR as...	User	→ Allowed with Card. User ID: 1687 Event Date Time: 19/06/2018 05:32:41 PM	586	19/06/2018 05:32:42 PM	Panel Lite V2	Panel Lite V2	ACK	→ Event Ack for RollOver: 0 Event Seq. No: 1677	587	19/06/2018 05:32:47 PM	Panel Lite V2	Panel Lite V2 -> PVR as...	Door	→ Door Open/Close - NotOperated. User ID: 1687 Event Date Time: 19/06/2018 05:32:46 PM	588	19/06/2018 05:32:47 PM	Panel Lite V2	Panel Lite V2	ACK	→ Event Ack for RollOver: 0 Event Seq. No: 1678	589	19/06/2018 05:32:49 PM	Panel Lite V2	Panel Lite V2 -> PVR as...	User	→ Denied - Occupancy Control with Palm. User ID: 101 Event Date Time: 19/06/2018 05:32:46 PM	590	19/06/2018 05:32:49 PM	Panel Lite V2	Panel Lite V2	ACK	→ Event Ack for RollOver: 0 Event Seq. No: 1679
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## For Multiple Zones

Occupancy Control can be applied on each zone separately or occupancy of one zone (**Monitor zone**) can be monitored to control access into another zone (**Control zone**). To know about the detailed configuration, refer to ["Occupancy Control"](#).

Consider the following examples to understand the functioning of Occupancy Control for multiple zones.

### Example1:

Let there be two zones,

- Zone 1 - Control Zone - Door V3
- Zone 2 - Monitor Zone - PVR door

Initially occupancy of both the zones is empty.

Access Mode of both zones is **Entry**.

**Action** is selected as **Alarm** and Alarm Timer is 0 seconds.

**Condition** is avoid occupancy equal to 2

In this case, the first user will be allowed to access the monitor zone. When the second user tries to access the monitor zone, he/she will be allowed access but the occupancy rule will be violated. The occupancy violated Alarm will be generated when a user tries to access the control zone.

The screenshot shows the 'Device Configuration' window with the 'Occupancy Control' tab selected. The left sidebar lists various configuration options, with 'Zones' highlighted. The main area is divided into 'Setup' and 'Configuration' sections. The 'Configuration' section shows the following settings:

- Control Zone:** 1, Zone-1
- Access Mode:** Entry
- Action:** Alarm
- Alarm Timer (Sec):** 0
- Monitor Zone-1:** 2, Zone-2
- Avoid Occupancy:** Equal To, 2
- Monitor Zone-2:** ID, Name
- Avoid Occupancy:** Equal To, 0 - 999
- Check Conditions For:** Any One Zone

At the bottom, there is a table with the following data:

Control Zone	Action	Monitor Zone-1	Monitor Zone-2
Zone-1	Alarm	Zone-2	

### Example2:

Let there be two zones,

- Zone 1 - Control Zone - Door V3
- Zone 2 - Monitor Zone - PVR door

Initially occupancy of both the zones is **zero**.

Access Mode of both zones is **Exit**.

**Action** is selected as **Restrict**.

**Condition** is avoid occupancy greater than 1

In this case, the first user will be allowed to access the monitor zone. When the second user tries to access the monitor zone, he/she will be allowed access but the occupancy rule will be violated. When a user tries to access the control zone, he/she will be restricted access due to the violation of occupancy in monitor zone.

Device Configuration

Search Device ID or Name

3  
Panel Lite V2  
Panel Lite V2  
4/25000  
Active

Profile  
Enrollment  
Advanced  
Features  
Special Functions  
Input/Output  
Zones  
Additional  
Access Clusters

Setup Configuration Occupancy Control

Control Zone 1 Zone-1  
Access Mode Exit  
Action Restrict  
Monitor Zone-1 2 Zone-2  
Avoid Occupancy Greater Than 1  
Monitor Zone-2 ID 0-999  
Avoid Occupancy Equal To 0-999  
Check Conditions For Any One Zone  
Update Cancel

Search

Control Zone	Action	Monitor Zone-1	Monitor Zone-2
Zone-1	Restrict	Zone-2	

### Example 3:

Let there be two zones,

- Zone 1 - Control Zone - Door V3
- Zone 2 - Monitor Zone - PVR door

Occupancy of both zones is 4. User 1 to User 4 are in Monitor Zone while User 5 to User 8 are in Control Zone. Out of all the users, User 4 and User 8 are VIP Users.

Access Mode of both zones is **Exit**. The **Access Control on Exit Mode** check box is enabled for both the zones. **Action** is selected as **Restrict**. **Condition** is avoid occupancy less than 3.

Device Configuration

Search Device ID or Name

3  
Panel Lite V2  
Panel Lite V2  
4/25000  
Active

Profile  
Enrollment  
Advanced  
Features  
Special Functions  
Input/Output  
Zones  
Additional

Setup Configuration Occupancy Control


Control Zone 1 Zone-1  
Access Mode Exit  
Action Restrict  
Monitor Zone-1 2 Zone-2  
Avoid Occupancy Less Than 3  
Monitor Zone-2 ID 0-999  
Avoid Occupancy Equal To 0-999  
Check Conditions For Any One Zone  
Update Cancel

Search


Control Zone	Action	Monitor Zone-1	Monitor Zone-2
Zone-1	Restrict	Zone-2	

- In this case, Exit of User 1 from monitor zone is allowed. Exit of User 2 (Normal User) or User 4 (VIP User) from monitor zone will be allowed but it will violate the occupancy.
- When the User 5 tries to exit the control zone, access will be denied to him/her. But at the same time, if User 8 (VIP User) tries to exit from the control zone, access will be allowed to him/her as shown below.



User Details		Events					
 <p>User ID: 101 Khushbu</p> <p>Devices: Panel Lite V2 -&gt; Door V3 as Par</p> <p>Event Date &amp; Time: 19/06/2018 12:12:15 PM</p>		Sr No.	Date Time	Type	Device	Category	Detail
		106	19/06/2018 12:12:00 PM	Panel Lite V2	Panel Lite V2	ACK	Set Date & Time Command Successful
		107	19/06/2018 12:12:00 PM	Panel Lite V2	Panel Lite V2	Other	Get Information from Device
		108	19/06/2018 12:12:00 PM	Panel Lite V2	Panel Lite V2	Other	Reply Information from Device
		109	19/06/2018 12:12:00 PM	Panel Lite V2	Panel Lite V2	Other	End Of Message
		110	19/06/2018 12:12:06 PM	Panel Lite V2	Panel Lite V2 -> Door V3...	User	Allowed with Finger, User ID: 1 Event Date Time: 19/06/2018 12:12:05 PM
		111	19/06/2018 12:12:06 PM	Panel Lite V2	Panel Lite V2	ACK	Event Ack for RollOver: 0 Event Seq. No.: 1643
		112	19/06/2018 12:12:11 PM	Panel Lite V2	Panel Lite V2 -> Door V3...	User	Allowed with Finger, User ID: HR1 [1693] Event Date Time: 19/06/2018 12:12:10 PM
		113	19/06/2018 12:12:11 PM	Panel Lite V2	Panel Lite V2	ACK	Event Ack for RollOver: 0 Event Seq. No.: 1644
		114	19/06/2018 12:12:15 PM	Panel Lite V2	Panel Lite V2 -> Door V3...	Door	Door Open/Close - NotOperated, User ID: HR1 [1693] Event Date Time: 19/06/2018 12:12:15 PM
		115	19/06/2018 12:12:16 PM	Panel Lite V2	Panel Lite V2	ACK	Event Ack for RollOver: 0 Event Seq. No.: 1645
		116	19/06/2018 12:12:18 PM	Panel Lite V2	Panel Lite V2 -> Door V3...	User	Denied - Occupancy Control with Finger, User ID: 101 Event Date Time: 19/06/2018 12:12:15 PM
		117	19/06/2018 12:12:18 PM	Panel Lite V2	Panel Lite V2	ACK	Event Ack for RollOver: 0 Event Seq. No.: 1646

User Details		Events					
 <p>User ID: HR1 Ronald</p> <p>Devices: Panel Lite V2 -&gt; Door V3 as Par</p> <p>Event Date &amp; Time: 19/06/2018 12:24:15 PM</p> <p>Departments: DRLDPT</p> <p>Designations: DRLTDSG</p>		Sr No.	Date Time	Type	Device	Category	Detail
		106	19/06/2018 12:12:00 PM	Panel Lite V2	Panel Lite V2	ACK	Set Date & Time Command Successful
		107	19/06/2018 12:12:00 PM	Panel Lite V2	Panel Lite V2	Other	Get Information from Device
		108	19/06/2018 12:12:00 PM	Panel Lite V2	Panel Lite V2	Other	Reply Information from Device
		109	19/06/2018 12:12:00 PM	Panel Lite V2	Panel Lite V2	Other	End Of Message
		110	19/06/2018 12:12:06 PM	Panel Lite V2	Panel Lite V2 -> Door V3...	User	Allowed with Finger, User ID: 1 Event Date Time: 19/06/2018 12:12:05 PM
		111	19/06/2018 12:12:06 PM	Panel Lite V2	Panel Lite V2	ACK	Event Ack for RollOver: 0 Event Seq. No.: 1643
		112	19/06/2018 12:12:11 PM	Panel Lite V2	Panel Lite V2 -> Door V3...	User	Allowed with Finger, User ID: HR1 [1693] Event Date Time: 19/06/2018 12:12:10 PM
		113	19/06/2018 12:12:11 PM	Panel Lite V2	Panel Lite V2	ACK	Event Ack for RollOver: 0 Event Seq. No.: 1644
		114	19/06/2018 12:12:15 PM	Panel Lite V2	Panel Lite V2 -> Door V3...	Door	Door Open/Close - NotOperated, User ID: HR1 [1693] Event Date Time: 19/06/2018 12:12:15 PM
		115	19/06/2018 12:12:16 PM	Panel Lite V2	Panel Lite V2	ACK	Event Ack for RollOver: 0 Event Seq. No.: 1645
		116	19/06/2018 12:12:18 PM	Panel Lite V2	Panel Lite V2 -> Door V3...	User	Denied - Occupancy Control with Finger, User ID: 101 Event Date Time: 19/06/2018 12:12:15 PM
		117	19/06/2018 12:12:18 PM	Panel Lite V2	Panel Lite V2	ACK	Event Ack for RollOver: 0 Event Seq. No.: 1646
		118	19/06/2018 12:24:17 PM	Panel Lite V2	Panel Lite V2 -> Door V3...	User	Allowed with Finger, User ID: HR1 [1693] Event Date Time: 19/06/2018 12:24:16 PM
		119	19/06/2018 12:24:17 PM	Panel Lite V2	Panel Lite V2	ACK	Event Ack for RollOver: 0 Event Seq. No.: 1647
		120	19/06/2018 12:24:22 PM	Panel Lite V2	Panel Lite V2 -> Door V3...	Door	Door Open/Close - NotOperated, User ID: HR1 [1693] Event Date Time: 19/06/2018 12:24:21 PM
		121	19/06/2018 12:24:22 PM	Panel Lite V2	Panel Lite V2	ACK	Event Ack for RollOver: 0 Event Seq. No.: 1648

#### Example 4:

Let there be two zones,

- Zone 1 - Control Zone - Door V3
- Zone 2 - Monitor Zone - PVR door

Initially occupancy of both the zones is **zero**.

Access Mode of both zones is **Entry**.

**Action** is selected as **Restrict**.

**Condition** is Avoid occupancy equal to 2 in monitor zone-1 (Zone-2).

Device Configuration

3

Panel Lite V2

Panel Lite V2

14/25000

Active

Profile

Enrollment

Advanced

Features

Special Functions

Input/Output

Zones

Additional

Access Clusters

Door Group

Assign Users

Setup

Configuration

Occupancy Control

Control Zone

1

Zone-1

Access Mode

Entry

Action

Restrict

Monitor Zone-1

2

Zone-2

Avoid Occupancy

Equal To

2

Monitor Zone-2

ID

Name

Avoid Occupancy

Equal To

0 - 999

Check Conditions For

Any One Zone

Update


Cancel

Search

Control Zone	Action	Monitor Zone-1	Monitor Zone-2
Zone-1	Restrict	Zone-2	

- In this case, when the User 1 punches on PVR (Zone-2), he/she is allowed access.

- When User 2 punches on PVR (Zone-2), he/she will also be allowed access.
- But, when User 3 punches on Door V3 in control zone (Zone-1), he/she will be restricted access due to the violation of occupancy =2 in monitor zone (Zone-2) as shown below.

User Details		Events					
 <b>User ID:</b> 4 <b>Shinjini Ghosh</b> <b>Denied - Occupancy Control</b> <b>Device:</b> Panel Lite V2 -> Door V3 as P <b>Event Date &amp; Time:</b> 14/06/2018 05:49:04 PM <b>Department:</b> DRLDPT <b>Designation:</b> DRLTDSG		Sr No.	Date Time	Type	Device	Category	Detail
		406	14/06/2018 05:48:28 PM	Panel Lite V2	Panel Lite V2	Other	→ Advance Configuration Sent. TID: 1806140040000146
		407	14/06/2018 05:48:28 PM	Panel Lite V2	Panel Lite V2	ACK	← Advance Configuration Successful.
		408	14/06/2018 05:48:29 PM	Panel Lite V2	Panel Lite V2	Other	→ Access Zone Configuration Sent. Access Zone No: 1 TID: 1806140040000147
		409	14/06/2018 05:48:29 PM	Panel Lite V2	Panel Lite V2	ACK	← Access Zone Configuration Successful. Access Zone No: 1
		410	14/06/2018 05:48:29 PM	Panel Lite V2	Panel Lite V2	Other	→ Access Zone Configuration Sent. Access Zone No: 2 TID: 1806140040000148
		411	14/06/2018 05:48:29 PM	Panel Lite V2	Panel Lite V2	ACK	← Access Zone Configuration Successful. Access Zone No: 2
		412	14/06/2018 05:48:29 PM	Panel Lite V2	Panel Lite V2	Other	→ Access Cluster Configuration Sent. TID: 1806140040000149
		413	14/06/2018 05:48:29 PM	Panel Lite V2	Panel Lite V2	ACK	← Access Cluster Configuration Successful.
		414	14/06/2018 05:48:29 PM	Panel Lite V2	Panel Lite V2	Other	→ End Of Message
		415	14/06/2018 05:48:53 PM	Panel Lite V2	Panel Lite V2 -> PVR as...	User	→ Allowed with Palm. User ID: 1 Event Date Time: 14/06/2018 05:48:51 PM
		416	14/06/2018 05:48:53 PM	Panel Lite V2	Panel Lite V2	ACK	→ Event Ack for RollOver: 0 Event Seq. No.: 1126
		417	14/06/2018 05:48:58 PM	Panel Lite V2	Panel Lite V2 -> PVR as...	User	→ Allowed with Palm. User ID: 101 Event Date Time: 14/06/2018 05:48:56 PM
		418	14/06/2018 05:48:58 PM	Panel Lite V2	Panel Lite V2	ACK	→ Event Ack for RollOver: 0 Event Seq. No.: 1127
		419	14/06/2018 05:49:03 PM	Panel Lite V2	Panel Lite V2 -> PVR as...	Door	← Door Open/Close - NotOperated. User ID: 101 Event Date Time: 14/06/2018 05:49:01 PM
		420	14/06/2018 05:49:03 PM	Panel Lite V2	Panel Lite V2	ACK	→ Event Ack for RollOver: 0 Event Seq. No.: 1128
		421	14/06/2018 05:49:06 PM	Panel Lite V2	Panel Lite V2 -> Door V3...	User	→ Denied - Occupancy Control with Finger. User ID: 4 Event Date Time: 14/06/2018 05:49:04 PM
		422	14/06/2018 05:49:06 PM	Panel Lite V2	Panel Lite V2	ACK	→ Event Ack for RollOver: 0 Event Seq. No.: 1129

- Now, when User 4 punches on PVR Door in Zone-2, he/she will be restricted access as the maximum occupancy limit for Zone-2 is configured as 2 as shown below and User 1 and User 2 are already occupied in Zone-2.

### Occupancy Control

Device: 3 Panel Lite V2

Enable Rule: ☒

Update Device


Zone: Zone-2

Enable Rule On Zone: ☒

Occupants Limit: 2

Update Zone

ID	Name
2	NGT Direct Door-Device-2
3	Panel Lite V2
4	Panel Lite
4	Wireless Door
5	Door V3
6	Door FMX
8	ARC as Direct Door
9	Path as direct door
10	Vega as Direct Door

User Details		Events					
 <b>User ID:</b> 1687 <b>Aditi Ajay Gupta</b> <b>Denied - Occupancy Control</b> <b>Device:</b> Panel Lite V2 -> PVR as Pane <b>Event Date &amp; Time:</b> 14/06/2018 06:18:49 PM <b>Department:</b> DRLDPT <b>Designation:</b> DRLTDSG		Sr No.	Date Time	Type	Device	Category	Detail
		408	14/06/2018 05:48:29 PM	Panel Lite V2	Panel Lite V2	Other	→ Access Zone Configuration Sent. Access Zone No: 1 TID: 1806140040000147
		409	14/06/2018 05:48:29 PM	Panel Lite V2	Panel Lite V2	ACK	← Access Zone Configuration Successful. Access Zone No: 1
		410	14/06/2018 05:48:29 PM	Panel Lite V2	Panel Lite V2	Other	→ Access Zone Configuration Sent. Access Zone No: 2 TID: 1806140040000148
		411	14/06/2018 05:48:29 PM	Panel Lite V2	Panel Lite V2	ACK	← Access Zone Configuration Successful. Access Zone No: 2
		412	14/06/2018 05:48:29 PM	Panel Lite V2	Panel Lite V2	Other	→ Access Cluster Configuration Sent. TID: 1806140040000149
		413	14/06/2018 05:48:29 PM	Panel Lite V2	Panel Lite V2	ACK	← Access Cluster Configuration Successful.
		414	14/06/2018 05:48:29 PM	Panel Lite V2	Panel Lite V2	Other	→ End Of Message
		415	14/06/2018 05:48:53 PM	Panel Lite V2	Panel Lite V2 -> PVR as...	User	→ Allowed with Palm. User ID: 1 Event Date Time: 14/06/2018 05:48:51 PM
		416	14/06/2018 05:48:53 PM	Panel Lite V2	Panel Lite V2	ACK	→ Event Ack for RollOver: 0 Event Seq. No.: 1126
		417	14/06/2018 05:48:58 PM	Panel Lite V2	Panel Lite V2 -> PVR as...	User	→ Allowed with Palm. User ID: 101 Event Date Time: 14/06/2018 05:48:56 PM
		418	14/06/2018 05:48:58 PM	Panel Lite V2	Panel Lite V2	ACK	→ Event Ack for RollOver: 0 Event Seq. No.: 1127
		419	14/06/2018 05:49:03 PM	Panel Lite V2	Panel Lite V2 -> PVR as...	Door	← Door Open/Close - NotOperated. User ID: 101 Event Date Time: 14/06/2018 05:49:01 PM
		420	14/06/2018 05:49:03 PM	Panel Lite V2	Panel Lite V2	ACK	→ Event Ack for RollOver: 0 Event Seq. No.: 1128
		421	14/06/2018 05:49:06 PM	Panel Lite V2	Panel Lite V2 -> Door V3...	User	→ Denied - Occupancy Control with Finger. User ID: 4 Event Date Time: 14/06/2018 05:49:04 PM
		422	14/06/2018 05:49:06 PM	Panel Lite V2	Panel Lite V2	ACK	→ Event Ack for RollOver: 0 Event Seq. No.: 1129
		423	14/06/2018 06:18:50 PM	Panel Lite V2	Panel Lite V2 -> PVR as...	User	→ Denied - Occupancy Control with Card. User ID: 1687 Event Date Time: 14/06/2018 06:18:49 PM
		424	14/06/2018 06:18:50 PM	Panel Lite V2	Panel Lite V2	ACK	→ Event Ack for RollOver: 0 Event Seq. No.: 1130



The IN- OUT punches are stored in memory of Panel200. Re-booting the Panel/Panel Doors will not reset the Occupancy Count to zero.

If there are entry punches in a zone so zone will be occupied. There must be exit punch from the reader or from door in Exit mode to decrease the occupancy from the zone.

### Example 5:

Consider the above example 4 with change in Action as Alarm.

**Action** is selected as **Alarm** with Alarm Timer as 2 seconds. This will activate the alarm after 2 seconds of user access in control zone when the occupancy is violated in monitor zone.

The screenshot shows the 'Device Configuration' window with the 'Occupancy Control' tab selected. The 'Control Zone' is set to '1' (Zone-1) and the 'Access Mode' is 'Entry'. The 'Action' is set to 'Alarm' and the 'Alarm Timer (Sec)' is set to '2'. The 'Monitor Zone-1' is set to '2' (Zone-2). The 'Avoid Occupancy' is set to 'Equal To' and the 'Monitor Zone-2' is set to 'ID' and 'Name'. The 'Check Conditions For' is set to 'Any One Zone'. The 'Update' and 'Cancel' buttons are visible at the bottom.

Control Zone	Action	Monitor Zone-1	Monitor Zone-2
Zone-1	Restrict	Zone-2	

- In this case, when User 1 and User 2 punch on PVR door, they will be allowed access.
- But, when User 3 punches on Door V3 then he/she will be allowed access. But after 2 seconds, alarm will be generated as shown below.

Matrix COSEC MONITOR

File Device Tools Help

Features

- Alarms
- I/O Link
- Soft Override
- Events
- Exceptions
- Time Triggered Functions
- EMAP

Devices - All 1 10

Name	Site	IP/RS485 Address	MAC Address	Type	Status
Panel Lite V2		192.168.104.111	00:18:09:04:65:D1	Panel Lite V2	Connected
ARC as Single Door	Site-2	192.168.105.3	DF:E3:55:54:34:44	Panel Lite V2 Door	OFF-Line
Dummy Door	Site-1	192.111.111.111	11:11:11:11:11:11	Panel Lite V2 Door	OFF-Line
ARC as Dual Door-Dual Reader	Site-2	192.168.105.5	DF:E6:37:56:35:56	Panel Lite V2 Door	OFF-Line
ARC as Dual Door-Dual Reader	Site-2	192.168.105.5	DF:E6:37:56:35:56	Panel Lite V2 Door	OFF-Line
ARC as Dual Door-Single Reader	Site-2	192.168.105.6	FE:47:48:46:74:69	Panel Lite V2 Door	OFF-Line
ARC as Dual Door-Single Reader	Site-1	192.168.105.6	FE:47:48:46:74:69	Panel Lite V2 Door	OFF-Line
ARC as Dual Door-Single Reader	Site-1	192.168.105.7	EE:65:74:2A:00:0E	Panel Lite V2 Door	OFF-Line

User Details

User ID: 1  
Chirag  
Allowed

Device:  
Panel Lite V2 -> Door V3 as F

Event Date & Time:  
14/06/2018 06:51:49 PM

Department:  
DFLT DPT

Designation:  
DFLT DSG

Events

Sr No.	Date Time	Type	Device	Category	Detail
571	14/06/2018 06:50:03 PM	Panel Lite V2	Panel Lite V2	Other	→ End Of Message
572	14/06/2018 06:50:12 PM	Panel Lite V2	Panel Lite V2 -> PVR as...	User	→ Allowed with Palm. User ID: 1 Event Date Time: 14/06/2018 06:50:11 PM
573	14/06/2018 06:50:12 PM	Panel Lite V2	Panel Lite V2	ACK	→ Event Ack for RollOver: 0 Event Seq. No: 1139
574	14/06/2018 06:50:17 PM	Panel Lite V2	Panel Lite V2 -> PVR as...	Door	← Door Open/Close - NotOperated. User ID: 1 Event Date Time: 14/06/2018 06:50:16 PM
575	14/06/2018 06:50:17 PM	Panel Lite V2	Panel Lite V2	ACK	→ Event Ack for RollOver: 0 Event Seq. No: 1140
576	14/06/2018 06:50:19 PM	Panel Lite V2	Panel Lite V2 -> PVR as...	User	→ Allowed with Palm. User ID: 101 Event Date Time: 14/06/2018 06:50:17 PM
577	14/06/2018 06:50:19 PM	Panel Lite V2	Panel Lite V2	ACK	→ Event Ack for RollOver: 0 Event Seq. No: 1141
578	14/06/2018 06:50:22 PM	Panel Lite V2	Panel Lite V2 -> PVR as...	Door	← Door Open/Close - NotOperated. User ID: 101 Event Date Time: 14/06/2018 06:50:22 PM
579	14/06/2018 06:50:22 PM	Panel Lite V2	Panel Lite V2	ACK	→ Event Ack for RollOver: 0 Event Seq. No: 1142
580	14/06/2018 06:51:50 PM	Panel Lite V2	Panel Lite V2 -> Door V3...	User	→ Allowed with Finger. User ID: 1 Event Date Time: 14/06/2018 06:51:49 PM
581	14/06/2018 06:51:50 PM	Panel Lite V2	Panel Lite V2	ACK	→ Event Ack for RollOver: 0 Event Seq. No: 1143
582	14/06/2018 06:51:52 PM	Panel Lite V2	Panel Lite V2 -> Door V3...	Alarm	← Occupancy Violated - User ID: 1 Event Date Time: 14/06/2018 06:51:51 PM
583	14/06/2018 06:51:52 PM	Panel Lite V2	Panel Lite V2	ACK	→ Event Ack for RollOver: 0 Event Seq. No: 1144
584	14/06/2018 06:51:52 PM	Panel Lite V2	Panel Lite V2	System	← User Blocked - Occupancy Violated User ID: 1 Event Date Time: 14/06/2018 06:51:51 PM
585	14/06/2018 06:51:52 PM	Panel Lite V2	Panel Lite V2	ACK	→ Event Ack for RollOver: 0 Event Seq. No: 1145
586	14/06/2018 06:51:55 PM	Panel Lite V2	Panel Lite V2 -> Door V3...	Door	← Door Open/Close - NotOperated. User ID: 1 Event Date Time: 14/06/2018 06:51:54 PM
587	14/06/2018 06:51:55 PM	Panel Lite V2	Panel Lite V2	ACK	→ Event Ack for RollOver: 0 Event Seq. No: 1146

Matrix COSEC MONITOR

File Device Tools Help

Features

- Alarms
- I/O Link
- Soft Override
- Events
- Exceptions
- Time Triggered Functions
- EMAP

Devices - All 1 10

Name	Site	IP/RS485 Address	MAC Address	Type	Status
Panel Lite V2		192.168.104.111	00:18:09:04:65:D1	Panel Lite V2	Connected
ARC as Single Door	Site-2	192.168.105.3	DF:E3:55:54:34:44	Panel Lite V2 Door	OFF-Line
Dummy Door	Site-1	192.111.111.111	11:11:11:11:11:11	Panel Lite V2 Door	OFF-Line
ARC as Dual Door-Dual Reader	Site-2	192.168.105.5	DF:E6:37:56:35:56	Panel Lite V2 Door	OFF-Line
ARC as Dual Door-Dual Reader	Site-2	192.168.105.5	DF:E6:37:56:35:56	Panel Lite V2 Door	OFF-Line
ARC as Dual Door-Single Reader	Site-2	192.168.105.6	FE:47:48:46:74:69	Panel Lite V2 Door	OFF-Line
ARC as Dual Door-Single Reader	Site-1	192.168.105.6	FE:47:48:46:74:69	Panel Lite V2 Door	OFF-Line
ARC as Dual Door-Single Reader	Site-1	192.168.105.7	EE:65:74:2A:00:0E	Panel Lite V2 Door	OFF-Line

User Details

User ID: 1  
Chirag  
Allowed

Alarms

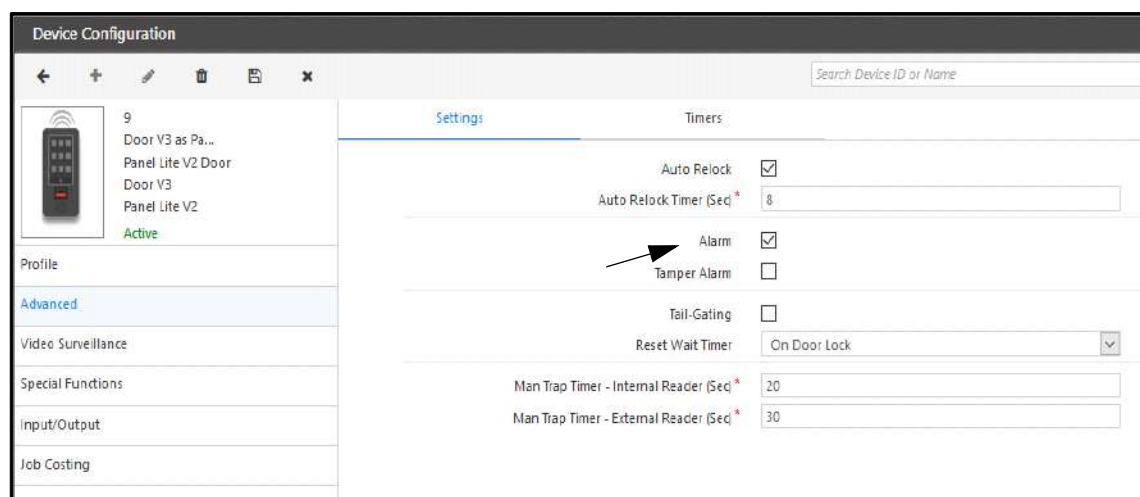
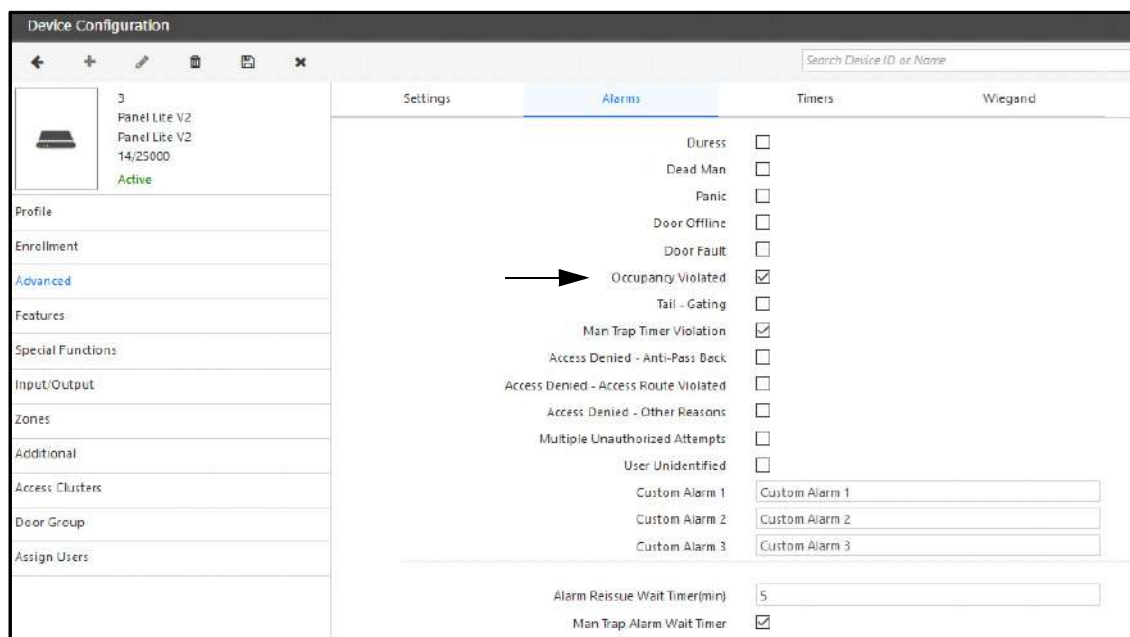
Device	Type	Description	Level	Status	Alarm Date Time
Panel Lite V2 -> Door V3...	Panel Lite V2	Occupancy Violated	Major	New	14/06/2018 06:51:51 PM

Context Menu:

- Acknowledge
- Acknowledge All
- Clear
- Clear All
- Cancel

For occupancy violation Alarm to generate, you must enable Alarms from both Panel200 and Panel door.

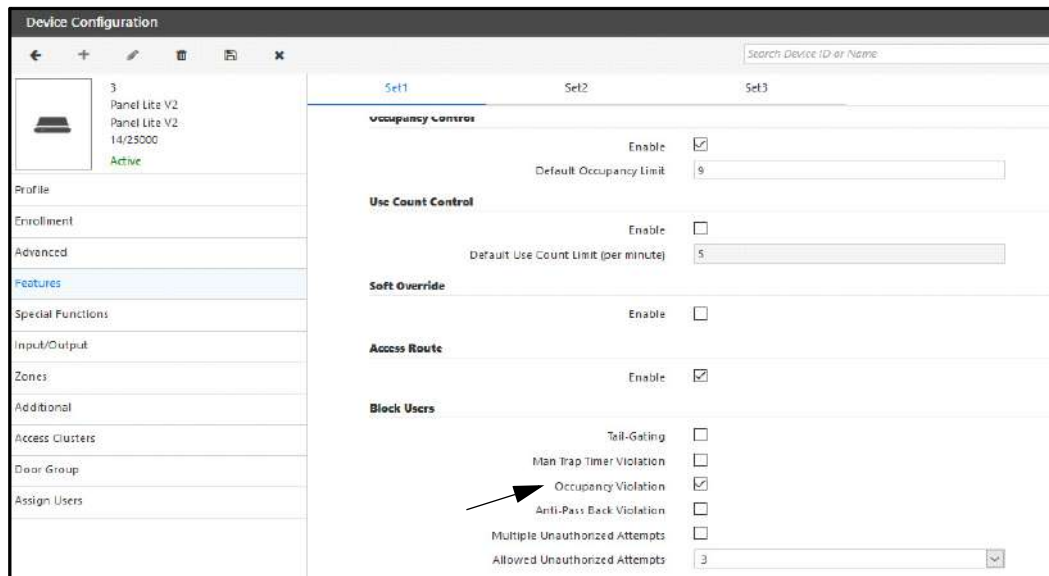
- Panel200> Advanced> Alarms> Occupancy Violated
- Panel door (in Control zone i.e. Door V3 here) > Advanced > Settings> Alarm



If you want to block the user who is violating occupancy rule, then enable the Occupancy Violation check-box for Block Users in Panel200> Features> Set1 as shown below.



This will block the user and you will have to restore back the user from Block Users page.



#### Example 6:

Let there be 3 zones of Panel200:

- Zone 1 - Control Zone - Door V3
- Zone 2 - Monitor Zone1- PVR Door
- Zone-3- Monitor Zone 2- Door V3-115

Initially occupancy of all the zones is empty. Access Mode of all zones is Entry. (Configure Access Mode from Panel doors> Reader section.)

**Access mode** is selected as Entry. This is the access mode of user in control zone (Zone-1) for which the Action (Alarm/ Restrict) is to be taken.

**Action** is selected as Alarm and Alarm Timer is set as 2 seconds. This will activate the alarm after 2 seconds of user access in control zone when the occupancy is violated in monitor zone.

**Condition** for Monitor Zone 1 condition is Avoid Occupancy equal to 2. For Monitor Zone 2 condition is Avoid occupancy greater than 1.

If **Check Conditions For** is selected as

- **Any One Zone** then occupancy Condition will be checked for any one zone. If occupancy is violated in either of the monitor zone then Alarm will be generated after the duration of Alarm Timer when the user punches in Control zone.
- If **Both Zones** is selected then occupancy Condition will be checked for both the zones. The alarm will be generated in control zone if occupancy is violated in both the monitor zones.

**Device Configuration**

Search Device ID or Name

Setup Configuration Occupancy Control

Control Zone: 1 Zone-1

Access Mode: Entry

Action: Alarm

Alarm Timer (Sec): 2

Monitor Zone-1: 2 Zone-2

Avoid Occupancy: Equal To 2

Monitor Zone-2: 3 Zone-3

Avoid Occupancy: Greater Than 1

Check Conditions For: Any One Zone

Update Cancel

Control Zone	Action	Monitor Zone-1	Monitor Zone-2
Zone-1	Alarm	Zone-2	Zone-3

- When User 1 punches on Door V3-115 (Zone-3), he/she will be allowed access. When User 2 punches on Door V3-115 (Zone-3), he/she will be also be access allowed. But this is violating Occupancy >1.
- Now when User 3 punches on Door V3 (Zone-1) then he/she will be allowed access but after 2 seconds alarm will be generated as shown below.

**Matrix COSEC MONITOR**

File Device Tools Help

Features: Alarm, I/O Link, Soft Override, Events, Exceptions, Time Triggered Functions, EMAP

Devices - All 1 10

Name	Site	IP/RS485 Address	MAC Address	Type	Status
Panel Lite V2		192.168.104.111	00:18:09:04:65:D1	Panel Lite V2	Connected
ARC as Single Door	Site-2	192.168.105.3	DF:E6:37:56:35:56	Panel Lite V2 Door	OFF-Line
Dummy Door	Site-1	192.111.111.111	11:11:11:11:11:11	Panel Lite V2 Door	OFF-Line
ARC as Dual Door-Dual Reader	Site-2	192.168.105.5	DF:E6:37:56:35:56	Panel Lite V2 Door	OFF-Line
ARC as Dual Door-Dual Reader	Site-2	192.168.105.5	DF:E6:37:56:35:56	Panel Lite V2 Door	OFF-Line
ARC as Dual Door-Single Reader	Site-2	192.168.105.6	FE:47:48:46:74:69	Panel Lite V2 Door	OFF-Line
ARC as Dual Door-Single Reader	Site-1	192.168.105.6	FE:47:48:46:74:69	Panel Lite V2 Door	OFF-Line
ARC as Dual Door-Single Reader	Site-1	192.168.105.7	FE:56:74:69:74:69	Panel Lite V2 Door	OFF-Line

User Details: User ID: 1, Chirag, Allowed

Device: Panel Lite V2 -> Door V3 as P

Event Date & Time: 18/06/2018 12:51:15 PM

Department: DFLDPT

Designation: DFLDSSG

Sr. No.	Date Time	Type	Device	Category	Detail
1708	18/06/2018 12:50:41 PM	Panel Lite V2	Panel Lite V2	Other	→ Access Cluster Configuration Sent: TID: 1806180040000625
1709	18/06/2018 12:50:41 PM	Panel Lite V2	Panel Lite V2	ACK	→ Access Cluster Configuration Successful
1710	18/06/2018 12:50:41 PM	Panel Lite V2	Panel Lite V2	Other	→ End Of Message
1711	18/06/2018 12:50:49 PM	Panel Lite V2	Panel Lite V2 -> Door V3...	User	→ Allowed with Finger: User ID: 101 Event Date Time: 18/06/2018 12:50:48 PM
1712	18/06/2018 12:50:49 PM	Panel Lite V2	Panel Lite V2	ACK	→ Event Ack for RollOver: 0 Event Seq. No.: 1283
1713	18/06/2018 12:50:54 PM	Panel Lite V2	Panel Lite V2 -> Door V3...	User	→ Allowed with Finger: User ID: 1 Event Date Time: 18/06/2018 12:50:52 PM
1714	18/06/2018 12:50:54 PM	Panel Lite V2	Panel Lite V2	ACK	→ Event Ack for RollOver: 0 Event Seq. No.: 1284
1715	18/06/2018 12:50:59 PM	Panel Lite V2	Panel Lite V2 -> Door V3...	Door	→ Door Open/Close - NotOperated: User ID: 1 Event Date Time: 18/06/2018 12:50:57 PM
1716	18/06/2018 12:50:59 PM	Panel Lite V2	Panel Lite V2	ACK	→ Event Ack for RollOver: 0 Event Seq. No.: 1285
1717	18/06/2018 12:51:16 PM	Panel Lite V2	Panel Lite V2 -> Door V3...	User	→ Allowed with Finger: User ID: 1 Event Date Time: 18/06/2018 12:51:15 PM
1718	18/06/2018 12:51:16 PM	Panel Lite V2	Panel Lite V2	ACK	→ Event Ack for RollOver: 0 Event Seq. No.: 1286
1719	18/06/2018 12:51:18 PM	Panel Lite V2	Panel Lite V2	ACK	→ Event Ack for RollOver: 0 Event Seq. No.: 1287
1720	18/06/2018 12:51:18 PM	Panel Lite V2	Panel Lite V2	System	→ User Blocked - Occupancy Violated User ID: 1 Event Date Time: 18/06/2018 12:51:17 PM
1721	18/06/2018 12:51:18 PM	Panel Lite V2	Panel Lite V2 -> Door V3...	Alarm	→ Occupancy Violated - User ID: 1 Event Date Time: 18/06/2018 12:51:17 PM
1722	18/06/2018 12:51:18 PM	Panel Lite V2	Panel Lite V2	ACK	→ Event Ack for RollOver: 0 Event Seq. No.: 1288
1723	18/06/2018 12:51:21 PM	Panel Lite V2	Panel Lite V2 -> Door V3...	Door	→ Door Open/Close - NotOperated: User ID: 1 Event Date Time: 18/06/2018 12:51:20 PM
1724	18/06/2018 12:51:21 PM	Panel Lite V2	Panel Lite V2	ACK	→ Event Ack for RollOver: 0 Event Seq. No.: 1289



Similarly if Action is Restrict; then User 3 will be denied access on Door V3.

If Check Conditions For is Both Zones, then occupancy in PVR door will also be monitored.

# Use Count Control

Use Count Control feature enables the system to set the maximum number of times an authorized user can use his/her credential in order to enter/exit a controlled area within a minute, after which the credentials are blocked.

**For example:** If the Use Count per minute is set as 5, a valid user can access the door, that is, can mark the punch for entry/exit only 5 times in a minute. If the user punches for 6th time in a minute, his/her credentials will be blocked. The user will need to restore the credentials before using them again.



*This functionality can also be enabled from the **Device Module > Device Configuration > Features** option.*


To set the Use Count Control,

- Click **Access Control > Use Count Control**. The **Use Count Control** page appears.

ID	Name
2	NGT Direct Door-Device-2
3	Panel Lite V2
4	Panel Lite
4	Wireless Door
5	Door V3
6	Door FMX
8	ARC as Direct Door
9	Peth as direct door
10	Vega as Direct Door
12	PVR Door-Device-12

The grid on the right hand side of the page displays the list of the devices configured with Advance Access Control System.

Configure the following parameters:

- **Device:** Select the required device using the **Device**  picklist.
- **Enable Rule:** Select the check box to enable the rule on the selected device.
- **Use Count per Minute:** Specify the number of counts (entry /exit) allowed per minute.
- Click **Update Device** to enable the rule on the device.

## Example of Use Count Control for Direct Door

Consider the following scenario where a NGT Direct Door is enabled for Use Count Control with Use Count per minute as 3.



**Use Count Control** ✓ Saved Successfully

---

Device \*  NGT Direct Door-Device-2

Enable Rule ☒

Use Count Per Minute \*

**Update Device**

Search

ID	Name
2	NGT Direct Door-Device-2
3	Panel Lite V2
4	Panel Lite
4	Wireless Door
5	Door V3
6	Door FMX
8	ARC as Direct Door
9	Path as direct door
10	Vega as Direct Door
12	PVR Door-Device-12

- The User 1 is assigned the NGT direct door on which Use Count Control rule is enabled.

**User Configuration**

1 Chirag Active

Profile

Devices

Credentials

Group

T&A

Access Control

FSS

**Assign** | **Configure**


Device Group

Device

Search

Device Name	Type	Restrict Access	Restrict Attendance	
NGT Direct Door-Device-2	NGT Direct Door	<input type="checkbox"/>	<input type="checkbox"/>	
Panel Lite V2	Panel Lite V2	<input type="checkbox"/>	<input type="checkbox"/>	
PVR Door-Device-12	PVR Door	<input type="checkbox"/>	<input type="checkbox"/>	

- When User 1 punches on the door, he/she will be allowed access for 3 times including entry and exit punches. But when he/she punches for the 4th time in 1 minute, he/she will be denied access and user will be blocked.



User ID: 1

Chirag

Denied - Blocked User

Device:

NGT Direct Door-Device-2

Event Date & Time:

24/05/2018 12:51:57 PM

Department:

PLDTFT

Designation:

PLDTSG

Sr No.	Date Time	Type	Device	Category	Detail
38	24/05/2018 12:50:46 PM	NGT Direct Door	NGT Direct Door-Device-2	Other	→ End Of Message
39	24/05/2018 12:50:56 PM	PVR Door	PVR Door-Device-12	User	→ Allowed with Palm, User ID: 102 [1689] Event Date Time: 24/05/2018 12:50:55 PM
40	24/05/2018 12:50:56 PM	PVR Door	PVR Door-Device-12	ACK	→ Event Ack for RollOver: 0 Event Seq. No: 92
41	24/05/2018 12:51:37 PM	NGT Direct Door	NGT Direct Door-Device-2	Request	← Message Request Received
42	24/05/2018 12:51:37 PM	NGT Direct Door	NGT Direct Door-Device-2	Other	→ Advance Configuration Sent: TID: 1805240040000003
43	24/05/2018 12:51:37 PM	NGT Direct Door	NGT Direct Door-Device-2	ACK	← Advance Configuration Successful
44	24/05/2018 12:51:37 PM	NGT Direct Door	NGT Direct Door-Device-2	Other	→ End Of Message
45	24/05/2018 12:51:42 PM	NGT Direct Door	NGT Direct Door-Device-2	User	→ Allowed with Finger, User ID: 1 Event Date Time: 24/05/2018 12:51:42 PM
46	24/05/2018 12:51:42 PM	NGT Direct Door	NGT Direct Door-Device-2	ACK	→ Event Ack for RollOver: 0 Event Seq. No: 220
47	24/05/2018 12:51:47 PM	NGT Direct Door	NGT Direct Door-Device-2	User	→ Allowed with Finger, User ID: 1 Event Date Time: 24/05/2018 12:51:47 PM
48	24/05/2018 12:51:47 PM	NGT Direct Door	NGT Direct Door-Device-2	ACK	→ Event Ack for RollOver: 0 Event Seq. No: 221
49	24/05/2018 12:51:52 PM	NGT Direct Door	NGT Direct Door-Device-2	User	→ Allowed with Finger, User ID: 1 Event Date Time: 24/05/2018 12:51:52 PM
50	24/05/2018 12:51:52 PM	NGT Direct Door	NGT Direct Door-Device-2	ACK	→ Event Ack for RollOver: 0 Event Seq. No: 222
51	24/05/2018 12:51:57 PM	NGT Direct Door	NGT Direct Door-Device-2	System	← User Blocked - Usage Count User ID: 1 Event Date Time: 24/05/2018 12:51:57 PM
52	24/05/2018 12:51:57 PM	NGT Direct Door	NGT Direct Door-Device-2	ACK	→ Event Ack for RollOver: 0 Event Seq. No: 223
53	24/05/2018 12:51:57 PM	NGT Direct Door	NGT Direct Door-Device-2	User	→ Denied - Blocked User with Finger, User ID: 1 Event Date Time: 24/05/2018 12:51:57 PM
54	24/05/2018 12:51:57 PM	NGT Direct Door	NGT Direct Door-Device-2	ACK	→ Event Ack for RollOver: 0 Event Seq. No: 224

- The user will be blocked and listed in Blocked User list. The user must be restored to be allowed to punch on the NGT Direct Door.

Blocked User						
Blocked User (1)						
Search						
ID	Name	Panel/Direct Door	Block DateTime	Reason for Block	Remark	Restore
1	Chirag	NGT Direct Door-Device-2	24/05/2016 12:51:57	Usage Count		
Restored User (0)						

### Example of Use Count Control for Panel Door

Consider the following scenario where a Panel200 is enabled for Use Count Control with Use Count per minute as 3. When Use Count Control is enabled on Panel200, the use count on each of its doors will be monitored.

Use Count Control

✓ Saved Successfully

Device 3

Panel Lite V2

Enable Rule ☒

Use Count Per Minute 3


Update Device

ID	Name
2	NGT Direct Door-Device-2
3	Panel Lite V2
4	Panel Lite
4	Wireless Door
5	Door V3
6	Door FMX
8	ARC as Direct Door
9	Path as direct door
10	Vega as Direct Door

- If Door V3 and PVR are connected to Panel200. The maximum use count on each door will be set as 3.

Device Status							
Search							
Filter List		Device Type	Device Status		Group By		
		All	Connected/Online		None		
Name	Status	IP	MAC Address	Device Type	Site		
Panel Lite V2	Connected	192.168.104.111	00:1B:09:04:65:D1	Panel Lite V2			
Door V3 as Panel Door	Online	192.168.104.114	00:1B:09:05:3F:E2	Panel Lite V2 Door			
PVR as Panel Door	Online	192.168.104.113	00:1B:09:03:F2:B0	Panel Lite V2 Door			

- When a user who is assigned with the Panel punches on any of the connected doors for the 4th time in 1 minute, he will be blocked and denied access on all doors of Panel200.



User ID: 1

Chirag

Denied - Blocked User

Device:

Panel Lite V2 -> PVR as Pane

Event Date & Time:

24/05/2018 05:08:38 PM

Department:

DPLDPT

Designation:

DPLTDSG

Events

Sr No.	Date Time	Type	Device	Category	Detail
280	24/05/2018 05:07:45 PM	Panel Lite V2	Panel Lite V2	ACK	→ Event Ack for RollOver: 0 Event Seq. No.: 193
281	24/05/2018 05:07:45 PM	Panel Lite V2	Panel Lite V2	Other	→ End Of Message
282	24/05/2018 05:07:52 PM	Panel Lite V2	Panel Lite V2 -> PVR as...	User	→ Allowed with Palm. User ID: 1 Event Date Time: 24/05/2018 05:07:51 PM
283	24/05/2018 05:07:52 PM	Panel Lite V2	Panel Lite V2	ACK	→ Event Ack for RollOver: 0 Event Seq. No.: 194
284	24/05/2018 05:07:54 PM	Panel Lite V2	Panel Lite V2 -> PVR as...	User	→ Allowed with Palm. User ID: 1 Event Date Time: 24/05/2018 05:07:53 PM
285	24/05/2018 05:07:54 PM	Panel Lite V2	Panel Lite V2	ACK	→ Event Ack for RollOver: 0 Event Seq. No.: 195
286	24/05/2018 05:08:02 PM	Panel Lite V2	Panel Lite V2 -> Door V3...	User	→ Allowed with Finger. User ID: 1 Event Date Time: 24/05/2018 05:08:00 PM
287	24/05/2018 05:08:02 PM	Panel Lite V2	Panel Lite V2	ACK	→ Event Ack for RollOver: 0 Event Seq. No.: 196
288	24/05/2018 05:08:08 PM	Panel Lite V2	Panel Lite V2 -> Door V3...	User	→ Allowed with Finger. User ID: 1 Event Date Time: 24/05/2018 05:08:06 PM
289	24/05/2018 05:08:08 PM	Panel Lite V2	Panel Lite V2	ACK	→ Event Ack for RollOver: 0 Event Seq. No.: 197
290	24/05/2018 05:08:12 PM	Panel Lite V2	Panel Lite V2 -> Door V3...	User	→ Allowed with Finger. User ID: 1 Event Date Time: 24/05/2018 05:08:10 PM
291	24/05/2018 05:08:12 PM	Panel Lite V2	Panel Lite V2	ACK	→ Event Ack for RollOver: 0 Event Seq. No.: 198
292	24/05/2018 05:08:17 PM	Panel Lite V2	Panel Lite V2	System	← User Blocked - Usage Count User ID: 1 Event Date Time: 24/05/2018 05:08:15 PM
293	24/05/2018 05:08:17 PM	Panel Lite V2	Panel Lite V2	ACK	→ Event Ack for RollOver: 0 Event Seq. No.: 199
294	24/05/2018 05:08:17 PM	Panel Lite V2	Panel Lite V2 -> Door V3...	User	→ Denied - Blocked User with Finger. User ID: 1 Event Date Time: 24/05/2018 05:08:15 PM
295	24/05/2018 05:08:17 PM	Panel Lite V2	Panel Lite V2	ACK	→ Event Ack for RollOver: 0 Event Seq. No.: 200
296	24/05/2018 05:08:37 PM	Panel Lite V2	Panel Lite V2 -> PVR as...	User	→ Denied - Blocked User with Palm. User ID: 1 Event Date Time: 24/05/2018 05:08:36 PM
297	24/05/2018 05:08:38 PM	Panel Lite V2	Panel Lite V2	ACK	→ Event Ack for RollOver: 0 Event Seq. No.: 201

- The user will be blocked and listed in Blocked User list. The user must be restored from the Blocked List to be able to punch on the NGT Direct Door again.

Blocked User						
Blocked User (2)						
Search						
ID ▲	Name	Panel/Direct Door	Block DateTime	Reason for Block	Remark	Restore
1	Chirag	NGT Direct Door-Device-2	24/05/2016 12:51:57	Usage Count		↺
1	Chirag	Panel Lite V2	24/05/2018 15:58:55	Usage Count		↺
Restored User (0)						

Blocked User (1)					
Restored User (1)					
Search					
ID ▲	Name	Panel/Direct Door	Application Restore DateTime	Controller Restore DateTime	Remark
1	Chirag	Panel Lite V2	24/05/2018 16:01:15		

# Dead Man Zone

Dead Man Zone feature enables the system to track the safety and security of a user while performing a task in a risky environment. The user is expected to come out of the zone at predefined intervals (Dead Man time period) to show his/her card/credential.



*This functionality can also be enabled from the **Device Module > Device Configuration > Features** option.*


To set the Dead Man Zone,

- Click **Access Control > Dead Man Zone**. The **Dead Man Zone** page appears.

ID	Name
3	Panel Lite V2
4	Panel Lite

The grid on the right hand side of the page displays the list of the Panel devices configured with Advance Access Control System.

Configure the following parameters:

- **Device:** Select the required device using the **Device**  picklist.
- **Enable Rule:** Select the check box to enable the rule on the selected device.
- Click **Update Device** to enable the rule on the device.

Once you update the device, you can configure the following parameters:

- **Zone:** Select the Zone on which you want to enable the rule.
- **Enable Rule on Zone:** Select the check box to enable the rule on the zone.
- **Warning Timer (Min):** Specify the Dead Man Time/Warning Time within which any user inside the zone must show the credentials.
- **Alert Timer (Min):** Specify the time for which a user is allowed to stay in the Dead Man Zone.



*Dead Man Alarm is generated when the person working in restricted environment does not come out of the Dead Man Zone within a pre-defined Warning time i.e. when the presence of user is not marked.*

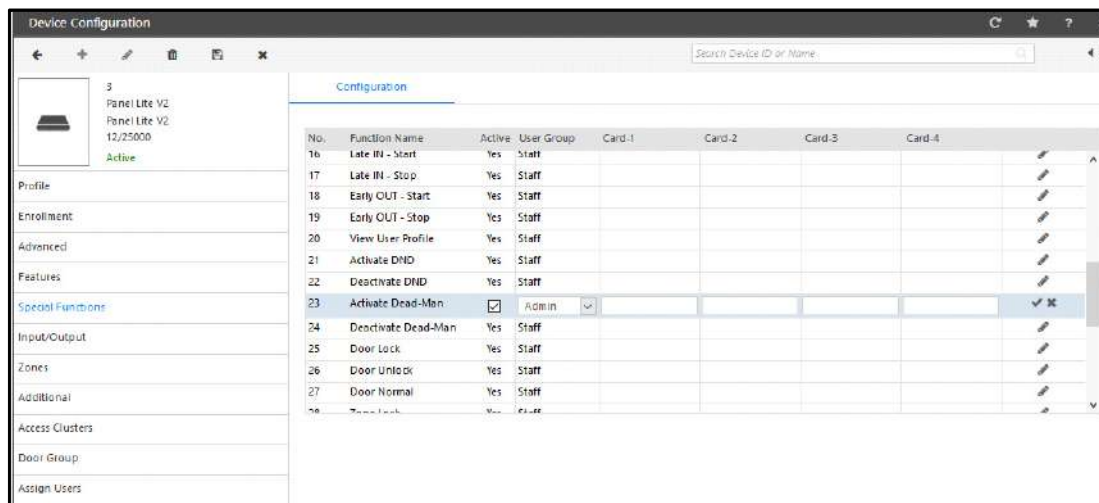
- Click on **Update Zone** to save the changes.



When any user enters into the zone, the Warning timer and the Alert timer start. If the user punches on Exit Reader at regular interval within the Zone, then after each punch the Warning Timer will reset. If the user fails to punch on the Exit Reader of the Dead Man Zone within the Warning time, the Alarm will be generated.

For a Panel device, the Dead Man Zone can be activated when you select **Activate Dead-Man** from **Device module > Device Configuration (Panel200/Panel/Panel Lite) > Special Functions**.

Create a users group (For example: Admin). Users belonging to Admin functional group can activate this feature using the card enrolled for this feature. You can enroll special function card from Users> Credential Management> Enrollment> Special Card.

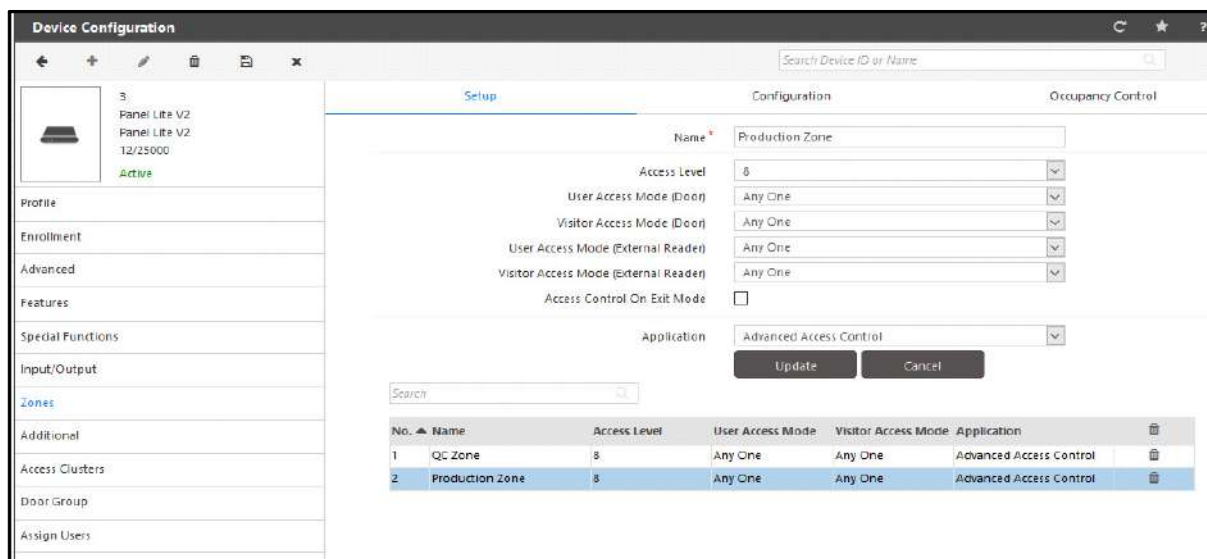


No.	Function Name	Active	User Group	Card-1	Card-2	Card-3	Card-4
16	Late IN - Start	Yes	Staff				
17	Late IN - Stop	Yes	Staff				
18	Early OUT - Start	Yes	Staff				
19	Early OUT - Stop	Yes	Staff				
20	View User Profile	Yes	Staff				
21	Activate DND	Yes	Staff				
22	Deactivate DND	Yes	Staff				
23	Activate Dead-Man	<input checked="" type="checkbox"/>	Admin				
24	Deactivate Dead-Man	Yes	Staff				
25	Door Lock	Yes	Staff				
26	Door Unlock	Yes	Staff				
27	Door Normal	Yes	Staff				

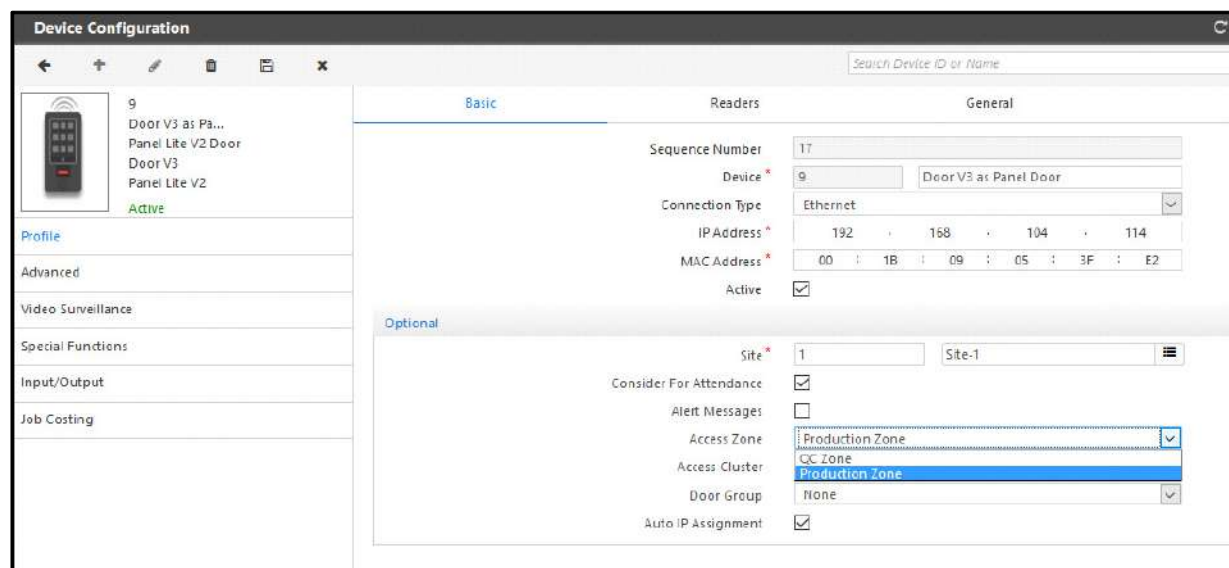
### Example of Dead Man Zone - Panel device.

Consider the following scenario where a Panel200 has a Door V3 connected to it. Dead Man Zone is enabled for the Panel200.

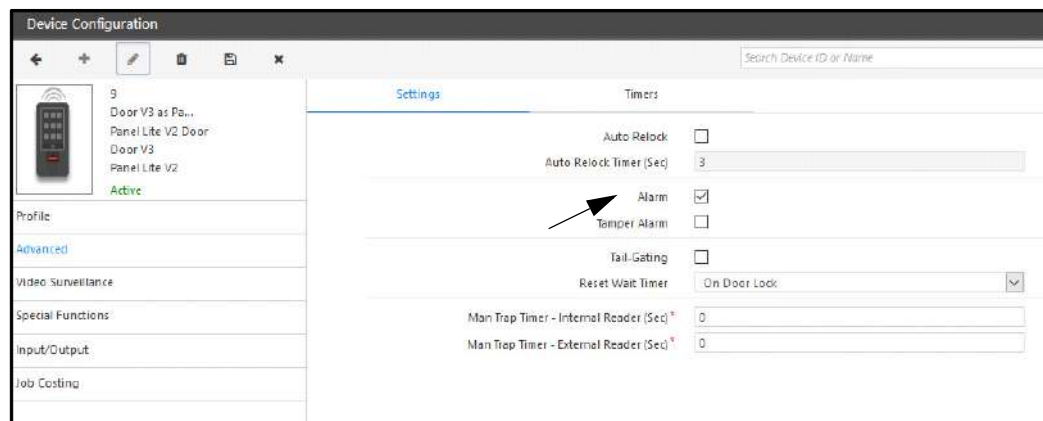
The Dead Man Zone is activated for Production Zone on the Panel.



Now the Access Zone for Panel Door, that is Door V3 must be set as Production zone as shown below.

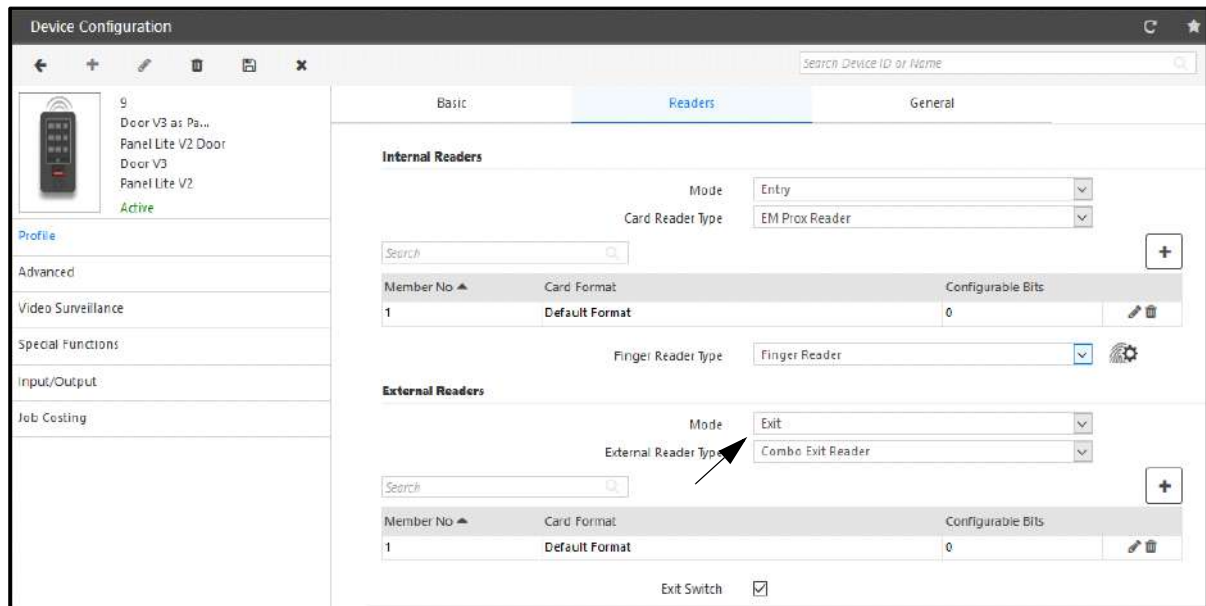


You must activate the Alarm for the Door V3.





Connect an Exit Reader (For example: COSEC PATH RDFE) to the Reader port of Door V3 and set the mode and reader type in External Readers section of Door V3.



Then click Menu> Zone Settings> Dead Man Zone from the display of door and activate Dead Man Zone feature. Then show your ID on door, that is punch on the door. This will activate the Dead Man feature.


Now once the feature is activated; when the user goes inside the Dead Man Zone by punching on the entry door then the timer will start. This will monitor the user in the Dead Man Zone. He/She must show his/her presence by punching on the exit door (reader) within the Warning Timer.



*When you enroll credential of a user through Entry door (say V3 door) then credentials will automatically sync to the exit reader (Path reader) as well. If you have enrolled finger before and you are connecting PATH reader later; then you will have to enroll the finger template again.*

*If the timer value in Access Control> Dead Man Zone and Device Configuration (Panel200)> Features are different then the timer duration specified in Access Control > Dead Man Zone will be considered.*

The events will be displayed in the Monitor as below.

User Details		Events				
		Sr No.	Date Time	Type	Device	Category
 <p>User ID: 1 Chirag</p> <p>Allowed - Dead Man Zone</p> <p>Device: Panel Lite V2 -&gt; Door V3 as P</p> <p>Event Date &amp; Time: 22/05/2018 01:54:16 PM</p> <p>Department: DPLTDP</p> <p>Designation: DPLTDSG</p>		130	22/05/2018 01:01:24 PM	Panel Lite V2	Panel Lite V2	Other
		131	22/05/2018 01:01:24 PM	Panel Lite V2	Panel Lite V2	ACK
		132	22/05/2018 01:01:24 PM	Panel Lite V2	Panel Lite V2	Other
		133	22/05/2018 01:01:24 PM	Panel Lite V2	Panel Lite V2	ACK
		134	22/05/2018 01:01:24 PM	Panel Lite V2	Panel Lite V2	Other
		135	22/05/2018 01:01:24 PM	Panel Lite V2	Panel Lite V2	ACK
		136	22/05/2018 01:01:24 PM	Panel Lite V2	Panel Lite V2	Other
		137	22/05/2018 01:01:24 PM	Panel Lite V2	Panel Lite V2	ACK
		138	22/05/2018 01:01:24 PM	Panel Lite V2	Panel Lite V2	Other
		139	22/05/2018 01:01:24 PM	Panel Lite V2	Panel Lite V2	ACK
		140	22/05/2018 01:01:24 PM	Panel Lite V2	Panel Lite V2	Other
		141	22/05/2018 01:54:17 PM	Panel Lite V2	Panel Lite V2	ACK
		142	22/05/2018 01:54:16 PM	Panel Lite V2	Panel Lite V2 -> Door V3... Door	Other
		143	22/05/2018 01:54:17 PM	Panel Lite V2	Panel Lite V2 -> Door V3... User	Other
		144	22/05/2018 01:54:17 PM	Panel Lite V2	Panel Lite V2	ACK
		145	22/05/2018 01:54:30 PM	Panel Lite V2	Panel Lite V2 -> Door V3... Door	Other
		146	22/05/2018 01:54:30 PM	Panel Lite V2	Panel Lite V2	ACK

When the user does not punch before the expiry of Warning Timer, then Alarm will be generated and displayed in Monitor as shown below.

**Matrix COSEC MONITOR**

File Device Tools Help

Features: Alarms, I/O Link, Soft Override, Events, Exceptions, Time Triggered Functions, EMAP

Devices - All 3 7

Name	Site	IP/RS485 Address	MAC Address	Type	Status
Panel Lite V2		192.168.104.111	98:1B:09:04:65:01	Panel Lite V2	Connected
ARC as Single Door	Site-1	192.168.105.3	DF:E3:65:54:34:44	Panel Lite V2 Door	OFF-Line
Dummy Door	Site-1	192.111.111.111	11:11:11:11:11:11	Panel Lite V2 Door	OFF-Line
ARC as Dual Door-Dual Reader	Site-1	192.168.105.5	DF:E6:37:56:35:56	Panel Lite V2 Door	OFF-Line
ARC as Dual Door-Dual Reader	Site-1	192.168.105.5	DF:E6:37:56:35:56	Panel Lite V2 Door	OFF-Line
ARC as Dual Door-Single Reader	Site-1	192.168.105.6	FE:47:4B:46:74:69	Panel Lite V2 Door	OFF-Line
ARC as Dual Door-Single Reader	Site-1	192.168.105.6	FE:47:4B:46:74:69	Panel Lite V2 Door	OFF-Line
Both as Panel door	Site-1	192.168.105.7	EE:56:74:63:60:65	Panel Lite V2 Door	OFF-Line

**User Details**

User ID: 1  
Chirag

Allowed - Dead Man Zone

Devices: Panel Lite V2 -> Door V3 as P

Event Date & Time: 22/05/2018 02:05:18 PM

Department: DFLTDP

Designation: DFLTDG

**Events**

Sr No.	Date Time	Type	Device	Category	Detail
170	22/05/2018 02:03:55 PM	Panel Lite V2	Panel Lite V2	Other	→ End Of Message
171	22/05/2018 02:04:23 PM	NGT Direct Door	NGT Direct Door-Device-2	Request	← Login Request Received
172	22/05/2018 02:04:23 PM	NGT Direct Door	NGT Direct Door-Device-2	ACK	→ Login Success Poll Duration: 3 Poll Interval: 2
173	22/05/2018 02:04:23 PM	NGT Direct Door	NGT Direct Door-Device-2	Request	← Message Request Received
174	22/05/2018 02:04:23 PM	NGT Direct Door	NGT Direct Door-Device-2	Command	→ Event Request for RollOver: 0 Event Seq. No.: 212
175	22/05/2018 02:04:23 PM	NGT Direct Door	NGT Direct Door-Device-2	Other	← Start Of Event
176	22/05/2018 02:04:23 PM	NGT Direct Door	NGT Direct Door-Device-2	Command	→ Set Date & Time
177	22/05/2018 02:04:23 PM	NGT Direct Door	NGT Direct Door-Device-2	ACK	← Set Date & Time Command Successful
178	22/05/2018 02:04:23 PM	NGT Direct Door	NGT Direct Door-Device-2	Other	→ End Of Message
179	22/05/2018 02:05:18 PM	Panel Lite V2	Panel Lite V2 -> Door V3...	Door	← Dead man timer changed - Activated Event Date Time: 22/05/2018 02:05:18 PM
180	22/05/2018 02:05:18 PM	Panel Lite V2	Panel Lite V2	ACK	→ Event Ack for RollOver: 0 Event Seq. No.: 57
181	22/05/2018 02:05:18 PM	Panel Lite V2	Panel Lite V2 -> Door V3...	User	→ Allowed - Dead Man Zone with Finger, User ID: 1 Event Date Time: 22/05/2018 02:05:18 PM
182	22/05/2018 02:05:18 PM	Panel Lite V2	Panel Lite V2	ACK	→ Event Ack for RollOver: 0 Event Seq. No.: 58
183	22/05/2018 02:06:18 PM	Panel Lite V2	Panel Lite V2	ACK	→ Event Ack for RollOver: 0 Event Seq. No.: 59
184	22/05/2018 02:06:18 PM	Panel Lite V2	Panel Lite V2 -> Door V3...	Alarm	← Dead man timer expired Alarm - User ID: 1 Event Date Time: 22/05/2018 02:06:18 PM
185	22/05/2018 02:06:18 PM	Panel Lite V2	Panel Lite V2 -> Door V3...	Door	← Dead man timer changed - Deactivated Event Date Time: 22/05/2018 02:06:18 PM
186	22/05/2018 02:06:18 PM	Panel Lite V2	Panel Lite V2	ACK	→ Event Ack for RollOver: 0 Event Seq. No.: 60

The description of Alarm is shown below. You can acknowledge the Alarm by right clicking on the Alarm. The Alarm will be re-issued after the Alarm Re-issue Wait Timer (default 5 mins). You can also clear the Alarm.

**Matrix COSEC MONITOR**

File Device Tools Help

Features: Alarms, I/O Link, Soft Override, Events, Exceptions, Time Triggered Functions, EMAP

Devices - All 3 7

Name	Site	IP/RS485 Address	MAC Address	Type	Status
Panel Lite V2		192.168.104.111	98:1B:09:04:65:01	Panel Lite V2	Connected
ARC as Single Door	Site-1	192.168.105.3	DF:E3:65:54:34:44	Panel Lite V2 Door	OFF-Line
Dummy Door	Site-1	192.111.111.111	11:11:11:11:11:11	Panel Lite V2 Door	OFF-Line
ARC as Dual Door-Dual Reader	Site-1	192.168.105.5	DF:E6:37:56:35:56	Panel Lite V2 Door	OFF-Line
ARC as Dual Door-Dual Reader	Site-1	192.168.105.5	DF:E6:37:56:35:56	Panel Lite V2 Door	OFF-Line
ARC as Dual Door-Single Reader	Site-1	192.168.105.6	FE:47:4B:46:74:69	Panel Lite V2 Door	OFF-Line
ARC as Dual Door-Single Reader	Site-1	192.168.105.6	FE:47:4B:46:74:69	Panel Lite V2 Door	OFF-Line
Both as Panel door	Site-1	192.168.105.7	EE:56:74:63:60:65	Panel Lite V2 Door	OFF-Line

**User Details**

User ID: 1  
Chirag

Allowed - Dead Man Zone

Devices: Panel Lite V2 -> Door V3 as P

Event Date & Time: 22/05/2018 02:05:18 PM

Department: DFLTDP

Designation: DFLTDG

**Alarms**

Device	Type	Description	Level	Status	Alarm Date Time
Panel Lite V2 -> Door V3...	Panel Lite V2...	Dead man timer expired Alarm - User ID: 1	Critical	New	22/05/2018 02:06:18 PM

After the expiry of Alert Timer duration; the Dead Man Zone violation alert will be sent as SMS and Email to the configured user if the Alert Message Configuration is done for Dead Man Zone Violation. For details, refer to ["Configuring Alert Messages"](#).

**Send Alert To:** You can select the user to whom SMS and Email alert is to be sent. The contact details of the user must be available in the user profile for sending the alert.

**Send Alert Of:** You can select the users whose Dead Man Violation alert is to be sent.



Alert Message Configuration

←

✎

📄

✕

Alert Filter

Access Control

Event

Dead Man Zone Violation

Header Message

Dear User,

Footer Message

From COSEC Software

Additional Message Parameters

Message Selection

☒ SMS

☒ Email

Message Preview

Assign Alert

Assign Alert

Send Alert To

User \*

3

Sheetal Raval

⋮

User

ID

Name

⋮

Send Alerts Of

Select Users

Randomly

▼

User

ID

Name

⋮

Search

User ID ▲

Name

SMS ☒

Email ☒

🗑

1

Chirag

☒


☒

🗑

# Do Not Disturb

DND feature allows the user to declare that a particular zone is not to be accessed by other users for a specific period of time thereby ensuring that the users inside the zone are not disturbed by others.



 This functionality can also be enabled from the **Device Module > Device Configuration > Features** option.

To set Do Not Disturb,

- Click **Access Control > Do Not Disturb**. The **Do Not Disturb** page appears.

A screenshot of the 'Do Not Disturb' configuration page. The page has a dark header with the title 'Do Not Disturb'. Below the header, there are two main sections. The first section is for 'Device' configuration, with fields for 'ID' and 'Name', an 'Enable Rule' checkbox, and an 'Update Device' button. The second section is for 'Zone' configuration, with a 'Zone' dropdown menu, an 'Enable Rule On Zone' checkbox, an 'Access Level' dropdown menu, and an 'Update Zone' button. On the right side of the page, there is a table with two columns: 'ID' and 'Name'. The table contains two rows: one with ID '1' and Name 'Panel Lite V2-Device-1', and another with ID '21' and Name 'panel lite v2 default'.

The grid on the page shows the list of the Panel200 configured with Access Control System.

The user can select any Panel200 from the list. Click on the Panel200 from the list. The selection will be reflected in the **Device** field. Also the Device picklist is given to search and select the device from a list of devices.

Click on **Enable Rule**.

Then Click on **Update Device**. The DND rule will be updated on device.

**Zone:** Click on the Zone dropdown button and select the Zone of the Panel200 where the DND rule is to be configured.

**Enable Rule on Zone:** Check the box to enable this Rule on Zone. The Rule is enabled on the zone only after the device is updated for the rule.

**Access Level:** Select the Access level for DND Zone within a range of 1-15. DND access Level must be higher than the zone access level so that the unwanted users are restricted to access the DND zone.  
For example: If DND Zone access level - 5 and User access level - 4; then user is not allowed to enter in DND zone.

VIP users are not affected by the Do Not Disturb zone i.e. they will be allowed to access the door even if DND is enabled.

Click on **Update Zone**. The Do Not Disturb Rule will be activated.



The DND can be activated using a special card i.e. Special function **21** on Panel lite or it can be activated on the door using Active DND special function.

## Configuration of DND feature

Create a Zone of Pane Lite V2 where the DND rule is to be configured. For example: QC Zone

Now the Panel door (say Door V3) where the DND rule is to be activated must be assigned the QC Zone.

**Device Configuration**

Search Device ID or Name

**Basic** | Readers | General

Sequence Number: 17

Device: 9 | Door V3 as Panel Door

Connection Type: Ethernet

IP Address: 192 . 168 . 104 . 114

MAC Address: 00 : 1B : 09 : 05 : 3F : E2

Active: ☒

**Optional**

Site: 1 | Site-1

Consider For Attendance: ☒

Alert Messages: ☐

Access Zone: QC Zone

Access Cluster: QC Zone

Door Group: None

Auto IP Assignment: ☒

Now enable the DND rule from Access Control on Panel200 and QC Zone. Ensure that the access level of zone is higher than the access level of user.

**Do Not Disturb** | Saved Successfully

Device: 3 | Panel Lite V2

Enable Rule: ☒

Update Device

Zone: QC Zone

Enable Rule On Zone: ☒

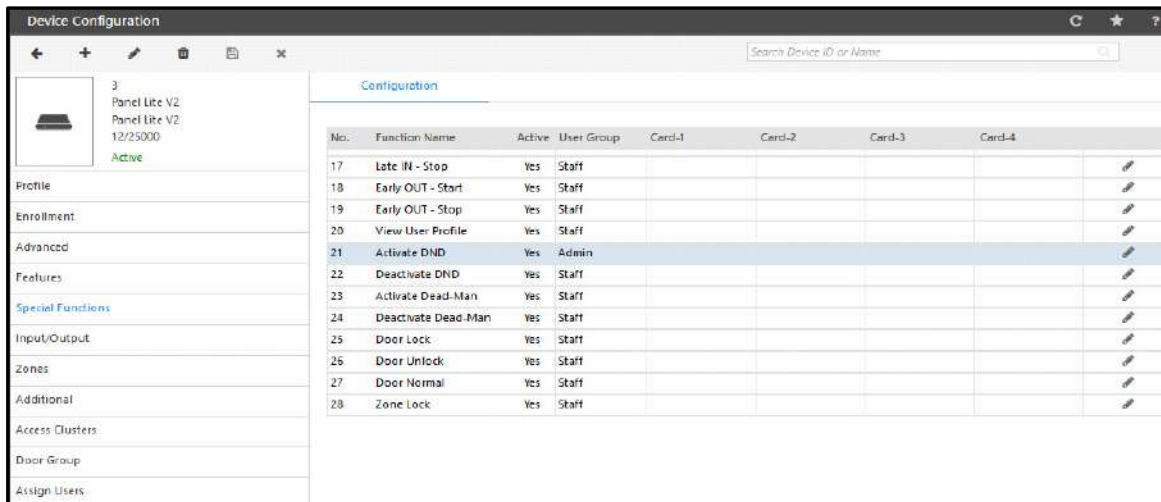
Access Level: 15

Update Zone

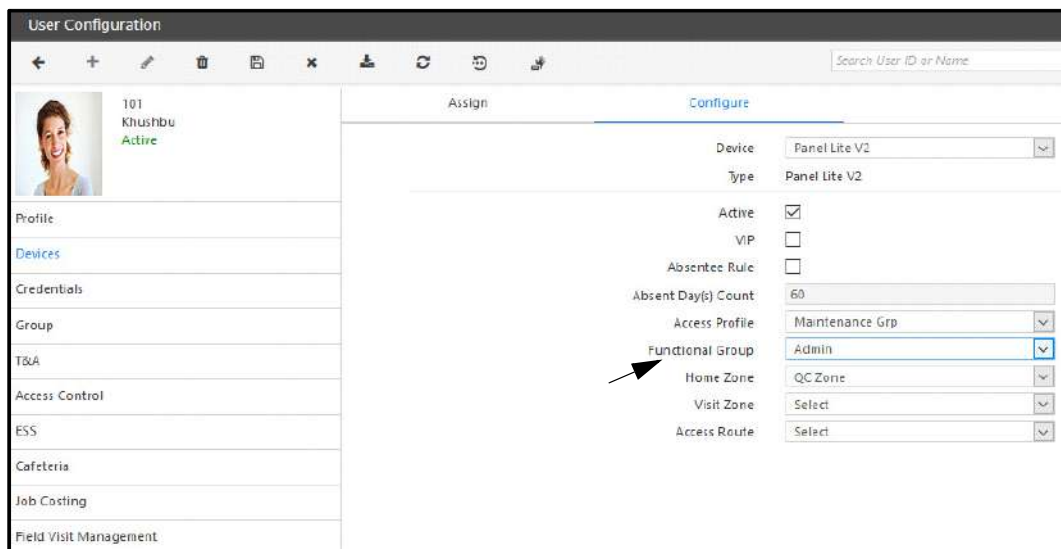
ID	Name
3	Panel Lite V2
4	Panel Lite

If you want to allow the special function to be activated by specific user group then select that user group for the particular special function.

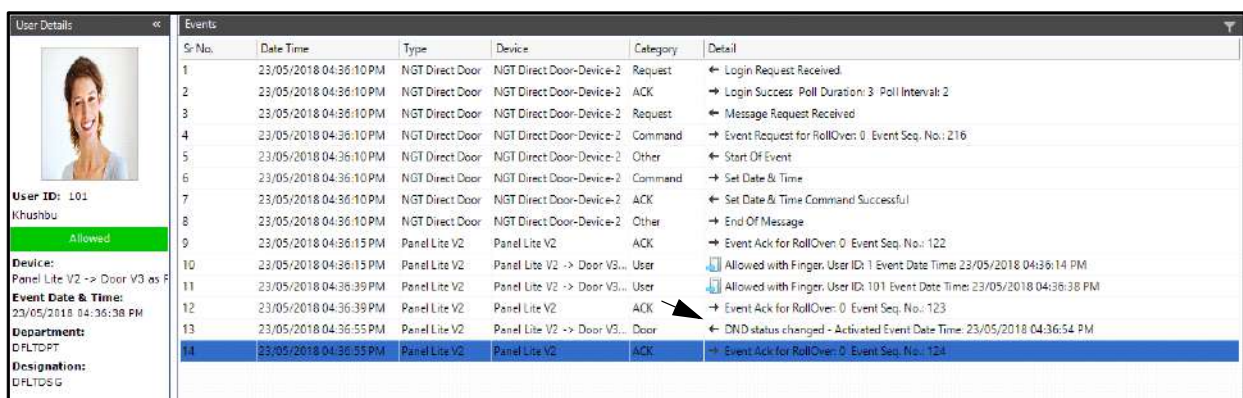
For example: The Special function Activate DND can be activated by the Admin user group as configured below. Similarly Deactivate DND function can be set on the door by Staff user group.




Now the user 101 is assigned functional group Admin for Panel200 as shown below. So this user can activate DND on Door V3.



When the particular area is to be set as Do Not Disturb, then go to Menu> Zone Settings> Do Not Disturb> Activate from the display of door. Then show your ID on door i.e. punch on the door. This will activate Do Not Disturb feature. The DND activated event will be shown on Monitor as below.



Now when any user punches on door; then he/she will be denied access as it is DND enabled zone.

User Details		Events					
 <b>User ID:</b> 102 <b>Shruti Patil</b> <b>Denied - DND Enabled</b> <b>Device:</b> Panel Lite V2 -> Door V3 as P <b>Event Date &amp; Time:</b> 23/05/2018 04:38:12 PM <b>Department:</b> DRLDPT <b>Designation:</b> DPLTDSG		Sr No.	Date Time	Type	Device	Category	Detail
		2	23/05/2018 04:36:10 PM	NGT Direct Door	NGT Direct Door-Device-2	ACK	→ Login Success Poll Duration: 3 Poll Interval: 2
		3	23/05/2018 04:36:10 PM	NGT Direct Door	NGT Direct Door-Device-2	Request	← Message Request Received
		4	23/05/2018 04:36:10 PM	NGT Direct Door	NGT Direct Door-Device-2	Command	→ Event Request for RollOver: 0 Event Seq. No.: 216
		5	23/05/2018 04:36:10 PM	NGT Direct Door	NGT Direct Door-Device-2	Other	← Start Of Event
		6	23/05/2018 04:36:10 PM	NGT Direct Door	NGT Direct Door-Device-2	Command	→ Set Date & Time
		7	23/05/2018 04:36:10 PM	NGT Direct Door	NGT Direct Door-Device-2	ACK	← Set Date & Time Command Successful
		8	23/05/2018 04:36:10 PM	NGT Direct Door	NGT Direct Door-Device-2	Other	→ End Of Message
		9	23/05/2018 04:36:15 PM	Panel Lite V2	Panel Lite V2	ACK	→ Event Ack for RollOver: 0 Event Seq. No.: 122
		10	23/05/2018 04:36:15 PM	Panel Lite V2	Panel Lite V2 -> Door V3...	User	→ Allowed with Finger, User ID: 1 Event Date Time: 23/05/2018 04:36:14 PM
		11	23/05/2018 04:36:39 PM	Panel Lite V2	Panel Lite V2 -> Door V3...	User	→ Allowed with Finger, User ID: 101 Event Date Time: 23/05/2018 04:36:38 PM
		12	23/05/2018 04:36:39 PM	Panel Lite V2	Panel Lite V2	ACK	→ Event Ack for RollOver: 0 Event Seq. No.: 123
		13	23/05/2018 04:36:55 PM	Panel Lite V2	Panel Lite V2 -> Door V3...	Door	← DND status changed - Activated Event Date Time: 23/05/2018 04:36:54 PM
		14	23/05/2018 04:36:55 PM	Panel Lite V2	Panel Lite V2	ACK	→ Event Ack for RollOver: 0 Event Seq. No.: 124
		15	23/05/2018 04:38:02 PM	Panel Lite V2	Panel Lite V2 -> Door V3...	User	→ Denied - DND Enabled with Finger, User ID: 4 Event Date Time: 23/05/2018 04:38:01 PM
		16	23/05/2018 04:38:02 PM	Panel Lite V2	Panel Lite V2	ACK	→ Event Ack for RollOver: 0 Event Seq. No.: 125
		17	23/05/2018 04:38:13 PM	Panel Lite V2	Panel Lite V2 -> Door V3...	User	→ Denied - DND Enabled with Finger, User ID: 102 [1689] Event Date Time: 23/05/2018 04:38:12 PM
		18	23/05/2018 04:38:13 PM	Panel Lite V2	Panel Lite V2	ACK	→ Event Ack for RollOver: 0 Event Seq. No.: 126

The DND feature can be deactivated by the user belonging to the user group which is set for this special function. Here Staff group is set for Deactivate DND. So go to Menu> Zone Settings> Do Not Disturb> Deactivate from the display of door. Then show your ID on door i.e. punch on the door. This will deactivate Do Not Disturb feature.

Events						
Sr No.	Date Time	Type	Device	Category	Detail	
4	23/05/2018 04:36:10 PM	NGT Direct Door	NGT Direct Door-Device-2	Command	→ Event Request for RollOver: 0 Event Seq. No.: 216	
5	23/05/2018 04:36:10 PM	NGT Direct Door	NGT Direct Door-Device-2	Other	← Start Of Event	
6	23/05/2018 04:36:10 PM	NGT Direct Door	NGT Direct Door-Device-2	Command	→ Set Date & Time	
7	23/05/2018 04:36:10 PM	NGT Direct Door	NGT Direct Door-Device-2	ACK	← Set Date & Time Command Successful	
8	23/05/2018 04:36:10 PM	NGT Direct Door	NGT Direct Door-Device-2	Other	→ End Of Message	
9	23/05/2018 04:36:15 PM	Panel Lite V2	Panel Lite V2	ACK	→ Event Ack for RollOver: 0 Event Seq. No.: 122	
10	23/05/2018 04:36:15 PM	Panel Lite V2	Panel Lite V2 -> Door V3...	User	→ Allowed with Finger, User ID: 1 Event Date Time: 23/05/2018 04:36:14 PM	
11	23/05/2018 04:36:39 PM	Panel Lite V2	Panel Lite V2 -> Door V3...	User	→ Allowed with Finger, User ID: 101 Event Date Time: 23/05/2018 04:36:38 PM	
12	23/05/2018 04:36:39 PM	Panel Lite V2	Panel Lite V2	ACK	→ Event Ack for RollOver: 0 Event Seq. No.: 123	
13	23/05/2018 04:36:55 PM	Panel Lite V2	Panel Lite V2 -> Door V3...	Door	← DND status changed - Activated Event Date Time: 23/05/2018 04:36:54 PM	
14	23/05/2018 04:36:55 PM	Panel Lite V2	Panel Lite V2	ACK	→ Event Ack for RollOver: 0 Event Seq. No.: 124	
15	23/05/2018 04:38:02 PM	Panel Lite V2	Panel Lite V2 -> Door V3...	User	→ Denied - DND Enabled with Finger, User ID: 4 Event Date Time: 23/05/2018 04:38:01 PM	
16	23/05/2018 04:38:02 PM	Panel Lite V2	Panel Lite V2	ACK	→ Event Ack for RollOver: 0 Event Seq. No.: 125	
17	23/05/2018 04:38:13 PM	Panel Lite V2	Panel Lite V2 -> Door V3...	User	→ Denied - DND Enabled with Finger, User ID: 102 [1689] Event Date Time: 23/05/2018 04:38:12 PM	
18	23/05/2018 04:38:13 PM	Panel Lite V2	Panel Lite V2	ACK	→ Event Ack for RollOver: 0 Event Seq. No.: 126	
19	23/05/2018 04:40:04 PM	Panel Lite V2	Panel Lite V2 -> Door V3...	Door	← DND status changed - Deactivated Event Date Time: 23/05/2018 04:40:03 PM	
20	23/05/2018 04:40:04 PM	Panel Lite V2	Panel Lite V2	ACK	→ Event Ack for RollOver: 0 Event Seq. No.: 127	

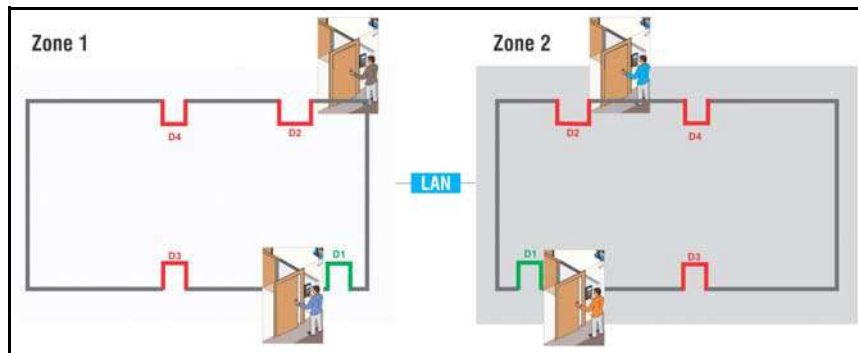
# Man Trap

Man Trap, interlock or airlock systems provide safety, security and environmental control between two or more rooms by ensuring that opening any door causes all other doors to lock until the opened door returns to the closed position.

In this feature, Man Trap timer is provided which is the timer for which door needs to wait for the other door to get closed in the same zone where the mantrap feature is enabled. The system then waits for the defined timer period and then ignores the status of that door if it continues to be in the abnormal state.

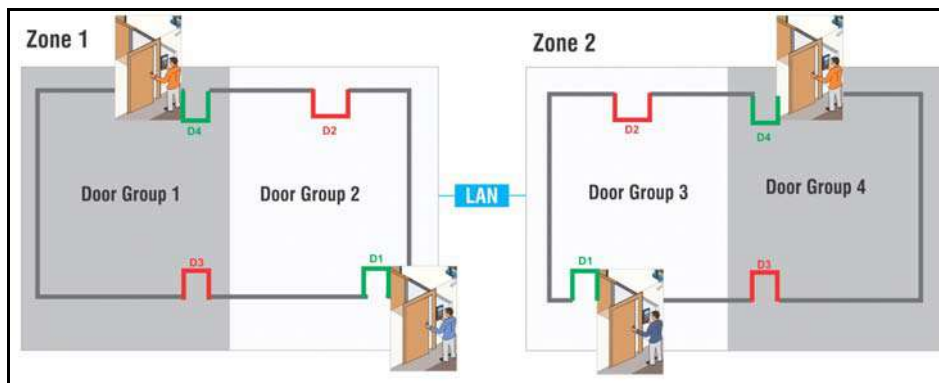
## Man Trap-Zone Based

Second Door opens only after the first Door gets closed completely of that particular Zone.



## Man Trap-Door Based

Second Door opens only after the first Door gets closed completely of that particular Door Group.



*This functionality can also be enabled from the **Device Module > Device Configuration > Features** option.*

- 1. Door sense is must for this feature as the system will ignore the door status either in the absence of a door sense or its fault state.*
- 2. This feature is not supported when the Panel Doors are in degraded mode (standalone mode).*

To use the Man Trap feature, click **Access Control > Man Trap**. The page appears as shown below:



Man Trap

Device \* 9 Panel Lite V2-Device-9

Enable Rule ☒

Man Trap Wait Timer (Sec) \* 5

Functioning Zone Based

Update Device

Zone \* Zone-1

Enable Rule On Zone ☐

Enable Strict Man Trap ☐ ⓘ

Update Zone

ID ▲	Name
1	RnD Panel lite V2
9	Panel Lite V2-Device-9

The grid on the page shows the list of the Panel lite configured with Access Control System.

The user can select any Panel lite from the list. The selection will be reflected in the **Device** field.

**Enable Rule:** Select the check box to enable Man trap rule on the selected Panel lite.

**Man Trap Wait Timer:** Specify the Man Trap Wait Timer (sec) for which the door needs to wait for the other door to get closed in the same zone where the Man Trap feature is enabled. By default the value of the Man Trap timer is 5 seconds and valid range is from **3 sec to 99 sec**.

**Functioning:** Select the Man Trap functioning from the option of **Zone based** and **Door Group based**.

Then Click on **Update Device**. The device will be updated as shown below:

Man Trap

Device \* 9 Panel Lite V2-Device-9

Enable Rule ☒

Man Trap Wait Timer (Sec) \* 5

Functioning Zone Based

Update Device

Zone \* HO zone

Enable Rule On Zone ☒

Enable Strict Man Trap ☒ ⓘ

Update Zone

ID ▲	Name
1	RnD Panel lite V2
9	Panel Lite V2-Device-9

**Zone:** If Zone based functioning is selected then select the Zone from the configured Zones of panel lite to be monitored for security.

**Enable Rule on Zone:** Select the check box to enable this rule on Zone.

**Enable Strict Man Trap:** Select the check box to enable Strict Man Trap. By this the Man Trap process will not use the wait timer to open the next door. Instead it will indefinitely wait for one door to close before the second door can open.

Click on **Update Zone**. The Man Trap Rule will be activated on Zone.



**Door Group:** If Door Group functioning is selected then select the Door Group on which Man Trap feature is to be implemented.

The screenshot shows the 'Man Trap' configuration window. On the left, there are input fields for 'Device' (set to 9), 'Enable Rule' (checked), 'Man Trap Wait Timer (Sec)' (set to 5), and 'Functioning' (set to 'Door Group Based'). Below these are fields for 'Door Group' (set to 'RandD Group'), 'Enable Rule On Door Group' (checked), and 'Enable Strict Man Trap' (unchecked). 'Update Device' and 'Update Group' buttons are at the bottom. On the right, a table lists devices:

ID	Name
1	RnD Panel lite V2
9	Panel Lite V2-Device-9

**Enable Rule on Door Group:** Select the check box to enable this Rule on Door Group.

**Enable Strict Man Trap:** Select the check box to enable Strict Man Trap. By this the Man Trap process will not use the wait timer to open the next door. Instead it will indefinitely wait for one door to close before the second door can open.

Click on **Update Group**. The Man Trap Rule will be activated on Door Group.

### Configuration of Man Trap- Zone based

Let us configure Man Trap on Panel200 for Zone Based on Production Zone. Enable the rule for Panel200 and for Production zone as shown below.

The screenshot shows the 'Man Trap' configuration window with a green success banner at the top that says 'Saved Successfully'. The configuration is now for a zone-based setup. The 'Device' field is set to 3, 'Enable Rule' is checked, 'Man Trap Wait Timer (Sec)' is set to 20, and 'Functioning' is set to 'Zone Based'. The 'Zone' field is set to 'Production Zone', 'Enable Rule On Zone' is checked, and 'Enable Strict Man Trap' is unchecked. 'Update Device' and 'Update Zone' buttons are at the bottom. On the right, a table lists zones:

ID	Name
3	Panel Lite V2
4	Panel Lite

Now the Production zone has 2 doors i.e. Door V3 and PVR door. Both doors are assigned Production Zone from door profile as shown below.



The Door Sense for the doors must be configured as shown below. You can select sense type as Normally Open or Normally Closed.

## Man Trap Only

When user1 punches on Door V3, door opens. If pulse time is elapsed before closing the door then “Door held open too long” alarm is generated. Now if door still remains open till abnormal wait timer elapse then “Door abnormal” alarm will be generated.



*When Alarm is disabled for Door V3 then alarms “Door Held Open too long” and “Door abnormal” will not be generated and displayed in Monitor.*

Now If **Man Trap Wait timer** is **20 sec**; then PVR door waits for 20 sec for Door V3 to close. If Strict Man Trap is enabled then PVR door wont check for the 20 sec time; it will only wait for Door V3 to close.

If Door V3 is open and user2 punches on PVR door then he will be asked to wait displaying the message on door as another door is open.

When 20 sec is over or Door V3 gets closed then user2 is access allowed on PVR door.

Suppose the Pulse time for Door V3 is set as 14sec. The Door Abnormal Wait Timer is set as 15sec.

Suppose user1 access Door V3 at 11:50:41 hrs. Then after 14 seconds i.e. at 11:59:56 Door Held open too long alarm is generated. The door is still open so after 15 sec; Door Abnormal alarm is generated. Now after 20 sec i.e. at 12:00:31 user 2 will be allowed access on PVR door.

The events on Monitor is shown below.

User Details



User ID: 1

Chirag

Allowed

Device:

Panel Lite V2 -> PVR as Pane

Event Date & Time:

01/06/2018 12:00:41 PM

Department:

DLTDPT

Designation:

DLTDSG

Events

Sr No.	Date Time	Type	Device	Category	Detail
125	01/06/2018 11:46:14 AM	NGT Direct Door	NGT Direct Door-Device-2	Other	← Start Of Event
126	01/06/2018 11:46:14 AM	NGT Direct Door	NGT Direct Door-Device-2	Command	→ Set Date & Time
127	01/06/2018 11:46:14 AM	NGT Direct Door	NGT Direct Door-Device-2	ACK	← Set Date & Time Command Successful
128	01/06/2018 11:46:14 AM	NGT Direct Door	NGT Direct Door-Device-2	Other	→ End Of Message
129	01/06/2018 11:59:41 AM	Panel Lite V2	Panel Lite V2 -> Door V3...	Door	← Allowed with Finger User ID: 1 Event Date Time: 01/06/2018 11:59:41 AM
130	01/06/2018 11:59:41 AM	Panel Lite V2	Panel Lite V2	ACK	→ Event Ack for RollOver: 0 Event Seq. No.: 628
131	01/06/2018 11:59:45 AM	Panel Lite V2	Panel Lite V2 -> Door V3...	Door	← Door Open/Close - Open User ID: 1 Event Date Time: 01/06/2018 11:59:44 AM
132	01/06/2018 11:59:45 AM	Panel Lite V2	Panel Lite V2	ACK	→ Event Ack for RollOver: 0 Event Seq. No.: 629
133	01/06/2018 11:59:56 AM	Panel Lite V2	Panel Lite V2 -> Door V3...	Alarm	← Door Held open too long Event Date Time: 01/06/2018 11:59:56 AM
134	01/06/2018 11:59:56 AM	Panel Lite V2	Panel Lite V2	ACK	→ Event Ack for RollOver: 0 Event Seq. No.: 630
135	01/06/2018 12:00:11 PM	Panel Lite V2	Panel Lite V2 -> Door V3...	Alarm	← Door Abnormal Event Date Time: 01/06/2018 12:00:11 PM
136	01/06/2018 12:00:11 PM	Panel Lite V2	Panel Lite V2	ACK	→ Event Ack for RollOver: 0 Event Seq. No.: 631
137	01/06/2018 12:00:31 PM	Panel Lite V2	Panel Lite V2 -> PVR as...	User	← Allowed with Palm User ID: 1 Event Date Time: 01/06/2018 12:00:31 PM
138	01/06/2018 12:00:31 PM	Panel Lite V2	Panel Lite V2	ACK	→ Event Ack for RollOver: 0 Event Seq. No.: 632
139	01/06/2018 12:00:36 PM	Panel Lite V2	Panel Lite V2 -> PVR as...	Door	← Door Open/Close - NotOperated User ID: 1 Event Date Time: 01/06/2018 12:00:36 PM
140	01/06/2018 12:00:36 PM	Panel Lite V2	Panel Lite V2	ACK	→ Event Ack for RollOver: 0 Event Seq. No.: 633
141	01/06/2018 12:00:40 PM	Panel Lite V2	Panel Lite V2 -> Door V3...	Door	← Door Open/Close - Close User ID: 1 Event Date Time: 01/06/2018 12:00:39 PM
142	01/06/2018 12:00:40 PM	Panel Lite V2	Panel Lite V2	ACK	→ Event Ack for RollOver: 0 Event Seq. No.: 634

### Advance Configuration with Readers duration

Enable Man Trap Timer Violation and Man Trap Alarm Wait Timer for Panel200 as shown below.

### Device Configuration

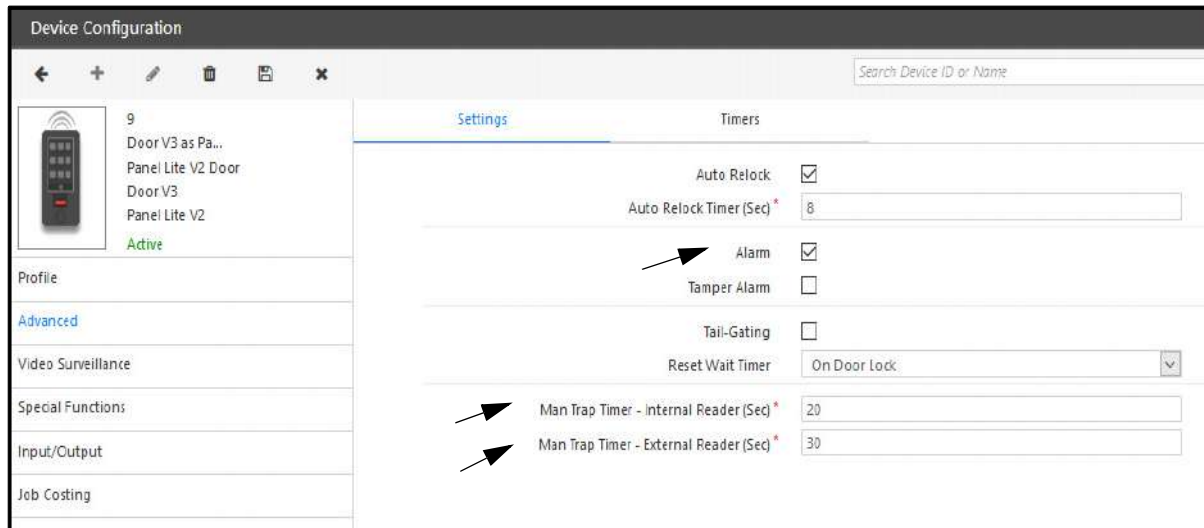
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Settings	Alarms	Timers	Wiegand
<div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;"> <p>3 Panel Lite V2 14/25000 <span style="color: green;">Active</span></p> </div> <div>Profile</div> <div>Enrollment</div> <div style="background-color: #e0f0ff;">Advanced</div> <div>Features</div> <div>Special Functions</div> <div>Input/Output</div> <div>Zones</div> <div>Additional</div> <div>Access Clusters</div> <div>Door Group</div> <div>Assign Users</div>	Duress	<input type="checkbox"/>	
	Dead Man	<input type="checkbox"/>	
	Panic	<input type="checkbox"/>	
	Door Offline	<input type="checkbox"/>	
	Door Fault	<input type="checkbox"/>	
	Occupancy Violated	<input type="checkbox"/>	
	Tail - Gating	<input type="checkbox"/>	
	Man Trap Timer Violation	<input checked="" type="checkbox"/>	
	Access Denied - Anti-Pass Back	<input type="checkbox"/>	
	Access Denied - Access Route Violated	<input type="checkbox"/>	
	Access Denied - Other Reasons	<input type="checkbox"/>	
	Multiple Unauthorized Attempts	<input type="checkbox"/>	
	User Unidentified	<input type="checkbox"/>	
	Custom Alarm 1	<input type="text" value="Custom Alarm 1"/>	
	Custom Alarm 2	<input type="text" value="Custom Alarm 2"/>	
Custom Alarm 3	<input type="text" value="Custom Alarm 3"/>		
Alarm Reissue Wait Timer(min)	<input type="text" value="5"/>		
Man Trap Alarm Wait Timer	<input checked="" type="checkbox"/>		

The Panel doors must be enabled with Alarm. And enter the duration in seconds for Man Trap Timer- Internal Reader and Man Trap Timer- External Reader as shown below.

**Door V3- 20 sec** for Internal reader and **30 sec** for External reader

**PVR Door - 25 sec** for Internal reader and **35 sec** for External reader

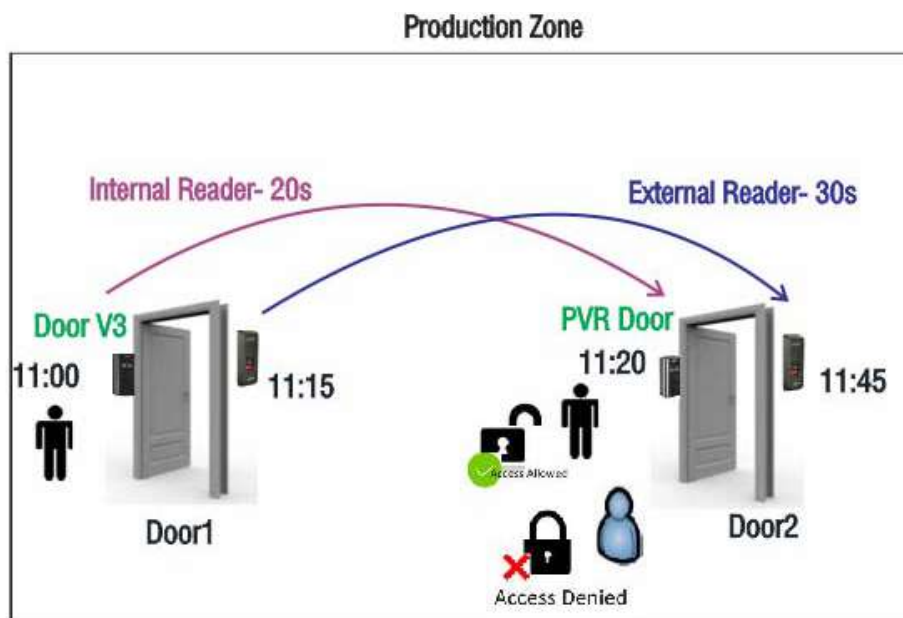


When user punches on internal reader of a door (say Door V3). Then he is expected to punch on internal reader of any other door (say here PVR door) of same zone within 20 seconds (Man Trap timer- Internal reader of Door V3).

- Until the same user punches on any internal reader in the same zone, no other user will be allowed to any other internal reader in the same zone.

When user punches on external reader of a door then he is expected to punch on external reader of any other door (say here PVR door) of same zone within 30 seconds (Man Trap timer- External reader of Door V3).

- Until the same user punches on any external reader in the same zone, no other user will be allowed to any other external reader in the same zone. This will work if Access Control on Exit mode is enabled for the zone. If this check-box is disabled then other user also can access the external reader of (say PVR door).



Matrix COSEC MONITOR

File Device Tools Help

Features

- Alarms
- I/O Link
- Soft Override
- Events
- Exceptions
- Time Triggered Functions
- EMAP

Devices - All 2 6

Name	Site	IP/RS485 Address	MAC Address	Type	Status
Panel Lite V2		192.168.104.111	001B090465D1	Panel Lite V2	Connected
ARC as Single Door	Site-1	192.168.105.3	DF-E3:65:54:34:44	Panel Lite V2 Door	OFF-Line
Dummy Door	Site-1	192.111.111.111	11:11:11:11:11:11	Panel Lite V2 Door	OFF-Line
ARC as Dual Door-Dual Reader	Site-1	192.168.105.5	DF-E6:37:56:35:56	Panel Lite V2 Door	OFF-Line
ARC as Dual Door-Dual Reader	Site-1	192.168.105.5	DF-E6:37:56:35:56	Panel Lite V2 Door	OFF-Line
ARC as Dual Door-Single Reader	Site-1	192.168.105.6	FE-47:48:46:74:69	Panel Lite V2 Door	OFF-Line
ARC as Dual Door-Single Reader	Site-1	192.168.105.6	FE-47:48:46:74:69	Panel Lite V2 Door	OFF-Line
ARC as Dual Door-Single Reader	Site-1	192.168.105.7	55:56:7A:8A:00:9E	Panel Lite V2 Door	OFF-Line

User Details

User ID: 1687  
Aditi Ajay Gupta

Denied - Control zone

Device:  
Panel Lite V2 -> PVR as Panel

Event Date & Time:  
06/06/2018 05:57:26 PM

Department:  
DPLTDP

Designation:  
DPLTDSG

Events

Sr.No.	Date Time	Type	Device	Category	Detail
9	06/06/2018 05:57:14 PM	Panel Lite V2	Panel Lite V2 -> Door V3...	User	Allowed with Finger: User ID: 1 Event Date Time: 06/06/2018 05:57:13 PM
10	06/06/2018 05:57:14 PM	Panel Lite V2	Panel Lite V2	ACK	Event Ack for RollOver: 0 Event Seq. No: 873
11	06/06/2018 05:57:19 PM	Panel Lite V2	Panel Lite V2 -> Door V3...	Door	Door Open/Close - Open: User ID: 1 Event Date Time: 06/06/2018 05:57:18 PM
12	06/06/2018 05:57:19 PM	Panel Lite V2	Panel Lite V2	ACK	Event Ack for RollOver: 0 Event Seq. No: 874
13	06/06/2018 05:57:21 PM	Panel Lite V2	Panel Lite V2 -> Door V3...	Door	Door Open/Close - Close: User ID: 1 Event Date Time: 06/06/2018 05:57:20 PM
14	06/06/2018 05:57:21 PM	Panel Lite V2	Panel Lite V2	ACK	Event Ack for RollOver: 0 Event Seq. No: 875
15	06/06/2018 05:57:27 PM	Panel Lite V2	Panel Lite V2 -> PVR as...	User	Denied - Control zone with Palm: User ID: 1687 Event Date Time: 06/06/2018 05:57:26 PM
16	06/06/2018 05:57:27 PM	Panel Lite V2	Panel Lite V2	ACK	Event Ack for RollOver: 0 Event Seq. No: 876

If user fails to punch within Man Trap Internal/External timer then Man Trap violation alarm will be generated.

User Details

User ID: 1687  
Aditi Ajay Gupta

Denied - Control zone

Device:  
Panel Lite V2 -> PVR as Panel

Event Date & Time:  
06/06/2018 05:57:26 PM

Department:  
DPLTDP

Designation:  
DPLTDSG

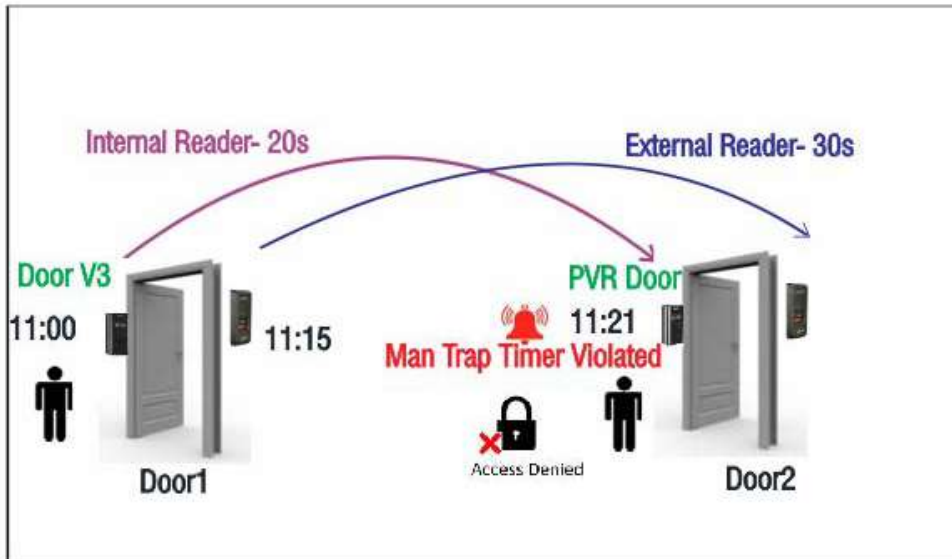
Events

Sr.No.	Date Time	Type	Device	Category	Detail
9	06/06/2018 05:57:14 PM	Panel Lite V2	Panel Lite V2 -> Door V3...	User	Allowed with Finger: User ID: 1 Event Date Time: 06/06/2018 05:57:13 PM
10	06/06/2018 05:57:14 PM	Panel Lite V2	Panel Lite V2	ACK	Event Ack for RollOver: 0 Event Seq. No: 873
11	06/06/2018 05:57:19 PM	Panel Lite V2	Panel Lite V2 -> Door V3...	Door	Door Open/Close - Open: User ID: 1 Event Date Time: 06/06/2018 05:57:18 PM
12	06/06/2018 05:57:19 PM	Panel Lite V2	Panel Lite V2	ACK	Event Ack for RollOver: 0 Event Seq. No: 874
13	06/06/2018 05:57:21 PM	Panel Lite V2	Panel Lite V2 -> Door V3...	Door	Door Open/Close - Close: User ID: 1 Event Date Time: 06/06/2018 05:57:20 PM
14	06/06/2018 05:57:21 PM	Panel Lite V2	Panel Lite V2	ACK	Event Ack for RollOver: 0 Event Seq. No: 875
15	06/06/2018 05:57:27 PM	Panel Lite V2	Panel Lite V2 -> PVR as...	User	Denied - Control zone with Palm: User ID: 1687 Event Date Time: 06/06/2018 05:57:26 PM
16	06/06/2018 05:57:27 PM	Panel Lite V2	Panel Lite V2	ACK	Event Ack for RollOver: 0 Event Seq. No: 876
17	06/06/2018 05:57:34 PM	Panel Lite V2	Panel Lite V2 -> Door V3...	Alarm	Man Trap Time Violation Alarm: User ID: 1 Event Date Time: 06/06/2018 05:57:33 PM
18	06/06/2018 05:57:34 PM	Panel Lite V2	Panel Lite V2	ACK	Event Ack for RollOver: 0 Event Seq. No: 877

When user1 punches on Door V3 at 11:00 hours then he is expected to punch PVR door within 11:20 hours. When 20 second elapses and user does not punch then Man Trap violation alarm is generated.

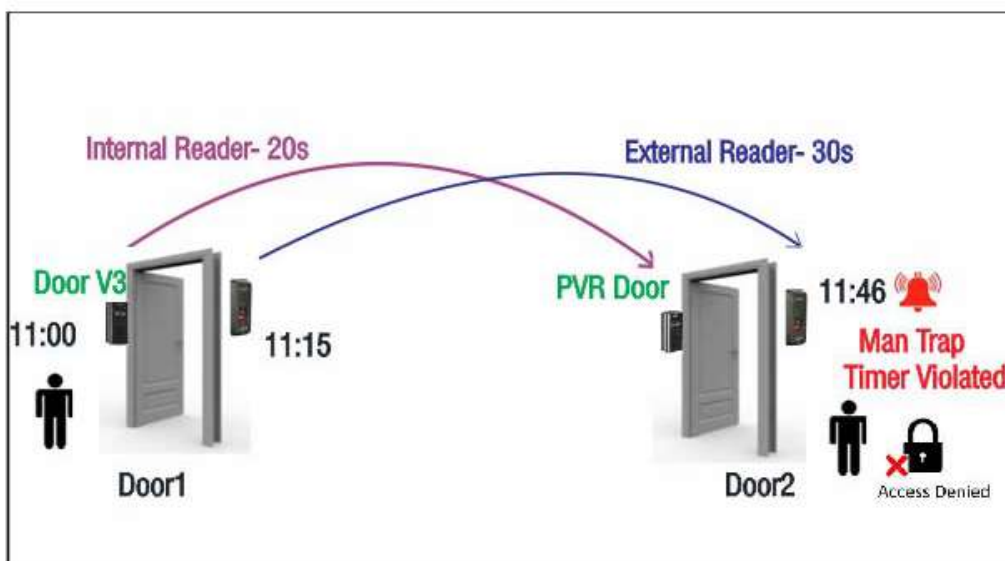


### Production Zone



Also if user1 punches on external reader of Door V3 at 11:15 hours then he is expected to punch on external reader of PVR door within 11:45 hours. When 30 second elapses and user does not punch then Man Trap violation alarm is generated.

### Production Zone



Features

Alarms

I/O Link

Soft Override

Events

Exceptions

Time Triggered Functions

EMAP

Devices - All

2

8

Name	Site	IP/RS485 Address	MAC Address	Type	Status
Panel Lite V2		192.168.104.111	00:1B:79:04:65:D1	Panel Lite V2	Connected
ARC as Single Door	Site-1	192.168.105.3	DFE3655A2444	Panel Lite V2 Door	OFF-Line
Dummy Door	Site-1	192.111.111.111	11:11:11:11:11:11	Panel Lite V2 Door	OFF-Line
ARC as Dual Door-Dual Reader	Site-1	192.168.105.5	DFE637563556	Panel Lite V2 Door	OFF-Line
ARC as Dual Door-Dual Reader	Site-1	192.168.105.5	DFE637563556	Panel Lite V2 Door	OFF-Line
ARC as Dual Door-Single Reader	Site-1	192.168.105.6	FE4748467469	Panel Lite V2 Door	OFF-Line
ARC as Dual Door-Single Reader	Site-1	192.168.105.6	FE4748467469	Panel Lite V2 Door	OFF-Line
Panel Lite V2	Site-1	192.168.105.7	EE6574340000	Panel Lite V2 Door	OFF-Line

User Details

User ID: 1

Chirag

Allowed

Device:

Panel Lite V2 -> Door V3 as P

Event Date & Time:

06/06/2018 06:16:47 PM

Department:

DLTDPT

Designation:

DLTDSG

Events

Sr.No.	Date Time	Type	Device	Category	Detail
16	06/06/2018 05:57:27 PM	Panel Lite V2	Panel Lite V2	ACK	→ Event Ack for RollOver: 0 Event Seq. No.: 876
17	06/06/2018 05:57:34 PM	Panel Lite V2	Panel Lite V2 -> Door V3...	Alarm	← Man Trap Timer Violation Alarm - User ID: 1 Event Date Time: 06/06/2018 05:57:33 PM
18	06/06/2018 05:57:34 PM	Panel Lite V2	Panel Lite V2	ACK	→ Event Ack for RollOver: 0 Event Seq. No.: 877
19	06/06/2018 06:16:27 PM	Panel Lite V2	Panel Lite V2	Request	← Message Request Received
20	06/06/2018 06:16:27 PM	Panel Lite V2	Panel Lite V2	Command	→ Clear alarm. Alarm Seq. No.: 67 TID: 1806060050000016
21	06/06/2018 06:16:27 PM	Panel Lite V2	Panel Lite V2	ACK	← Clear alarm Command Successful. Alarm Seq. No.: 67
22	06/06/2018 06:16:27 PM	Panel Lite V2	Panel Lite V2 -> Door V3...	Alarm	← Alarm cleared Event Date Time: 06/06/2018 06:16:26 PM
23	06/06/2018 06:16:27 PM	Panel Lite V2	Panel Lite V2	Other	→ End Of Message
24	06/06/2018 06:16:27 PM	Panel Lite V2	Panel Lite V2	ACK	→ Event Ack for RollOver: 0 Event Seq. No.: 878
25	06/06/2018 06:16:43 PM	Panel Lite V2	Panel Lite V2 -> Door V3...	User	→ Allowed with Finger. User ID: 1 Event Date Time: 06/06/2018 06:16:41 PM
26	06/06/2018 06:16:43 PM	Panel Lite V2	Panel Lite V2	ACK	→ Event Ack for RollOver: 0 Event Seq. No.: 879
27	06/06/2018 06:16:48 PM	Panel Lite V2	Panel Lite V2	ACK	→ Event Ack for RollOver: 0 Event Seq. No.: 880
28	06/06/2018 06:16:48 PM	Panel Lite V2	Panel Lite V2 -> Door V3...	User	→ Allowed with Finger. User ID: 1 Event Date Time: 06/06/2018 06:16:47 PM
29	06/06/2018 06:16:56 PM	Panel Lite V2	Panel Lite V2 -> Door V3...	Door	← Door Open/Close - NotOperated. User ID: 1 Event Date Time: 06/06/2018 06:16:55 PM
30	06/06/2018 06:16:56 PM	Panel Lite V2	Panel Lite V2	ACK	→ Event Ack for RollOver: 0 Event Seq. No.: 881
31	06/06/2018 06:17:18 PM	Panel Lite V2	Panel Lite V2 -> Door V3...	Alarm	← Man Trap Timer Violation Alarm - User ID: 1 Event Date Time: 06/06/2018 06:17:17 PM
32	06/06/2018 06:17:18 PM	Panel Lite V2	Panel Lite V2	ACK	→ Event Ack for RollOver: 0 Event Seq. No.: 882



If user punches on PVR first; then Man Trap timer- Internal and External of PVR door will be considered.



# VIP Access

VIP Access feature allows the admin to give VIP access to a specific user on the particular door for security purposes.

To use the VIP Access feature, click **Access Control > VIP Access**. The page appears as shown below:

VIP Access

Device - Wise

User - Wise

Device \* ID Name

There are two modes to configure this rule:

- Device-wise configuration
- User-wise configuration

## Device- Wise

To assign VIP Access Rule Device-wise, select Device-wise option. The following page appears.

The user can select the **Device** from the picklist where the Rule is to be configured. Click on the button and select the Device from the picklist.

The List of the assigned Users on the selected device will be listed in the grid as shown below.

VIP Access

Device - Wise

User - Wise

Device \* 34 NGT Direct Door-Device-34

Search

User ID ▲	Name	Rule Enabled
1687	Aditi Gupta	No
JCP2	Suresh	No
jcp3	Tina	No
sunny	sunny	No
user1	user1	No

To assign the VIP Access Rule to one or more person on the selected device, click the edit button for that user. Now select the **Rule Enabled** check box and click **OK** to save the changes as shown below.

User ID ▲	Name	Rule Enabled
1687	Aditi Gupta	<input checked="" type="checkbox"/>
JCP2	Suresh	No
jcp3	Tina	No
sunny	sunny	No
user1	user1	No

OK

## User- Wise

To Assign VIP Access Rule User-wise, select User-wise option. The following page appears.

The admin can select the user for whom the Rule is to be configured. Click the picklist button and select the User.

Device ID	Name	Rule Enabled
1	Panel Lite V2-Device-1	No
10	NGT Direct Door-Device-10	No
32	Door V3-Device-32	No
33	PVR Door-Device-33	No
34	NGT Direct Door-Device-34	Yes

The List of all the devices assigned to the selected user will be listed in the grid.

To assign the VIP Access Rule on one or more devices for the selected user, click the edit button for the device.

Now select the **Rule Enabled** check box and click **OK** to save the changes as shown below.

Device ID	Name	Rule Enabled
1	Panel Lite V2-Device-1	No
10	NGT Direct Door-Device-10	No
32	Door V3-Device-32	<input checked="" type="checkbox"/>
33	PVR Door-Device-33	No
34	NGT Direct Door-Device-34	Yes

# Visitor Escort

This rule requires all Visitors to be accompanied by an escort and the display of the visitor's credential has to be followed by the credential of the Escort within the stipulated time period. Check this box to enable this feature at the system level.



*This functionality can also be enabled from the **Device Module > Device Configuration > Features** option.*

To use the Visitor Escort Rule, click **Access Control > Visitor Escort**. The page appears as shown below:

ID	Name
4	Panel Lite V2

The grid on the page shows the list of the Panel configured with Access Control System.

The user can select any Panel from the list. Click on the Panel from the grid. The selection will be reflected in the **Device** field.

**Enable Rule:** Check the box to enable the rule.

Then Click on **Update Device**. The device will be updated as shown below:

ID	Name
4	Panel Lite V2

**Zone:** Click on the Zone dropdown button and select the Zone to be monitored for security from the configured Zones of the selected panel.

**Enable Rule on Zone:** Select the check box to enable this Rule on Zone.

Click on **Update Zone**. The Visitor Escort Rule will be activated.

# Anti-Pass Back

The Anti-Pass Back or APB feature is used to ensure that users pass through the entry reader followed by the exit reader before their ID will be accepted a second time at the designated entry reader. It prevents a card holder from passing back his/her card to other person to gain entry into an access controlled area.

**Hard APB** restricts the entry/exit of a person in case of an APB violation while **Soft APB** does not restrict the person from re-entering/ leaving on an APB Violation but reports the same and maintains a log.



*In degraded mode, APB will not be verified.*

*The configuration of Anti-pass back feature as done from Access Control >Anti-Pass Back will be updated on Device Configuration (Panel lite)> Zones (respective zones)*

*For Direct doors, Anti-Pass Back must be configured from **Device Module > Device Configuration> Features** option.*



To use the Anti-Pass Back feature, click **Access Control >Anti-Pass Back**. The page appears as shown below:

ID	Name
1	Panel lite V2

The grid on the right side shows the list of the Panel lite configured with Access Control System.

The user can select any Panel lite from the grid on which Anti-Pass Back Rule is to be configured.

**Enable Rule:** Select the check box to enable the rule for the selected Panel lite.

Then Click on **Update Device** to update the rule on the panel lite. The device will be updated as shown below and the Zone section will get enabled.

**Zone:** Click on the Zone dropdown button and select the Zone to be monitored for security from the configured Zones of the selected panel.

**On Entry:** Check this box so that the system monitors the entry reader for APB violation. Select the options from Local or Global from the drop down list.

- **Local:** In the event of the Local APB, the system applies the Anti-Pass Back rule at the Zone level. [See "Local" on page 1696.](#)
- **Global:** In the event of the Global APB, the system applies the rule across all zones at the Panel Lite level. [See "Global" on page 1697.](#)

**On Exit:** Check this box also so that the system monitors the entry as well as the exit readers for APB violations.

Eg: If Anti Pass back in exit mode is configured for the internal port then the system shall display 'Access Allowed', 'Entry Was Not Registered' for Soft Anti-Pass Back and for Hard Anti-Pass Back display 'Access Denied, Entry Not Recorded'.

**Restriction Type:** Select the restriction type as Hard or Soft option from the drop down options.

- **Hard APB:** The access will be denied if the exit is not registered first. It does not allow a second entry using the same card without an exit. [See "Configuration of APB- Hard" on page 1693.](#)

- **Soft APB:** The access will be granted even if the exit is not registered. It allows a second entry of the same user without an exit; however, an event and a warning are generated that indicates the second entry. See [“Configuration of APB- Soft” on page 1695](#).

**Forgiveness:** Check this box to enable the system to reset the APB status. When forgiveness is enabled, then there will be following options to reset the pass.

1. **Reset After Day Change:** This will reset the APB status of all the users to NULL at midnight. This enables a user, who left the building in the evening without exit punch, to use his card for entry in the next morning.
  2. **Reset After Timer Expiry:** This will reset the APB status of all the users after the expiry of user defined time.
- **Forgiveness Timer (Mins):** Enter the time duration in minutes after which Anti-Pass Back status will get reset and the pass will be in original state.

Click on **Update Zone**. The Anti-Pass Back Rule will be updated.

The screenshot shows the 'Anti-Pass Back' configuration window. At the top, a green banner indicates 'Saved Successfully'. The interface is divided into two main sections: configuration settings on the left and a table of devices on the right.

**Configuration Settings:**

- Device:** 1 (selected), Panel lite V2 (device name)
- Enable Rule:** ☒
- Update Device:** Button
- Zone:** RnD Zone (selected)
- On Entry:** ☒ Local
- On Exit:** ☒ Local
- Hard/Soft:** Soft
- Forgiveness:** ☒
- Reset After:** ☐ Day Change ☒ Timer Expiry
- Forgiveness Timer (Mins):** 5
- Update Zone:** Button

**Table of Devices:**

ID	Name
1	Panel lite V2

## Configuration of APB- Hard

Create the zone of Panel200. Then select that zone (say Production zone) where the APB feature is to be activated.

The screenshot shows the 'Anti-Pass Back' configuration window. On the left, there are fields for 'Device' (set to 3), 'Enable Rule' (checked), and 'Zone' (set to 'Production Zone'). Below these are options for 'On Entry' (Local), 'On Exit' (Local), 'Hard/Soft' (Hard), 'Forgiveness' (checked), and 'Reset After' (Timer Expiry). A 'Forgiveness Timer (Mins)' field is set to 60. On the right, a table lists devices: ID 3 'Panel Lite V2' and ID 4 'Panel Lite'. An arrow points to the 'Zone' dropdown menu.

Now the door in the zone where APB violation is to be monitored must be assigned the Access Zone as Production Zone. The Door V3 is assigned Production zone as shown below.

The screenshot shows the 'Device Configuration' window for 'Door V3 as Panel Door'. The 'Basic' tab is active, showing fields for 'Sequence Number' (17), 'Device' (9), 'Connection Type' (Ethernet), 'IP Address' (192.168.104.114), and 'MAC Address' (00:1B:09:05:3F:E2). The 'Optional' tab is also visible, showing 'Site' (1), 'Consider For Attendance' (checked), 'Alert Messages' (unchecked), 'Access Zone' (Production Zone), 'Access Cluster' (Cluster-1), 'Door Group' (None), and 'Auto IP Assignment' (checked). An arrow points to the 'Access Zone' dropdown menu.

For APB feature, you must have Exit reader. So here PATH RDFE is connected to Door V3 as exit reader. And the Mode in External Reader is selected as Exit and Reader type is selected as Combo Exit Reader.

**Device Configuration**

Search Device ID or Name

Basic **Readers** General

**Internal Readers**

Mode: Entry

Card Reader Type: MiFare Reader

Search

Member No	Card Format	Configurable Bits
1	Default Format	0

Finger Reader Type: Finger Reader

**External Readers**

Mode: Exit

External Reader Type: Combo Exit Reader

Search

Member No	Card Format	Configurable Bits
1	Default Format	0

Exit Switch: ☒

The Card must be enrolled for the user.

**User Configuration**

Search User ID or Name

Profile

Devices

**Credentials**

Group

T&A

Access Control

ESS

Cafeteria

Job Costing

Field Visit Management

PIN

Biometric Group No. 1

Roaming User ☐

Access Card 1: 3280168263

Access Card 2

Enrolled Fingers(Suprema Proprietary) 1

Enrolled Fingers(Suprema ISO) 0


Enrolled Fingers(Lumidigm ISO) 0

Enrolled Palm 1

Enable Self-Enrollment ☐

During Entry punch user is allowed. If there is second Entry punch using the same card then user will be denied access with Anti-Pass Back violation.





User ID: 1

Chirag

Denied - Anti-Pass Back

Device:

Panel Lite V2 -> Door V3 as F

Event Date & Time:

24/05/2018 06:05:17 PM

Department:

DFLTDPT

Designation:

DFLTDSG

Sr No.	Date Time	Type	Device	Category	Detail
1	24/05/2018 06:04:49 PM	NGT Direct Door	NGT Direct Door-Device-2	Request	← Login Request Received
2	24/05/2018 06:04:49 PM	NGT Direct Door	NGT Direct Door-Device-2	ACK	→ Login Success Poll Duration: 3 Poll Interval: 2
3	24/05/2018 06:04:50 PM	NGT Direct Door	NGT Direct Door-Device-2	Request	← Message Request Received
4	24/05/2018 06:04:50 PM	NGT Direct Door	NGT Direct Door-Device-2	Command	→ Event Request for RollOver: 0 Event Seq. No.: 238
5	24/05/2018 06:04:50 PM	NGT Direct Door	NGT Direct Door-Device-2	Other	← Start Of Event
6	24/05/2018 06:04:50 PM	NGT Direct Door	NGT Direct Door-Device-2	Command	→ Set Date & Time
7	24/05/2018 06:04:50 PM	NGT Direct Door	NGT Direct Door-Device-2	ACK	← Set Date & Time Command Successful
8	24/05/2018 06:04:50 PM	NGT Direct Door	NGT Direct Door-Device-2	Other	→ End Of Message
9	24/05/2018 06:04:55 PM	Panel Lite V2	Panel Lite V2	ACK	→ Event Ack for RollOver: 0 Event Seq. No.: 234
10	24/05/2018 06:04:54 PM	Panel Lite V2	Panel Lite V2 -> Door V3...	User	Allowed with Card. User ID: 1 Event Date Time: 24/05/2018 06:04:54 PM
11	24/05/2018 06:05:02 PM	Panel Lite V2	Panel Lite V2 -> Door V3...	User	Allowed with Finger. User ID: 1 Event Date Time: 24/05/2018 06:05:02 PM
12	24/05/2018 06:05:02 PM	Panel Lite V2	Panel Lite V2	ACK	→ Event Ack for RollOver: 0 Event Seq. No.: 235
13	24/05/2018 06:05:12 PM	Panel Lite V2	Panel Lite V2 -> Door V3...	User	Allowed with Card. User ID: 1 Event Date Time: 24/05/2018 06:05:12 PM
14	24/05/2018 06:05:12 PM	Panel Lite V2	Panel Lite V2	ACK	→ Event Ack for RollOver: 0 Event Seq. No.: 236
15	24/05/2018 06:05:17 PM	Panel Lite V2	Panel Lite V2 -> Door V3...	User	Denied - Anti-Pass Back with Card. User ID: 1 Event Date Time: 24/05/2018 06:05:17 PM
16	24/05/2018 06:05:17 PM	Panel Lite V2	Panel Lite V2	ACK	→ Event Ack for RollOver: 0 Event Seq. No.: 237

## Configuration of APB- Soft

Anti-Pass Back

✓ Saved Successfully

Device \*

3

Panel Lite V2

Enable Rule

☒

Update Device

Zone \*

Production Zone

On Entry

☒ Local

On Exit

☒ Local

Hard/Soft

Soft

Forgiveness

☒

Reset After

☐ Day Change ☒ Timer Expiry

Forgiveness Timer (Mins)

60


Update Zone

Search

ID	Name
3	Panel Lite V2
4	Panel Lite

In Soft APB, when APB is violated, it will give message on door as “Exit not Registered” but door can be accessed.

User Details



User ID: 1  
Chirag  
Allowed - Anti-Pass Back-soft  
Device:  
Panel Lite V2 -> Door V3 as F  
Event Date & Time:  
24/05/2018 06:14:45 PM  
Department:  
DFLTDP  
Designation:  
DFLTDSG

Events

Sr No.	Date Time	Type	Device	Category	Detail
57	24/05/2018 06:14:35 PM	Panel Lite V2	Panel Lite V2	Request	← Login Request Received
58	24/05/2018 06:14:36 PM	Panel Lite V2	Panel Lite V2	ACK	→ Login Success Poll Duration: 3 Poll Interval: 2
59	24/05/2018 06:14:36 PM	Panel Lite V2	Panel Lite V2	Request	← Message Request Received
60	24/05/2018 06:14:36 PM	Panel Lite V2	Panel Lite V2	Command	→ Event Request for RollOver: 0 Event Seq. No.: 242
61	24/05/2018 06:14:36 PM	Panel Lite V2	Panel Lite V2	Other	← Start Of Event
62	24/05/2018 06:14:36 PM	Panel Lite V2	Panel Lite V2	Command	→ Set Date & Time
63	24/05/2018 06:14:36 PM	Panel Lite V2	Panel Lite V2 -> Door V3...	User	Allowed with Finger. User ID: 1 Event Date Time: 24/05/2018 06:14:27 PM
64	24/05/2018 06:14:36 PM	Panel Lite V2	Panel Lite V2	ACK	→ Event Ack for RollOver: 0 Event Seq. No.: 242
65	24/05/2018 06:14:36 PM	Panel Lite V2	Panel Lite V2	ACK	← Set Date & Time Command Successful
66	24/05/2018 06:14:36 PM	Panel Lite V2	Panel Lite V2	Other	→ Get Information from Device
67	24/05/2018 06:14:36 PM	Panel Lite V2	Panel Lite V2	Other	← Reply Information from Device
68	24/05/2018 06:14:36 PM	Panel Lite V2	Panel Lite V2	Other	→ End Of Message
69	24/05/2018 06:14:42 PM	Panel Lite V2	Panel Lite V2 -> Door V3...	User	Allowed with Card. User ID: 1 Event Date Time: 24/05/2018 06:14:42 PM
70	24/05/2018 06:14:43 PM	Panel Lite V2	Panel Lite V2	ACK	→ Event Ack for RollOver: 0 Event Seq. No.: 243
71	24/05/2018 06:14:46 PM	Panel Lite V2	Panel Lite V2 -> Door V3...	User	Allowed - Anti-Pass Back-soft with Card. User ID: 1 Event Date Time: 24/05/2018 06:14:45 PM
72	24/05/2018 06:14:46 PM	Panel Lite V2	Panel Lite V2	ACK	→ Event Ack for RollOver: 0 Event Seq. No.: 244

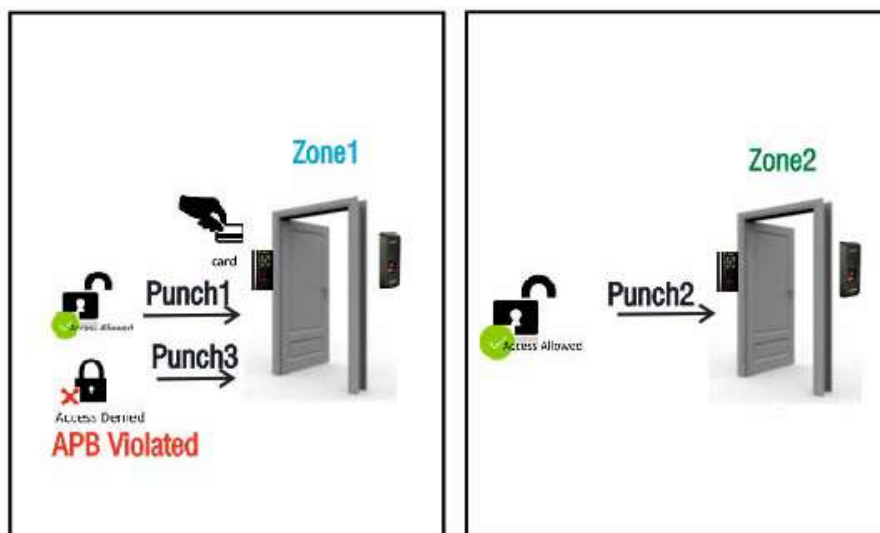
## Local

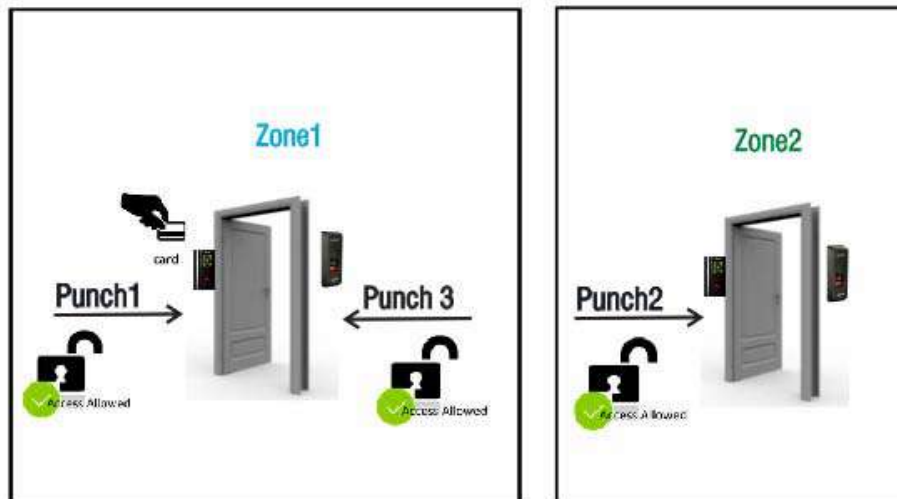
Local configuration can be used when specific zones of panel lite is to be restricted. When “Local” is selected “On Entry” then APB is monitored zone wise. So here both the zone (Production and QC zone) must be selected and configured for APB.

The image displays two side-by-side screenshots of the 'Panel Lite V2' configuration interface. Both screenshots show the 'Device' set to '3' and 'Panel Lite V2'. The 'Enable Rule' checkbox is checked. The 'Update Device' button is visible. In the left screenshot, the 'Zone' dropdown is set to 'Production Zone', and both 'On Entry' and 'On Exit' are set to 'Local'. In the right screenshot, the 'Zone' dropdown is set to 'QC Zone', and both 'On Entry' and 'On Exit' are also set to 'Local'. Both screenshots show 'Hard/Soft' set to 'Soft', 'Forgiveness' checked, and 'Reset After' set to 'Timer Expiry' with a 'Forgiveness Timer (Mins)' of 60. Arrows point to the 'Zone' dropdown in both screenshots.

Suppose **Door V3** is in- **Production zone** and **PVR Door** is in- **QC zone** of Panel200.

- When user1 enters Production zone through Door V3 then he will be access allowed. Then his exit punch is required from production zone i.e. exit reader of Door V3.
- Without exit punch from production zone; If the same card is used to punch on PVR door (entry punch) of QC zone then he will be allowed access because both the doors are in different zone and APB is monitored zone wise.
- But without exit punch from production zone; If the same card is used to punch on Door V3 i.e. production zone; then APB will be violated. And access will be allowed if Soft APB is configured else access will be denied if Hard APB is configured.



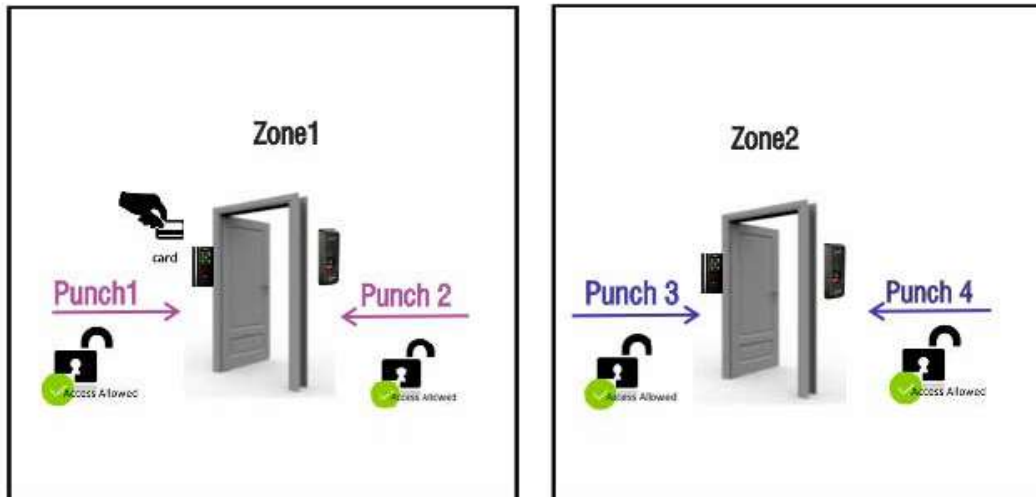
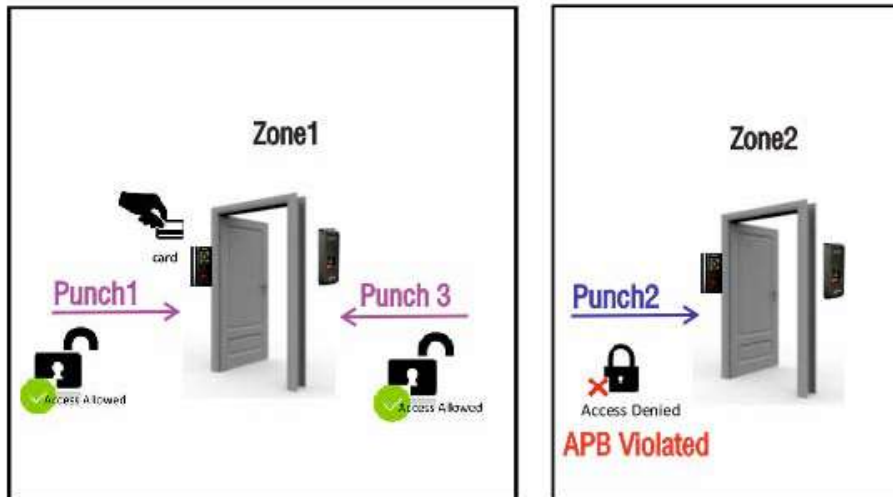


## Global

Global configuration can be used when all zones of panel lite are to be restricted. When “Global” is configured “On Entry” then APB is monitored Panel Lite wise.

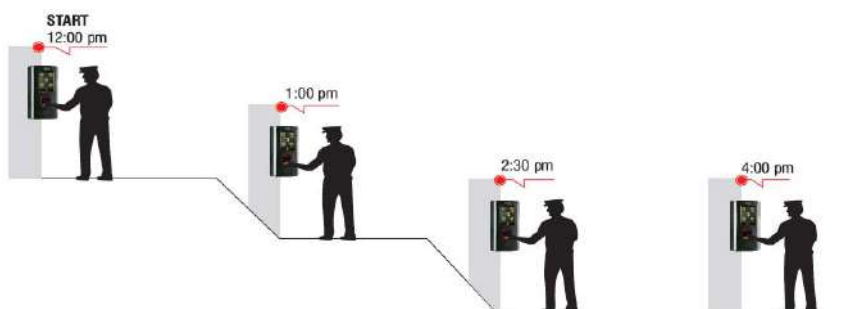
Suppose **Door V3** is in- **Production zone** and **PVR Door** is in- **QC zone** of Panel200.

- When user1 enters Production zone through Door V3 then he will be access allowed. Then his exit punch from production zone is must; only then he can access another zone of same panel lite.
- Without exit punch from production zone; If the same card is used to punch on PVR door (entry punch) of QC zone then he will be denied access.



# Guard Tour

Guard Tour functionality enables the system to monitor the movements of the security guards within the facility premises during the specified time periods. It is specially required to provide security during the non working hours. This is achieved by defining a series of check points or door controllers where the guard has to show the configured credential within a given amount of time. The check points can be sequenced (they must be activated in a specified order) or they can be unsequenced (they can be activated in any order).



A maximum of **99** Guard Tours and **99** member devices per Guard Tour can be configured in the system. Devices can also be repeated in the member list. The guard tour configuration is maintained at the system level and is not sent to the devices.

To use the Guard Tour feature, click **Access Control > Guard Tour**. The page appears as shown below:

The screenshot shows the 'Guard Tour' configuration page. It has a top toolbar with icons for back, add, edit, delete, and search. Below the toolbar, there are input fields for 'Guard Tour' ID and Name, an 'Active' checkbox, and three time input fields for 'Start Time', 'Tour Duration (Hrs)', and 'Single Tour Time (Hrs)'. There is also an 'Enable Sequence' checkbox. Below these, there is a 'Guard' dropdown menu. At the bottom, there is a 'Configured Tour Path' section with a 'Device' dropdown menu. On the right side, there is a table with columns 'ID' and 'Name', and it currently displays 'No Data'.

To Add a Guard Tour, Click on **Add** button.

**Name:** Specify a unique and descriptive Guard Tour Name.

**Active:** Check the box to activate the Guard tour.

**Start Time:** Specify the **Start Time** in **HH:MM** format for the Guard Tour when the guard will start the tour.

**Tour Duration:** Specify the **Tour Duration** in **HH:MM** format for the Guard Tour. It defines the time period within which a particular number of tour cycles should be completed.

**Single Tour Time:** Specify the time period within which the guard has to complete a single tour. Specify the single tour time in hh:mm format.

- **Example:** If Tour duration for a guard tour is 6:00 hours, start tour time is 00:00 and single tour time is 00:30 hours. And the devices defined for the tour are 4. Then the guard has to start the tour from 00:00 and have to cover all the four check points(4 devices) within 30 minutes. This tour cycle will continue for 6 hours i.e. the duration of the tour.

**Enable Sequence:** Select the check box to sequence the checkpoints of the Guard Tour.

In case of the sequenced option the Guard has to go to the devices in the sequence as mentioned in the member list in the grid below.

**Guard:** Select the user whose credentials will be used for the Guard Tour from the User Master picklist window.

### Configured Tour Path

Now user needs to define the Member devices which would be part of the Guard Tour being defined.

Under Configured Tour Path, select the desired Member Devices. To do so,

Click the **Device** picklist. The **Select Device** pop-up appears.

Select Device

Total Selected: 3 Records

Search  [Show Selected](#)

☐ Select All

<input type="checkbox"/>	MID ▲	Name	Type
<input type="checkbox"/>	94	RnD1 GF TRIPOD RIGHT IN	PVR Door
<input type="checkbox"/>	102	RnD2 3rd Floor PVR	PVR Door
<input type="checkbox"/>	103	RnD2 2nd Floor PVR	PVR Door
<input type="checkbox"/>	104	RnD2 4th Floor PVR	PVR Door
<input type="checkbox"/>	105	RnD2 1st Floor PVR	PVR Door
<input type="checkbox"/>	159	RnD1 Canteen2 PVR	PVR Door
<input type="checkbox"/>	107	RnD2 GF TRIPOD LEFT OUT	PVR Door
<input type="checkbox"/>	108	RnD2 GF TRIPOD RIGHT IN	PVR Door
<input type="checkbox"/>	158	RnD1 Canteen1 PVR	PVR Door
<input type="checkbox"/>	161	Factory Admin PVR	PVR Door

1 - 10 of 40 records

« < 1 2 3 4 > »

OK Cancel

You can either select particular devices or can select all the devices at once.

To select particular devices, select the check boxes of the desired devices.

Select Random Devices

Total Selected: 2 Records

Search  Show Selected

☐ Select All

<input type="checkbox"/>	ID	Name	Site Name
<input checked="" type="checkbox"/>	1	RnD1 Canteen1 ARGO	Site 9
<input checked="" type="checkbox"/>	2	RnD1 2nd FLR Server Room VEGA	Site 9
<input type="checkbox"/>	3	RnD1 4th FLR Server Room VEGA	Factory
<input type="checkbox"/>	4	RnD1 GF TRIPOD RIGHT IN	Factory
<input type="checkbox"/>	5	RnD1 Integra ARGO	Factory
<input type="checkbox"/>	6	RnD1 Basement Tripod Entry PVR	Factory
<input type="checkbox"/>	7	RnD1 4th Floor FB VEGA OUT	Factory
<input type="checkbox"/>	8	RnD1 4th Floor FB VEGA IN	Factory
<input type="checkbox"/>	9	RnD1 GF MODE TRIPOD LEFT IN	Factory
<input type="checkbox"/>	10	Factory Admin FMX	Factory

1 - 10 of 125 records

« < 1 2 3 ... 13 > »

OK Cancel

OR

To select all the devices, select the **Select All** check box. The devices on all the pages will be selected.

Select Device

Total Selected: 40 Records

Search  Show Selected

☒ Select All

<input checked="" type="checkbox"/>	MID	Name	Type
<input checked="" type="checkbox"/>	94	RnD1 GF TRIPOD RIGHT IN	PVR Door
<input checked="" type="checkbox"/>	102	RnD2 3rd Floor PVR	PVR Door
<input checked="" type="checkbox"/>	103	RnD2 2nd Floor PVR	PVR Door
<input checked="" type="checkbox"/>	104	RnD2 4th Floor PVR	PVR Door
<input checked="" type="checkbox"/>	105	RnD2 1st Floor PVR	PVR Door
<input checked="" type="checkbox"/>	159	RnD1 Canteen2 PVR	PVR Door
<input checked="" type="checkbox"/>	107	RnD2 GF TRIPOD LEFT OUT	PVR Door
<input checked="" type="checkbox"/>	108	RnD2 GF TRIPOD RIGHT IN	PVR Door
<input checked="" type="checkbox"/>	158	RnD1 Canteen1 PVR	PVR Door
<input checked="" type="checkbox"/>	161	Factory Admin PVR	PVR Door

1 - 10 of 40 records


« < 1 2 3 4 > »

OK Cancel

Click **OK**.

The selected devices appears in the grid.

Configured Tour Path				
Device * <input type="text" value="ID"/> <input type="text" value="Name"/>				
Seq.	Device ID ▲	Name	Up/Down	
1	94	RnD1 GF TRIPOD RIGHT IN	▼	🗑
2	102	RnD2 3rd Floor PVR	▲▼	🗑
3	103	RnD2 2nd Floor PVR	▲▼	🗑
4	104	RnD2 4th Floor PVR	▲	🗑

You can change the sequence of the devices using the up/down arrows or can delete the desired device/s by clicking the **Delete**  icon of the respective device.

Click on **Save** button to add the Tour to the list in the right grid. The **ID** will be automatically generated.



*User needs to ensure that the door controllers are added in the sequence which the Guard needs to cover in the tour (required only if the **Sequence** box is checked).*



# Access Route

The Access Route functionality enables the administrator to define an access policy which allows the user to access only specified doors (applicable to Panel200 and Panel doors) with specified levels in predefined route, sequenced or unsequenced.

The COSEC system has the capability to define up to maximum **255** routes and **255** doors on a single route.



*This functionality can also be enabled from the **Device Module > Device Configuration > Features** and **User Module > User Configuration > Devices > Configure**.*

To use the Access Route feature, click **Access Control > Access Route**. The page appears as shown below:

**Panel:** Select the Panel from the picklist on which the Access Route feature is to be configured.

Click **New** button from the toolbar to configure the route.

**Access Route:** Specify a unique and descriptive name for the route. The Access Route ID is auto-generated and cannot be edited by the user.

**Active:** Select the check box to activate the Access Route.

**Sequence Route:** The Access Route can be sequenced or unsequenced. Select the check box if you require the configured route to be Sequenced.

In sequenced route the system checks the route based on the levels defined. For e.g. the user has to swipe the credential on a Level 1 door and then go to Level 2, Level 3 and so on. In this case the order needs to be maintained for both the "IN" as well as the "OUT" punches. Therefore it is necessary to have exit readers installed on all the doors of the Access Route.

**Restrictions:** Select the Restriction option from the drop down list as per the site requirements. This functionality can operate in two modes:

- **Hard:** Access will be allowed only if the Access Route is followed.
- **Soft:** Access will be allowed on any door on the Access Route with an Access Route violation message.

**Reset On Start Level:** Select the check box to enable the system to reset the current level status to allow access on the lowest level.

This option is useful in the event of the user not following the proper order while exiting the premises. If this functionality is enabled then the user will be allowed access on the lowest level irrespective of his/her state but this will happen only on entry side.

**Check on Last Exit Level:** Select the check box, if you want the system to check the Lowest Route Level Door accessed by the User during exit.

If enabled, then the system will check whether any violation has occurred during Access Route Cycle (i.e. from Entry to Exit).

If any violation has not occurred during the Cycle, then the User will be allowed to access the Lowest Level door. If any violation has occurred during the Cycle, then the system will allow/deny the access to the User as per the option configured in "Last Exit Level Restriction" option.

**Last Exit Level Restriction:** Select the Last Exit Level Restriction option from the drop down list as per the site requirements.

- **Hard:** The access will be denied if the Access Route is not followed by the User while he/she exits.
- **Soft:** The access will be granted even if the Access Route is not followed by the User while he/she exits, with an Access Route Violation Alert.

## Configured Route

Click **Add** button to add the doors to the route.

**Configured Route**

Search

Member No. ▲	Device ID	Name	Level	
1	<input type="text" value="1"/>	Panel Door V3	1 ▼	» ✓ ✕

**Device ID:** Click on the Picklist button and select the Device ID of the Panel door to be added to the route.

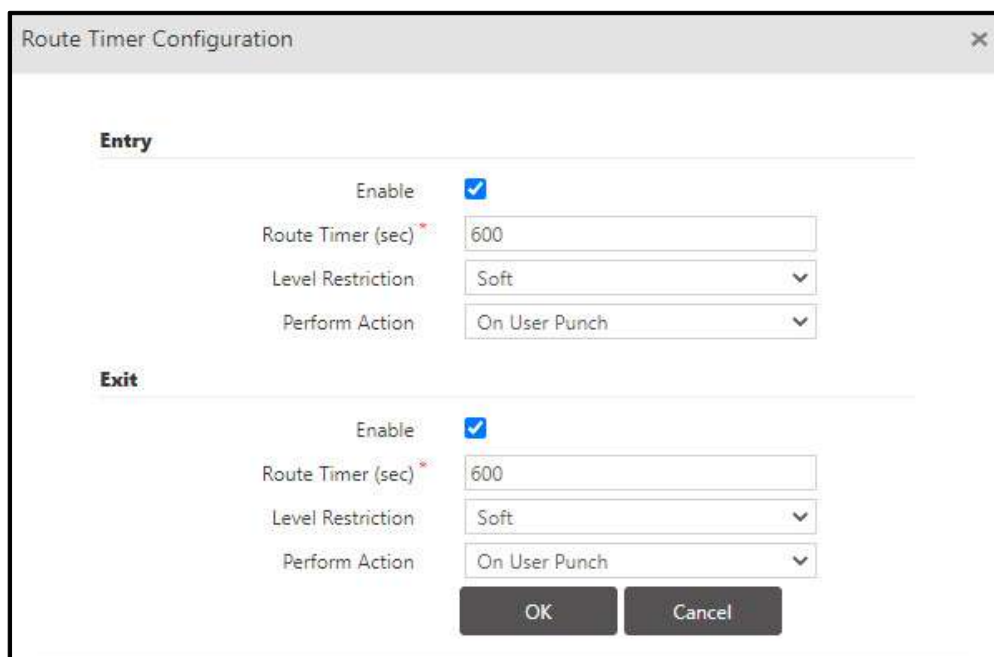
**Name:** Click on the Picklist button and select the Panel door to be added to the route.

**Level:** Select the Level number for the Door from the drop down list. Multiple Doors can be assigned to a single level. However, the same door cannot be assigned to multiple levels.

Now click on **Route Timer Configuration**  button.



A pop-up of **Route Timer Configuration** appears as shown below:



## Entry

**Enable:** Select this check box to enable Access Route Timer and Restrictions while the User enters.

**Route Timer (sec):** This is the time within which the User needs to access the next configured door defined in the respective route.

Enter the value of Timer as per your requirement.

**Level Restriction:** Select the Level Restriction option from the drop down list as per the site requirements.

- **Hard:** The User will not be allowed to access the door. Additionally, an Alarm will be raised for the violation of Access Route Timer Policy.
- **Soft:** The User will be allowed to access the door, however an Alarm will be raised for the violation of Access Route Timer Policy.

**Perform Action:** Select the desired option from the drop down list.

- **On User Punch:** Access Route Timer Violation Alarm as well as an Alert (if configured) will be generated once the User punches on the next Route Level Door after the configured Route Timer, which violates the Access Route Timer Policy.
- **On Timer Elapsed:** Access Route Timer Violation Alarm as well as an Alert (if configured) will be generated automatically once the User fails to punch within the configured Route Timer, which violates the Access Route Timer Policy.

## Exit

**Enable:** Select this check box to enable Access Route Timer and Restrictions while the User exits.


**Route Timer (sec):** This is the time within which the User needs to access the next configured door defined in the respective route.

**Level Restriction:** Select the Level Restriction option from the drop down list as per the site requirement. This functionality can operate in two modes:







- **Hard:** The User will be denied to access the door. Additionally, an Alarm will be generated for the violation of Access Route Timer Policy.
- **Soft:** The User will be allowed to access the door, however an Alarm will be generated for the violation of Access Route Timer Policy.

**Perform Action:** Select the desired option from the drop down list.

- **On User Punch:** Access Route Timer Violation Alarm as well as an Alert (if configured) will be generated once the User punches on the next Route Level Door after the configured Route Timer, which violates the Access Route Timer Policy.
- **On Timer Elapsed:** Access Route Timer Violation Alarm as well as an Alert (if configured) will be generated automatically once the User fails to punch within the configured Route Timer, which violates the Access Route Timer Policy.

Click  button to save the added door.

Similarly add other panel doors to the route as shown below.

Configured Route				
Search				+
Member No. ▲	Device ID	Name	Level	
1	1	PVR Paneldoor	1	 
2	2	Path Paneldoor	1	 
3	4	Vega Paneldoor	2	 

The Door which is not required in the route can be deleted from the **Delete** button.

Finally click on Save button to save the configured Access Route. The route will be listed in grid on right side.

Access Route

←

+

Panel \*

Z

HQ Panelite VZ

Access Route \*

Z

Head Ofc Route

Active

☒

Sequenced Route

☒

Restrictions

Soft







Reset On Start Level

☒

Configured Route

Search

+

Member No. ▲	Device ID	Name	Level	
1	1	PVR Paneldoor	1	 
2	2	Path Paneldoor	1	 
3	4	Vega Paneldoor	2	 

Search

ID ▲	Name
2	Head Ofc Route

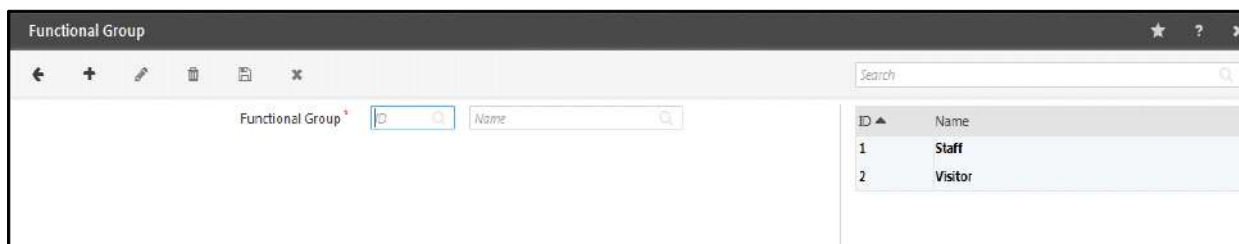
# Functional Group

The Functional Group feature is used to group users with similar profiles and access policies to help the System administrators in better managing the security and access control policies of a site.

This user grouping is used in assigning the activation rights of the Special Functions as explained in the “**Special Function**” section of this manual.

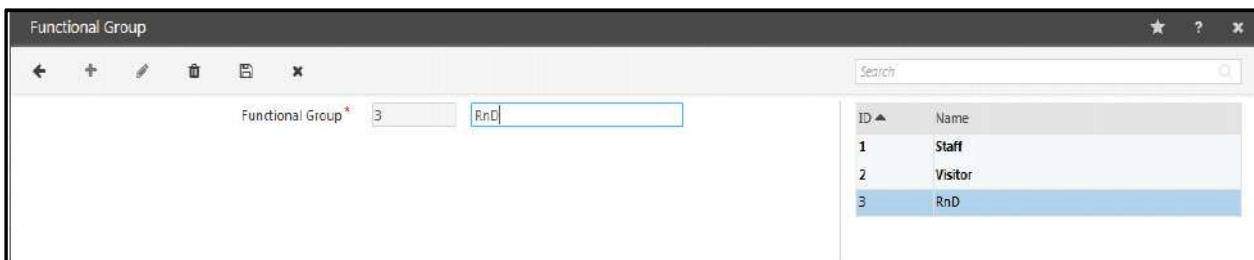
These groups are usually classified based on the roles they perform. A maximum of 99 Functional Groups can be created in the system.

To use the Functional Group feature, click **Access Control > Functional Group**. The page appears as shown below:



The system creates two default Functional Groups viz. **Staff** and **Visitor**.

To create a new Functional Group, Click on **New** button. The following window appears on your screen.



**Functional Group:** Specify a user friendly name for the new Functional Group. The ID appears by default and cannot be edited by the user.

Click on **Save** button. The Functional Group will be created as shown in the grid.

Administrator can now assign the users to the respective Functional Groups from the **User Module>User Configuration> Devices**. The users belonging to these Functional Groups can then be assigned to activate certain Special functions.

# Time Schedule

Time Schedule allows the system to grant access to the users to certain Access Zone only in a specified time period. This time period can be set to a full 24-hours or any limited set of hours or minutes. You can create maximum **99** Time Schedules.

Each time zone represents a particular period of time and time zones may have overlapping time periods. The maximum time period which can be assigned to a time zone is **23:59** hours.

To use the Time Schedule feature, click **Access Control > Time Schedule**. The page appears as shown below:

The screenshot displays the 'Time Schedule' configuration window. It includes a toolbar with icons for back, add, edit, delete, save, and close. The main form contains the following fields:

- Time Schedule**: A numeric input field with the value '2'.
- Name**: A text input field containing 'Lunch Time'.
- Active**: A checked checkbox.
- Start Time**: A time input field set to '13:00'.
- End Time**: A time input field set to '15:00'.
- Active Days**: A set of checkboxes for days of the week: Sun (unchecked), Mon (checked), Tue (checked), Wed (checked), Thu (checked), Fri (checked), Sat (checked), and Holiday (unchecked).

On the right side, there is a table listing existing time zones:

ID	Name
1	Time Zone-1
2	Lunch Time
3	Maintenance Zon
4	Working Shift

To create a new Time Schedule, Click on **New** button.

**Time Schedule:** Specify a user friendly name for the new Time Schedule. The ID will be auto-generated when the Time Schedule is saved.

**Active:** Select the check box to activate the Time Schedule.

**Start Time-End Time:** Specify the Start and End time period in **HH:MM** format for particular Time Schedule for the below selected day/s.

**Active Days:** Select the check boxes for the days for which the Time Schedule is to be activated.

Click on **Save** to save the Time Schedule configurations.

This Time Schedule can be assigned to the user in Access Profile while configuring Schedule based Access Level Override. For details, refer to ["Access Profile"](#).

# Time Schedule Group

You can create maximum **99** Time Schedule groups.

To use the Time Schedule Group feature, click **Access Control > Time Schedule Group**. The page appears as shown below

:

Time Schedule Group

Time Schedule Group \* ID Name

Configure Time Schedule

Time Schedule \* ID Name

Search

Sr. No.	ID	Time Schedule	Active	Start Time	End Time	Active Days	
No Data							

No Data

To create a new Time Schedule Group, Click on **New** button.

**Time Schedule Group:** Specify a user friendly name for the new Time Schedule Group. The ID will be auto-generated when the Time Schedule group is saved.

**Time Schedule:** Time Schedules are the Time Zones created from the Time Schedule page. Click the picklist and select the desired Time Schedules.

You can select particular Time Zones or can select all the Time Zones at once.

Click the **Time Schedule** picklist, the **Picklist For TimeZone** pop-up appears.

Picklist For TimeZone

Total Selected: 0 Records

Search Show Selected

☐ Select All

<input type="checkbox"/>	Time Zone No. ▲	Name
<input type="checkbox"/>	1	Time Zone 1
<input type="checkbox"/>	2	TimeZone2
<input type="checkbox"/>	3	TimeZone3
<input type="checkbox"/>	4	TimeZone4
<input type="checkbox"/>	5	TimeZone5
<input type="checkbox"/>	6	TimeZone6
<input type="checkbox"/>	7	TimeZone7
<input type="checkbox"/>	8	TimeZone8
<input type="checkbox"/>	9	TimeZone9
<input type="checkbox"/>	10	TimeZone10

1 - 10 of 18 records

« < 1 2 > »

OK Cancel

You can either select particular Time Zones or can select all the Time Zones at once.



To select particular Time Zones, select the check boxes of the desired Time Zones.

The screenshot shows a dialog box titled "Picklist For TimeZone". At the top, a green bar indicates "Total Selected: 2 Records". Below this is a search bar and a "Show Selected" button. A "Select All" checkbox is present and unchecked. The main area is a table with columns "Time Zone No." and "Name". The table lists 10 time zones, with the first two (1 and 2) having their checkboxes selected. At the bottom, there is a pagination bar showing "1 - 10 of 18 records" and a set of navigation buttons. The "OK" and "Cancel" buttons are at the very bottom.

<input type="checkbox"/>	Time Zone No.	Name
<input checked="" type="checkbox"/>	1	Time Zone 1
<input checked="" type="checkbox"/>	2	TimeZone2
<input type="checkbox"/>	3	TimeZone3
<input type="checkbox"/>	4	TimeZone4
<input type="checkbox"/>	5	TimeZone5
<input type="checkbox"/>	6	TimeZone6
<input type="checkbox"/>	7	TimeZone7
<input type="checkbox"/>	8	TimeZone8
<input type="checkbox"/>	9	TimeZone9
<input type="checkbox"/>	10	TimeZone10


OR

To select all the Time Zones, select the **Select All** check box. The Time Zone on all the pages will be selected.

This screenshot shows the same "Picklist For TimeZone" dialog box, but with the "Select All" checkbox checked. The green bar at the top now indicates "Total Selected: 18 Records". In the table, all 10 time zones have their checkboxes selected. The rest of the interface, including the search bar, pagination, and buttons, remains the same.

<input checked="" type="checkbox"/>	Time Zone No.	Name
<input checked="" type="checkbox"/>	1	Time Zone 1
<input checked="" type="checkbox"/>	2	TimeZone2
<input checked="" type="checkbox"/>	3	TimeZone3
<input checked="" type="checkbox"/>	4	TimeZone4
<input checked="" type="checkbox"/>	5	TimeZone5
<input checked="" type="checkbox"/>	6	TimeZone6
<input checked="" type="checkbox"/>	7	TimeZone7
<input checked="" type="checkbox"/>	8	TimeZone8
<input checked="" type="checkbox"/>	9	TimeZone9
<input checked="" type="checkbox"/>	10	TimeZone10

Click **OK**. The time schedules will be listed in the grid along with the Start and End time and Active days.

You can also delete the desired Time Zones. To do so, click **Delete**  icon of the respective Time Zones.

You can add maximum **9** Time Schedules per Time Schedule Group.

Time Schedule Group

←

+

✎

🗑

📄

✕

Search

Time Schedule Group \*

ID

Emp Group

ID

Name

No Data

Configure Time Schedule

Time Schedule \*

ID

Name

⋮

Search

Sr. No. ▲	ID	Time Schedule	Active	Start Time	End Time	Active Days	🗑
1	1	Time Zone-1	Yes	09:00	18:00	Su Mo Tu We Th Fr Sa PH	🗑
2	2	Time Zone-2	Yes	07:00	14:00	Mo Tu We Th Fr	🗑

Click **Save** to save the Time Schedule Group. The Schedule appears in the list on the right.



*Same Time Schedule can be added in multiple Time Schedule Groups.*

Time Schedule Group

←

+

✎

🗑

📄

✕

Search

Time Schedule Group \*

1

Emp Group

ID ▲

Name

1 Emp Group

Configure Time Schedule

Time Schedule \*

ID

Name

⋮

Search

Sr. No. ▲	ID	Time Schedule	Active	Start Time	End Time	Active Days	🗑
1	1	Time Zone-1	Yes	09:00	18:00	Su Mo Tu We Th Fr Sa PH	🗑
2	2	Time Zone-2	Yes	07:00	14:00	Mo Tu We Th Fr	🗑

# Elevator Configuration

In high-rise corporate buildings; Elevators can be integrated with the Access Control Solution. This enables employees/users to access the specific areas or floors of buildings in-order to ensure company's security and employees' convenience.


Elevator Configuration enables to create the Elevators and assign floors to the Elevators. You can add maximum **64** Elevators in a Panel200.

To configure the Elevator Configuration, click **Access Control > Elevator Access Control> Elevator Configuration**.

The screenshot shows the 'Elevator Configuration' web application. It features a top navigation bar with a search field. Below the navigation bar, there are several input fields and picklists for configuring an elevator: 'Panel', 'Elevator', and 'Authentication Device'. Each of these fields has a picklist icon (three horizontal lines) to its right. Below these fields is the 'Access Duration For Floor(s)' field, which is currently set to '1 - 99' seconds. A 'Floor Configuration' section is located below the duration field, containing a search field and a table with columns: 'Floor No.', 'Floor Name', 'Free Access Floor', 'Device ID', 'Name', and 'Output Port'. The table currently displays 'No Data'. On the right side of the interface, there is another table with columns 'ID' and 'Name', also displaying 'No Data'.

- **Panel:** Click the picklist. The **Picklist For Panel200** pop-up appears. Select the desired Panel.

The **Elevator Access Control** feature must be enabled for Panel200 from Device Configuration> Features.

- Click **New** .
- **Elevator:** Enter the name for the Elevator. You can add maximum 64 Elevators.
- **Authentication Device:** Click the picklist. The **Picklist For Panel200 Doors** pop-up appears. Select the desired Panel200 door which will act as Authentication Device to access the Elevator. The Authentication Device must be placed inside the Elevator so it is recommended to select individual Authentication Device for each Elevator.

Once the user credential is verified on Authentication Device; only then floor selection buttons will become active. The supported doors as Authentication Device are: **Door V1, Door V2, Door V3, Door V4, Vega Controller, Path Controller, PVR Door, ARC DC100, ARC DC200, ARGO and ARGO FACE**.

- **Access Duration For Floors:** Enter the Access duration in seconds (1 - 99). The default time is 10 seconds. It is the duration for which floor selection buttons in Elevator will remain active.

If the floor is not selected within this access duration then selection buttons will disable. Then user has to punch on Authentication Device again for activating floor selection buttons.

**Elevator Configuration**

Panel: 1 Panel Lite V2

Elevator: 1 Elevator1

Authentication Device: 1 Vega Panel Door


Access Duration For Floor(s): 10 (secs)

**Floor Configuration**

Search

Floor No.	Floor Name	Free Access Floor	Device ID	Name	Output Port
No Data					

## Floor Configuration

- Click **Add** , to add the floors to the Elevator. You can add maximum **99** floors to an Elevator.

**Elevator Configuration**

Panel: 1 Panel Lite V2

Elevator: 1 Elevator1

Authentication Device: 1 Vega Panel Door

Access Duration For Floor(s): 10 (secs)

**Floor Configuration**



Search

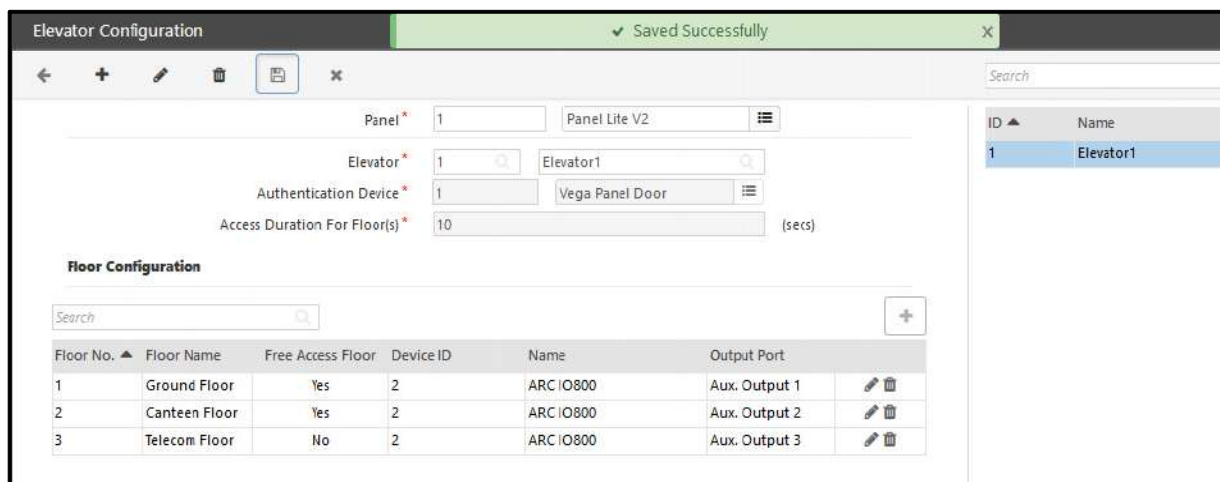
Floor No.	Floor Name	Free Access Floor	Device ID	Name	Output Port
1	Ground Floor	<input checked="" type="checkbox"/>	2	ARC IO800	None

- Floor No.:** It is auto generated by system. You can also change the floor number if required.
- Floor Name:** Specify the name of the floor.
- Free Access Floor:** Select the check box to allow the floor to be accessed freely by everyone.
- Device ID/Name:** Click the picklist and select the ARC IO800 Panel200 door.
- Output Port:** Select the Aux Output port from the drop down options which is to be connected to the respective floor of the Elevator. You can also connect one Aux Output Port to multiple floors.

**Example:** If a user is to be given access to Floors 1, 3 and 5; then one Aux Port, say Aux Output1 can be connected to floor1,3 and 5.

- Click **OK**. Similarly you can add other floors.

- You can also edit the desired Floor details. To do so, click **Edit**  of the respective Floor.
- You can also delete the Floor. To do so, click **Delete**  of the respective Floor.
- Click **Save** to save the Elevator Configuration. The Elevator appears in the right grid.



**Elevator Configuration** ✓ Saved Successfully







Panel \* 1 Panel Lite V2

Elevator \* 1 Elevator1

Authentication Device \* 1 Vega Panel Door

Access Duration For Floor(s) \* 10 (secs)

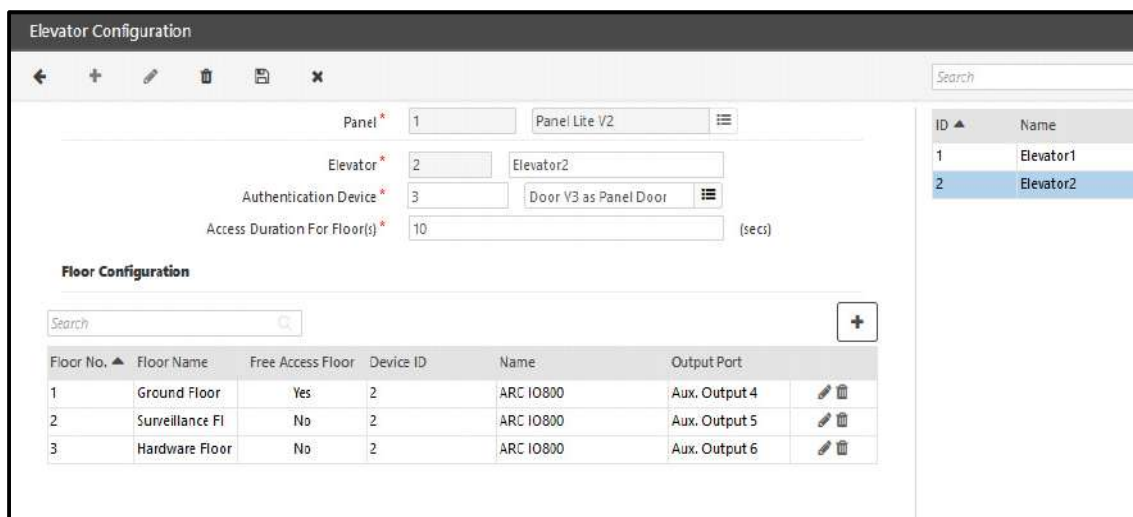
**Floor Configuration**

Floor No. ▲	Floor Name	Free Access Floor	Device ID	Name	Output Port	
1	Ground Floor	Yes	2	ARC IO800	Aux. Output 1	 
2	Canteen Floor	Yes	2	ARC IO800	Aux. Output 2	 
3	Telecom Floor	No	2	ARC IO800	Aux. Output 3	 

Search

ID ▲	Name
1	Elevator1

Similarly you can add other Elevators to the Panel200.



**Elevator Configuration**







Panel \* 1 Panel Lite V2

Elevator \* 2 Elevator2

Authentication Device \* 3 Door V3 as Panel Door

Access Duration For Floor(s) \* 10 (secs)

**Floor Configuration**

Floor No. ▲	Floor Name	Free Access Floor	Device ID	Name	Output Port	
1	Ground Floor	Yes	2	ARC IO800	Aux. Output 4	 
2	Surveillance FI	No	2	ARC IO800	Aux. Output 5	 
3	Hardware Floor	No	2	ARC IO800	Aux. Output 6	 

Search

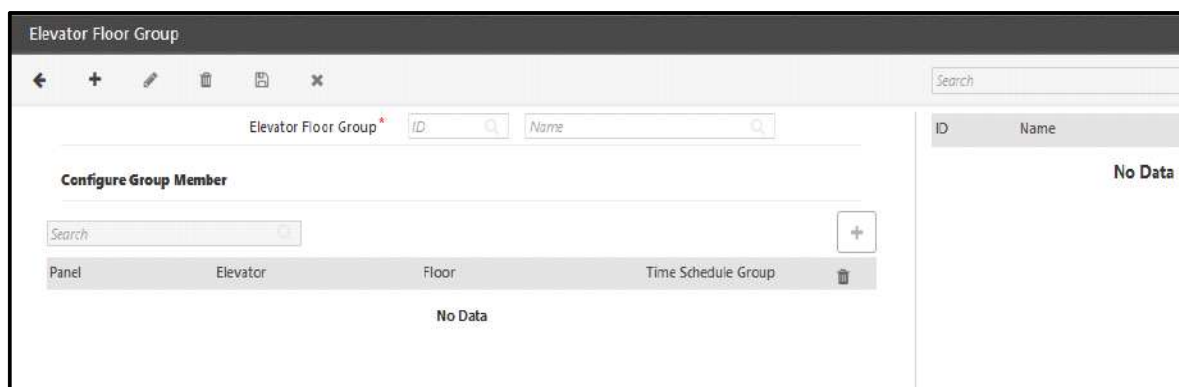
ID ▲	Name
1	Elevator1
2	Elevator2

# Elevator Floor Group

Elevator Floor Group enables to create the group of floors. The floors can be of same Elevator or different Elevators. This Elevator Floor Group is then assigned to the user. The user can access the floors included in the group.

You can configure maximum **999** Elevator Floor Groups.


To configure the Elevator Floor Group, click **Access Control > Elevator Access Control> Elevator Floor Group**.

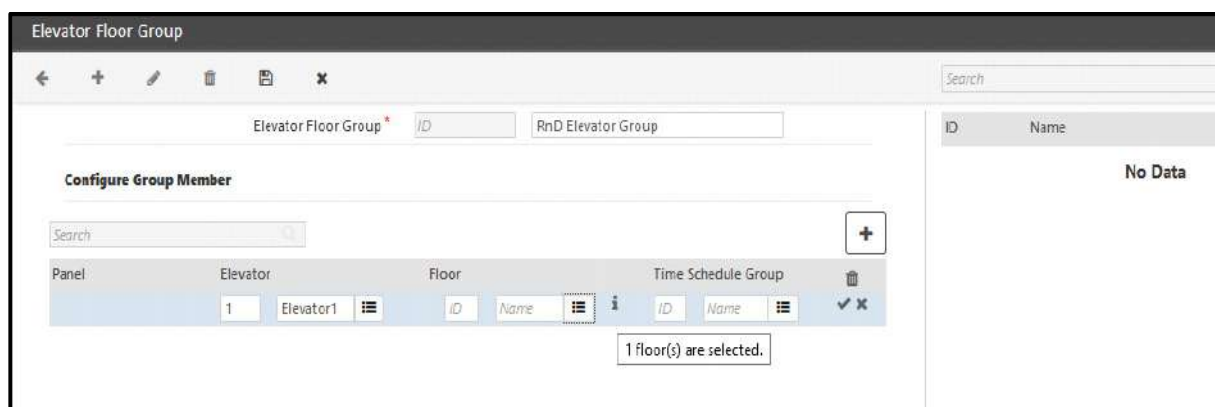


To create a new Elevator Floor Group, click **New** .

- **Elevator Floor Group:** Specify a user friendly name for the Elevator Floor Group. The ID will be auto-generated when the group is saved.

## Configure Group Members

- Click **Add** , to add the floors of the Elevator to the Group. Max **999999** members can be added to the group.



- Click the **Elevator** picklist, the **Picklist For Elevators** pop-up appears.
- Select the desired Elevator.

- Click the **Floor** picklist, the **Picklist For Elevator Floors** pop-up appears.

Picklist For Elevator Floors

Total Selected: 0 Records

Search  Show Selected

☐ Select All


<input type="checkbox"/>	ID ▲	Floor
<input type="checkbox"/>	1	1
<input type="checkbox"/>	2	2
<input type="checkbox"/>	3	3
<input type="checkbox"/>	4	4
<input type="checkbox"/>	5	5
<input type="checkbox"/>	6	6
<input type="checkbox"/>	7	7
<input type="checkbox"/>	8	8
<input type="checkbox"/>	9	9
<input type="checkbox"/>	10	10


You can select particular floors or all the floors at once.

To select particular floors, select the check boxes of the desired floors.

OR

To select all the floors, select the **Select All** check box. The floors on all the pages will be selected.

Click **OK**. Hover over the **Info**  icon. It displays the number of floors selected.

- Click the **Time Schedule Group** picklist. The **Picklist For Time Schedule Groups** pop-up appears.
  - Select the desired Time Schedule Group.
- Click **OK** to save the Group Member.
- You can also delete any Group Member. To do so, click **Delete**  of the respective Group Member.

**Example:** Telecom Floor of Elevator1 is selected and Emp Group is assigned as the Time Schedule group. So

Telecom Floor can be accessed by Elevator1 in the time zones available in Emp Group.

Similarly you can add other group members.



*Time Schedule Group is created from Access Control > Time Schedule Group.*

**Configure Group Member**

Search

Panel	Elevator	Floor	Time Schedule Group
1	Elevator1	3	Emp Group

**Configure Group Member**

Search

Panel	Elevator	Floor	Time Schedule Group
1-Panel Lite V2	1-Elevator1	3-Telecom Floor	1-Emp Group
1-Panel Lite V2	2-Elevator2	2-Surveillance Fl	1-Emp Group

Click **Save** to save the Elevator Floor Group. The Elevator Floor Group appears in the right grid.

**Elevator Floor Group** ✓ Saved Successfully

← + ✎ 🗑️ 📁 ✕

Elevator Floor Group \*  RnD Elevator Group

**Configure Group Member**

Search

Panel	Elevator	Floor	Time Schedule Group
1-Panel Lite V2	1-Elevator1	3-Telecom Floor	1-Emp Group
1-Panel Lite V2	2-Elevator2	2-Surveillance Fl	1-Emp Group

ID	Name
1	RnD Elevator Group



*Same Elevator, Floor & Time Schedule Group combination can coexist in multiple Elevator Floor Groups but not in same group.*

*If no Time Schedule Group is assigned then that particular floor of the Elevator will be accessible throughout the day.*

*The Access to the Elevators can be viewed in Elevator Access Report and it can also be scheduled in Report Scheduler.*

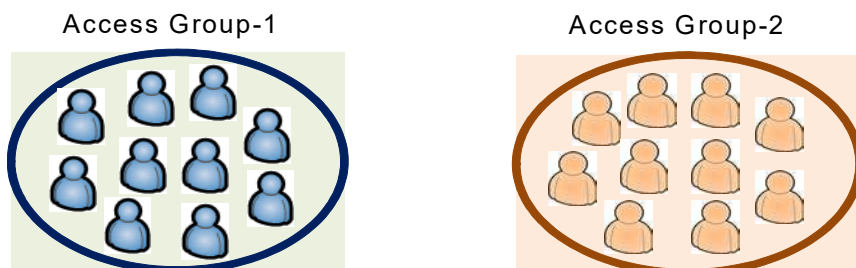


# Access Profile

Access Profile defines the group of users having similar job functions and need equal privileges throughout the day.

Access Groups having Time Zone based Access Levels programmed, when assigned to any user, enables the system to determine user Access Level at any particular time.

System Access Policy compares User's Access Level with Zone's Access Level before the user is Allowed or Denied to access the restricted areas. A maximum of **99** Access Groups can be defined in the system.



Once the Access Groups are defined, the system administrator can define the Users from **User Module > User Configuration**.

To use the Access Profile feature, click **Access Control > Access Group > Access Profile**. The page appears as shown below:

Access Profile

Search

Access Profile \* ID Name

Active ☐

User Access Levels

Work Hours 8

Break Hours 8

Non-Working Hours 8

Schedule Based Access Level Override

Member	ID	Time Schedule	Status	Access Level
No Data				

ID	Name
1	Group-1
2	Group-2

The Group-1 and Group-2 are default Access Groups which are predefined and have an access level of 8.

To define a new **Access Group**, click on the **New** button. The following window appears on your screen.

**Access Profile**

Access Profile: 3 RnD Employees

Active: ☒

**User Access Levels**

Work Hours: 9

Break Hours: 8

Non-Working Hours: 8

**Schedule Based Access Level Override**

Member ID	ID	Time Schedule	Status	Access Level
1	1	Time Zone-1	InActive	8
2	1	Time Zone-1	InActive	8
3	1	Time Zone-1	InActive	8
4	1	Time Zone-1	InActive	8
5	1	Time Zone-1	InActive	8

1 - 5 of 8 records

Search

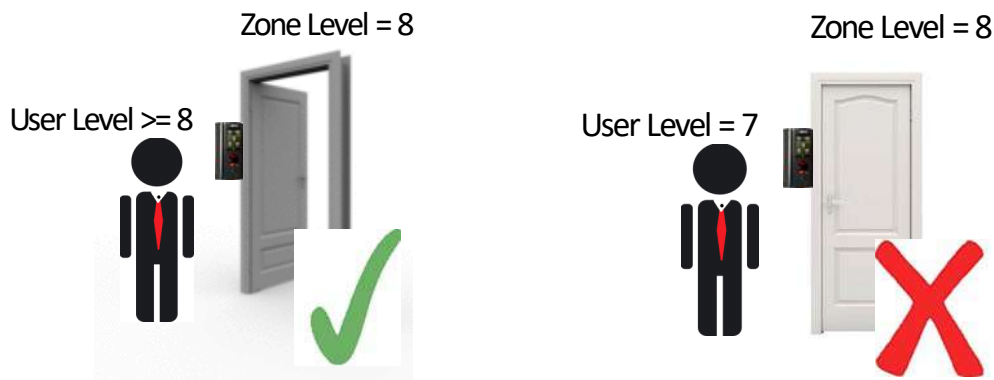
ID	Name
1	Group-1
2	Group-2

**Access Profile:** Enter a user friendly name for the new Access Profile in the Name field. The ID appears automatically.

**Active:** Select the check box to activate the Access Profile.

### User Access Levels

The access level of the user is compared to the access level of the zone and user is granted access only if user access level is greater than or equal to the access level of the zone. Either the User Access Levels or the Schedule Based Access Levels will work at a time.



**Work Hours:** Specify the Access Level for the Working hours ranging from **01 to 15** from the drop down list.

**Break Hours:** Specify the Access Level for the Break hours ranging from **01 to 15** from the drop down list.

**Non- Working Hours:** Specify the Access Level for the Non- Working hours ranging from **01 to 15** from the drop down list.

### Example:

If shift is defined from 9am to 6pm and Access Level for Work Hours is set at **9**, Access Level for Break Hours is set at **8**, Access Level for Non-Working Hours is set at **8**, Access Level for the Panel Door is set at **9** in Zone3 (Not Home zone)

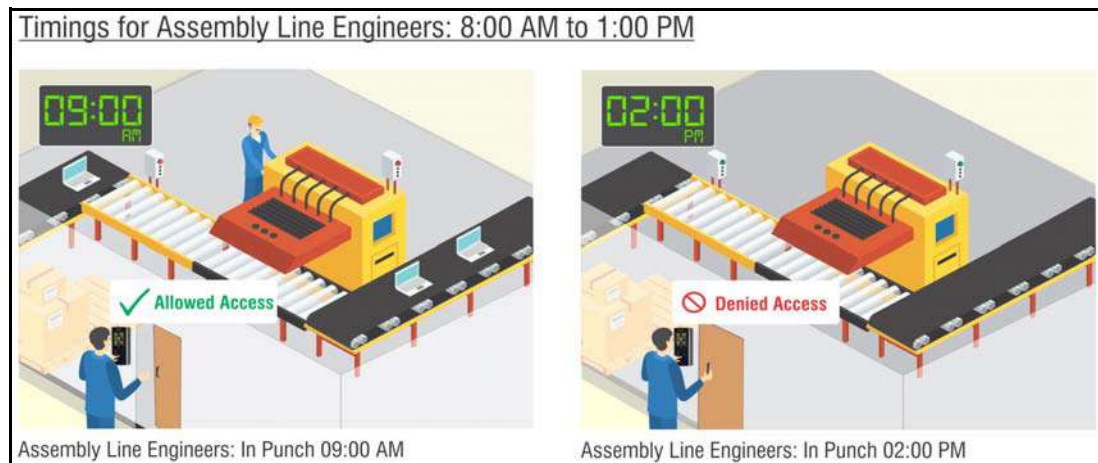
Case1: Then if employee punches between 9 to 6, he will be allowed access.

Case2: If employee punches before 9am, he will be denied access as access level for Non-working hours (8) is less than the access level of Door(9).

Case3: If employee punches during break hours, he will be denied access as access level for Break hours (8) is less than the access level of Door(9).

### Schedule Based Access Level Override

Sometimes it is essential for certain groups to have access to a particular zone in Multiple Time Slots. The Time Zone based Access Levels allows user to configure such additional time slots for certain groups to have access to various zones during different time periods of the day.



Click on the Member to select the Time Schedule for which the group is to be activated based on the Access Level.

**Time Schedule:** Select the Time Zone from the picklist. To configure Time Schedule click Access Control > Time Schedule.

**Status:** Select the check box to activate the Time Zone.

**Access Level:** Select the Access Level for the Time Zone ranging from 1 to 15 from the drop down list.

Schedule Based Access Level Override						
Member	ID	Time Schedule	Status	Access Level		
1	4	Working Shift	<input checked="" type="checkbox"/>	9	<input type="checkbox"/>	<input type="checkbox"/>
2	1	Time Zone-1	InActive	8	<input type="checkbox"/>	<input type="checkbox"/>
3	1	Time Zone-1	InActive	8	<input type="checkbox"/>	<input type="checkbox"/>
4	1	Time Zone-1	InActive	8	<input type="checkbox"/>	<input type="checkbox"/>
5	1	Time Zone-1	InActive	8	<input type="checkbox"/>	<input type="checkbox"/>

1 - 5 of 8 records

<< < 1 2 > >>

Click on **OK** and **Save** the changes. The Time schedule for Working Shift and Lunch Time zones is activated for the RnD Employees group as shown below.

The screenshot shows the 'Access Profile' configuration window for the 'RnD Employees' group. The 'Active' checkbox is checked. Under 'User Access Levels', the 'Work Hours' are set to 9, 'Break Hours' to 8, and 'Non-Working Hours' to 8. The 'Schedule Based Access Level Override' section contains a table with 5 records. The first two records, 'Working Shift' and 'Lunch Time', are both set to 'Active' with an 'Access Level' of 9. The remaining three records, all labeled 'Time Zone-1', are set to 'Inactive' with an 'Access Level' of 8. Two arrows point to the 'Working Shift' and 'Lunch Time' rows. On the right, a list of groups shows 'RnD Employees' selected. At the bottom, a pagination bar shows '1 - 5 of 8 records' and a page selector with '1' highlighted.

Member ID	Time Schedule	Status	Access Level
1	Working Shift	Active	9
2	Lunch Time	Active	9
3	Time Zone-1	InActive	8
4	Time Zone-1	InActive	8
5	Time Zone-1	InActive	8

If the Access Level of Panel Door at the configured zones is 9 then employees belonging to RnD Employees profile can access the Working Shift zone and Lunch Time zone as the Access Level for user is 9.

For assigning users to the Access Profile see *Access Group > Assignment*.



*Either the User Access Levels or the Schedule Based Access Levels will work at a time. For example: If Access level of Break is 8; then employee will not be allowed to access in break hours. But the Lunch Time Zone has access level 9, so the employee will be allowed to access the lunch area.*

# Access Profile Assignment

Access Profile Assignment enables to assign Access Group to Users and Devices.

To use the Access Profile Assignment feature, click **Access Control > Access Group > Assignment**. There are two modes of Access Profile Assignment:


- Device-Wise
- User-Wise

## Device -Wise Configuration


**Device:** Select the Device (Panel200) from the device selection picklist to which the rule is to be assigned. The assigned users on the selected device will appear in the grid as shown below:

The screenshot shows the 'Access Profile Assignment' window. On the left, there are two tabs: 'Device - Wise' (selected) and 'User - Wise'. The main area contains three input fields: 'Device' with the value '3', 'User' with the value 'ID', and 'Access Profile' with the value 'ID'. Each field has a corresponding picklist icon to its right. Below these fields is an 'Update' button. A search bar is located above a table. The table has three columns: 'User ID', 'Name', and 'Access Profile'. It contains three rows of data.

User ID	Name	Access Profile
1	Chirag	Group-1
101	Khushbu	Group-1
1667	Aditi Ajay Gupta_Ahmedabad	Group-1

**User:** The single or multiple users can be selected from the picklist to which Access Profile is to be assigned. The number of selected users will be displayed on hovering over Info  icon.

**Access Profile:** You can select the Access Profile from the picklist which is to be assigned to the selected users on the selected Panel200. The profile is created from Access Group > Access Profile.

**Example:** The 2 users are selected as shown by Info  icon. The default Access Profile of users is Group-1 which is displayed in the grid. Now the Access Profile for the users to be assigned on Panel200 is selected as "Group- 2" as shown below.

Access Profile Assignment

Device-Wise

User-Wise

Device \* 3 Panel Lite V2

User \* 101 Khushbu

Access Profile \* 2 Group-2

Update

2 User(s) are selected

User ID ▲	Name	Access Profile
1	Chirag	Group-1
101	Khushbu	Group-1
1687	Aditi Ajay Gupta_Ahmedabad	Group-1



The Access Profile for a User on a device can be set from User Module > Devices > Configure.

Click on **Update** to save the assignment. The Access Profile will be processed and updated as shown below.

Access Profile Assignment

Process Completed.

Device-Wise

User-Wise

Device \* 3 Panel Lite V2

User \* ID Name

Access Profile \* ID Name

Update

User ID ▲	Name	Access Profile
1	Chirag	Group-2
101	Khushbu	Group-2
1687	Aditi Ajay Gupta_Ahmedabad	Group-1

## User-Wise Configuration

**User:** Select the User from the picklist to whom the Access Profile is to be assigned.

The assigned devices on the selected user will appear in the grid as shown below:

Access Profile Assignment

Device-Wise

User-Wise

User \* 101 Khushbu

Device \* ID Name

Access Profile \* ID Name

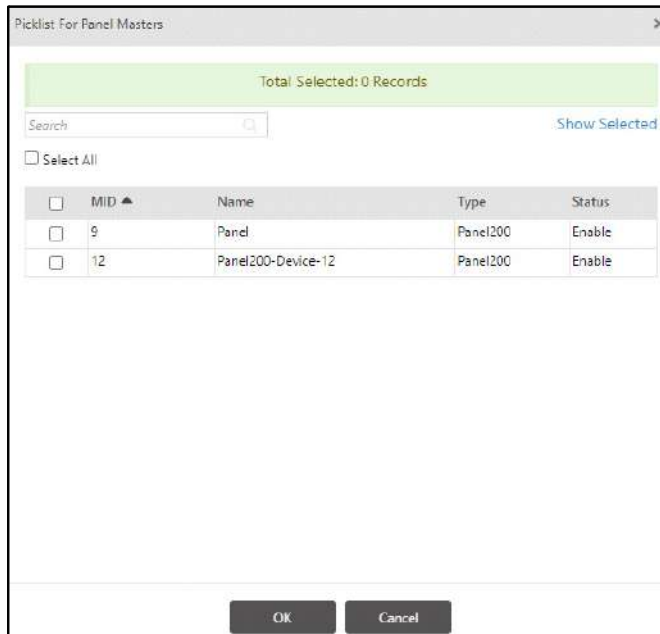
Update

Device ID ▲	Name	Access Profile
3	Panel Lite V2	Group-2
4	Panel Lite	Group-1

**Device:** The single or multiple devices (Panel200) can be selected from the picklist to which the Access Profile is to be assigned.

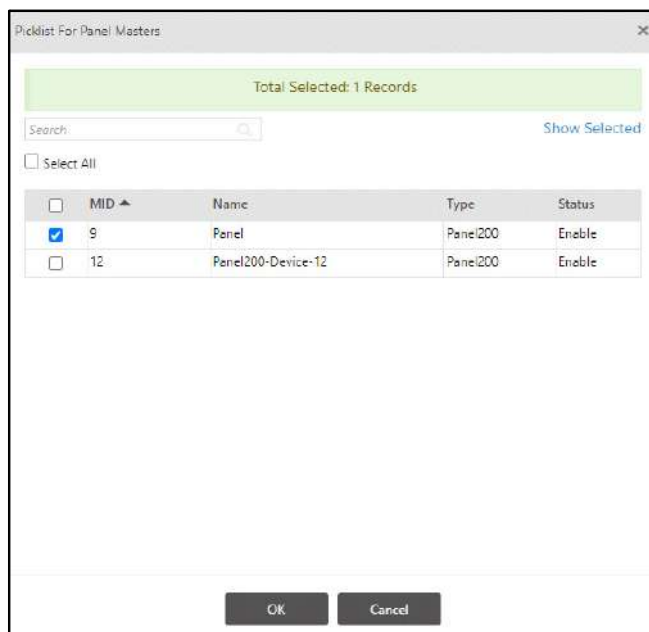
To do so,

Click the **Device** picklist. The **Picklist For Panel Masters** pop-up appears.



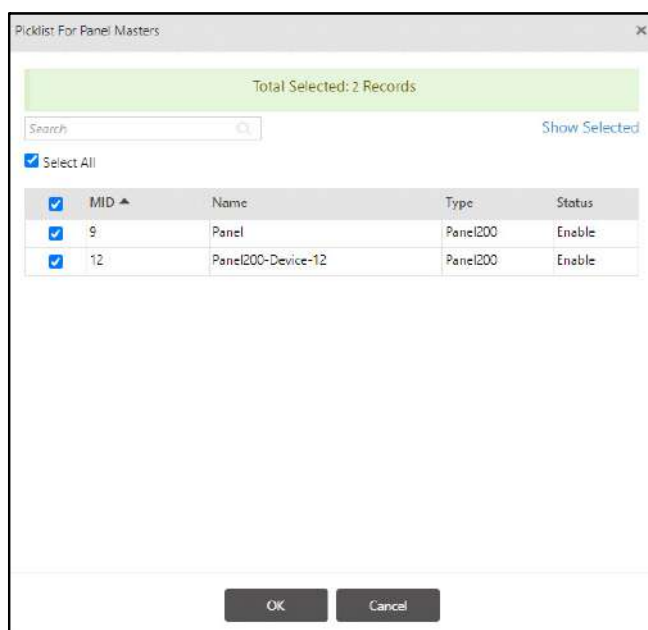
You can either select particular devices or can select all the devices at once.

To select particular devices, select the check boxes of the desired devices.



**OR**

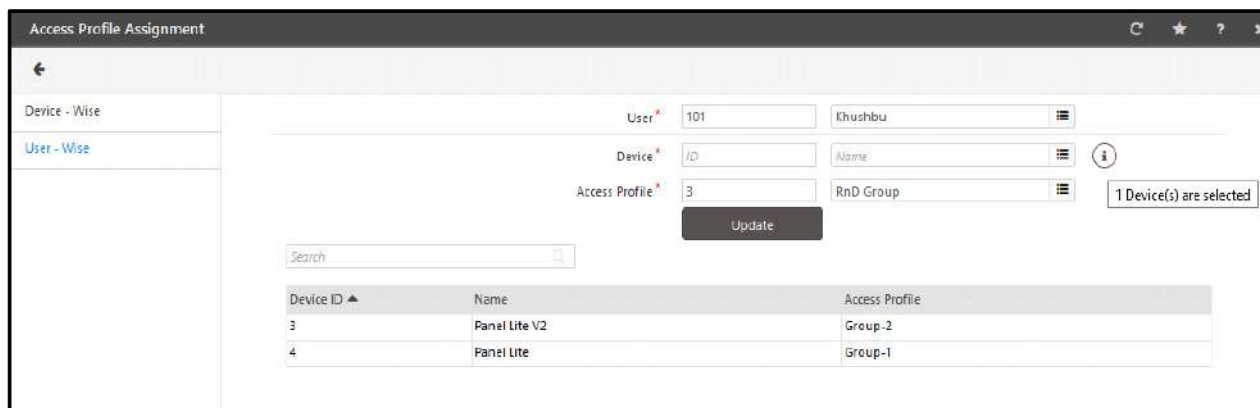
To select all the devices, select the **Select All** check box. The devices on all the pages will be selected.



Click **OK**.

Hover over the Info  icon. It displays the number of devices selected.

**Access Profile:** You can select the Access Profile from the picklist to assign on the selected devices for the selected user. The profile is created from Access Group > Access Profile.



Click on **Update** to save the assignment. The Access Profile will be processed and updated as shown below.



Access Profile Assignment

✔ Process Completed.

⌂ ⭐ ?

←

Device - Wise

User - Wise

User\*101Khushbu

Device\*IDName

Access Profile\*IDName

Update

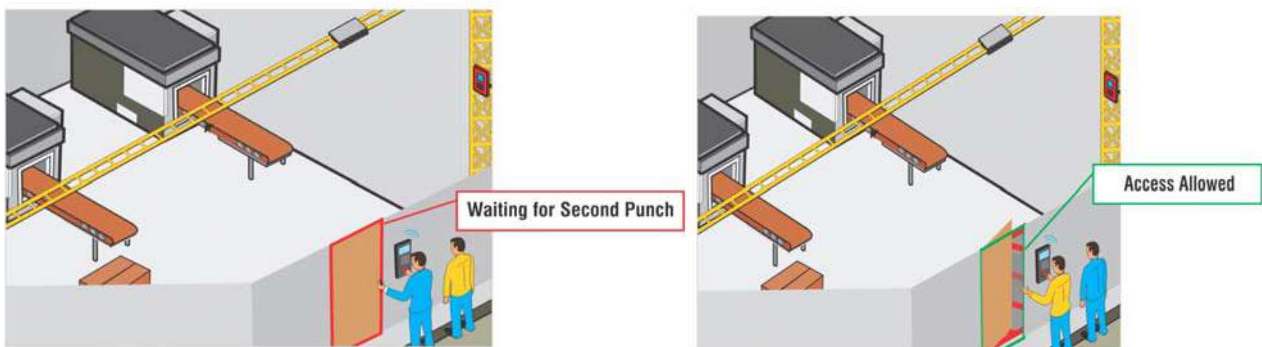
Search

Device ID ▲	Name	Access Profile
3	Panel Lite V2	RnD Group
4	Panel Lite	Group-1

## 2 Person Group

2-Person Rule is a feature that enables the system to insist for two valid user entries within specified time to allow access to a secured zone.

This is a control mechanism, designed to achieve a high level of security, especially for critical areas like Cash rooms, R&D Labs, sensitive documents storage etc.

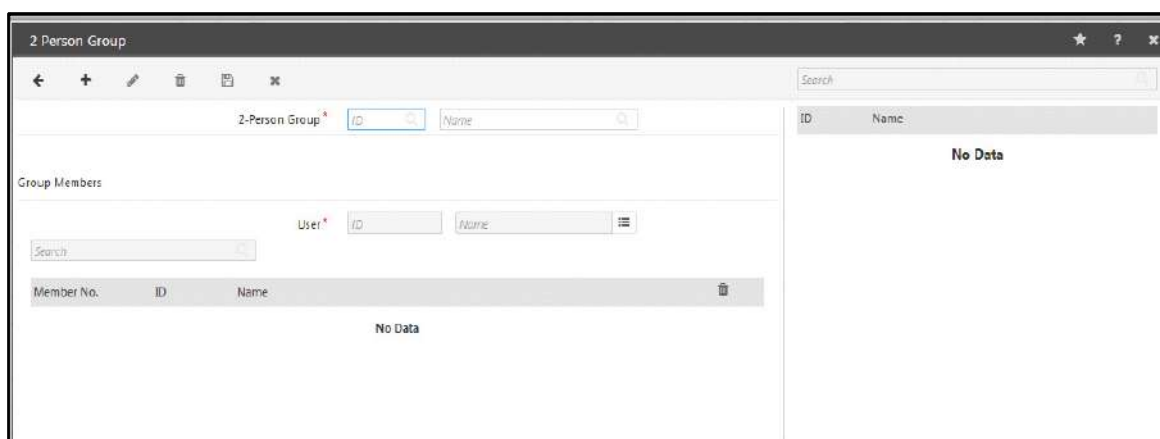


*This functionality can also be enabled from the **Device Module > Device Configuration > Features** option.*

*Visitors with or without Escort are not allowed into a zone where 2-Person Rule is enabled while a VIP user can always enter a 2-Person Rule enabled zone without the need for a second credential.*

*If the first person is an authorized user and the 2nd person is a VIP then, system considers the VIP as an authorized 2nd person to validate the 2-Person Rule.*

To use the 2-Person Rule, click **Access Control > 2-Person Rule > Group**. The page appears as shown below:



To create a new Group, Click on **New** button. You can create upto 9999 Groups.

The following window appears.

2 Person Group

2-Person Group: 1 QA Group

Group Members:

User: ID Name

Search

Member No.	ID	Name
No Data		

ID Name

No Data

**2-Person Group:** Specify a user friendly name for the Group. The Group ID will be generated by the system and cannot be edited by the user.

### Group Members

**User:** Click on the picklist button and select the Users for the Group one by one. You can define upto 20 person per group.

2 Person Group

2-Person Group: 1 QA Group

Group Members:

User: ID Name

Search

Member No.	ID	Name
1	1220	Sheetal
2	1320	Shruti
3	1414	Sweta

ID Name

No Data

Click on **Save** button from the toolbar. The Group with **2-Person Rule** will be saved in the right grid as shown below:

2 Person Group

2-Person Group: 1 QA Group

Group Members:

User: ID Name

Search

Member No.	ID	Name
1	1220	Sheetal
2	1320	Shruti
3	1414	Sweta

ID Name

ID	Name
1	QA Group

✓ Saved Successfully

Create the other groups same as above.



*Zone Access Mode (ZAM) is applied on both users while verifying for 2-Person group authorization.  
ZAM is not applied on VIP user under any condition.*

To assign Groups to doors, refer [“2 Person Rule Assignment”](#).

## 2 Person Rule Assignment

2-Person Rule Assignment enables to assign 2-Person Rule to Users and Devices.

To use the 2-Person Rule Assignment feature, click **Access Control > 2-Person Rule > Assignment**. The page appears as shown below:

ID	Name
1	Door V3
1	R and D PaneliteV2
2	Vega Directdoor
3	Path-Direct door

The grid on the right shows all the devices including Panel200 and Direct Doors set to Advanced Access Control.

Click on the device from the grid, the related parameters will appear in the respective fields as shown below for Panel200:

ID	Name
1	Door V3
1	R and D PaneliteV2
2	Vega Directdoor
3	Path-Direct door

**Enable Rule:** Select the check box to enable the 2-Person Rule on selected device.

Click on **Update Device** to update the rule on selected device.

**Zone:** For Panel200, select the Zone from the drop down list.

**Enable Rule on Zone:** Select the check box to enable the 2-Person Rule on selected Zone.



*Zone is applicable for Panel Door only.*

**Mode:** Select the Mode from the options of Primary Must or Primary and Secondary Must.

- **Primary Must:** In this mode, the 2-Person Rule will grant access only when at least 1 user from the 2-Person Group is from the Primary Group and make sure that you have configured both the Groups—Primary Group and Secondary Group. Then the access is granted if both users are from Primary Group or first from Primary and second from Secondary Group. The situation when the access will be denied is when both the users are from Secondary Group or if one member does not belong to any configured group.

In case Secondary Group is not configured then both members need to be from the Primary Group.

- **Primary & Secondary Must:** In this mode, the 2-Person Rule will grant access only in one condition, one user from Primary Group and the other from Secondary Group.

In case Secondary Group is not configured then one member must be from Primary Group and the other member may or may not be a member of any configured group.

Access will be denied, only if the Primary member is missing.

**Primary Group:** Select the Group from the pick list to work as Primary Group. Members from the Primary Group are now valid users for the access and any two members of this group together can access a controlled area.

**Secondary Group:** Select the Group from the pick list to work as Secondary Group. If Secondary Group is selected, then the system verifies that any member of Secondary Group is always accompanied by a member from the Primary Group or a VIP user before allowing access to the zone.



*For 2 Person Rule, maximum 16 Groups can be assigned to the Panel.*

*For Direct Doors, maximum 2 groups can be assigned at any point of time.*



*If you wish to use only one Group, make sure you select the Primary Group. This is required because a member from the Secondary Group needs to be accompanied by a member from the Primary Group always for a valid transaction. However, any two members from the Primary Group are treated as valid user for the access to the Door.*

Click on **Update Zone** to save the changes.

# First In User

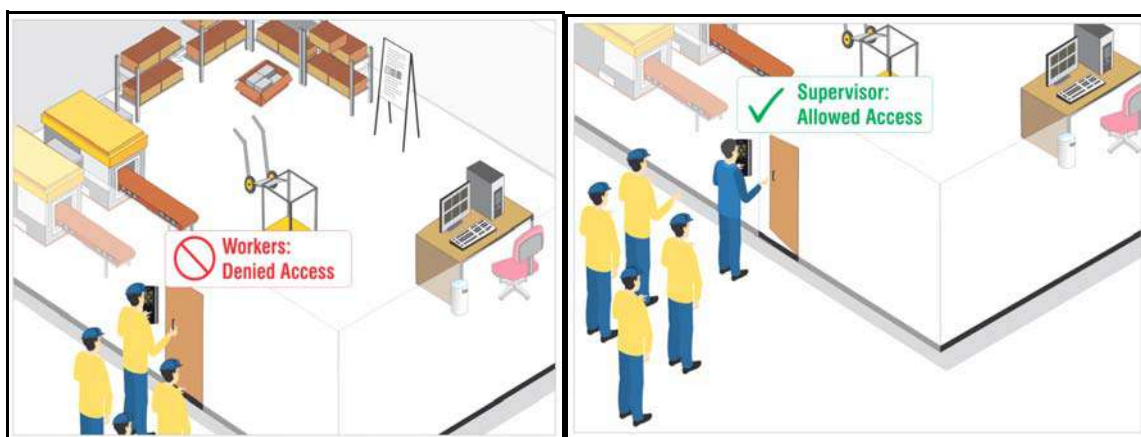
First-IN User rule uses a card or fingerprint as credential of the user declared as First-IN User to unlock the Access locked to a particular zone.

The access control system waits in lock mode till a valid First-IN user is detected whose effective working hours overlaps with the current time. The working hours of the zone is linked to the first detected First-IN user's effective working hours and system allows access to all authorized users till the working hours of the First-IN user is valid.

The system allows the administrator to define upto 99 groups with 999 users in each group.



999 users in each group is applicable for ARGO, VEGA, ARGO FACE, PATH V2, ARC DC200, Panel200. In other devices it is 99 users in each group.



This functionality can also be enabled from the **Device Module > Device Configuration > Features** option.

To use the First-IN User rule, click **Access Control > First-In User Rule > Group**. The page appears as shown below:

To create a new Group, Click on **New** button. You can also select the group from the right grid and add the users to it.

**First IN User:** Specify a user friendly name for the Group for First-IN users. The ID No. appears by default and cannot be edited by the user.

### Group Members:

**User:** Click on the picklist button and select the Users for the Group one by one. You can define upto 999 users per group.

Click on **Save** button from the toolbar. The First-IN Group will be saved in the right grid as shown below.



*A VIP user is allowed to access the First-IN enabled zone even when the zone is not activated by a First-IN user. However, the VIP user cannot activate the zone to allow access to other users.*



# First In User Assignment

First-IN User Rule Assignment enables to assign the Rule on Devices.

To use the First-IN User Assignment feature, click **Access Control > First-In User Rule > Assignment**. The page appears as shown below:

ID	Name
1	Door v3
1	RnD Panel lite V2
3	NGT Ground Floor
4	Vega Direct Door
5	Wireless Door 1st Floor
7	NGT-34
8	Panel Lite V2-Device-8

The grid on the right shows all the devices including Panel200 and direct doors set to advanced access control.

Click on the device from the grid, the related parameters will appear in the respective fields.

## Panel200

ID	Name
1	Door v3
1	RnD Panel lite V2
3	NGT Ground Floor
4	Vega Direct Door
5	Wireless Door 1st Floor
7	NGT-34
8	Panel Lite V2-Device-8

**Enable Rule:** Check the box to enable the First-IN user rule on selected device.

**Group1-4:** You can select four First-IN groups which can then be assigned to different zones of Panel200. Select the First-IN group from the picklist button. It will list all the First-IN groups as created from First-IN User Rule-Group.

Click on **Update Device** to update the First-IN groups on Panel200.

**Zone:** Select the Zone from the drop down list. The zones are configured while adding Panel200 to the Devices.

**Enable Rule on Zone:** Select the check box to enable the First-IN user rule on selected Zone.

**Reset On:** If a user from First-IN User group punches then access to other users can be restricted to that day or defined time duration.

- **Day Change:** If Day Change is selected, other user will be allowed access in the selected zone on that day and will be restricted on next day.
- **Access Timer (Sec):** If Timer Expiry is selected, specify the Access Timer in seconds (say 5 seconds); after which the user will be restricted the access.

**First-IN User Group:** Select the First-IN User group to be applicable for the selected zone. For example, for zone QC, Group1 is selected.

Click on **Update Zone** and **Save** the selection.

ID	Name
1	Door v3
1	RnD Panel lite V2
3	NGT Ground Floor
4	Vega Direct Door
5	Wireless Door 1st Floor
7	NGT-34
8	Panel Lite V2-Device-8

## Direct Door

First IN Rule Assignment

←

Search

Device \*

1

Door v3

⋮

Enable Rule

☒

Reset On

☒ Day Change ☐ Timer Expiry

Access Timer (Sec)

3

First-IN User Group

4

List 4

⋮

Update Device

ID ▲	Name
1	Door v3
1	RnD Panel lite V2
3	NGT Ground Floor
4	Vega Direct Door
5	Wireless Door 1st Floor
7	NGT-34
8	Panel Lite V2-Device-8

**Enable Rule:** Select the check box to enable the First-IN user rule on selected door.

**Reset On** and **Access Timer (Sec)** are disabled for direct door.

**First-IN User Group:** Select the First-IN User group to be applicable for the selected door.

Click on **Update Device** to save the selection.

# Smart Access Route

The Smart Access Route functionality using Mifare Cards/ HiD Cards enables the administrator to define an access policy which allows the user to access the COSEC Doors in the configured sequence. The COSEC system has the capability to define up to **75** doors on a single route.



*This functionality must be enabled from the **Admin Module > System Configuration> Global Policy> Access Control** option.*

*Also Access Route type and Smart Card Key settings are to be done from Global Policy Page.*

To use the Smart Card based Access Route, click **Access Control > Smart Access > Smart Access Route**. The page appears as shown below:

To create a new Access Route, Click on **New** button.

**Name:** Specify a user friendly name for the Smart Access Route.

**Active:** Select the check box to activate the feature.

**Sequenced Route:** When Sequenced Route is selected then restrictions for the route can be configured. If the check box is disabled then the Restrictions option will be disabled. Then the non-sequenced route can be configured.

**Restrictions:** Select the Restriction mode from the drop down list. This functionality can operate in two modes:

- **Hard:** Access will be allowed only if the Access Route is followed.
- **Soft:** Access will be allowed on any door on the Access Route with an Access Route violation message.

**Reset on Start Level:** Select the check box to enable the system to reset the current level status to allow access on the lowest level.

This option is useful in the event of the user not following the proper order while exiting the premises. If this functionality is enabled then the user will be allowed access on the lowest level irrespective of his/her state but this will happen only on entry side.

## Configured Route

The user needs to define the member doors as the part of defined Access Route. Click on **Add** button to add the doors to Access route.

**Device:** Click on the picklist button and select the required direct door or panel door from the picklist window.

**Level:** Select the Level number to be assigned to the Door from the drop down list.

Click on **OK** button. The Door will appear in the grid. Similarly you can add other doors in the route.

Smart Access Route

Smart Access Route \* ID Matrix Route

Active ☒

Sequenced Route ☒

Restrictions Soft

Reset On Start Level ☐

**Configured Route**

Search

Sr. No.	Device ID	Name	Level
1	1	Door V3-Device-7	1

ID Name

Click on **Save** to save the configured Smart Access Route. The **ID** will be system generated and Route will be shown in right grid.

Smart Access Route

✓ Saved Successfully

Smart Access Route \* 1 Matrix Route

Active ☒

Sequenced Route ☒

Restrictions Soft

Reset On Start Level ☐

**Configured Route**

Search

Sr. No.	Device ID	Name	Level
1	1	Door V3-Device-7	1
2	8	ARC as Dual Door Dual Reader	1
3	2	PVR as Panel Door	1

ID Name

1	Matrix Route
---	--------------

After configuring the Smart Access Route; it can be assigned to the user from User Configuration> Access Control> Advance. The user can access the assigned route using the Smart Card enrolled with Smart Access Route. The card can be configured to include Smart Access Route from Card Personalization.

User Configuration

1687

Aditi Gupta

Active

Profile

Devices

Credentials

Group

T&A

Access Control

ESS

Basic

Advance

Enable Advance Access Control

☒

Shift Based Access

☐

Smart Access Route

1

Matrix Route

Max Route Level

75

Enable Elevator Access Control

☐

Elevator Floor Group

ID

Name

Card Personalization

Field List

Configuration

Card Type

iClass 2K2

Card Mode

Custom

Card No.

CSN

Read CSN

☐

Field Profile

Search

+

Field	Start Position(Page-Block-Byte)	End Position(Page-Block-Byte)	Length(Bytes)
Facility Code	0-19-0	0-19-1	2
User Name	0-20-0	0-21-6	15
Smart Access Route ID	0-22-1	0-22-1	1

Save

Cancel

## Enrolling Smart Card

The configuration for enrolling Smart Card is shown below.

Device Configuration

7

Door V3-Devic...

Door V3

6/50000

Active

Profile

Enrollment

Advanced

Features

Video Surveillance

Special Functions

Input/Output

Additional

Job Costing

Assign Users

Identification Server

Basic

Readers

Access Settings

General

Door Mode Selection

☐

Prompt Special Function

☐

Auto Detect Readers

☐

Internal Readers

Mode

Entry

Card Reader Type

HID iClass-U Reader

Search

+

Member No	Card Format	Configurable Bits
1	Default Format	0

Finger Reader Type

Finger Reader

Enable Scheduling

☐

Reader Mode Schedule

ID

Name

Enroll Credentials

Enrollment Command Sent

Door: 7 Door V3-Dev1

Device Readers

Enrollment Type: Smart Card  
Number Of Cards: One

**Details on Smart Card**

User ID: ☒  
Facility Code (FC): ☒  
Additional Security Code (ASC): ☐  
Finger Templates: None

**Additional Details On Smart Card**

Short Name: ☒ Aditi Gupta  
Branch: ☐ DFLTBRC  
Department: ☐ DFLTDPF  
Designation: ☐ DFLTDSG  
Emergency Contact: ☐  
Blood Group: ☐ NA  
Medical History: ☐

Enroll

User Configuration

1687

Aditi Gupta

Active

Profile

Devices

Credentials

Group

T&A

Access Control

ESS

Cafeteria

Job Costing

Field Visit Management


Search User ID or Name

Credentials

PIN:   
Biometric Group No.: 8  
Roaming User: ☐  
Access Card 1: 11453921554  
Access Card 2:   
Enrolled Fingers(Suprema Proprietary): 1  
Enrolled Fingers(Suprema ISO): 0  
Enrolled Fingers(Lumidigm ISO): 0  
Enrolled Palm: 1  
Enrolled Face: 0  
Enable Self-Enrollment: ☐

Events					
Sr No.	Date Time	Type	Device	Category	Detail
333	20/09/2018 12:35:48 PM	Door V3	Door V3-Device-7	Enrollment	→ TID: 1809200150000006
334	20/09/2018 12:35:48 PM	Door V3	Door V3-Device-7	ACK	← Enrollment Command Successful
335	20/09/2018 12:35:48 PM	Door V3	Door V3-Device-7	Other	→ End Of Message
336	20/09/2018 12:36:06 PM	Door V3	Door V3-Device-7	Request	← Message Request Received
337	20/09/2018 12:36:06 PM	Door V3	Door V3-Device-7	Enrollment	→ TID: 1809200150000007
338	20/09/2018 12:36:06 PM	Door V3	Door V3-Device-7	ACK	← Enrollment Command Successful
339	20/09/2018 12:36:06 PM	Door V3	Door V3-Device-7	Other	→ End Of Message
340	20/09/2018 12:36:14 PM	Door V3	Door V3-Device-7	System	← Enrollment Card - User ID: 1687 Event Date Time: 20/09/2018 12:36:12 PM
341	20/09/2018 12:36:14 PM	Door V3	Door V3-Device-7	ACK	→ Event Ack for RollOver: 0 Event Seq. No.: 35
342	20/09/2018 12:36:17 PM	Door V3	Door V3-Device-7	Request	← Message Request Received
343	20/09/2018 12:36:17 PM	Door V3	Door V3-Device-7	Request	→ Get Card for User ID: 1687. TID: 1809200320000001
344	20/09/2018 12:36:17 PM	Door V3	Door V3-Device-7	Reply Data	← User Card Received. User ID: 1687
345	20/09/2018 12:36:17 PM	Door V3	Door V3-Device-7	Other	→ End Of Message
346	20/09/2018 12:36:18 PM	Panel Lite V2	Panel Lite V2	Request	← Message Request Received
347	20/09/2018 12:36:18 PM	Panel Lite V2	Panel Lite V2	Other	→ User Configuration Sent. User ID: 1687 TID: 1809200040000441
348	20/09/2018 12:36:18 PM	Panel Lite V2	Panel Lite V2	ACK	← User Configuration Successful. User ID: 1687
349	20/09/2018 12:36:18 PM	Panel Lite V2	Panel Lite V2	Other	→ End Of Message

User Details



**User ID:** 1687  
**Adio Gupta**  
**Allowed - Smart card based Route Access - Soft**  
**Device:**  
Door V3-Device-7  
**Event Date & Time:**  
20/09/2018 12:56:51 PM  
**Department:**  
DPLDPT  
**Designation:**  
DPLTDSG

Events

Sr No.	Date Time	Type	Device	Category	Detail
435	20/09/2018 12:54:34 PM	Panel Lite V2	Panel Lite V2	Other	→ End Of Message
436	20/09/2018 12:54:40 PM	Panel Lite V2	Panel Lite V2	Request	← Message Request Received
437	20/09/2018 12:54:40 PM	Panel Lite V2	Panel Lite V2	Other	→ Access Zone Configuration Sent, Access Zone No: 1 TID: 1809200040000539
438	20/09/2018 12:54:40 PM	Panel Lite V2	Panel Lite V2	ACK	← Access Zone Configuration Successful, Access Zone No: 1
439	20/09/2018 12:54:40 PM	Panel Lite V2	Panel Lite V2	Other	→ End Of Message
440	20/09/2018 12:54:57 PM	Door V3	Door V3-Device-7	User	→ Allowed - Smart card based Route Access - Soft with Card, User ID: 1687 Event Date Time: 20/09/20...
441	20/09/2018 12:54:57 PM	Door V3	Door V3-Device-7	ACK	→ Event Ack for RollOver: 0 Event Seq. No.: 37
442	20/09/2018 12:56:52 PM	Door V3	Door V3-Device-7	User	→ Allowed - Smart card based Route Access - Soft with Card, User ID: 1687 Event Date Time: 20/09/20...
443	20/09/2018 12:56:52 PM	Door V3	Door V3-Device-7	ACK	→ Event Ack for RollOver: 0 Event Seq. No.: 38
444	20/09/2018 12:57:45 PM	Panel Lite V2	Panel Lite V2 -> PVR as...	Door	← Door Communication Status Changed - Offline Event Date Time: 20/09/2018 12:57:38 PM
445	20/09/2018 12:57:45 PM	Panel Lite V2	Panel Lite V2	ACK	→ Event Ack for RollOver: 0 Event Seq. No.: 13
446	20/09/2018 12:57:49 PM	Panel Lite V2	Panel Lite V2 -> PVR as...	Door	← Door Communication Status Changed - Online Event Date Time: 20/09/2018 12:57:42 PM
447	20/09/2018 12:57:49 PM	Panel Lite V2	Panel Lite V2	ACK	→ Event Ack for RollOver: 0 Event Seq. No.: 14
448	20/09/2018 12:58:32 PM	Panel Lite V2	Panel Lite V2 -> PVR as...	Door	← Door Communication Status Changed - Offline Event Date Time: 20/09/2018 12:58:25 PM
449	20/09/2018 12:58:32 PM	Panel Lite V2	Panel Lite V2	ACK	→ Event Ack for RollOver: 0 Event Seq. No.: 15
450	20/09/2018 01:01:04 PM	Panel Lite V2	Panel Lite V2 -> PVR as...	Door	← Door Communication Status Changed - Online Event Date Time: 20/09/2018 01:00:57 PM
451	20/09/2018 01:01:04 PM	Panel Lite V2	Panel Lite V2	ACK	→ Event Ack for RollOver: 0 Event Seq. No.: 16



# Smart Identification

Smart Identification enables to define the Access Mode on the selected device (Panel or direct door) through Smart Card, Finger or PIN combinations.

Under this functionality, users defined in the system will be assigned Smart Cards by enrolling at the COSEC Enrollment station. Access to these users is granted based on the information written on the Smart Cards.



*This functionality can also be enabled from the **Device Module > Device Configuration > Advanced** option.*

*This functionality has to be first enabled from the **Admin Module > System Configuration > Global Policy > Device** option.*

*Also Set any General Additional Security Code which can be used as a passcode for this feature.*



*Click on the Default button on Door to set the **Additional Security Code** to the value set in the **General Additional Security Code** field on the Global Policy page of Admin Module.*

Firstly, User Shows RFID Card in which Fingerprint Template is Stored



Device Temporarily Stores the Fingerprint Template



User Punches after Showing the RFID Card



Device Matches the Punch against the Temporarily Stored Fingerprint Template



To use the Smart identification feature, click **Access Control > Smart Access > Smart Identification**. The page appears as shown below:

Smart Identification

Device \* ID Name

Enable Rule ☐

Update Device

Zone Select

Enable Rule On Zone ☐

Zone Access Level 8

SI Access Mode Card

Update Zone

ID	Name
23	wireless fake test
24	PVR door new
26	Pvr door2
28	Vega to testcount
29	fake pvr door
30	Door FMX-Device-30
31	Vega Controller-Device-31
32	Door V3-Device-32
33	PVR Door-Device-33
34	NGT Direct Door-Device-34

16 - 25 of 25 records

The grid on the right shows all the configured devices including direct doors and Panel200.

Click on the device from the grid, the related parameters will appear in the respective fields.

Smart Identification

Device \* 4 Panel Lite V2

Enable Rule ☐

Update Device

Zone Zone-1

Enable Rule On Zone ☐

Zone Access Level 8

SI Access Mode Card

Update Zone

**Enable Rule:** Select the check box to enable the Smart Identification rule on selected device.

Click on **Update Device**.

**Zone:** Select the Zone from the drop down list.

**Enable Rule on Zone:** Select the check box to enable the Smart Identification feature on selected Zone.

**Zone Access Level:** Select the Zone Access Level from the drop down list.

**SI Access Mode:** Select the Smart Identification (SI) mode from the drop down list. The options available are:

- Card
- Card + Finger
- Card + Finger+ PIN
- Card + PIN

For the PVR Door (Direct Door/Panel Door), the SI Access mode is as below:

- Card
- Card + PIN
- Card + Biometric
- Card + Biometric + PIN

Click on **Update Zone**.



*However, the user needs to ensure that the functionality is enabled at the device level.*

*It is essential to install either a Mifare or an HID i-Class serial reader at the DOOR devices for this functionality to work.*

*SI users need not be assigned any devices and need to be enrolled from the COSEC ENROLL application only.*

# Access Rule Profile

The Access Rule option allows you to create the conditional rules for a particular time duration to access the doors. Access Rule can be configured for Panel200 (Server Mode) and Panel Doors.

Access Rule is supported in the following Panel Doors — PVR Door, Vega Controller, Door V1/V2/V3/V4, PATH Controller, ARC DC 200, ARC DC 100, ARGO, ARGO FACE.

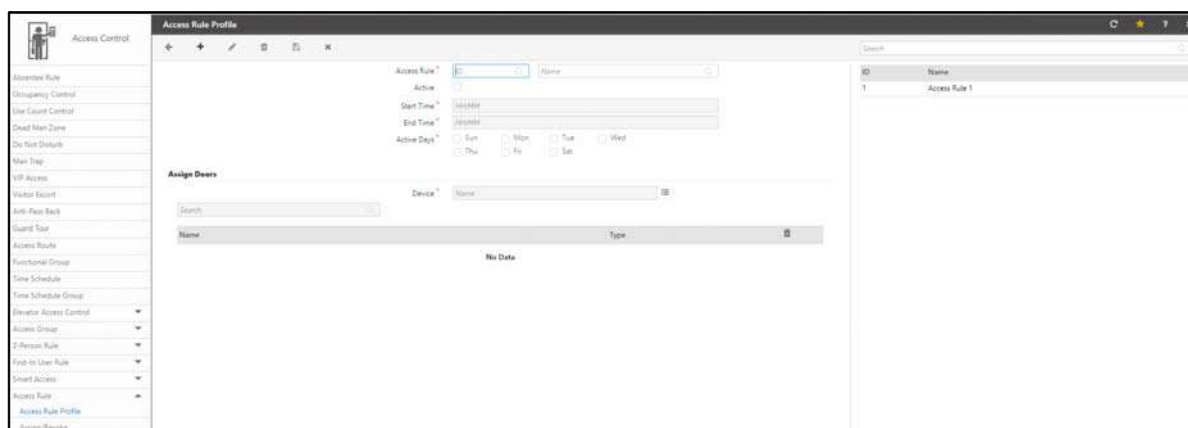
To use this feature you must:

- create an Access Rule
- assign doors to the Access Rule
- assign/revoke users to the Access Rule

## Access Rule Profile

To configure the Access Rule,

- Click **Access Control > Access Rule > Access Rule Profile**. The **Access Rule Profile** page appears.



- Click **New**  .



*Maximum 999 Access Rules can be created.*

*Maximum 99 Access Rules can be assigned to each user.*

**Access Rule Profile**

Access Rule \* 2 Access Rule 2

Active ☒

Start Time \* 09:00

End Time \* 18:00

Active Days \* ☐ Sun ☒ Mon ☒ Tue ☒ Wed ☒ Thu ☒ Fri ☐ Sat

**Assign Doors**

Device \* None

Search

Name	Type	
ARGOFACE_PanelDoor1	Panel200 Door	
ABhavin Argoface - 131	Panel200 Door	

Configure the following parameters:

- **Access Rule:** Specify a user friendly name for the new Access Rule. The ID is auto-generated by default.
- **Active:** Select the check box to activate the Access Rule.
- **Start Time:** Specify the Start Time for the Access Rule in HH:MM format.
- **End Time:** Specify the End Time for the Access Rule in HH:MM format.
- **Active Days:** Select the check boxes for the days on which you wish the Access Rule to be applied.

### Assign Doors

- **Device:** Select the desired device to which you wish to assign the Access Rule using the **Device** picklist.

Click the **Device** picklist. The **Picklist For Panel Door Masters** pop-up appears.

- You can either select particular Panel Doors or can select all the Panel Doors at once.
- To select particular Panel Doors, select the check boxes of the desired Panel Doors.

OR

- To select all the Panel Doors, select the **Select All** check box. The Panel Door on all the pages will be selected.

Picklist For Panel Door Masters

Total Selected: 43 Records

Search  Show Selected

☒ Select All

<input checked="" type="checkbox"/>	Name
<input checked="" type="checkbox"/>	ARGO_PANEL
<input checked="" type="checkbox"/>	DoorV3
<input checked="" type="checkbox"/>	DOORV4_PANEL
<input checked="" type="checkbox"/>	PATHV2_PANEL
<input checked="" type="checkbox"/>	VEGA_PANEL
<input checked="" type="checkbox"/>	dummy
<input checked="" type="checkbox"/>	DoorV3_Door
<input checked="" type="checkbox"/>	ARDC100_SD_Door
<input checked="" type="checkbox"/>	ARDC100_DD_Door
<input checked="" type="checkbox"/>	ARDC100_PD_Door

1 - 10 of 43 records

1 2 3 4 5

OK Cancel

Click **OK**.

All the selected devices appear in a grid.

Access Rule Profile

Access Rule \* 2 Access Rule 2

Active ☒

Start Time \* 09:00

End Time \* 18:00

Active Days \* ☐ Sun ☒ Mon ☒ Tue ☒ Wed ☒ Thu ☒ Fri ☐ Sat

**Assign Doors**

Device \* Name

Search


Name	Type	
ARGOFACE_PanelDoor1	Panel200 Door	
ABhavin Argoface - 131	Panel200 Door	

The device details displayed are — Name and Type. You can delete a Panel Door from the grid if required.

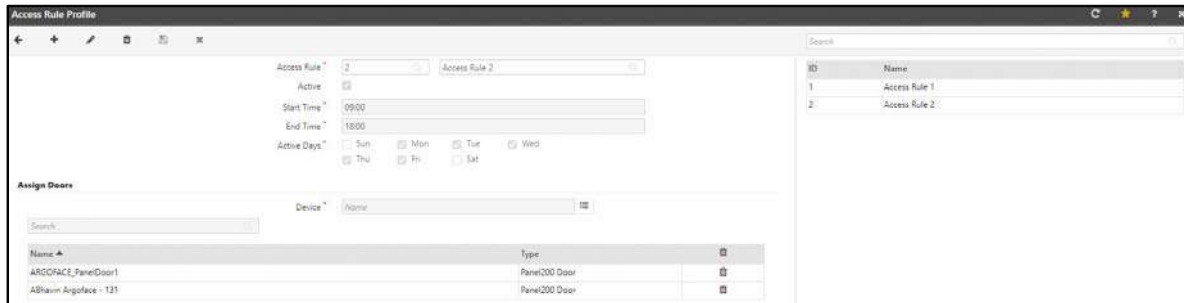
- Click **Delete** corresponding to the required device to delete it from the Access Rule, if required.




*If any device or a device belonging to any device group is un-assigned against any user or is selected for deletion but is a part of the Access Rule which is assigned to that user, then those door(s) will be retained against that user.*

- Click **Save**  to save the Access Rule.

The new Access Rule Profile appears in the right pane.



If you wish to edit any profile,

- Click the desired Access Rule from the right pane. Edit the Access Rule as per your requirement.
- Click **Save**  to save the Access Rule.

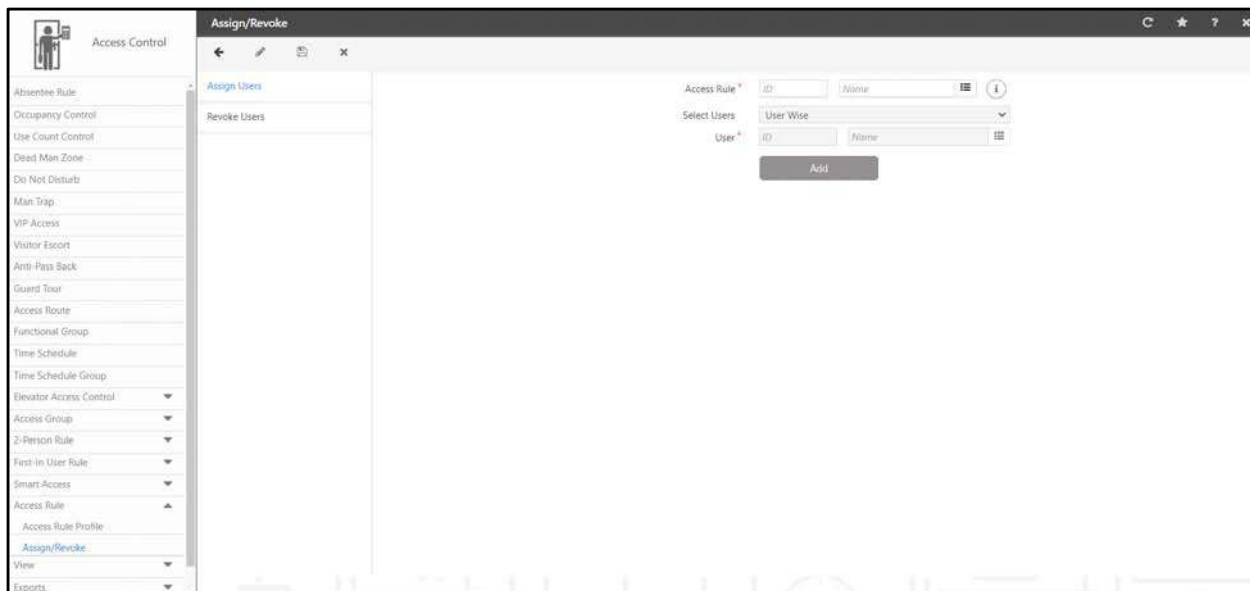


# Assign/Revoke

## Assign/Revoke

To Assign/Revoke users to/from an Access Rule,

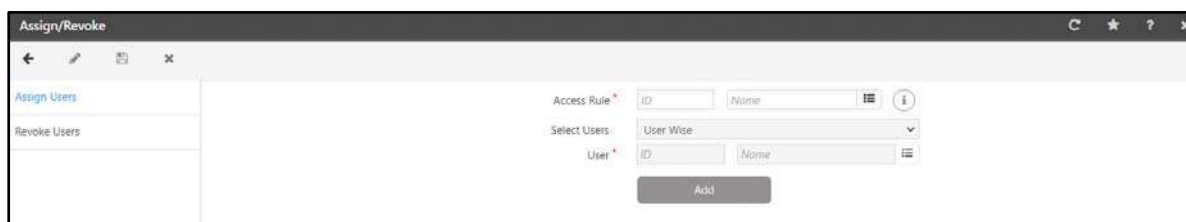
- Click **Access Control > Access Rule > Assign/Revoke**. The **Assign/Revoke** page appears.




## Assign Users

To Assign a user to an Access Rule,

- Click **Access Control > Access Rule > Assign/Revoke > Assign Users**. The **Assign Users** page appears.



Configure the following parameters:

- Access Rule:** Select the desired Access Rule/s to which you wish to assign users using the **Access Rule**  picklist. Click the picklist, the **Picklist For Access Rule** pop-up appears.

Picklist For Access Rule

Total Selected: 0 Records

Search

Show Selected

☐ Select All

ID	Name
1	AccessRule 1
2	AccessRule 2
3	AccessRule 3
4	AccessRule 4
5	AccessRule 5

OK Cancel

- You can either select particular Access Rule or can select all the Access Rules at once.
- To select particular Access Rules, select the desired check boxes.

Picklist For Access Rule

Total Selected: 1 Records

Search

Show Selected

☐ Select All

ID	Name
<input checked="" type="checkbox"/> 1	AccessRule 1
<input type="checkbox"/> 2	AccessRule 2
<input type="checkbox"/> 3	AccessRule 3
<input type="checkbox"/> 4	AccessRule 4
<input type="checkbox"/> 5	AccessRule 5

OK Cancel

OR

- To select all the Access Rules at once, select the **Select All** check box. The Access Rules on all the pages will be selected.

Picklist For Access Rule

Total Selected: 5 Records

Search  [Show Selected](#)

☒ Select All

<input checked="" type="checkbox"/>	ID ▲	Name
<input checked="" type="checkbox"/>	1	AccessRule 1
<input checked="" type="checkbox"/>	2	AccessRule 2
<input checked="" type="checkbox"/>	3	AccessRule 3
<input checked="" type="checkbox"/>	4	AccessRule 4
<input checked="" type="checkbox"/>	5	AccessRule 5

OK Cancel

- Click **OK**.
- **Select Users:** Select the desired option — User Wise, Group Wise, All.
- If you select **User Wise**, click the **User** picklist. The **Picklist for All Users** pop-up appears.

Picklist For All Users

Total Selected: 0 Records

Search  [Show Selected](#)

<input type="checkbox"/>	User ID ▲	Name
<input type="checkbox"/>	01	Visitor Profile 1
<input type="checkbox"/>	02	Visitor Profile 2
<input type="checkbox"/>	03	Visitor Profile 3
<input type="checkbox"/>	1	User 1
<input type="checkbox"/>	2	User 2
<input type="checkbox"/>	3	User 3
<input type="checkbox"/>	VisitorP	VisitorP

OK Cancel

- Select check boxes of the desired users. Click **OK**.
- The selected Users appear in the grid.

Assign/Revoke

Assign Users

Revoke Users

Access Rule \* ID Name

Select Users User Wise

User \* ID Name

Search

User ID	Name	
1	User 1	
2	User 2	

Add

- You can also delete the desired User. To do so, click **Delete** of the respective user.
- If you select **Group Wise** option, select the desired enterprise group from the drop-down list—Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1/2/3.

For each enterprise group — Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1/2/3, click the corresponding picklist to select the desired option/s.

The selected Groups appear in the grid.

Assign/Revoke

Assign Users

Revoke Users

Access Rule \* ID Name

Select Users Group Wise

Select Group Organization

Organization \* ID Name

Search

ID	Name	Group	
1	Organization-1	Organization	

Add

You can also delete particular group. To do so, click **Delete** of the respective group.

- If you select **All**, then all users will be selected.

All the selected users appear in a grid.

Assign/Revoke

Assign Users

Revoke Users

Access Rule \* ID Name

Select Users User Wise


User \* ID Name

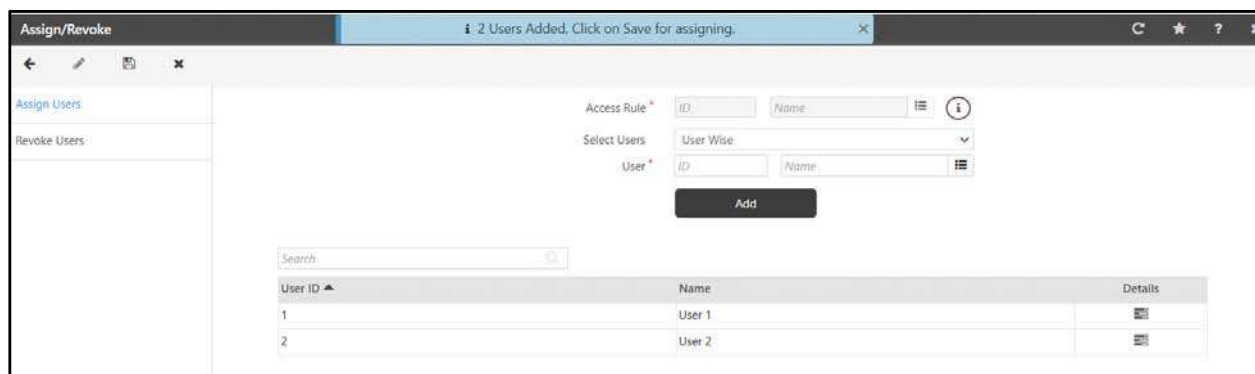
Search

User ID	Name	
1	User 1	
2	User 2	

Add

The user details displayed are — User ID and Name. You can delete a user from the grid if required.

- Click **Delete**  corresponding to the desired user to delete it from the Access Rule.
- Click **Add** to add the users to the Access Rule/s. Once the users are added you cannot delete them from the grid. However, you can “[Revoke Users](#)”, if required.



Assign/Revoke

2 Users Added, Click on Save for assigning.

Assign Users

Revoke Users

Access Rule \* ID: Name: [icon] [icon]


Select Users User Wise

User \* ID: Name: [icon] [icon]

Add

Search

User ID ▲	Name	Details
1	User 1	[icon]
2	User 2	[icon]

 *The Panel - Server Mode supports 25000 users. If this is exhausted and you assign a new user to the desired Panel Door, then the same will not be possible.*

- Click **Details**  of the desired user to view the Access Rule/s already assigned to her/him.




Access Rule List

User 1 User 1

Search

ID ▲	Name
2	AccessRule 2

- Click **Save**  to save the Access Rule. The selected Access Rules are assigned to the user/s.

The screenshot shows the 'Assign/Revoke' window with the 'Assign Users' tab selected. On the left, there are buttons for 'Assign Users' and 'Revoke Users'. The main area contains an 'Access Rule' section with 'ID' and 'Name' fields, a 'Select Users' dropdown set to 'User Wise', and a 'User' section with 'ID' and 'Name' fields and an 'Add' button. Below this is a search bar and a table with columns 'User ID', 'Name', and 'Details'. The table contains two rows: '1' with 'User 1' and '2' with 'User 2'.

If the user/s are not added, the reason for the same appears in the **Error** collapsible panel. Click the collapsible panel to view the details.

The screenshot shows the 'Assign/Revoke' window with an error message at the top: 'No Records Processed. Check Process Error List.' Below the 'Add' button, there is an 'Error List' section with a search bar and a table. The table has columns 'User ID', 'User Name', 'Access Rule ID', and 'Reason'. It contains one row: 'w1', 'w1', '998', and 'Maximum 99 Access Rules can be assigned to the User'.

You can also view the Access Rule/s assigned to the Users/Workers/ Visitor from their respective modules. To do so,

- Click User module > User Configuration > Access Control > Advance. For details, refer to [“Advance”](#) and [“Devices”](#).
- Click Contract Worker module > Workers > Worker Profile > Access Control > Advance. For details, refer to [“Advance”](#) and [“Worker Profile- Devices”](#).
- Click Visitor Management module > Visitor > Visitor Profile > Access Control > Advance. For details, refer to [“Access Control”](#) and [“Devices”](#).

You can also view the Access Rule/s and User/s assigned to the Devices. To do so, click Device module > Device Configuration > Assign Users. For details, refer to [“Assign Users”](#) in [“ARC Door”](#), [“Assign Users”](#) in [“PVR Door”](#), [“Assign Users”](#) in [“PATH Door”](#), [“Assign Users”](#) in [“Door Controllers”](#), [“Assign Users”](#) in [“VEGA Door”](#), [“Assign Users”](#) in [“ARGO Door”](#), [“Assign Users”](#) in [“ARGO FACE Door”](#).

## Revoke Users

To Revoke a user from an Access Rule,

- Click **Access Control Module > Access Rule > Assign/Revoke > Revoke Users**. The **Revoke Users** page appears.

Assign/Revoke

Assign Users

Revoke Users

Access Rule\* ID Name

Select Users User Wise

User\* ID Name

Select

Search

User ID	Name	Revoke
No Data		

Configure the following parameters:

- **Access Rule:** Select the desired Access Rule/s from which you wish to revoke the users using the **Access Rule** picklist. Click the picklist, the **Picklist For Access Rule** pop-up appears.

Picklist For Access Rule

Total Selected: 0 Records

Search

Show Selected

☐ Select All

<input type="checkbox"/>	ID ▲	Name
<input type="checkbox"/>	1	AccessRule 1
<input type="checkbox"/>	2	AccessRule 2
<input type="checkbox"/>	3	AccessRule 3
<input type="checkbox"/>	4	AccessRule 4
<input type="checkbox"/>	5	AccessRule 5

OK Cancel

- You can either select particular Access Rule or can select all the Access Rules at once.
- To select particular Access Rules, select the desired check boxes.

Picklist For Access Rule

Total Selected: 1 Records

Search  Show Selected

☐ Select All

<input type="checkbox"/>	ID ▲	Name
<input checked="" type="checkbox"/>	1	AccessRule 1
<input type="checkbox"/>	2	AccessRule 2
<input type="checkbox"/>	3	AccessRule 3
<input type="checkbox"/>	4	AccessRule 4
<input type="checkbox"/>	5	AccessRule 5

OK Cancel

OR

- To select all the Access Rules at once, select the **Select All** check box. The Access Rules on all the pages will be selected.

Picklist For Access Rule

Total Selected: 5 Records

Search  Show Selected

☒ Select All

<input checked="" type="checkbox"/>	ID ▲	Name
<input checked="" type="checkbox"/>	1	AccessRule 1
<input checked="" type="checkbox"/>	2	AccessRule 2
<input checked="" type="checkbox"/>	3	AccessRule 3
<input checked="" type="checkbox"/>	4	AccessRule 4
<input checked="" type="checkbox"/>	5	AccessRule 5

OK Cancel

- Click **OK**.
- Select Users:** Select the desired option — User Wise, Group Wise, All
- If you select **User Wise**, click the **User** picklist. The **Picklist for All Users** pop-up appears.



Picklist For All Users

Total Selected: 0 Records

Search  [Show Selected](#)

<input type="checkbox"/>	User ID ▲	Name
<input type="checkbox"/>	1	User 1
<input type="checkbox"/>	2	User 2

OK Cancel

- Select check boxes of the desired users. Click **OK**.
- The selected Users appear in the grid.

Assign/Revoke

Assign Users

Revoke Users

Access Rule \* ID  Name

Select Users User Wise

User \* ID  Name


Search

User ID ▲	Name	
1	User 1	

Select

Search

User ID ▲	Name	Revoke <input type="checkbox"/>
1	User 1	<input type="checkbox"/>
2	User 2	<input type="checkbox"/>

- You can also delete the desired User. To do so, click **Delete**  of the respective user.
- If you select **Group Wise** option, select the desired enterprise group from the drop-down list— Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1/2/3.

For each enterprise group — Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1/2/3, click the corresponding picklist to select the desired option/s.

The selected Groups appear in the grid.

Assign/Revoke

Assign Users

Revoke Users

Access Rule \* ID Name

Select Users Group Wise

Select Group Organization

Organization \* ID Name


Search

ID	Name	Group
1	Organization-1	Organization

Select

Search

User ID	Name	Revoke
1	User 1	<input type="checkbox"/>
2	User 2	<input type="checkbox"/>

You can also delete particular group. To do so, click **Delete**  of the respective group.

- If you select **All**, then all users will be selected.

All the selected users appear in a grid.

Assign/Revoke

Assign Users

Revoke Users

Access Rule \* ID Name

Select Users User Wise

Select Group User

User \* ID Name

Search

User ID	Name
1	User 1

Select

Search

User ID	Name	Revoke
1	User 1	<input type="checkbox"/>
2	User 2	<input type="checkbox"/>

- Click **Select**. Click the **Revoke** check box corresponding to the desired user/s to revoke them from the Access Rule/s.

Assign/Revoke

1 Users Selected. Click on Save for revoking.

Assign Users

Revoke Users

Access Rule \* ID Name

Select Users User Wise

Select Group User

User \* ID Name


Search

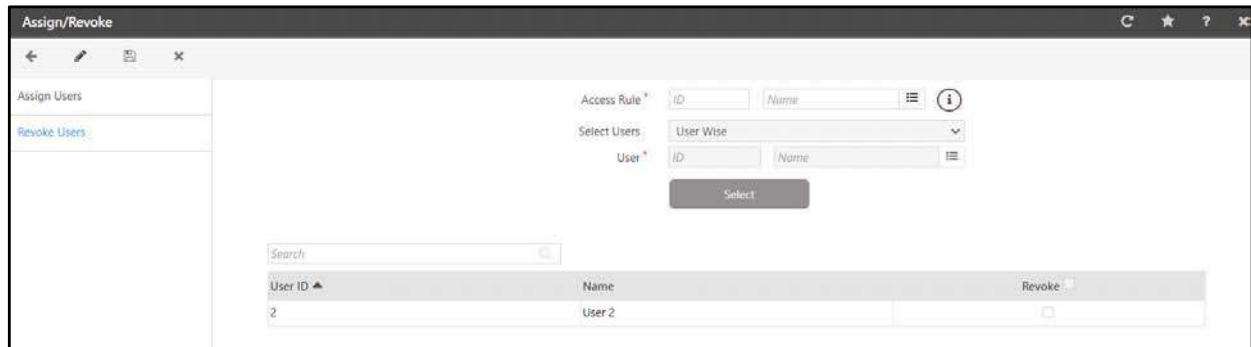
User ID	Name
1	User 1

Select

Search

User ID	Name	Revoke
1	User 1	<input checked="" type="checkbox"/>
2	User 2	<input type="checkbox"/>

- Click **Save**  to save the Access Rule. The selected users are revoked from the Access Rule/s.



Assign/Revoke

Assign Users

Revoke Users

Access Rule \* ID Name

Select Users User Wise

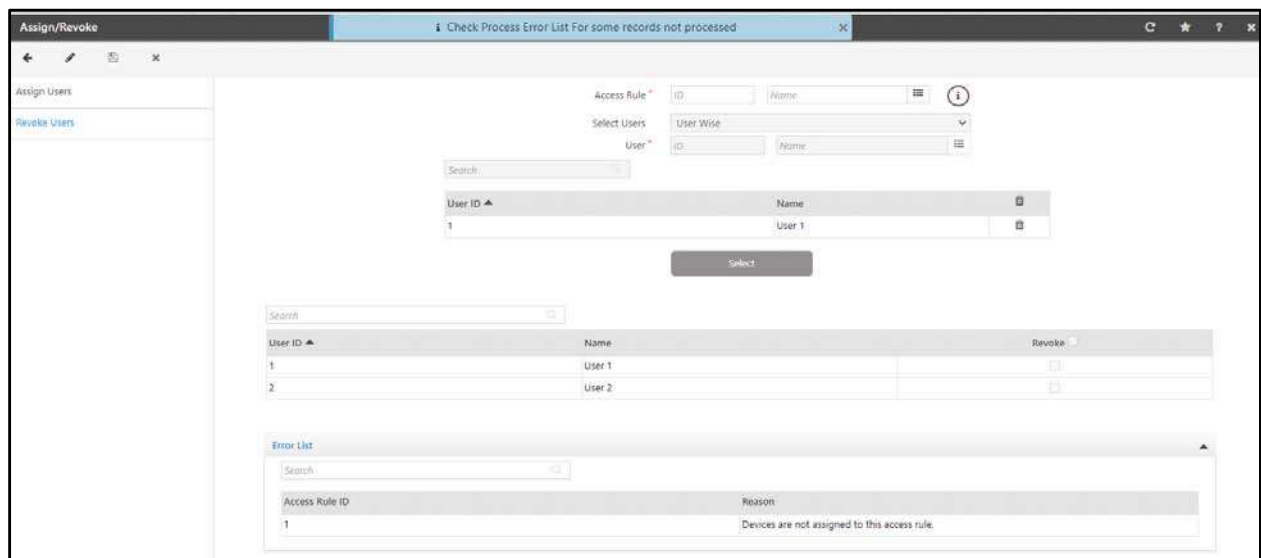
User \* ID Name

Select

Search

User ID ▲	Name	Revoke
2	User 2	<input type="checkbox"/>

If the user/s are not revoked, the reason for the same appears in the **Error** collapsible panel. Click the collapsible panel to view the details.



Assign/Revoke

Check Process Error List For some records not processed

Assign Users

Revoke Users

Access Rule \* ID Name

Select Users User Wise

User \* ID Name

Select

Search

User ID ▲	Name	Revoke
1	User 1	<input type="checkbox"/>
2	User 2	<input type="checkbox"/>

Error List

Search

Access Rule ID	Reason
1	Devices are not assigned to this access rule.

# View Alarm Log

Alarm Log option enables the user to view logs of all alarms which have occurred in the time period as specified in the filtering option. Alarm Log Events can be filtered to show only events within a certain time period or based on the Alarm Type.

To access the Alarm Log feature, click **Access Control > View > Alarm Log**. The page appears as shown below:

Alarm Log

Date \* 21/03/2017 21/03/2017

Alarm Type All

View

**Date:** Select the Start and the End date to define the time period for which the Alarm Logs are to be viewed.

**Alarm type:** Select the Alarm type from the options of Critical, Major, Minor and All.

Click on the **View** button to view the Alarm Logs. The following page appears displaying the Alarm Logs for selected period.

Alarm Log

Date \* 10/03/2017 21/03/2017

Alarm Type All

View

Search

Seq	Alarm Date-Time	Level	Status	Alarm Name	Panel	Source
0	15/03/2017 11:46:09	Critical	Cleared	Tamper Alarm	WIRELESS DOOR DEVICE 8 SWETAAA	WIRELESS DOOR DEVICE 8 SWETAAA
0	15/03/2017 11:23:23	Critical	Cleared	Tamper Alarm	WIRELESS DOOR DEVICE 8 SWETAAA	WIRELESS DOOR DEVICE 8 SWETAAA
0	15/03/2017 10:29:31	Critical	Cleared	Tamper Alarm	WIRELESS DOOR DEVICE 8 SWETAAA	WIRELESS DOOR DEVICE 8 SWETAAA
0	10/03/2017 16:27:22	Critical	Cleared	Tamper Alarm	WIRELESS DOOR DEVICE 8 SWETAAA	WIRELESS DOOR DEVICE 8 SWETAAA
0	10/03/2017 16:06:55	Critical	Cleared	Tamper Alarm	WIRELESS DOOR DEVICE 8 SWETAAA	WIRELESS DOOR DEVICE 8 SWETAAA
0	10/03/2017 15:56:34	Critical	Cleared	Tamper Alarm	WIRELESS DOOR DEVICE 8 SWETAAA	WIRELESS DOOR DEVICE 8 SWETAAA
0	10/03/2017 15:55:05	Critical	New	Tamper Alarm	WIRELESS DOOR DEVICE 8 SWETAAA	WIRELESS DOOR DEVICE 8 SWETAAA

Application Ack Date

System Ack Date

Application Clear Date

System Clear Date

The screenshot shows the 'Alarm Log' window. At the top, there are filters for 'Date' (21/01/2022) and 'Alarm Type' (All). Below these is a search bar and a 'View' button. The main area contains a table with the following columns: Seq, Alarm Date-Time, Level, Status, Alarm Name, Panel, and Source. Two rows of data are visible, both with a status of 'Cleared'.

Seq	Alarm Date-Time	Level	Status	Alarm Name	Panel	Source
2	21/01/2022 14:11:53	Critical	Cleared	Duress detection	Panel000-Device-2	Hk Vega
1	21/01/2022 14:11:02	Critical	Cleared	Duress detection	Panel000-Device-2	Hk Vega

Below the table, there are four input fields for dates: Application Ack Date, System Ack Date, Application Clear Date, and System Clear Date.

The details displayed are — Sequence, Alarm Date-Time, Level, Status, Alarm Name, Panel and Source.

**Application Ack Date:** It shows the date on which alarm is acknowledged by the user.

**System Ack Date:** It shows the date on which alarm is acknowledged by the system.

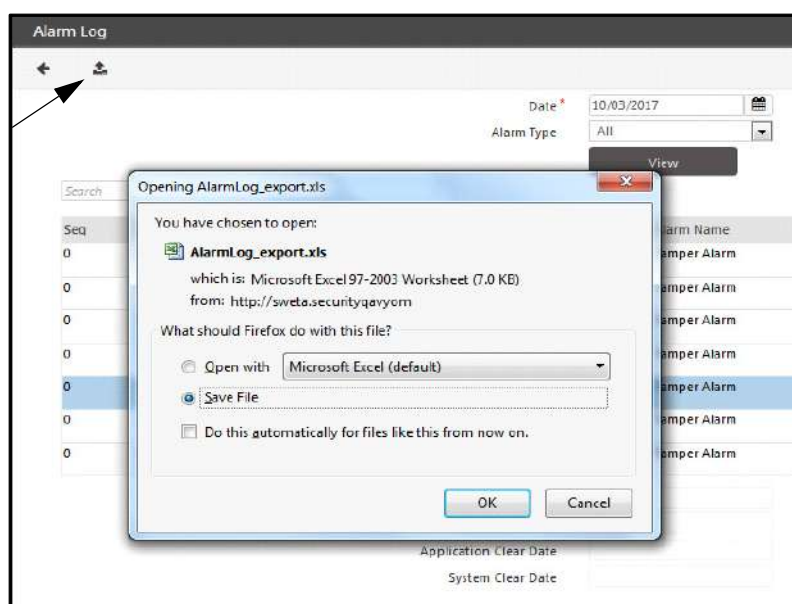
**Application Clear Date:** It shows the date on which alarm is cleared by the user.

**System Clear Date:** It shows the date on which alarm is cleared by the system.

This screenshot shows the date input fields from the previous image. The 'Application Ack Date' and 'System Ack Date' fields are empty. The 'Application Clear Date' field contains the text '10/03/2017 16:07:11'. The 'System Clear Date' field contains the text '10/03/2017 16:07:13'.

## Export

To export the log of alarm, click on Export button as shown below. You can open or save the Alarm log in excel file.



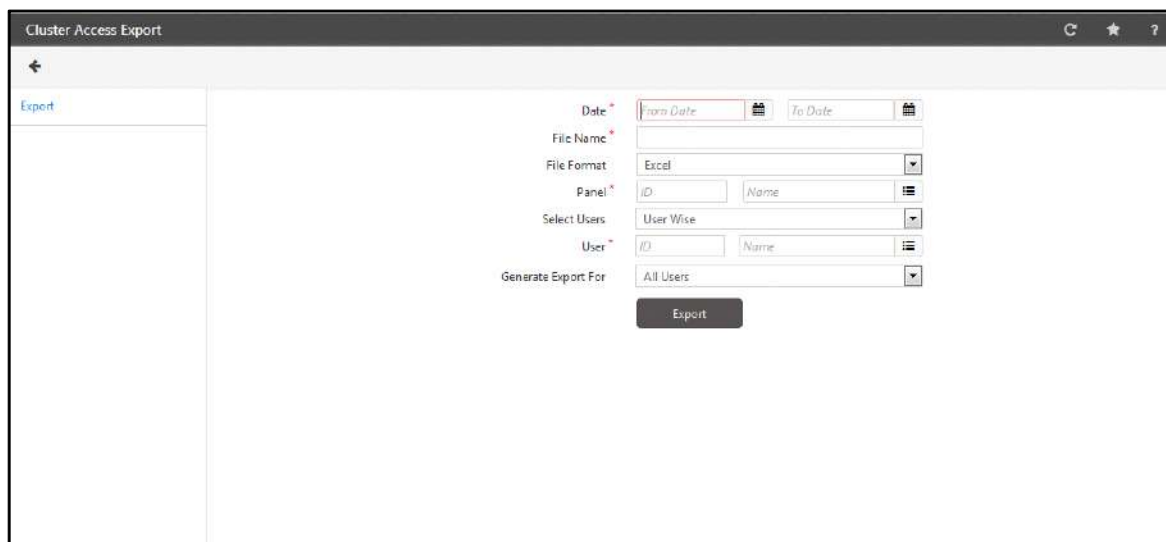
The exported file is shown as below:

Seq	Alarm Date Time	Level	Status	Alarm Name	Panel	Source	Application Ack	System Ack	Application Clear Date	System Clear Date
0	15/03/2017 11:46:09	Critical	Cleared	Tamper Alarm	WIRELESS DOOR	WIRELESS DOOR				15/03/2017 11:46:16
0	15/03/2017 11:23:23	Critical	Cleared	Tamper Alarm	WIRELESS DOOR	WIRELESS DOOR				15/03/2017 11:23:33
0	15/03/2017 10:29:31	Critical	Cleared	Tamper Alarm	WIRELESS DOOR	WIRELESS DOOR				15/03/2017 10:29:45
0	10/03/2017 16:27:22	Critical	Cleared	Tamper Alarm	WIRELESS DOOR	WIRELESS DOOR			10/03/2017 16:27:42	10/03/2017 16:27:46
0	10/03/2017 16:06:55	Critical	Cleared	Tamper Alarm	WIRELESS DOOR	WIRELESS DOOR			10/03/2017 16:07:11	10/03/2017 16:07:13
0	10/03/2017 15:56:34	Critical	Cleared	Tamper Alarm	WIRELESS DOOR	WIRELESS DOOR				10/03/2017 15:56:43
0	10/03/2017 15:55:05	Critical	New	Tamper Alarm	WIRELESS DOOR	WIRELESS DOOR				

# Cluster Access Details Export

This functionality enables the administrator to export Cluster Access data in a pre-defined Excel format. The exported file displays the information, which includes user-wise punch details.

To access this functionality, click **Access Control > Exports > Cluster Access Details** and the following page appears.

The screenshot shows a web application window titled "Cluster Access Export". On the left, there is a sidebar with a back arrow icon and a button labeled "Export". The main area contains a form with the following fields: "Date" with "From Date" and "To Date" date pickers; "File Name" as a text input; "File Format" as a dropdown menu currently set to "Excel"; "Panel" with "ID" and "Name" input fields; "Select Users" as a dropdown menu currently set to "User Wise"; "User" with "ID" and "Name" input fields; and "Generate Export For" as a dropdown menu currently set to "All Users". At the bottom of the form is a dark "Export" button.

**Date:** Enter the date range for which data has to be exported.

**File Name:** Enter an appropriate **File Name** for the export file.

**File Format:** Specify the export **File Format** as **Excel**.

**Panel:** Select the Panel for which Cluster Access details are to be fetched.

**Select Users:** Select one of the following filters from the **User Filter** drop down list:

- **User Wise** - To select users randomly using the **User** picklist.
- **Group Wise** - To select all users associated with a particular Enterprise group.
- **All** - To select all users on the system.

**Generate Export for:** Select the users as **All**, **Active** or **Inactive** for which Cluster Access Detail is to be exported.

Click the **Export** button. On the **File Download** dialog box, click **Save**. Save the file at a desired location.

The Exported File will display the date-wise user's punches in the following format.

AditiClusterReports.xls - LibreOffice Calc		
File Edit View Insert Format Tools Data Window Help		
Anal 10		
C28 f0 Σ =		
	A	B
1	<b>User-wise Cluster Access Details From</b>	
2	<b>04/18/2017 To 04/26/2017</b>	
3	<b>1-Cluster-1</b>	
4	Date: 18/04/2017	
5	07-Aciti	
6	08:30-IN	
7	19:30-IN	
8	Date: 19/04/2017	
9	07-Aciti	
10	09:00-IN	
11	19:00-IN	
12	Date: 20/04/2017	
13	07-Aciti	
14	09:01-IN	
15	10:02-IN	
16	19:01-IN	
17	20:02-IN	
18	Date: 21/04/2017	
19	07-Aciti	
20	07:00-IN	
21	09:00-IN	
22	09:01-IN	
23	09:01-IN	
24	09:02-IN	
25	09:42-IN	
26	19:01-IN	
27	Date: 22/04/2017	
28	07-Aciti	
29	10:02-IN	



# Access Control Reports

Reports available within the COSEC Access Control option are categorized as under:

*[“Access Zone”](#)*

*[“Time Zone”](#)*

*[“Groups”](#)*

*[“I/O Linking”](#)*

*[“User Access”](#)*

*[“Guard”](#)*

*[“Access Route Master”](#)*

*[“Elevator Access Control”](#)*

*[“Door Held Open”](#)*

*[“Emergency Evacuation”](#)*

*[“Alarm Details”](#)*

## Access Zone

Generates a Panel wise list of all the Access Zones defined in the system.

It also displays the access level selected for the zone along with the access mode (credentials) for the zone. If the Visitor Escort rule and First-IN user rule are activated for the zone; then it will display Active for the respective zones.

### Panel Selection

- **Select Panels:** Select the desired option— **All** or **Panel-Wise**.
  - If you select **All**, all the Panels will be selected.
  - If you select **Panel-Wise**, click **Panel** picklist. The **Picklist For Panel** pop-up appears.

Picklist For Panel

Total Selected: 0 Records

Search  Show Selected

<input type="checkbox"/>	ID ▲	Name
<input type="checkbox"/>	9	Panel
<input type="checkbox"/>	10	Panel 2
<input type="checkbox"/>	11	CC2
<input type="checkbox"/>	12	Panel200-Device-12
<input type="checkbox"/>	13	Panel
<input type="checkbox"/>	14	PanelLite
<input type="checkbox"/>	15	Panel200-Device-15
<input type="checkbox"/>	16	Panel200

OK Cancel

- Select the desired check boxes from the list. Click **OK**.
- The selected Panel appears in the grid.

ID	Name	Group	
9	Panel	Panel	
10	Panel 2	Panel	
11	CC2	Panel	
12	Panel200-Device-12	Panel	

- You can delete the desired Panel. To do so, click **Delete** of the respective Panel.
- Click **Generate Report**

### Sample Report

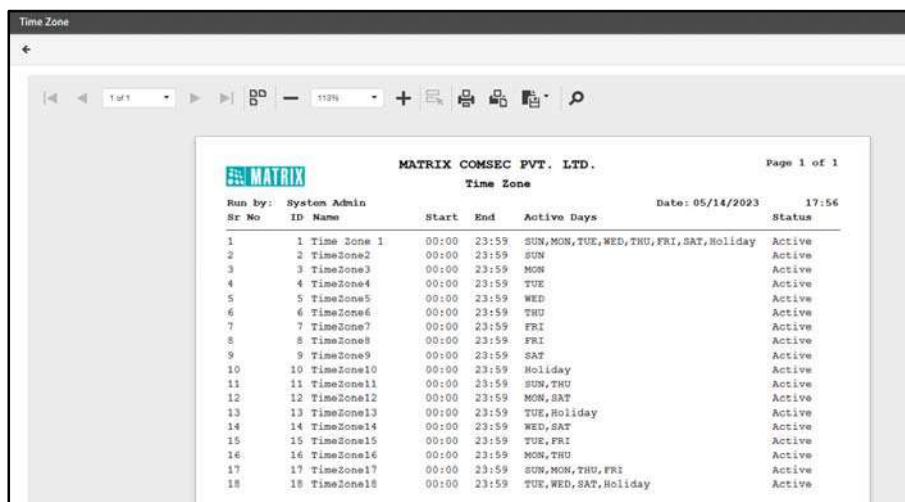
Sr No	ID	Name	Level	Application Type	Visitor Escort	Zone Access Mode	First-In User	First-In User Group
Panel 1	1	Zone-1	8	Basic Access Control	Inactive	ANYONE	Inactive	List 1
Panel 2	1	Zone-1	8	Basic Access Control	Inactive	ANYONE	Inactive	List 1
CC2	1	Zone-1	8	Basic Access Control	Inactive	ANYONE	Inactive	List 1
Panel200-Device-12	1	Zone-1	8	Basic Access Control	Inactive	ANYONE	Inactive	List 1

## Time Zone

Generates a report that displays the Time Zones assigned from *Access Control > Access Group > Access Profile > Time Schedule*.

These time zones can be then assigned to the user Access Profile which will determine user access at the particular time.

## Sample Report

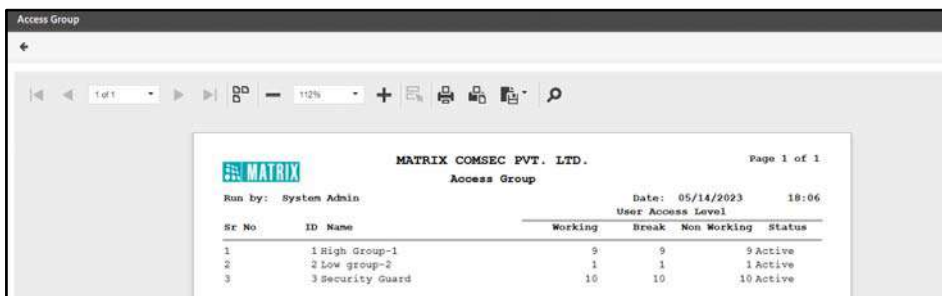


Sr No	ID Name	Start	End	Active Days	Status
1	TimeZone1	00:00	23:59	SUN, MON, TUE, WED, THU, FRI, SAT, Holiday	Active
2	TimeZone2	00:00	23:59	SUN	Active
3	TimeZone3	00:00	23:59	MON	Active
4	TimeZone4	00:00	23:59	TUE	Active
5	TimeZone5	00:00	23:59	WED	Active
6	TimeZone6	00:00	23:59	THU	Active
7	TimeZone7	00:00	23:59	FRI	Active
8	TimeZone8	00:00	23:59	FRI	Active
9	TimeZone9	00:00	23:59	SAT	Active
10	TimeZone10	00:00	23:59	Holiday	Active
11	TimeZone11	00:00	23:59	SUN, THU	Active
12	TimeZone12	00:00	23:59	MON, SAT	Active
13	TimeZone13	00:00	23:59	TUE, Holiday	Active
14	TimeZone14	00:00	23:59	WED, SAT	Active
15	TimeZone15	00:00	23:59	TUE, FRI	Active
16	TimeZone16	00:00	23:59	MON, THU	Active
17	TimeZone17	00:00	23:59	SUN, MON, THU, FRI	Active
18	TimeZone18	00:00	23:59	TUE, WED, SAT, Holiday	Active

## Groups

### Access Group

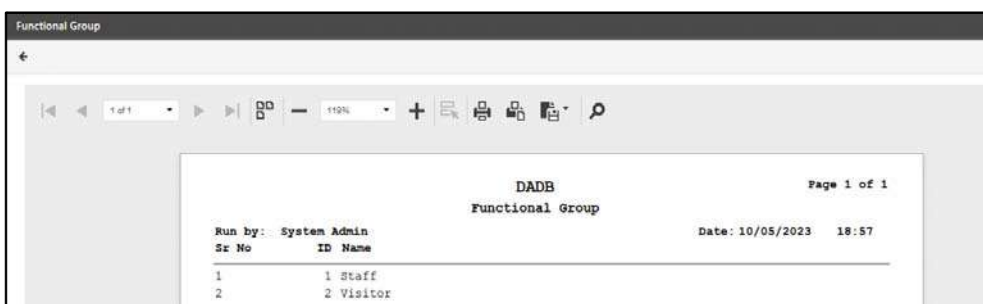
Generates a report of all the Access Groups defined from *Access Control > Access Group > Access Profile*. It also displays the user access level for working hours, break hours and non-working hours for the respective groups.



Sr No	ID Name	User Access Level			Status
		Working	Break	Non Working	
1	1 High Group-1	9	9	9	Active
2	2 Low group-2	1	1	1	Active
3	3 Security Guard	10	10	10	Active

### Functional Group

Generates a report that displays the Functional Groups created from *Access Control > Functional Group*.



Sr No	ID Name
1	1 Staff
2	2 Visitor

## 2-Person Groups

Generates a group-wise list of the members of all the 2- Person Groups.

2-Person Groups

MATRIX COMSEC PVT. LTD. Page 1 of 1

Run by: System Admin Date: 05/14/2023 18:22

2-Person Groups

Sr No	User ID	Name
<b>primary group</b>		
1	33	GOPAL TANK
<b>secondary group</b>		
1	306	MINESH SONI
2	422	Mukesh R Bhatt

## Access Group wise Time Zone

Generates an Access Group wise list of all the Time Zones as well as their Access level defined in the system.

## Access Group Selection

- **Select Access Groups:** Select the desired option— **All** or **Access Group-Wise**.
  - If you select **All**, the details of all the Access Groups will appear.
  - If you select **Access Group Wise**, click the **Access Group** picklist. The **Picklist For Access Group** pop-up appears.

Picklist For Access Group

Total Selected: 0 Records

Search Show Selected


<input type="checkbox"/>	ID ▲	Name
<input type="checkbox"/>	1	High Group-1
<input type="checkbox"/>	2	Low group-2
<input type="checkbox"/>	3	Security Guard

OK Cancel

- Select the desired check boxes from the list. Click **OK**.

- The selected Access Group appears in the grid.

ID	Name	Group
1	High Group-1	Access Group
2	Low group-2	Access Group

- You can delete the desired Access Group. To do so, click **Delete**  of the respective Access Group.

- Click **Generate Report**

## Sample Report

Sr No	ID	Name	Access Level	Status
1	2	z2	2	Active

## I/O Linking

### Input Port Group

This report provided a Panel wise list of the Input Port Groups defined in the system.

### Panel Selection

**Select Panels:** Select the desired option— **All** or **Panel-Wise**.

- If you select **All**, Input Port Group of all Panels will be included.

- If you select **Panel-Wise**, click **Panel** picklist. The **Picklist For Panel** pop-up appears.

Picklist For Panel

Total Selected: 0 Records

Search

Show Selected

<input type="checkbox"/>	ID ▲	Name
<input type="checkbox"/>	9	Panel
<input type="checkbox"/>	10	Panel 2
<input type="checkbox"/>	11	CC2
<input type="checkbox"/>	12	Panel200-Device-12
<input type="checkbox"/>	13	Panel
<input type="checkbox"/>	14	Panellite
<input type="checkbox"/>	15	Panel200-Device-15
<input type="checkbox"/>	16	Panel200

OK Cancel

- Select the desired check boxes from the list. Click **OK**.
- The selected Panel appears in the grid.

Input Port Group

Panel Selection

Select Panels: Panel-Wise

Panel\* ID Name

Search

ID	Name	Group ▲	
9	Panel	Panel	
10	Panel 2	Panel	

Generate Report

- You can delete the desired Panel. To do so, click **Delete** of the respective Panel.
- Click **Generate Report**.

## Sample Report.

Sr No	Group No.	Name	Mode
<b>Panel 1</b>			
1	1	Aux Input Group Source	Any one Active Port
2	2	ARGO_PANEL Door Force Open Source	DC_AUX_1_IN_ACTIVE Any one Active Port
3	3	ARGO_PANEL Fire Alarm Source	DC_DoorForceOpen Any one Active Port
		Panel 1	MC_AlarmInput
<b>Panel 2</b>			
1	1	Aux Input Group Source	Any one Active Port
2	2	Door Force Open Source	DC_AUX_1_IN_ACTIVE Any one Active Port
3	3	Fire Alarm Source	DC_DoorForceOpen Any one Active Port
		Panel 2	MC_AlarmInput

## Output Port Group

This report provided a PANEL wise listing of the Output Port Groups defined in the system.

### Panel Selection

**Select Panels:** Select the desired option — **All** or **Panel-Wise**.


- If you select **All**, Output Port Groups of all the Panels will be included.
- If you select **Panel-Wise**, click **Panel** picklist. The **Picklist For Panel** pop-up appears.

ID	Name
<input type="checkbox"/> 9	Panel
<input type="checkbox"/> 10	Panel 2
<input type="checkbox"/> 11	CC2
<input type="checkbox"/> 12	Panel200-Device-12
<input type="checkbox"/> 13	Panel
<input type="checkbox"/> 14	Panellite
<input type="checkbox"/> 15	Panel200-Device-15
<input type="checkbox"/> 16	Panel200

- Select the desired check boxes from the list. Click **OK**.

- The selected panel appears in the grid.

ID	Name	Group
10	Panel 2	Panel
11	CC2	Panel
12	Panel200-Device-12	Panel

- You can also delete the desired panels. To do so, click **Delete**  of the respective panel.
- Click **Generate Report**

Sample Report.

Sr No	Group No.	Name	Output Type	Pulse Time (Sec)
<b>Panel 2</b>				
1	1	DC Aux Ports	Pulse	10
2	2	Door Unlock	Pulse	10
3	3	Panel Output	Pulse	10
4	4	Panel Output	Pulse	10
5	5	Panel Output	Pulse	10
<b>CC2</b>				
1	1	DC Aux Ports	Pulse	10
2	2	Door Unlock	Pulse	10
3	3	Panel Output	Pulse	10
4	4	Panel Output	Pulse	10
5	5	Panel Output	Pulse	10
<b>Panel200-Device-12</b>				
1	1	DC Aux Ports	Pulse	10
2	2	Door Unlock	Pulse	10
3	3	Panel Output	Pulse	10
4	4	Panel Output	Pulse	10
5	5	Panel Output	Pulse	10
6	6	sadasdaad	Pulse	10

## Panels

The reports lists PANEL wise details of the I/O linkings defined in the system.

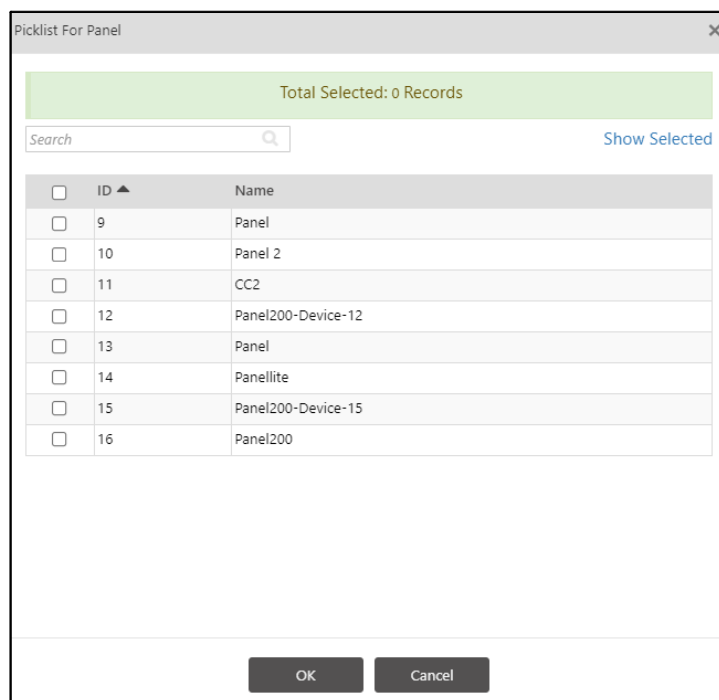
## Panels

**Select Panels:** Select the desired option— **All** or **Panel-Wise**.

- If you select **All**, I/O linkings for all the Panels will be included.



- If you select **Panel-Wise**, click Panel picklist. The **Picklist For Panel** pop-up appears.



Picklist For Panel

Total Selected: 0 Records

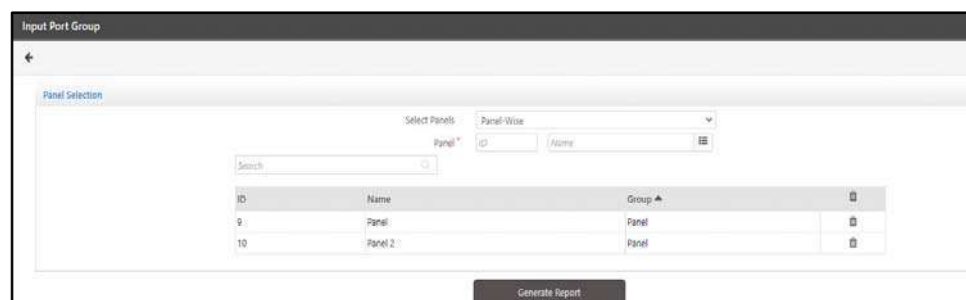
Search  [Show Selected](#)

<input type="checkbox"/>	ID ▲	Name
<input type="checkbox"/>	9	Panel
<input type="checkbox"/>	10	Panel 2
<input type="checkbox"/>	11	CC2
<input type="checkbox"/>	12	Panel200-Device-12
<input type="checkbox"/>	13	Panel
<input type="checkbox"/>	14	Panellite
<input type="checkbox"/>	15	Panel200-Device-15
<input type="checkbox"/>	16	Panel200

OK Cancel

Select the desired check boxes from the list. Click **OK**.

The selected panel appears in the grid.






Input Port Group

Panel Selection


Select Panels: Panel-Wise

Panel\* ID Name

Search

ID	Name	Group ▲	
9	Panel	Panel	
10	Panel 2	Panel	

Generate Report

- You can also delete the desired panel. To do so, click **Delete**  icon of the respective panel.

Click **Generate Report**.

## Sample Report

**Panels**

Back

1 of 1

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I/O Linking - Panels

Page 1 of 1

Run by: System Admin

Date: 06/18/2023 19:21

Sr No	Link No.	Name	Input Group	Output Group	Time Zone 1	Time Zone 2	Time Zone 3	Status
<b>Panel 1</b>								
1	1	Aux Linking	Aux Input Group	DC Aux Ports				Inactive
2	2	Force Open link	Door Force Open	Panel Output				Inactive
3	3	Fire-Unlock	Fire Alarm	Door Unlock				Inactive
<b>Panel 2</b>								
1	1	Aux Linking	Aux Input Group	DC Aux Ports				Inactive
2	2	Force Open link	Door Force Open	Panel Output				Inactive
3	3	Fire-Unlock	Fire Alarm	Door Unlock				Inactive
4	4	dasfasfsaf	Aux Input Group	DC Aux Ports	TimeZone11			Active
<b>CC2</b>								
1	1	Aux Linking	Aux Input Group	DC Aux Ports				Inactive
2	2	Force Open link	Door Force Open	Panel Output				Inactive
3	3	Fire-Unlock	Fire Alarm	Door Unlock				Inactive
<b>Panel200-Device-12</b>								
1	1	Aux Linking	Aux Input Group	DC Aux Ports				Inactive
2	2	Force Open link	Door Force Open	Panel Output				Inactive

## Direct Doors

The report enables you to generate a DIRECT DOOR wise list of the I/O linkings defined in the system.

### Direct Door Selection

**Select Direct Doors:** Select the desired option— **All**, or **Direct Door Wise**

- If you select **All**, it will include all the I/O linkings for all the Direct Door.
- If you select **Direct Door Wise**, click **Direct Door** picklist. The **Picklist For Direct Door** pop-up appears.

Picklist For Direct Door

Total Selected: 0 Records

Search

Show Selected

<input type="checkbox"/>	ID	Name
<input type="checkbox"/>	11	RnD Basement V2
<input type="checkbox"/>	12	RnD 2nd Flr V2
<input type="checkbox"/>	13	RnD Grnd Flr V2
<input type="checkbox"/>	16	Canteen HO
<input type="checkbox"/>	17	RnD 4th Flr
<input type="checkbox"/>	18	RnD Grnd W. less
<input type="checkbox"/>	19	HO Wireless
<input type="checkbox"/>	20	Test Door
<input type="checkbox"/>	21	RND GROUND FLOOR PVR
<input type="checkbox"/>	22	HO PVR

1 - 10 of 144 records


< < 1 2 3 ... 15 > >

OK Cancel

- Select the desired check boxes from the list. Click **OK**.

- The selected Direct Doors appear in the grid.

ID	Name	Group
11	RnD Basement V2	Direct Door
12	RnD 2nd Flr V2	Direct Door
13	RnD Grnd Flr V2	Direct Door

- You can delete the desired Direct Door. To do so, click **Delete**  of the respective Direct Door.
- Click **Generate Report**.

## Sample Report

Sr No	ID	Name	Input Group	Output Group	Output Type	Pulse Time (Sec)	Status
1	1		User Allowed	Aux. Output			InACTIVE
2	2		User Allowed	Door Relay			InACTIVE
3	3		User Denied	Aux. Output			InACTIVE
4	4		User Denied	Door Relay			InACTIVE
5	5	Emergency	Aux. Input	Aux. Output	Latch		InACTIVE
6	6		Aux. Input	Door Relay			InACTIVE
7	7		Intercom Panic	Aux. Output			InACTIVE
8	8		Intercom Panic	Door Relay			InACTIVE
9	9		Zone Empty	Aux. Output			InACTIVE
10	10		Zone Empty	Door Relay			InACTIVE
11	11		Duress	Aux. Output			InACTIVE
12	12		Duress	Door Relay			InACTIVE

## User Access

### First In User

This report provides a list of all the first in users.

### First IN User Group Selection

**Select First in-User Group:** Select the desired option— **All** or **First IN User Group Wise**.

- If you select **All**, to include all the First IN Users Group Wise.

- If you select **First IN User Group Wise**, click the **First In User** picklist. The **Picklist For First In User** pop- up appears.

Picklist For First In User

Total Selected: 0 Records

Search  [Show Selected](#)

<input type="checkbox"/>	ID ▲	Name
<input type="checkbox"/>	1	List 1
<input type="checkbox"/>	2	List 2
<input type="checkbox"/>	3	List 3
<input type="checkbox"/>	4	List 4

OK Cancel

- Select the check boxes of the desired users. Click **OK**
- The selected First In Users appear in the grid

Select First In User Group First In User Group Wise

First In User ID Name

Search

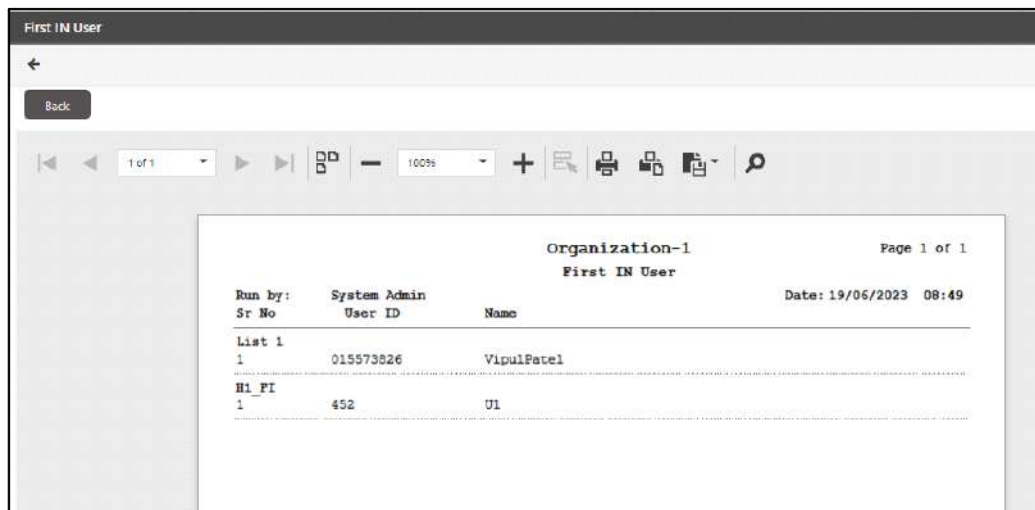
ID	Name	Group ▲	
1	List 1	First In User	
2	List 2	First In User	

Generate Report For All Users

Generate Report

- You can also delete the desired First IN User, To do so, click **Delete** of the respective First IN User.
- **Generate Report For:** Select the desired option— **All Users**, **Active Users** or **Inactive User**.
- Click **Generate Report**.

## Sample Report



Organization-1			Page 1 of 1
First IN User			
Run by:	System Admin		Date: 19/06/2023 08:49
Sr No	User ID	Name	
List 1			
1	015573826	VipulPatel	
H1_FI			
1	452	U1	

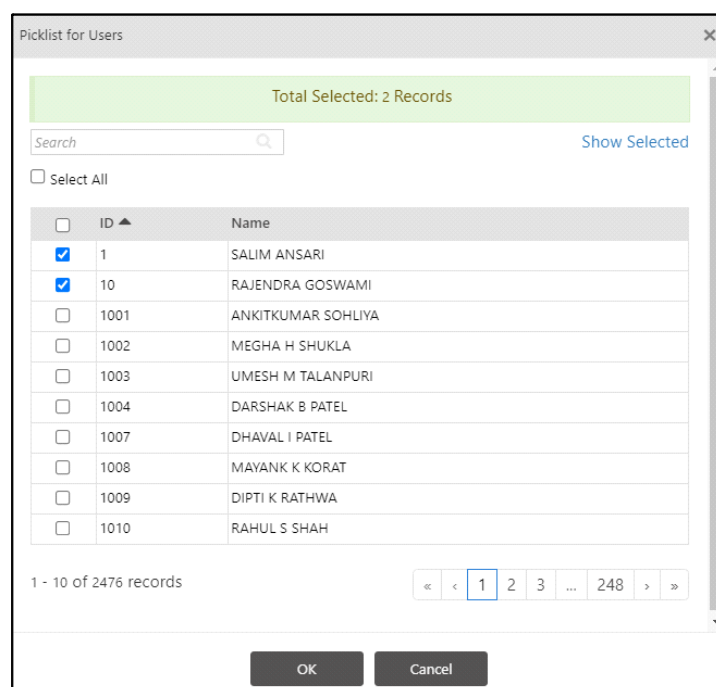
## Zones Accessed By User

This report provides a zone wise list of users who have entered an Access Zone.

- **Date:** Select the to and from date for which the report is to be generated.

## User Selection

- **Select User:** Select the desired option— **All**, **User Wise** or **Group Wise**.
- If you select **User Wise** click the **User** picklist. The **Picklist For User** pop-up appears.



ID	Name
1	SALIM ANSARI
10	RAJENDRA GOSWAMI
1001	ANKITKUMAR SOHLIYA
1002	MEGHA H SHUKLA
1003	UMESH M TALANPURI
1004	DARSHAK B PATEL
1007	DHAVAL I PATEL
1008	MAYANK K KORAT
1009	DIPTI K RATHWA
1010	RAHUL S SHAH

- You can select particular users or all the users at once.

To select particular users, select the check boxes of the desired users.

**OR**


To select all the users at once, select the **Select All** check box.

Click **OK**.

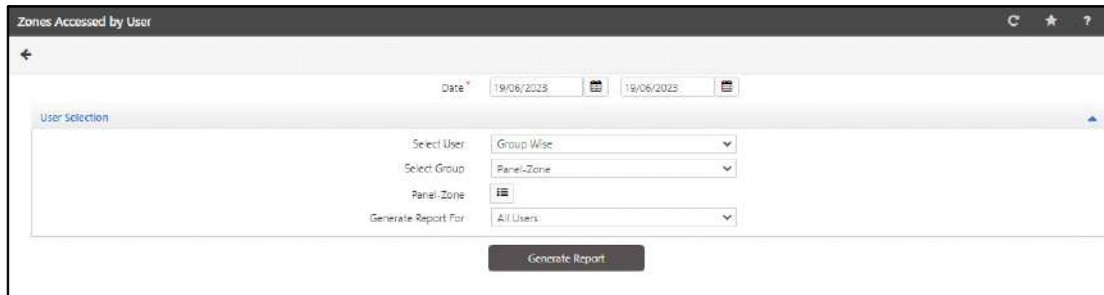
- The selected users appear in the grid.



ID	Name
1	SALIM ANSARI
10	RAJENDRA GOSWAMI
1001	ANKITKUMAR SOHLIYA
1002	MEGHA H SHUKLA
SwapnaT	Swapna

- You can also delete the desired User. Click **Delete**  of the respective user.
- If you select **Group Wise** option, select the desired enterprise group — Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1(Association Maps), Custom Group/2/3.

For each enterprise group — Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1(Association Maps) Custom Group 2/3 as well as Panel-Zone, click the corresponding picklist to select the desired option/s.



- Click the **Panel-Zone** picklist. The **Picklist For Panel-Zone** pop-up appears.

Picklist For Panel-Zone

Total Selected: 0 Records

Search  Show Selected

<input type="checkbox"/>	ID ▲	Panel Name	ID	Zone Name
<input type="checkbox"/>	12	Panel200-142	1	Zone-1
<input type="checkbox"/>	13	Panel200-Device-13	1	Zone-1
<input type="checkbox"/>	14	Panel200-Device-14	1	Zone-1
<input type="checkbox"/>	15	Panel200-Device-15	1	Zone-1
<input type="checkbox"/>	17	Panel200-Device-227	1	Zone-1
<input type="checkbox"/>	18	Panel200-Device-18	1	Zone-1
<input type="checkbox"/>	19	Panel200-55-JK	1	Zone-1
<input type="checkbox"/>	4	Panel200-Device-171	1	Zone-1
<input type="checkbox"/>	5	Panel200-Device-5	1	Zone-1
<input type="checkbox"/>	6	Panel200-222	1	Zone-1

1 - 10 of 12 records

« < 1 2 > »

OK Cancel

- Select the check boxes of the desired panel zones. Click **OK**.
- The selected Zones appear in the grid.

User Selection

Select User: Group Wise  
Select Group: Panel-Zone  
Panel-Zone: 10 Selected

Search

ID	Name	Group	
12   1	Panel200-142   Zone-1	Panel-Zone	
13   1	Panel200-Device-13   Zone-1	Panel-Zone	
14   1	Panel200-Device-14   Zone-1	Panel-Zone	
15   1	Panel200-Device-15   Zone-1	Panel-Zone	
17   1	Panel200-Device-227   Zone-1	Panel-Zone	

1 - 5 of 10 records

« < 1 2 > »

Generate Report For: All Users

Generate Report

- You can also delete particular Zone. Click **Delete** of the respective Zone.
- If you select **All**, then all users will be selected.
- Generate Report For:** Select the desired option— **All User**, **Active User**, **Inactive User**.
- Click **Generate Report**.

## Sample Report

**Zones Accessed by User**

Back

MATRIX COMSEC PVT. LTD. Page 1 of 1

Zones Accessed by User From 05/14/2020 To 05/14/2023

Run by: System Admin Date: 05/14/2023 22:26

Sr No	User ID	Name	Date	In	Out	Duration
<b>Panel200-Device-15</b>						
<b>Zone-1</b>						
1	SwapnaT	Swapna	04/06/2023	16:30		
2	SwapnaT	Swapna	04/06/2023	16:30		
3	SwapnaT	Swapna	04/06/2023	16:30		
4	SwapnaT	Swapna	04/06/2023	16:30		
5	SwapnaT	Swapna	04/06/2023	16:31		
6	SwapnaT	Swapna	04/06/2023	16:31		
7	SwapnaT	Swapna	04/06/2023	16:32		
8	SwapnaT	Swapna	04/06/2023	16:32		
9	SwapnaT	Swapna	04/06/2023	16:32		
10	SwapnaT	Swapna	04/06/2023	16:32		
11	SwapnaT	Swapna	04/06/2023	16:33		

## 2-Person Access

This report provides a list of 2 person access records.

- **Date:** Select the to and from date for which the report is to be generated.

## Door Selection

- **Select Doors:** Select the desired option— **All** or **Door-Wise**.
  - If you select **All**, it will include all the details of the 2 Person Accessed devices.
  - If you select **Door-Wise**, click the **Door** picklist. The **Picklist For Door** pop-up appears.

Picklist For Door

Total Selected: 2 Records

Search [Show Selected](#)

<input type="checkbox"/>	ID ▲	Name
<input checked="" type="checkbox"/>	1	RnD1 Canteen1 ARGO
<input checked="" type="checkbox"/>	2	RnD1 2nd FLR Server Room VEGA
<input type="checkbox"/>	3	RnD1 4th FLR Server Room VEGA
<input type="checkbox"/>	4	RnD1 GF TRIPOD RIGHT IN
<input type="checkbox"/>	5	RnD1 Integra ARGO
<input type="checkbox"/>	6	RnD1 Basement Tripod Entry PVR
<input type="checkbox"/>	7	RnD1 4th Floor FB VEGA OUT
<input type="checkbox"/>	8	RnD1 4th Floor FB VEGA IN
<input type="checkbox"/>	10	Factory Admin FMX
<input type="checkbox"/>	11	HO TA ARGO

1 - 10 of 105 records


« < 1 2 3 ... 11 > »

OK Cancel

- Select the desired check boxes from the list. Click **OK**.



- The selected doors appear in the grid.

- You can delete the desired door. To do so, click **Delete**  of the respective door.
- **Generate Report For:** Select the desired option — **All Visitors, Active Visitors, Inactive Visitors.**
- Click **Generate Report**.

## Sample Report

Run by:	Sr No	Date-Time	User ID	Name	Group	Department	Date	Designation
System Admin	1	05/05/2022 00:27:09	RI2	Reporting Incharge2	Primary	Department-1	15/05/2023	23:46
	2	05/05/2022 00:27:09	test1	Reporting Incharge2	Primary	Department-1		
	3	05/05/2022 00:27:39	RI2	Reporting Incharge2	Primary	Department-1		
	4	05/05/2022 00:27:39	test1	Reporting Incharge2	Primary	Department-1		

## Zone-Wise Who Is In

Generates a list that displays the count and details of users who are inside a particular zone.

## Optional Parameter

- **Consider Last IN only:** Select this check box if you wish to consider the Last IN users only.

## Panel Zone Selection

- **Select Panel-Zone:** Select the desired option— **All or Selected.**
- If you select **All**, all the panel zones will be selected.

- If you select **Selected**, you can select particular panel zone or can select all the panel zones at once.
- To select particular panel zones, select the check boxes of the desired panel zones.

ID	Panel Name	ID	Zone Name
10	Panel 2	1	Zone-1
11	CC2	1	Zone-1
12	Panel200-Device-12	1	Zone-1
13	Panel	1	Zone-1
14	Panelite	1	Zone-1

OR

- To select all panel zones at once, select the **Select All** check box.

ID	Panel Name	ID	Zone Name
10	Panel 2	1	Zone-1
11	CC2	1	Zone-1
12	Panel200-Device-12	1	Zone-1
13	Panel	1	Zone-1
14	Panelite	1	Zone-1

- Click **Generate Report**.

## Sample Report

Run by:	Zone No.	Name	Panel Name	Date:	Who Is In Count
System Admin	2	Zone2	Panel200-Device-1	29/08/2023 15:43	2

## Access Route- Wise Who Is In

Generates a list that displays the count and details of users who have entered the last access level in access route.

## Access Route Selection

- **Select Access Route:** Select the desired option— All or Selected.
- If you select **All**, all Access Routes will be selected.
- If you select **Selected**, Access Routes created appear in the grid.

Select Access Route: Selected

Search

☐ Select All

ID	Panel Name	ID	Access Route Name
9	Panel	1	AR_1
9	Panel	10	AR_10
9	Panel	11	AR_11
9	Panel	2	AR_2
9	Panel	3	AR_3

1 - 5 of 11 records

Generate Report

- You can either select particular Access Routes or can select all the Access Routes at once.
- To select particular Access Routes, select the check boxes of the desired Access Routes.

Select Access Route: Selected

Search

☐ Select All

ID	Panel Name	ID	Access Route Name
<input checked="" type="checkbox"/> 9	Panel	1	AR_1
<input checked="" type="checkbox"/> 9	Panel	10	AR_10
<input type="checkbox"/> 9	Panel	11	AR_11
<input type="checkbox"/> 9	Panel	2	AR_2
<input type="checkbox"/> 9	Panel	3	AR_3

1 - 5 of 11 records

Generate Report

OR

- To select all the Access Routes at once, select the **Select All** check box.

Select Access Route: Selected

Search

☒ Select All

ID	Panel Name	ID	Access Route Name
<input checked="" type="checkbox"/> 9	Panel	1	AR_1
<input checked="" type="checkbox"/> 9	Panel	10	AR_10
<input checked="" type="checkbox"/> 9	Panel	11	AR_11
<input checked="" type="checkbox"/> 9	Panel	2	AR_2
<input checked="" type="checkbox"/> 9	Panel	3	AR_3

1 - 5 of 11 records

Generate Report

- Click **Generate Report**.

## Smart Access Route- Wise Who Is In

Generates a list showing count and details of users who have entered the last access level in smart access route.

## Smart Access Route Selection

- **Select Smart Access Route:** Select the desired option— **All** or **Smart Access Route Wise**

- If you select **All**, all the Smart Access Routes will be selected.
- If you select **Smart Access Route Wise**, click **ARID** picklist. The **Picklist For ARID** pop up appears.

Picklist For ARID

Total Selected: 0 Records

Search

Show Selected

<input type="checkbox"/>	ID ▲	Name
<input type="checkbox"/>	1	SAR-1
<input type="checkbox"/>	2	SAR-2
<input type="checkbox"/>	3	SAR-3
<input type="checkbox"/>	4	SAR-4
<input type="checkbox"/>	5	SAR-5
<input type="checkbox"/>	6	SAR-6
<input type="checkbox"/>	7	SAR-7
<input type="checkbox"/>	8	SAR-8
<input type="checkbox"/>	9	SAR-9
<input type="checkbox"/>	10	SAR-10

1 - 10 of 11 records

« < 1 2 > »

OK Cancel

- Select the desired check boxes from the list. Click **OK**.
- The selected ARID appear in the grid.

Select Smart Access Route

Smart Access Route Wise

ARID \* ID Name

Search

ID	Name	Group ▲	
1	SAR-1	ARID	
2	SAR-2	ARID	
3	SAR-3	ARID	

Generate Report

You can delete the desired Smart Access Route. To do so, click **Delete** of the desired Smart Access Route.

## Assigned Device

This report provided a list a devices that can be accessed by the selected user.

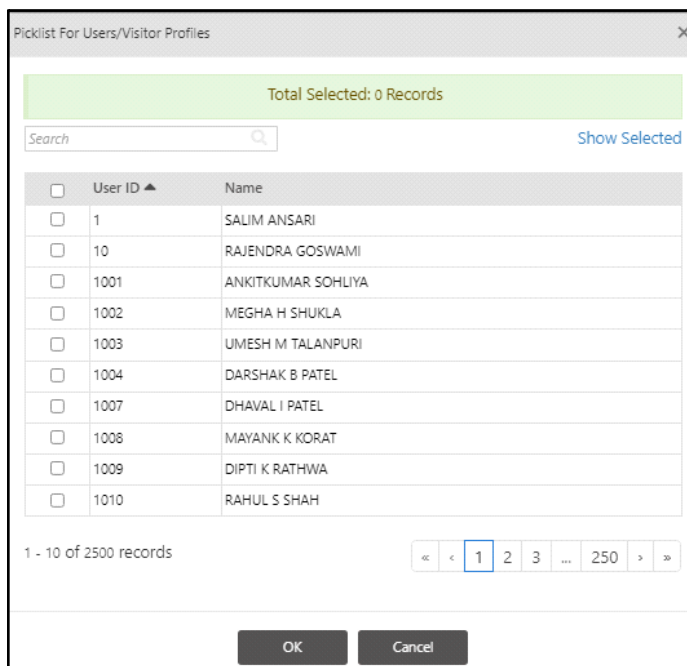
## Optional Parameter

- **Group By:** Select the desired enterprise group from the drop-down list — Organization, Branch, Department, Section, Category, Grade, Designation, Custom group 1 (Association Maps), Custom Group 2/3.

- **Organization Name in Header As Per:** Select the desired option — **User Selection** or **Customized Selection**.
- If you select **Customized Selection**, click on **Customize Report Header**.
- You can select the desired option from the drop down list or can also add a new header according to your choice.

## User Selection

- **Select User:** Select the desired option— **User-Wise**, **Group-Wise** or **ALL**
  - If you select **User Wise**, click the **User** picklist. The **Picklist For Users/Visitor Profiles** pop-up appears.



Picklist For Users/Visitor Profiles

Total Selected: 0 Records

Search  [Show Selected](#)

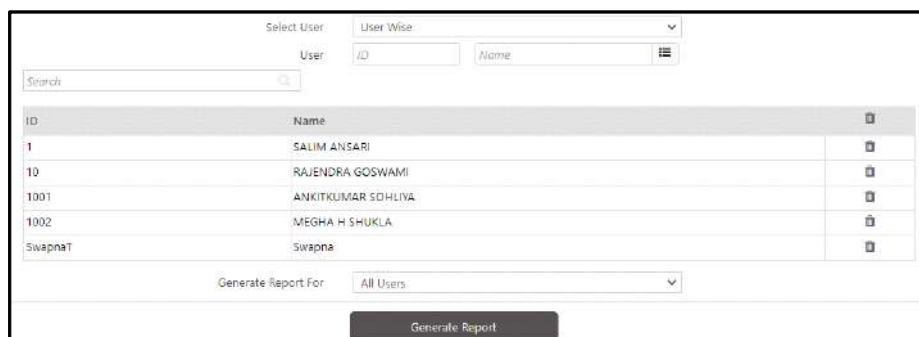
<input type="checkbox"/>	User ID ▲	Name
<input type="checkbox"/>	1	SALIM ANSARI
<input type="checkbox"/>	10	RAJENDRA GOSWAMI
<input type="checkbox"/>	1001	ANKITKUMAR SOHLIYA
<input type="checkbox"/>	1002	MEGHA H SHUKLA
<input type="checkbox"/>	1003	UMESH M TALANPURI
<input type="checkbox"/>	1004	DARSHAK B PATEL
<input type="checkbox"/>	1007	DHAVAL I PATEL
<input type="checkbox"/>	1008	MAYANK K KORAT
<input type="checkbox"/>	1009	DIPTI K RATHWA
<input type="checkbox"/>	1010	RAHUL S SHAH

1 - 10 of 2500 records

« < 1 2 3 ... 250 > »

Select the check boxes of the desired users. Click **OK**.

The selected users appears in the grid.



Select User: User Wise

User:  ID:  Name:

Search

ID	Name	
1	SALIM ANSARI	
10	RAJENDRA GOSWAMI	
1001	ANKITKUMAR SOHLIYA	
1002	MEGHA H SHUKLA	
Swapnat	Swapna	

Generate Report For: All Users

You can also delete the desired User. Click **Delete**  of the respective user.

- If you select **Group Wise** option, select the desired enterprise group — Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1(Association Maps), Custom Group2/3.

For each enterprise group — Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1(Association Maps) Custom Group 2/3, click the corresponding picklist to select the desired option/s.

Picklist For Organization

Total Selected: 2 Records

Search  [Show Selected](#)

<input type="checkbox"/>	ID ▲	Name
<input checked="" type="checkbox"/>	1	MATRIX COMSEC PVT. LTD.
<input checked="" type="checkbox"/>	2	SAMARTH
<input type="checkbox"/>	3	AVDHOOT
<input type="checkbox"/>	4	ELSENGARD
<input type="checkbox"/>	5	TECH SERVICES
<input type="checkbox"/>	6	CONSULTANT
<input type="checkbox"/>	7	CANTEEN
<input type="checkbox"/>	8	APPRENTICE
<input type="checkbox"/>	9	TRAINEE
<input type="checkbox"/>	10	or10

1 - 10 of 13 records

« < 1 2 > »

OK Cancel

The selected Groups appear in the grid. You can also delete particular Groups. Click **Delete** of the respective Group.

- If you select **All**, then all users will be selected.
- **Generate Report For:** Select the desired option— **All User, Active User, Inactive User**.
- Click **Generate Report**.

## Sample Report

Assigned Devices

Back

1 of 1 100% +

MATRIX COMSEC PVT. LTD. Page 1 of 1

Organization-Wise Assigned Devices

Run by: System Admin  
Panel/Door Name

Panel/Door Name	MID	DID	Device Type	Status	Assignment Type	Details
MATRIX COMSEC PVT. LTD.						
Swagat-Swagat						
Panel200-Device-15	15	0	Panel200 Door	Active	Home Zone	1-Zone-1
ARC_DC_176_PD	15	1	Panel200 Door	Active	Home Zone	1-Zone-1
VEGA_105_PD	15	2	Panel200 Door	Active	Home Zone	1-Zone-1
ARGO_236_PD	15	3	Panel200 Door	Active	Home Zone	1-Zone-1
PATHV2_115_PD	15	4	Panel200 Door	Active	Home Zone	1-Zone-1
ARGO_FACE_170_PD	15	5	Panel200 Door	Active	Home Zone	1-Zone-1
GATE_CONTROLLER_227_PD	15	6	Panel200 Door	Active	Home Zone	1-Zone-1

## Guard

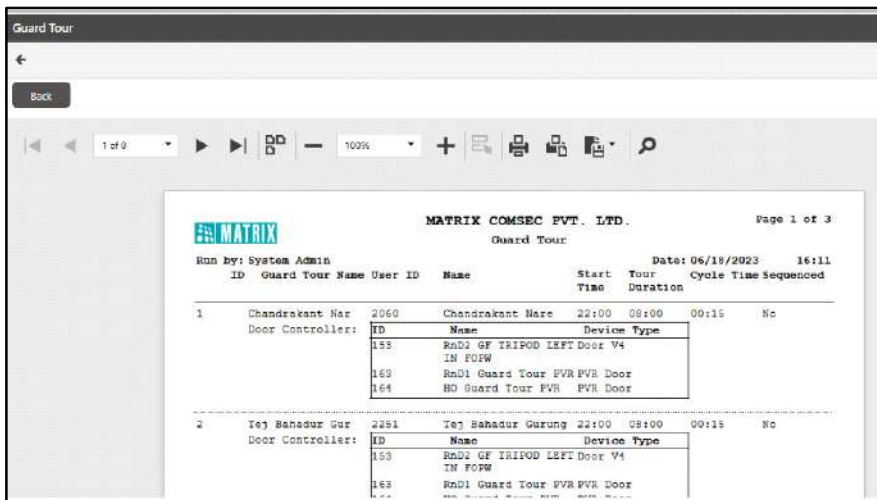
### Guard Tour

This report provides a list of the Guard Tours defined in the system.

**ID Range:** Configure the Start and End ID.

Click **Generate Report**.

### Sample Report



The screenshot shows a web application interface for 'Guard Tour'. It includes a 'Back' button, a navigation bar with '1 of 9' and various icons, and a report area. The report is titled 'MATRIX COMSEC PVT. LTD. Guard Tour' and is 'Page 1 of 3'. It was 'Run by: System Admin' on 'Date: 06/18/2023' at '16:11'. The report contains two main entries, each with a table of details.

ID	Guard Tour Name	User ID	Name	Start Time	Tour Duration	Cycle Time	Sequenced
1	Chandrasekhar Nare	2060	Chandrasekhar Nare	22:00	08:00	00:15	No
Door Controller:							
ID	Name	Device	Type				
153	RND2 GF TRIPOD LEFT Door V4	IN FOFW					
163	RND1 Guard Tour PVR PVR Door						
164	NO Guard Tour PVR PVR Door						
2	Tej Bahadur Gurung	2251	Tej Bahadur Gurung	22:00	08:00	00:15	No
Door Controller:							
ID	Name	Device	Type				
153	RND2 GF TRIPOD LEFT Door V4	IN FOFW					
163	RND1 Guard Tour PVR PVR Door						

### Tour Details

This report provides a list of the Guard Tours details as defined in the system.

Configure the Optional Parameters and Tour Selection in Tour details as shown below.

- **Date:** Select the to and from date for which the report is to be generated.

### Optional Parameter

- **Format Selection:** Select the desired option—**Format 1** or **Format 2**.



*Format 1 can be generated when there are upto 8 devices in the tour only. If there are more than 8 devices this report will not be generated (error "No Data Found" will be displayed).*

*Format 2 does not have any dependency on number of devices.*

### Tour Selection

- **Select Tour:** Select the desired option—**All** or **Tour-Wise**.
- If you select All, click Generate Report. All the details regarding the Tour Guard will be generated.

- If you select **Tour-Wise**, click **Tour** picklist. The **Picklist For Tour** pop-up appears.

Picklist For Tour

Total Selected: 0 Records

Search  [Show Selected](#)

<input type="checkbox"/>	ID ▲	Name
<input type="checkbox"/>	1	Chandrakant Nar
<input type="checkbox"/>	2	Tej Bahadur Gur
<input type="checkbox"/>	3	Prakash K Gurkh
<input type="checkbox"/>	4	Shreekumar Pand
<input type="checkbox"/>	5	Paresh Raval
<input type="checkbox"/>	6	Rajkumar
<input type="checkbox"/>	7	Mehul D Surani
<input type="checkbox"/>	8	Jitendra Rohit
<input type="checkbox"/>	9	Sameer Mansuri
<input type="checkbox"/>	10	Jitesh L Patel

1 - 10 of 24 records

« < 1 2 3 > »

OK Cancel

- Select the desired check boxes from the list. Click **OK**.
- The selected Tours appear in the grid.

Select Tour  Tour Wise

Tour \*  ID  Name

Search

ID	Name	Group ▲	
1	Chandrakant Nar	Tour	
2	Tej Bahadur Gur	Tour	
3	Prakash K Gurkh	Tour	
4	Shreekumar Pand	Tour	

Generate Report

- You can delete the desired Tour. To do so, click **Delete** of the respective Tour.
- Click **Generate Report**.



## Sample Report

**Guard Tour Details Report** From 05/14/2023 To 05/14/2023

Run by: System Admin Date: 05/14/2023 23:51

Page 3 of 4

Tour Details	Cycle No.	Start Time	End Time	Device1 No. of TOUR FID	Device2 No. of TOUR FID	Device3 No. of TOUR FID	Device4	Device5	Device6	Device7	Device8	Verdict
Tour ID: 3	1	22:00	22:15									FAIL
Date: 05/14/2023	2	22:15	22:30									FAIL
Tour Period: 22:00-04:00	3	22:30	22:45									FAIL
No. of	4	22:45	23:00									FAIL
Devices	5	23:00	23:15									FAIL
Guard ID: 811	6	23:15	23:30									FAIL
Name: Prakash K	7	23:30	23:45									FAIL
Sutika	8	23:45	00:00									FAIL
Sequential: No	9	00:00	00:15									FAIL
	10	00:15	00:30									FAIL
	11	00:30	00:45									FAIL
	12	00:45	01:00									FAIL
	13	01:00	01:15									FAIL
	14	01:15	01:30									FAIL
	15	01:30	01:45									FAIL
	16	01:45	02:00									FAIL
	17	02:00	02:15									FAIL
	18	02:15	02:30									FAIL
	19	02:30	02:45									FAIL
	20	02:45	03:00									FAIL
	21	03:00	03:15									FAIL
	22	03:15	03:30									FAIL
	23	03:30	03:45									FAIL
	24	03:45	04:00									FAIL
	25	04:00	04:15									FAIL
	26	04:15	04:30									FAIL
	27	04:30	04:45									FAIL
	28	04:45	05:00									FAIL
	29	05:00	05:15									FAIL
	30	05:15	05:30									FAIL
	31	05:30	05:45									FAIL
	32	05:45	06:00									FAIL

## Access Route Master

This report displays the details of Panel200, Access Route assigned to the Panel200 along with Devices in the Access Route.

### Optional Parameter

- Select the **New Page for Each Panel** check box if the Access Routes for each Panel is to be displayed on a new separate page.

**Access Route Master**

Optional Parameters

New Page For Each Panel ☐

Access Route Selection

Select Panel

Panel

Search

ID	Name	
3	Panel Lite V2	
4	Panel Lite	

Select Access Route

Generate Report

### Access Route Selection

- Select Panel:** Select the desired option — **All**, or **Panel Wise**.
- If you select **All**, the details of the all the Access Route will be included.

- If you select **Panel Wise**, click the **Panel** picklist. The **Picklist For Panel Masters** pop-up appears.

Picklist For Panel Masters

Total Selected: 0 Records

Search  [Show Selected](#)

☐ Select All

<input type="checkbox"/>	ID ▲	Name
<input type="checkbox"/>	9	Panel
<input type="checkbox"/>	10	panel 2
<input type="checkbox"/>	11	CC2
<input type="checkbox"/>	12	Panel200-Device-12
<input type="checkbox"/>	13	Panel
<input type="checkbox"/>	14	PanelLite
<input type="checkbox"/>	15	Panel200-Device-15
<input type="checkbox"/>	16	Panel200

OK Cancel

- You can either select particular Panel or can select all the Panels at once.
- To select particular Panels, select the check boxes of the desired Panels.

Picklist For Panel Masters

Total Selected: 2 Records

Search  [Show Selected](#)

☐ Select All

<input type="checkbox"/>	ID ▲	Name
<input checked="" type="checkbox"/>	9	Panel
<input checked="" type="checkbox"/>	10	panel 2
<input type="checkbox"/>	11	CC2
<input type="checkbox"/>	12	Panel200-Device-12
<input type="checkbox"/>	13	Panel
<input type="checkbox"/>	14	PanelLite
<input type="checkbox"/>	15	Panel200-Device-15
<input type="checkbox"/>	16	Panel200

OK Cancel

**OR**

- To select all the Panels, select the **Select All** check box. The Panel on all the pages will be selected.

Picklist For Panel Masters

Total Selected: 8 Records

Search  Show Selected

☒ Select All

<input checked="" type="checkbox"/>	ID ▲	Name
<input checked="" type="checkbox"/>	9	Panel
<input checked="" type="checkbox"/>	10	panel 2
<input checked="" type="checkbox"/>	11	CC2
<input checked="" type="checkbox"/>	12	Panel200-Device-12
<input checked="" type="checkbox"/>	13	Panel
<input checked="" type="checkbox"/>	14	Panellite
<input checked="" type="checkbox"/>	15	Panel200-Device-15
<input checked="" type="checkbox"/>	16	Panel200

OK Cancel

- Click **OK**.

All the selected Panels appear in the grid.

Access Route Selection

Select Panel: Panel Wise

Panel \* ID Name

Search

ID ▲	Name	
9	Panel	
10	panel 2	
11	CC2	
12	Panel200-Device-12	

Select Access Route: All

Generate Report

You can also delete the desired Panels. To do so, click **Delete** icon of the respective Panel.

- **Select Access Route:** Select the desired option — **All**, or **Access Route Wise**.
- If you select **All**, click **Generate Report**. All the details regarding the Access Route-Wise will be generated.

- If you select **Access Route Wise**, click the **Access Route** picklist. The **Picklist for Access Route** pop-up appears.

Picklist for Access Route

Total Selected: 0 Records

Search  [Show Selected](#)

☐ Select All

<input type="checkbox"/>	ID ▲	Access Route Name	Panel Name
<input type="checkbox"/>	1	AR_1	Panel
<input type="checkbox"/>	2	AR_2	Panel
<input type="checkbox"/>	3	AR_3	Panel
<input type="checkbox"/>	4	AR_4	Panel
<input type="checkbox"/>	5	AR_5	Panel
<input type="checkbox"/>	6	AR_6	Panel
<input type="checkbox"/>	7	AR_7	Panel
<input type="checkbox"/>	8	AR_8	Panel
<input type="checkbox"/>	9	AR_9	Panel
<input type="checkbox"/>	10	AR_10	Panel

1 - 10 of 11 records

OK Cancel

- You can either select particular Access Route or can select all the Access Route at once.
- To select particular Access Route, select the check boxes of the desired Access Route.

Picklist For Panel Masters

Total Selected: 2 Records

Search  [Show Selected](#)

☐ Select All

<input type="checkbox"/>	ID ▲	Name
<input checked="" type="checkbox"/>	9	Panel
<input checked="" type="checkbox"/>	10	panel 2
<input type="checkbox"/>	11	CC2
<input type="checkbox"/>	12	Panel200-Device-12
<input type="checkbox"/>	13	Panel
<input type="checkbox"/>	14	Panellite
<input type="checkbox"/>	15	Panel200-Device-15
<input type="checkbox"/>	16	Panel200

OK Cancel

**OR**

- To select all the Access Routes, select the **Select All** check box. The Access Route on all the pages will be selected.

Picklist for Access Route

Total Selected: 11 Records

Search  Show Selected

☒ Select All

<input checked="" type="checkbox"/>	ID ▲	Access Route Name	Panel Name
<input checked="" type="checkbox"/>	1	AR__1	Panel
<input checked="" type="checkbox"/>	2	AR__2	Panel
<input checked="" type="checkbox"/>	3	AR__3	Panel
<input checked="" type="checkbox"/>	4	AR__4	Panel
<input checked="" type="checkbox"/>	5	AR__5	Panel
<input checked="" type="checkbox"/>	6	AR__6	Panel
<input checked="" type="checkbox"/>	7	AR__7	Panel
<input checked="" type="checkbox"/>	8	AR__8	Panel
<input checked="" type="checkbox"/>	9	AR__9	Panel
<input checked="" type="checkbox"/>	10	AR__10	Panel

1 - 10 of 11 records

« < 1 2 > »

OK Cancel

- Click **OK**.
- All the selected Access Routes appear in a grid.

Select Panel: All

Select Access Route: Access Route Wise

Access Route: ID: Name:

Search:

ID ▲	Access Route Name	Panel Name	
1	AR__1	Panel	
2	AR__2	Panel	
3	AR__3	Panel	
4	AR__4	Panel	

Generate Report

- You can also delete the desired Access Routes. To do so, click **Delete** of the respective Access Route.

Click **Generate Report**.

## Sample Report

S# No	DID	Device Name	Type	Access Level
<b>1-Panel1-Panel200</b>				
1	1	ARGO_PANEL	ARGO	1
<b>2-AR_1-Non Sequence</b>				
1	2	DoorV3	Door V3	1
<b>3-AR_2-Non Sequence</b>				
1	3	DOORV4_PANEL	Door V4	1
<b>4-AR_3-Non Sequence</b>				
1	4	PATV2_PANEL	Path V2	1

## Elevator Access Control

### Elevator Access Report

This report displays the list of users accessing Elevators based on Date and Time filters. Configure the following parameters to generate the report:

- **Date:** Select the start and end date for which the report is to be generated.
- **Time:** Select the start and end time for which the report is to be generated.

### Optional Parameters

- **Format Selection:** Select the desired option — **Elevator Wise User Access**, or **User-Wise Elevator Access**.
- If you select **User-Wise Elevator Access**, configure **Organization Name in Header As Per**.
- **Organization Name in Header As Per:** Select the desired option — User Selection, or Customized Selection.

If you select **Customized Selection**, click on **Customized Report Header**.

You can select the desired option from the drop down list or can also add header according to your choice.

### Filter

If you have selected **User-Wise Elevator Access** as the Format, then click on Select User.

- **Select Users:** Select the desired option — **All**, **Group Wise**, or **User Wise**.

- If you select **User Wise**, click the **User** picklist. The **Picklist For Users/Visitor Profiles** pop-up appears.

Picklist For Users/Visitor Profiles

Total Selected: 0 Records

Search  Show Selected

<input type="checkbox"/>	User ID ▲	Name
<input type="checkbox"/>	1	SALIM ANSARI
<input type="checkbox"/>	10	RAJENDRA GOSWAMI
<input type="checkbox"/>	1001	ANKITKUMAR SOHLIYA
<input type="checkbox"/>	1002	MEGHA H SHUKLA
<input type="checkbox"/>	1003	UMESH M TALANPURI
<input type="checkbox"/>	1004	DARSHAK B PATEL
<input type="checkbox"/>	1007	DHAVAL I PATEL
<input type="checkbox"/>	1008	MAYANK K KORAT
<input type="checkbox"/>	1009	DIPTI K RATHWA
<input type="checkbox"/>	1010	RAHUL S SHAH

1 - 10 of 2497 records

« < 1 2 3 ... 250 > »

OK Cancel

- Select the desired check boxes from the list. Click **OK**.
- The selected Users appear in the grid.

Select Users User Wise


User \* ID Name

Search

User ID ▲	Name	
1	SALIM ANSARI	
10	RAJENDRA GOSWAMI	
1001	ANKITKUMAR SOHLIYA	
1002	MEGHA H SHUKLA	

Generate Report For All Users

Generate Report

- You can also delete the desired user. To do so, click **Delete**  of the respective user.
- If you select **Group Wise**, select the desired enterprise group from the **Select Group** drop-down list—Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1/2/3.

For each enterprise group — Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1/2/3, click the corresponding picklist to select the desired option/s.

The selected groups appear in the grid.

Select Users

Group Wise

Select Group

Organization

Organization \*

ID

Name


Search

ID	Name	Group	
1	MATRIX COMSEC PVT. LTD.	Organization	
2	SAMARTH	Organization	
3	AVDHOOT	Organization	
4	ELSENGARD	Organization	

Generate Report For

All Users

Generate Report

You can also delete the desired groups. To do so, click **Delete**  of the respective group.

- If you select **All**, then All User will be selected.
- Click **Generate Report**.

Sample Report.

Elevator Access Report

Back

DADB

Page 2 of 3

Run by: System Admin

User Wise Elevator Access Report From 15/05/2020 To 15/05/2023

Date: 15/05/2023 23:33

Sr. No	Elevator ID	Elevator Name	Door ID	Door Name	Access Date Time
mje1 - mje1					
1	1	new	1	vega_panel_1	05/05/2022-17:54:22
mje2 - mje2					
1	1	new	1	vega_panel_1	05/05/2022-17:58:46
R12 - Reporting Incharge2					
1	1	new	1	vega_panel_1	05/05/2022-00:19:11
2	1	new	1	vega_panel_1	05/05/2022-00:13:33
3	1	new	1	vega_panel_1	05/05/2022-00:09:05
4	1	new	1	vega_panel_1	05/05/2022-00:07:37
5	1	new	1	vega_panel_1	05/05/2022-00:06:51
6	1	new	1	vega_panel_1	05/05/2022-00:04:10
test1 - test1					
1	1	new	1	vega_panel_1	05/05/2022-17:49:44
2	1	new	1	vega_panel_1	05/05/2022-17:46:45
3	1	new	1	vega_panel_1	05/05/2022-17:40:24
4	1	new	1	vega_panel_1	05/05/2022-17:40:20
5	1	new	1	vega_panel_1	05/05/2022-17:34:18
6	1	new	1	vega_panel_1	05/05/2022-17:31:22
7	1	new	1	vega_panel_1	05/05/2022-17:31:20
8	1	new	1	vega_panel_1	05/05/2022-17:31:14
9	1	new	1	vega_panel_1	05/05/2022-17:30:04
10	1	new	1	vega_panel_1	05/05/2022-17:27:38
11	1	new	1	vega_panel_1	05/05/2022-17:27:35
12	1	new	1	vega_panel_1	05/05/2022-17:16:54
13	1	new	1	vega_panel_1	05/05/2022-17:16:53
14	1	new	1	vega_panel_1	05/05/2022-16:10:25
15	1	new	1	vega_panel_1	05/05/2022-01:19:18
16	1	new	1	vega_panel_1	05/05/2022-01:19:14
17	1	new	1	vega_panel_1	05/05/2022-01:16:31
18	1	new	1	vega_panel_1	05/05/2022-01:16:28
19	1	new	1	vega_panel_1	05/05/2022-01:16:25
20	1	new	1	vega_panel_1	05/05/2022-01:11:55

If you select **Elevator Wise User Access** as the Format, then click **Select Elevator**.

- **Select Elevator:** Select the desired option — **All**, or **Elevator Wise**.

If you select **All**, all the Elevators with all the details regarding Elevator Access will be included.



If you select **Elevator Wise**, click the **Elevator** picklist. The **Picklist For Elevators** pop-up appears.

Picklist For Elevators

Total Selected: 0 Records

Search

[Show Selected](#)

☐ Select All

<input type="checkbox"/>	ID ▲	Elevator	MID	Panel
<input type="checkbox"/>	1	Elevator__1	9	Panel
<input type="checkbox"/>	2	Elevator__2	9	Panel
<input type="checkbox"/>	3	Elevator__3	9	Panel
<input type="checkbox"/>	4	Elevator__4	9	Panel
<input type="checkbox"/>	5	Elevator__5	9	Panel
<input type="checkbox"/>	6	Elevator__6	9	Panel
<input type="checkbox"/>	7	Elevator__7	9	Panel
<input type="checkbox"/>	8	Elevator__8	9	Panel

OK Cancel

You can either select particular Elevator or can select all at once.

To select particular Elevators, select the check boxes of the desired Elevators.

Picklist For Elevators

Total Selected: 2 Records

Search

[Show Selected](#)

☐ Select All

<input type="checkbox"/>	ID ▲	Elevator	MID	Panel
<input checked="" type="checkbox"/>	1	Elevator__1	9	Panel
<input checked="" type="checkbox"/>	2	Elevator__2	9	Panel
<input type="checkbox"/>	3	Elevator__3	9	Panel
<input type="checkbox"/>	4	Elevator__4	9	Panel
<input type="checkbox"/>	5	Elevator__5	9	Panel
<input type="checkbox"/>	6	Elevator__6	9	Panel
<input type="checkbox"/>	7	Elevator__7	9	Panel
<input type="checkbox"/>	8	Elevator__8	9	Panel

OK Cancel

**OR**

To select all the Elevators select the **Select All** check box. The Elevator on all the pages will be selected.

Picklist For Elevators

Total Selected: 8 Records

Search

[Show Selected](#)

☒ Select All

<input checked="" type="checkbox"/>	ID ▲	Elevator	MID	Panel
<input checked="" type="checkbox"/>	1	Elevator__1	9	Panel
<input checked="" type="checkbox"/>	2	Elevator__2	9	Panel
<input checked="" type="checkbox"/>	3	Elevator__3	9	Panel
<input checked="" type="checkbox"/>	4	Elevator__4	9	Panel
<input checked="" type="checkbox"/>	5	Elevator__5	9	Panel
<input checked="" type="checkbox"/>	6	Elevator__6	9	Panel
<input checked="" type="checkbox"/>	7	Elevator__7	9	Panel
<input checked="" type="checkbox"/>	8	Elevator__8	9	Panel

OK Cancel

The selected Elevators appear in a grid. You can also delete the desired Elevators. To do so, click **Delete**



of the respective Elevators.

**Generate Report For:** Select the desired option — **All Users, Active Users, Inactive Users.**

Click **Generate Report.**

Sample Report

Elevator Access Report

Back

1 of 2

80%

Print

PDF

Excel

Search

DADB

Elevator Wise User Access Report From: 15/05/2020 To: 15/05/2023

Page 1 of 2

Run By: System Admin

Date: 15/05/2023 23:29

Sr. No	User ID	User Name	Access Date Time
1	W01F	W01F	05/05/2022 17:41:55
2	W01F	W01F	05/05/2022 17:40:17
3	W01F	W01F	05/05/2022 17:40:13
4	W01F	W01F	05/05/2022 17:38:33
5	W01F	W01F	05/05/2022 17:38:20
6	W01F	W01F	05/05/2022 17:38:04
7	W01F	W01F	05/05/2022 17:38:20
8	W01F	W01F	05/05/2022 17:35:18
9	W01F	W01F	05/05/2022 17:34:13
10	W01F	W01F	05/05/2022 17:34:13
11	W01F	W01F	05/05/2022 17:31:14
12	W01F	W01F	05/05/2022 17:30:00
13	W01F	W01F	05/05/2022 17:29:54
14	W01F	W01F	05/05/2022 17:27:32
15	W01F	W01F	05/05/2022 17:27:30
16	W01F	W01F	05/05/2022 17:19:44
17	W01F	W01F	05/05/2022 17:18:41
18	W01F	W01F	05/05/2022 17:18:38
19	W01F	W01F	05/05/2022 17:14:48
20	W01F	W01F	05/05/2022 17:14:44
21	W01F	W01F	05/05/2022 16:15:44
22	W01F	W01F	05/05/2022 16:15:40
23	W01F	W01F	05/05/2022 16:10:16
24	W01F	W01F	05/05/2022 16:01:14
25	W01F	W01F	05/05/2022 15:08:18
26	W01F	W01F	05/05/2022 15:07:49
27	W01F	W01F	05/05/2022 15:04:14
28	W01F	W01F	05/05/2022 01:20:05
29	W01F	W01F	05/05/2022 01:20:03
30	W01F	W01F	05/05/2022 01:20:03

## Elevator Floor Group Master

This report lists the details of the specific Elevator Floor Group or All Floor Groups.

Configure the following parameters:

### Elevator Floor Group Selection

- **Select Elevator Floor Group:** Select the desired option — **All**, or **Elevator Floor Group Wise**.
  - If you select **All**, details regarding all the Elevator Floor Group will be included.
  - If you select **Elevator Floor Group Wise**, click the **Elevator Floor Group** picklist. The **Picklist For Elevator Floor Group** pop-up appears.

Picklist For Elevator Floor Group

Total Selected: 0 Records

Search  [Show Selected](#)

☐ Select All

<input type="checkbox"/>	ID ▲	Name
<input type="checkbox"/>	1	EFloorGrp
<input type="checkbox"/>	2	EFloorGrp2
<input type="checkbox"/>	3	EFloorGrp3
<input type="checkbox"/>	4	EFloorGrp4
<input type="checkbox"/>	5	EFloorGrp5

OK Cancel

You can either select particular Elevator Floor Group or can select all Elevator Floor Group at once.

To select particular Elevator Floor Groups, select the check boxes of the desired Elevator Floor Groups.

The screenshot shows a dialog box titled "Picklist For Elevator Floor Group". At the top, a green bar indicates "Total Selected: 2 Records". Below this is a search bar with the placeholder text "Search" and a magnifying glass icon, followed by a "Show Selected" link. Underneath, there is a "Select All" checkbox which is currently unchecked. The main part of the dialog is a table with three columns: a checkbox, "ID ▲", and "Name". The table contains five rows of data:

<input type="checkbox"/>	ID ▲	Name
<input checked="" type="checkbox"/>	1	Elevator Floor Group 1
<input checked="" type="checkbox"/>	2	Elevator Floor Group 2
<input type="checkbox"/>	3	Elevator Floor Group 3
<input type="checkbox"/>	4	Elevator Floor Group 4
<input type="checkbox"/>	5	Elevator Floor Group 5

At the bottom of the dialog are "OK" and "Cancel" buttons.

OR

To select all the Elevator Floor Groups at once, select the **Select All** check box. The Elevator Floor Groups on all the pages will be selected.

The screenshot shows the same dialog box as before, but now the "Select All" checkbox is checked. The table below it shows that all five records are selected, with checkboxes checked in the first column:

<input checked="" type="checkbox"/>	ID ▲	Name
<input checked="" type="checkbox"/>	1	Elevator Floor Group 1
<input checked="" type="checkbox"/>	2	Elevator Floor Group 2
<input checked="" type="checkbox"/>	3	Elevator Floor Group 3
<input checked="" type="checkbox"/>	4	Elevator Floor Group 4
<input checked="" type="checkbox"/>	5	Elevator Floor Group 5

The "Total Selected" bar at the top now shows "Total Selected: 5 Records". The "OK" and "Cancel" buttons remain at the bottom.

The selected Elevator Floor Groups appear in the grid.

The screenshot shows the 'Elevator Floor Group Master' window. At the top, there's a 'Select Elevator Floor Group' dropdown set to 'Elevator Floor Group Wise'. Below it is a table with columns 'ID' and 'Name'. The table contains two rows: '1 Elevator Floor Group 1' and '2 Elevator Floor Group 2'. To the right of each row is a trash icon. Below the table is a 'Generate Report For' dropdown set to 'All Users' and a 'Generate Report' button.

You can also delete the desired Elevator Floor Groups. To do so, click **Delete**  of the respective Elevator Floor Group.

- **Generate Report For:** Select the desired option — **All Users, Active Users, Inactive Users.**

Click **Generate Reports**. The report appears as per the set filter.

#### Sample Report

The screenshot shows the 'Elevator Floor Group Master' window with a report displayed. The report header includes 'MATRIX COMSEC PVT. LTD. Elevator Floor Group Master' and 'Page 1 of 1'. The report body contains a table with the following data:

Sr No	Elevator ID	Elevator Name	Floor ID	Floor Name	Time Schedule Group ID	Time Schedule Group Name
1:Elevator Floor Group 1	1	Elevator__1	1	Floor1	Assigned User:0	
4:Elevator Floor Group 4	4	Elevator__4	1	Floor4	Assigned User:0	
5:Elevator Floor Group 5	5	Elevator__5	1	Floor5	Assigned User:0	

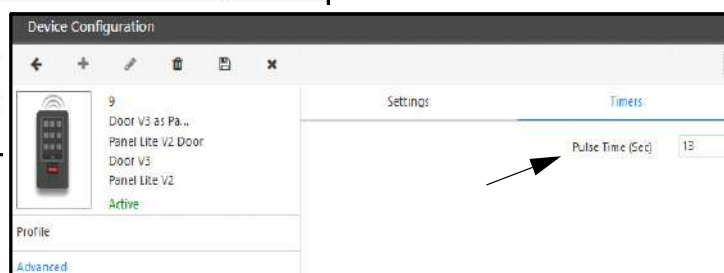
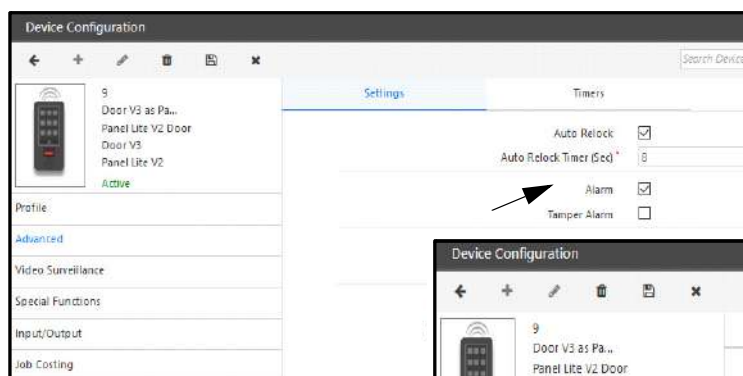
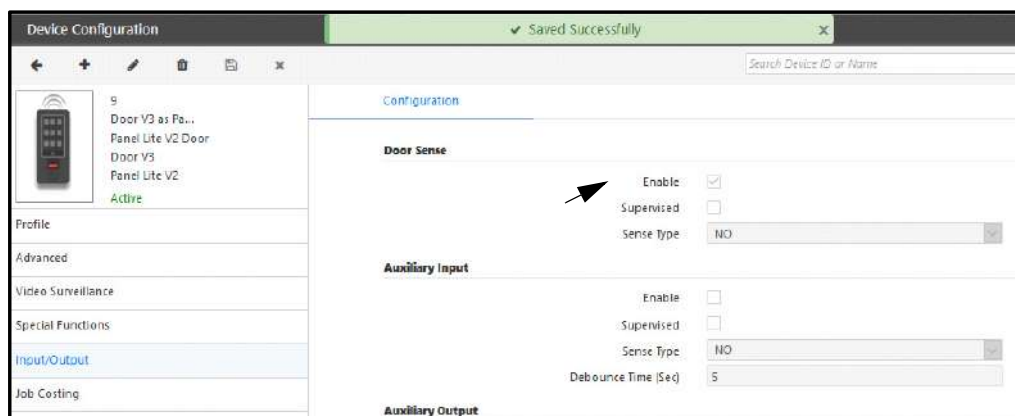
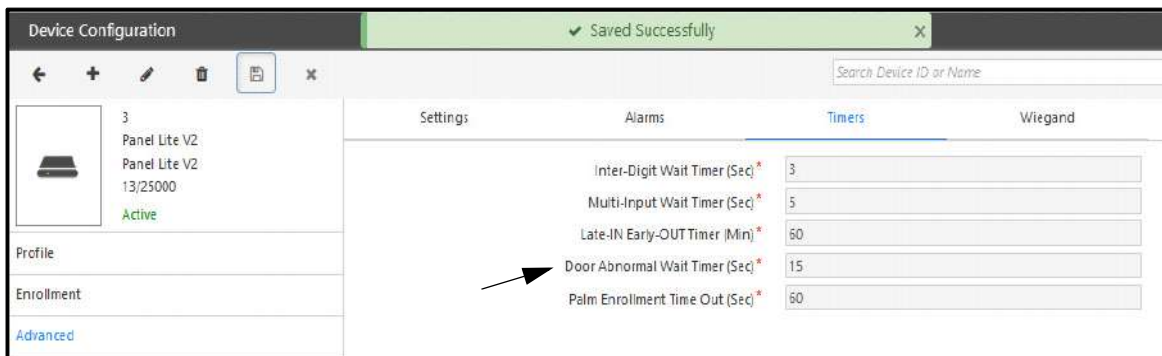
## Door Held Open

This report provides a list of the occasions when the door has been held open for more than the permissible limits.


**Date:** Configure the start and end dates for which the report is be generated.

Click **Generate Reports**.

Make sure the following configurations for Door Abnormal Wait Timer, Door Sense, Enable Alarm, Pulse Timer must be done for the respective doors.



When Door Opens and closes within the Pulse timer duration; then no Alarm will be generated.

User Details		Events					
 <b>User ID:</b> 1 <b>Chirag</b> <b>Allowed</b> <b>Device:</b> Panel Lite V2 -> Door V3 as F <b>Event Date &amp; Time:</b> 28/05/2018 04:40:20 PM <b>Department:</b> DFLTDPT <b>Designation:</b> DFLTDG		Sr No.	Date Time	Type	Device	Category	Detail
		210	28/05/2018 04:40:08 PM	Panel Lite V2	Panel Lite V2	Other	← Start Of Event
		211	28/05/2018 04:40:08 PM	Panel Lite V2	Panel Lite V2	Command	→ Event Request for RollOver: 0 Event Seq. No.: 447
		212	28/05/2018 04:40:08 PM	Panel Lite V2	Panel Lite V2	Command	→ Set Date & Time
		213	28/05/2018 04:40:08 PM	Panel Lite V2	Panel Lite V2	ACK	← Set Date & Time Command Successful
		214	28/05/2018 04:40:08 PM	Panel Lite V2	Panel Lite V2	Other	→ Get Information from Device
		215	28/05/2018 04:40:08 PM	Panel Lite V2	Panel Lite V2	Other	← Reply Information from Device
		216	28/05/2018 04:40:08 PM	Panel Lite V2	Panel Lite V2	Other	→ End Of Message
		217	28/05/2018 04:40:21 PM	Panel Lite V2	Panel Lite V2 -> Door V3...	User	→ Allowed with Finger. User ID: 1 Event Date Time: 28/05/2018 04:40:20 PM
		218	28/05/2018 04:40:21 PM	Panel Lite V2	Panel Lite V2	ACK	→ Event Ack for RollOver: 0 Event Seq. No.: 447
		219	28/05/2018 04:40:26 PM	Panel Lite V2	Panel Lite V2 -> Door V3...	Door	← Door Open/Close - Open User ID: 1 Event Date Time: 28/05/2018 04:40:26 PM
		220	28/05/2018 04:40:27 PM	Panel Lite V2	Panel Lite V2	ACK	→ Event Ack for RollOver: 0 Event Seq. No.: 448
		221	28/05/2018 04:40:29 PM	Panel Lite V2	Panel Lite V2 -> Door V3...	Door	← Door Open/Close - Close User ID: 1 Event Date Time: 28/05/2018 04:40:28 PM
		222	28/05/2018 04:40:29 PM	Panel Lite V2	Panel Lite V2	ACK	→ Event Ack for RollOver: 0 Event Seq. No.: 449
		223	28/05/2018 04:40:36 PM	NGT Direct Door	NGT Direct Door-Device-2	Request	← Login Request Received.
		224	28/05/2018 04:40:36 PM	NGT Direct Door	NGT Direct Door-Device-2	ACK	→ Login Success Poll Duration: 3 Poll Interval: 2
		225	28/05/2018 04:40:37 PM	NGT Direct Door	NGT Direct Door-Device-2	Request	← Message Request Received


The user punches on the door and the door opens with **Door Open/Close-Open** event.

When the door remains open for long time i.e. the till the expiry of pulse timer then **Door Held open too long** alarm is generated.

- Eg: User punches at 4:45:30 and Pulse timer duration= 13sec so Door Held Open too long alarm will be generated at 4:45:43

If the door is not closed even after the lapse of pulse timer and remains open till the expiry of Door Abnormal Wait timer then **Door Abnormal Event** alarm is generated.

- Now the Door Abnormal Wait timer= 15sec so after the 15 seconds of Door Held Open alarm i.e. (4:45:43 + 0:00:15= 4:45:58); Door Abnormal Event alarm will be generated at 4:45:58.

Features		Devices - All					
 <b>User ID:</b> 101 <b>Khushbu</b> <b>Allowed</b> <b>Device:</b> Panel Lite V2 -> Door V3 as F <b>Event Date &amp; Time:</b> 28/05/2018 04:45:30 PM <b>Department:</b> DFLTDPT <b>Designation:</b> DFLTDG		Name	Site	IP/RS485 Address	MAC Address	Type	Status
		Panel Lite V2		192.168.104.111	02:18:09:04:65:D1	Panel Lite V2	Connected
		ARC as Single Door	Site-1	192.168.105.3	DF:E3:65:54:34:44	Panel Lite V2 Door	OFF-Line
		Dummy Door	Site-1	192.111.111.111	11:11:11:11:11:11	Panel Lite V2 Door	OFF-Line
		ARC as Dual Door-Dual Reader	Site-1	192.168.105.5	DF:E6:37:56:35:56	Panel Lite V2 Door	OFF-Line
		ARC as Dual Door-Dual Reader	Site-1	192.168.105.5	DF:E6:37:56:35:56	Panel Lite V2 Door	OFF-Line
		ARC as Dual Door-Single Reader	Site-1	192.168.105.6	FE:47:48:46:74:69	Panel Lite V2 Door	OFF-Line
		ARC as Dual Door-Single Reader	Site-1	192.168.105.6	FE:47:48:46:74:69	Panel Lite V2 Door	OFF-Line
		Dual Reader	Site-1	192.168.105.7	FE:66:74:69:69:69	Panel Lite V2 Door	OFF-Line

User Details		Events					
		Sr No.	Date Time	Type	Device	Category	Detail
		10	28/05/2018 04:43:58 PM	Panel Lite V2	Panel Lite V2	Other	→ End Of Message
		11	28/05/2018 04:44:27 PM	NGT Direct Door	NGT Direct Door-Device-2	Request	← Login Request Received.
		12	28/05/2018 04:44:27 PM	NGT Direct Door	NGT Direct Door-Device-2	ACK	→ Login Success Poll Duration: 3 Poll Interval: 2
		13	28/05/2018 04:44:28 PM	NGT Direct Door	NGT Direct Door-Device-2	Request	← Message Request Received
		14	28/05/2018 04:44:28 PM	NGT Direct Door	NGT Direct Door-Device-2	Command	→ Event Request for RollOver: 0 Event Seq. No.: 254
		15	28/05/2018 04:44:28 PM	NGT Direct Door	NGT Direct Door-Device-2	Other	← Start Of Event
		16	28/05/2018 04:44:28 PM	NGT Direct Door	NGT Direct Door-Device-2	Command	→ Set Date & Time
		17	28/05/2018 04:44:28 PM	NGT Direct Door	NGT Direct Door-Device-2	ACK	← Set Date & Time Command Successful
		18	28/05/2018 04:44:28 PM	NGT Direct Door	NGT Direct Door-Device-2	Other	→ End Of Message
		19	28/05/2018 04:45:31 PM	Panel Lite V2	Panel Lite V2	ACK	→ Event Ack for RollOver: 0 Event Seq. No.: 459
		20	28/05/2018 04:45:31 PM	Panel Lite V2	Panel Lite V2 -> Door V3...	User	→ Allowed with Finger. User ID: 101 Event Date Time: 28/05/2018 04:45:30 PM
		21	28/05/2018 04:45:38 PM	Panel Lite V2	Panel Lite V2 -> Door V3...	Door	← Door Open/Close - Open User ID: 101 Event Date Time: 28/05/2018 04:45:37 PM
		22	28/05/2018 04:45:38 PM	Panel Lite V2	Panel Lite V2	ACK	→ Event Ack for RollOver: 0 Event Seq. No.: 460
		23	28/05/2018 04:45:44 PM	Panel Lite V2	Panel Lite V2 -> Door V3...	Alarm	← Door Held open too long Event Date Time: 28/05/2018 04:45:43 PM
		24	28/05/2018 04:45:44 PM	Panel Lite V2	Panel Lite V2	ACK	→ Event Ack for RollOver: 0 Event Seq. No.: 461
		25	28/05/2018 04:45:59 PM	Panel Lite V2	Panel Lite V2 -> Door V3...	Alarm	← Door Abnormal Event Date Time: 28/05/2018 04:45:58 PM
		26	28/05/2018 04:45:59 PM	Panel Lite V2	Panel Lite V2	ACK	→ Event Ack for RollOver: 0 Event Seq. No.: 462

## Emergency Evacuation

Generates a list of people who are present and missing in/from a secured zone at the time of emergency.

**Date:** Select the start and end date for which the report is to be generated.

**Time:** Select the start and end time for which the report is to be generated.

### Optional Parameters

- **User Type:** Select the desired option — **Users**, **Visitor**, or **Both**.

If you select **Users** as the User Type, configure the following:

- **Select Site:** Select the desired option — **All** or **Selected**.
  - If you select **All**, the details regarding the Emergency Evacuation for all the sites will be included.
  - If you select **Selected**, click the picklist. The picklist for **Select Sites** pop-up appears.

ID	Name
1	Factory
2	HO
3	RnD1
4	RnD2
5	Site 5
6	Site 6
7	Site 7
8	Site 8
9	Site 9
10	Site 10

You can either select particular sites or can select all the sites at once.



To select particular sites, select the check boxes of the desired sites.

The 'Select Sites' dialog box displays a table with 10 records. The first two records, 'Factory' (ID 1) and 'HO' (ID 2), are selected. The 'Total Selected' bar at the top indicates 2 records. The 'Select All' checkbox is unchecked. The pagination shows '1 - 10 of 11 records' and the first page is active.

<input type="checkbox"/>	ID ▲	Name
<input checked="" type="checkbox"/>	1	Factory
<input checked="" type="checkbox"/>	2	HO
<input type="checkbox"/>	3	RnD1
<input type="checkbox"/>	4	RnD2
<input type="checkbox"/>	5	Site 5
<input type="checkbox"/>	6	Site 6
<input type="checkbox"/>	7	Site 7
<input type="checkbox"/>	8	Site 8
<input type="checkbox"/>	9	Site 9
<input type="checkbox"/>	10	Site 10

OR

To select all the sites select the **Select All** check box. The sites on all the pages will be selected.

The 'Select Sites' dialog box displays the same table as the first screenshot, but now all 10 records are selected. The 'Total Selected' bar at the top indicates 11 records. The 'Select All' checkbox is checked. The pagination shows '1 - 10 of 11 records' and the first page is active.

<input checked="" type="checkbox"/>	ID ▲	Name
<input checked="" type="checkbox"/>	1	Factory
<input checked="" type="checkbox"/>	2	HO
<input checked="" type="checkbox"/>	3	RnD1
<input checked="" type="checkbox"/>	4	RnD2
<input checked="" type="checkbox"/>	5	Site 5
<input checked="" type="checkbox"/>	6	Site 6
<input checked="" type="checkbox"/>	7	Site 7
<input checked="" type="checkbox"/>	8	Site 8
<input checked="" type="checkbox"/>	9	Site 9
<input checked="" type="checkbox"/>	10	Site 10

Click **OK**. All the selected sites appear in a grid.

The screenshot shows a web interface for user selection. At the top, there are dropdowns for 'User Type' (set to 'Users') and 'Select Site' (set to 'Selected'). Below these are input fields for 'ID' and 'Name'. A search bar is located on the left. The main part of the interface is a table with the following data:

ID	Name	
1	Factory	
2	HQ	
3	RnD1	
4	RnD2	

At the bottom, there is a 'Save' button and a dropdown for 'Organization Name in Header As Per' set to 'User Selection'.

You can also delete the desired sites. To do so, click **Delete** icon of the respective sites.

Click **Save**.

## User Selection

- **Select Users:** Select the desired option — **All**, **Group Wise**, or **User Wise**.

If you select **User Wise**, click the **User** picklist. The **Picklist For All Users** pop-up appears.

The screenshot shows a pop-up window titled 'Picklist For All Users'. It has a search bar and a 'Show Selected' link. The main content is a table with the following data:

<input type="checkbox"/>	User ID ▲	Name
<input type="checkbox"/>	1	SALIM ANSARI
<input type="checkbox"/>	10	RAJENDRA GOSWAMI
<input type="checkbox"/>	1001	ANKITKUMAR SOHLIYA
<input type="checkbox"/>	1002	MEGHA H SHUKLA
<input type="checkbox"/>	1003	UMESH M TALANPURI
<input type="checkbox"/>	1004	DARSHAK B PATEL
<input type="checkbox"/>	1007	DHAVAL I PATEL
<input type="checkbox"/>	1008	MAYANK K KORAT
<input type="checkbox"/>	1009	DIPTI K RATHWA
<input type="checkbox"/>	1010	RAHUL S SHAH

At the bottom, there is a pagination bar showing '1 - 10 of 2479 records' and a set of navigation buttons. The 'OK' and 'Cancel' buttons are at the very bottom.

Select the desired check boxes from the list. Click **OK**.

The selected user appears in the grid.

The screenshot shows the 'Select Users' interface. At the top, there is a 'Select Users' dropdown set to 'User Wise'. Below it, there are input fields for 'User ID' and 'Name'. A search bar is present. The main grid displays the following data:

User ID	Name	
1	SALIM ANSARI	
10	RAJENDRA GOSWAMI	
1001	ANVITKUNAR SOHLIYA	
1002	MEGHA H SHUKLA	

At the bottom, there is a 'Generate Report For' dropdown set to 'All Users' and a 'Generate Report' button.

You can also delete the desired user. To do so, click **Delete** of the respective user.

If you select **Group Wise**, select the desired enterprise group from the **Select Group** drop-down list — Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1/2/3.

For each enterprise group — Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1/2/3, click the corresponding picklist to select the desired option/s.

The selected group appears in the grid.

The screenshot shows the 'Select Users' interface with 'Select Users' set to 'Group Wise' and 'Select Group' set to 'Organization'. Below these are input fields for 'Organization ID' and 'Name'. A search bar is present. The main grid displays the following data:

ID	Name	Group	
1	MATRIX COMSEC PVT. LTD.	Organization	
2	SAMARTH	Organization	
3	AVDHOOT	Organization	
4	ELSENGARD	Organization	

At the bottom, there is a 'Generate Report For' dropdown set to 'All Users' and a 'Generate Report' button.

You can also delete the desired groups. To do so, click **Delete** of the respective group.

If you select **All**, then all users will be selected.

- **Generate Report For:** If you have selected **Users** as the User Type, select the desired option — **All Users**, **Active Users**, **Inactive Users**.

If you select **Visitor** as the User Type, configure the following parameters:

- **Select Site:** Select the desired option — **All** or **Selected**.
  - If you select **All**, the details regarding the Emergency Evacuation for all the sites will be included.

- If you select **Selected**, click the picklist. The picklist for **Select Sites** pop-up appears.

The 'Select Sites' pop-up window displays a table with 10 records. The 'Total Selected' status at the top indicates 0 records. The table columns are ID and Name. The records are as follows:

ID	Name
1	Factory
2	HO
3	RnD1
4	RnD2
5	Site 5
6	Site 6
7	Site 7
8	Site 8
9	Site 9
10	Site 10

At the bottom, it shows '1 - 10 of 11 records' and navigation buttons. The 'OK' and 'Cancel' buttons are at the very bottom.

You can either select particular sites or can select all the sites at once.

To select particular sites, select the check boxes of the desired sites.

The 'Select Sites' pop-up window displays the same table as before, but now with 2 records selected (IDs 1 and 2). The 'Total Selected' status at the top indicates 2 records. The records are as follows:

ID	Name
1	Factory
2	HO
3	RnD1
4	RnD2
5	Site 5
6	Site 6
7	Site 7
8	Site 8
9	Site 9
10	Site 10

The checkboxes for IDs 1 and 2 are checked. The rest of the interface remains the same.

**OR**

To select all the sites select the **Select All** check box. The sites on all the pages will be selected.

Select Sites

Total Selected: 11 Records

Search  Show Selected

☒ Select All

<input checked="" type="checkbox"/>	ID	Name
<input checked="" type="checkbox"/>	1	Factory
<input checked="" type="checkbox"/>	2	HQ
<input checked="" type="checkbox"/>	3	RnD1
<input checked="" type="checkbox"/>	4	RnD2
<input checked="" type="checkbox"/>	5	Site 5
<input checked="" type="checkbox"/>	6	Site 6
<input checked="" type="checkbox"/>	7	Site 7
<input checked="" type="checkbox"/>	8	Site 8
<input checked="" type="checkbox"/>	9	Site 9
<input checked="" type="checkbox"/>	10	Site 10

1 - 10 of 11 records

« < 1 2 > »

OK Cancel

Click **OK**. All the selected sites appear in a grid.

User Type: Users

Select Site: Selected

ID: Name:

Search

ID	Name	
1	Factory	
2	HQ	
3	RnD1	
4	RnD2	

Save

Organization Name in Header As Per: User Selection

You can also delete the desired sites. To do so, click **Delete** icon of the respective sites.

Click **Save**.

## User Selection

- **Select Visitors:** Select the desired option — **All** or **Visitor Wise**.
- If you select **All**, details regarding all the visitor will be included.

- If you select **Visitor Wise**, click **Visitor** picklist. The **Picklist For Visitor Profiles** pop-up appears.

Picklist For Visitor Profiles

Total Selected: 0 Records

Search  Show Selected

<input type="checkbox"/>	User ID ▲	Name
<input type="checkbox"/>	RnD1V001	RnD1Visitor1
<input type="checkbox"/>	RnD1V002	RnD1Visitor2
<input type="checkbox"/>	RnD1V003	RnD1Visitor3
<input type="checkbox"/>	RnD1V004	RnD1Visitor4
<input type="checkbox"/>	RnD1V005	RnD1Visitor5
<input type="checkbox"/>	RnD1V006	RnD1Visitor6
<input type="checkbox"/>	RnD1V007	RnD1Visitor7
<input type="checkbox"/>	RnD1V008	RnD1Visitor8
<input type="checkbox"/>	RnD1V009	RnD1Visitor9
<input type="checkbox"/>	RnD1V010	RnD1Visitor10

1 - 10 of 21 records

« < 1 2 3 > »

OK Cancel

Select the desired check boxes from the list.

The selected visitor profile appears in the grid.

Select Visitors: Visitor Wise

Visitor\* ID: Name:

Search

User ID ▲	Name	
RnD1V001	RnD1Visitor1	
RnD1V002	RnD1Visitor2	

Generate Report For: All Visitors

Generate Report

Click **OK**.

You can also delete the desired Visitor Profiles. To do so, click **Delete** of the respective Visitor Profiles.

- **Generate Report For:** If you have selected **Visitors** as the User Type, select the desired option — **All Visitors, Active Visitors, Inactive Visitors**.

If you have selected **Both** as the User Type, then configure the following:

- **Select Site:** Select the desired option — **All** or **Selected**.
  - If you select **All**, the details regarding the Emergency Evacuation for all the sites will be included.

- If you select **Selected**, click the picklist. The picklist for **Select Sites** pop-up appears.

The 'Select Sites' pop-up window displays a green header bar with the text 'Total Selected: 0 Records'. Below this is a search bar with the placeholder 'Search' and a magnifying glass icon, and a 'Show Selected' link. A 'Select All' checkbox is present. The main area contains a table with columns 'ID' and 'Name'. The table lists 10 records: Factory, HO, RnD1, RnD2, Site 5, Site 6, Site 7, Site 8, Site 9, and Site 10. Each record has an unchecked checkbox in the 'ID' column. At the bottom, it shows '1 - 10 of 11 records' and a pagination control with '1' selected. 'OK' and 'Cancel' buttons are at the bottom.

ID	Name
1	Factory
2	HO
3	RnD1
4	RnD2
5	Site 5
6	Site 6
7	Site 7
8	Site 8
9	Site 9
10	Site 10

You can either select particular sites or can select all the sites at once.

To select particular sites, select the check boxes of the desired sites.

The 'Select Sites' pop-up window displays a green header bar with the text 'Total Selected: 2 Records'. Below this is a search bar with the placeholder 'Search' and a magnifying glass icon, and a 'Show Selected' link. A 'Select All' checkbox is present. The main area contains a table with columns 'ID' and 'Name'. The table lists 10 records: Factory, HO, RnD1, RnD2, Site 5, Site 6, Site 7, Site 8, Site 9, and Site 10. The checkboxes for 'Factory' (ID 1) and 'HO' (ID 2) are checked. At the bottom, it shows '1 - 10 of 11 records' and a pagination control with '1' selected. 'OK' and 'Cancel' buttons are at the bottom.

ID	Name
<input checked="" type="checkbox"/>	1 Factory
<input checked="" type="checkbox"/>	2 HO
<input type="checkbox"/>	3 RnD1
<input type="checkbox"/>	4 RnD2
<input type="checkbox"/>	5 Site 5
<input type="checkbox"/>	6 Site 6
<input type="checkbox"/>	7 Site 7
<input type="checkbox"/>	8 Site 8
<input type="checkbox"/>	9 Site 9
<input type="checkbox"/>	10 Site 10

**OR**

To select all the sites select the **Select All** check box. The sites on all the pages will be selected.

Select Sites

Total Selected: 11 Records

Search  Show Selected

☒ Select All

<input checked="" type="checkbox"/>	ID	Name
<input checked="" type="checkbox"/>	1	Factory
<input checked="" type="checkbox"/>	2	HQ
<input checked="" type="checkbox"/>	3	RnD1
<input checked="" type="checkbox"/>	4	RnD2
<input checked="" type="checkbox"/>	5	Site 5
<input checked="" type="checkbox"/>	6	Site 6
<input checked="" type="checkbox"/>	7	Site 7
<input checked="" type="checkbox"/>	8	Site 8
<input checked="" type="checkbox"/>	9	Site 9
<input checked="" type="checkbox"/>	10	Site 10

1 - 10 of 11 records

« < 1 2 > »

OK Cancel

Click **OK**. All the selected sites appear in a grid.

User Type: Users

Select Site: Selected

Search

ID	Name	
1	Factory	
2	HQ	
3	RnD1	
4	RnD2	

Save

Organization Name in Header As Per: User Selection

You can also delete the desired sites. To do so, click **Delete** icon of the respective sites.

Click **Save**.

## User Selection

- **Select User/Visitors:** Select the desired option — **All**, or **User/Visitor Wise**.
- If you select **All**, details regarding the Emergency Evacuation of all users as well as visitors will be included.



- If you select **User/Visitor Wise**, click the **User/Visitor** picklist. The **Picklist For Users/Visitor Profiles** pop-up appears.

Picklist For Users/Visitor Profiles

Total Selected: 0 Records

Search

<input type="checkbox"/>	User ID ▲	Name
<input type="checkbox"/>	1	SALIM ANSARI
<input type="checkbox"/>	10	RAJENDRA GOSWAMI
<input type="checkbox"/>	1001	ANKITKUMAR SOHLIYA
<input type="checkbox"/>	1002	MEGHA H SHUKLA
<input type="checkbox"/>	1003	UMESH M TALANPURI
<input type="checkbox"/>	1004	DARSHAK B PATEL
<input type="checkbox"/>	1007	DHAVAL I PATEL
<input type="checkbox"/>	1008	MAYANK K KORAT
<input type="checkbox"/>	1009	DIPTI K RATHWA
<input type="checkbox"/>	1010	RAHUL S SHAH

1 - 10 of 2497 records

« < 1 2 3 ... 250 > »

Select the desired check boxes from the list.

The selected user/visitor profile appears in the grid.

Select Users

User Type: User Wise


User ID:  Name:

Search

User ID ▲	Name	<input type="checkbox"/>
1	SALIM ANSARI	<input type="checkbox"/>
10	RAJENDRA GOSWAMI	<input type="checkbox"/>
1001	ANKITKUMAR SOHLIYA	<input type="checkbox"/>
1002	MEGHA H SHUKLA	<input type="checkbox"/>

Generate Report For: All Users

Click **OK**.

You can also delete the desired User/Visitor Profiles. To do so, click **Delete**  of the respective User/Visitor Profiles.

- **Generate Report For:** If you have selected **Both** as the User Type, select the desired option — **All Users/Visitors, Active Users/Visitors, Inactive Users/Visitors**.

Click **Generate Report**.

## Sample Report

Emergency Evacuation

Back

1 of 1

DADB

Emergency Evacuation From 14/05/2020 00:00 To 15/05/2023 23:21

Page 1 of 1

Run By: System Admin

Site ID	Name	Category	IN Count	OUT Count	Who Is IN	Assembly Count	Missing Count
1	Site-1	Category-1	10	0	10	0	10
Total			10	0	10	0	10

Emergency Evacuation

Back

1 of 1

DADB

User Event Details From 14/05/2020 00:00 To 15/05/2023 23:02

Page 1 of 1

Run By: System Admin

Date	User ID	Name	Category	Designation	Device Name	IN Punch Official No.	Personal No.
<b>Branch-1</b>							
<b>Department-1</b>							
21/01/2022	2punchnola	2punch user with no late in duration	Category-1	Designation-1		14:40	
05/05/2022	mjr	mjr	Category-1	Designation-1	vega_panel_1	17:41	
05/05/2022	test1	test1	Category-1	Designation-1	vega_panel_1	17:49	6546546
05/05/2022	mjr1	mjr1	Category-1	Designation-1	vega_panel_1	17:54	
05/05/2022	mjr2	mjr2	Category-1	Designation-1	vega_panel_1	17:58	
06/05/2022	2punchuser	2punch user with latein	Category-1	Designation-1	ARGO-Device-20	13:04	
<b>Branch 2</b>							
<b>Department-1</b>							
21/01/2022	npunchlate	npunch user with in 30min latein	Category-1	Designation-1		12:06	
04/05/2022	secondhalfa	second half absent event	Category-1	Designation-1	ARGO-Device-20	17:14	
04/05/2022	npunchwith early	npunch user with earlyout policy	Category-1	Designation-1	ARGO-Device-20	17:43	
05/05/2022	R12	Reporting Incharge2	Category-1	Designation-1	vega_panel_1	00:27	

**IN Count:** Number of users whose latest IN event within the duration specified is on this site. The events should not include events on Assembly points.

**OUT Count:** Number of users whose latest OUT and latest IN event within the duration specified both are on this site. The events should not include events on Assembly points.

**Who Is IN:** Number of users whose latest IN event within the duration specified is on this site and thereafter there is no OUT event within the specified duration. The events should not include events on Assembly points.

**Assembly Count:** Number of users contributing in Who Is IN Count whose at least one event is on assembly point within the specified duration. A site will be considered as an Assembly Point only if the check-box 'Consider As Assembly Point' is checked on Devices Module> Site page.

**Missing Count:** Difference between Who Is IN Count and Assembly Count. i.e. Who Is IN Count – Assembly Count.

## Alarm Details

This report provides the data of all alarms and the remark which are entered while manually acknowledging and clearing the Alarms.

- **Date:** Select the to and from date for which the report is to be generated.

## Optional Parameter

- **Alarm Status:** Select the desired option from the drop down— **All, New, Acknowledged and Cleared**.
- **Alarm Type:** Click on the desired check box— **Critical, Major or Minor**.

## Door Selection

- **Select Devices:** Select the desired option—**All or Selected**.
  - If you select **All**, details regarding the Alarms for all the panels, panel doors as well as direct doors will be included.
  - If you select **Group-Wise**, click **Select Group picklist**.
    - **Select Group Picklist:** Select the desired option— **Panel, Panel Door or Direct Door**.
      - If you select **Panel Door**, click **Panel Door** picklist. The **Picklist For Panel Door** pop-up appears.

Picklist For Panel Door

Total Selected: 0 Records

Search  [Show Selected](#)

<input type="checkbox"/>	ID ▲	Name
<input type="checkbox"/>	15	panel_door_200_1
<input type="checkbox"/>	18	vega_panel_1

OK Cancel

- Select the desired check boxes from the list. Click **OK**.
- The selected panel doors appear in the grid.

Select Devices: Group Wise

Select Group: Panel Door

Panel Door \* ID: Name: ☐

Search

ID	Name	Group ▲	<input type="checkbox"/>
15	panel_door_200_1	Panel Door	<input type="checkbox"/>
18	vega_panel_1	Panel Door	<input type="checkbox"/>

Generate Report

- Similarly, follow the same steps as Panel for **Panel** and **Direct Door**.

- Click **Generate Report**.

Sample Report.

Alarm Details

Back

1 of 1

DADB

Page 1 of 1

Run by: System Admin

Alarm Details From 15/05/2020 To 15/05/2023

Date: 15/05/2023 22:48

Sr No	Alarm Status	Alarm Door Name Type	Panel Name	Date-Time	Ack/Cleared By	Remark	Remark By
1	New	1 Door Held open too long	vega_panel_1	Panel1200-Device- 05/05/2022 01:02:53			
2	Cleared	3 vega_panel_1	Panel1200-Device- 05/05/2022 01:03:20	System Interlock		SA	
1	New	2 Door Abnormal	vega_panel_1	Panel1200-Device- 05/05/2022 01:03:03			
2	Cleared	2 vega_panel_1	Panel1200-Device- 05/05/2022 01:03:20	System Interlock		SA	

Matrix COSEC MONITOR

File Device Tools Help

Features

Alarms

I/O Link

Soft Override

Events

Exceptions

Time Triggered Functions

EMAP

Devices - All 2 7

Name	Site	IP/RS485 Address	MAC Address	Type	Status
Panel Lite V2		192.168.104.111	00:1B:09:04:05:01	Panel Lite V2	Connected
ARC as Single Door	Site-1	192.168.105.3	DFE365:54:34:44	Panel Lite V2 Door	OFF-Line
Dummy Door	Site-1	192.111.111.111	11:11:11:11:11:11	Panel Lite V2 Door	OFF-Line
ARC as Dual Door-Dual Reader	Site-1	192.168.105.5	DFE637:56:35:56	Panel Lite V2 Door	OFF-Line
ARC as Dual Door-Dual Reader	Site-1	192.168.105.5	DFE637:56:35:56	Panel Lite V2 Door	OFF-Line
ARC as Dual Door-Single Reader	Site-1	192.168.105.6	FE47:48:46:74:69	Panel Lite V2 Door	OFF-Line
ARC as Dual Door-Single Reader	Site-1	192.168.105.6	FE47:48:46:74:69	Panel Lite V2 Door	OFF-Line
Door Lite V2 Door	Site-1	192.168.105.7	EE:66:74:62:68:50	Door Lite V2 Door	OFF-Line

User Details

User ID: 101

Khushbu

Allowed

Device: Panel Lite V2 -> Door V3 as F

Event Date & Time: 28/05/2018 05:21:53 PM

Department: D/LTDPT

Designation: D/LTDSG

Alarms

Device	Type	Description	Level	Status	Alarm Date Time
Panel Lite V2 -> Door V3	Panel Lite V2	Door Abnormal	Major	New	28/05/2018 05:22:20 PM
Panel Lite V2 -> Door V3	Panel Lite V2	Door Held open too long	Minor	New	28/05/2018 05:22:08 PM

---

The COSEC Web based Time-Attendance Module enables organization to customize various time-attendance policies like Late-In, Overtime, C-OFF etc for the users and automate them. It allows an organization to have different time schedules and holidays for its different facilities. Elaborate reports and views are also available for people working at different levels.

The COSEC Time and Attendance system is a combination of hardware and software where


- Hardware is used to record time of an user from a credential and
- Software is used to process the time according to the Attendance Policy.

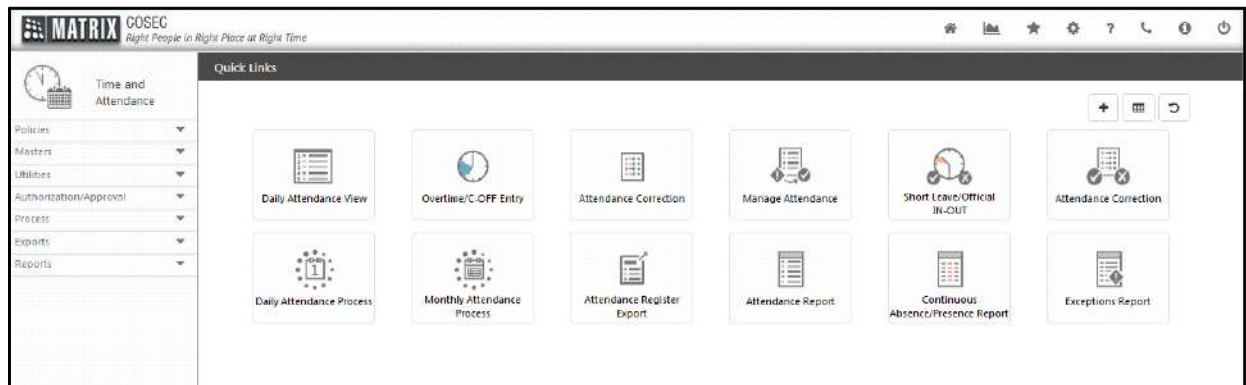
The **Benefits** of Time and Attendance system are mentioned as below:

- Eliminate human error in employee time records.
- Prevent buddy punching and fraudulent time keeping records.
- Significantly increase employee and manager satisfaction.
- Cut down on administrative time and cost.
- Monitor and analyze absence to reduce impact on productivity.
- Significantly cut down on payroll processing time.
- Adapt to existing HR policies.
- Eliminate payments for unapproved or fraudulent overtime.
- Give employees self-service access.

The **Features** of Time and Attendance system are mentioned as below:


- Support for Multiple working shift time
- User wise Late In & Early Out Policy, Overtime Policy, Compensatory OFF Policy
- User wise Absentee Policy for Week off and Holiday
- Manual Entry and Correction
- Past Adjustment
- Authorization
- Integration with Payroll
- SMS and E-mail Alert Notification
- View Attendance Details

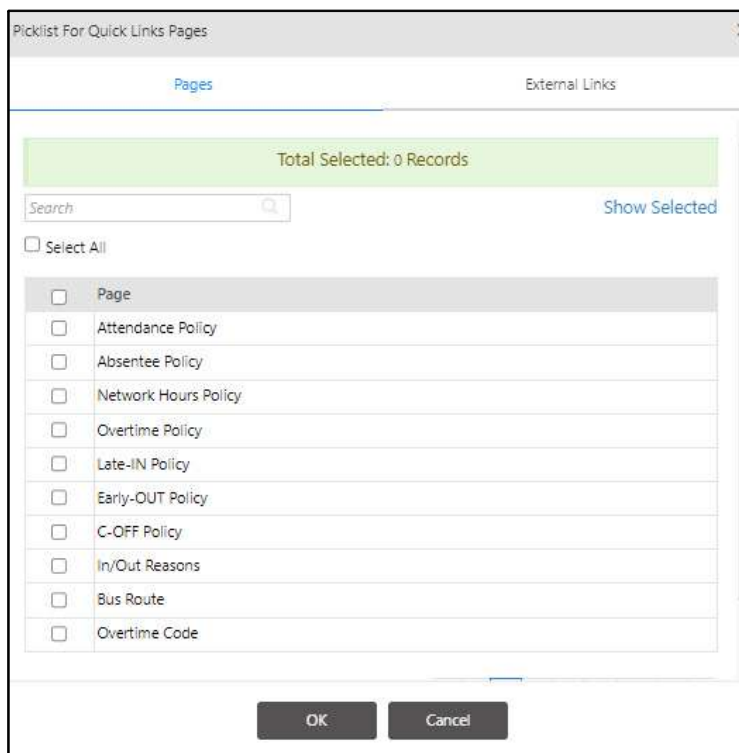
To use the Time and Attendance functionality, select the **Time and Attendance** module icon  on the module selection page. The **Time and Attendance** page appears on the screen as shown below.



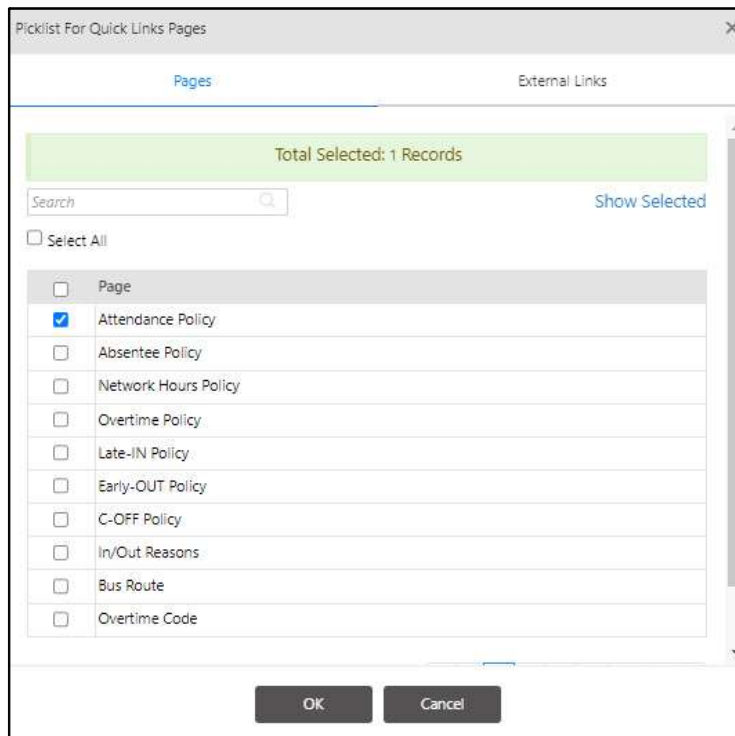
The page displays a menu and **Quick Links** to go to the required page in just one click. Quick Links are shortcuts to reach to a specific page easily. You can configure these options for Quick Links — **Add Quick Link, Select Layout** and **Reset to Default**.

### Add Quick Links

- Click **Add**  . The **Picklist For Quick Links Pages** pop-up appears.

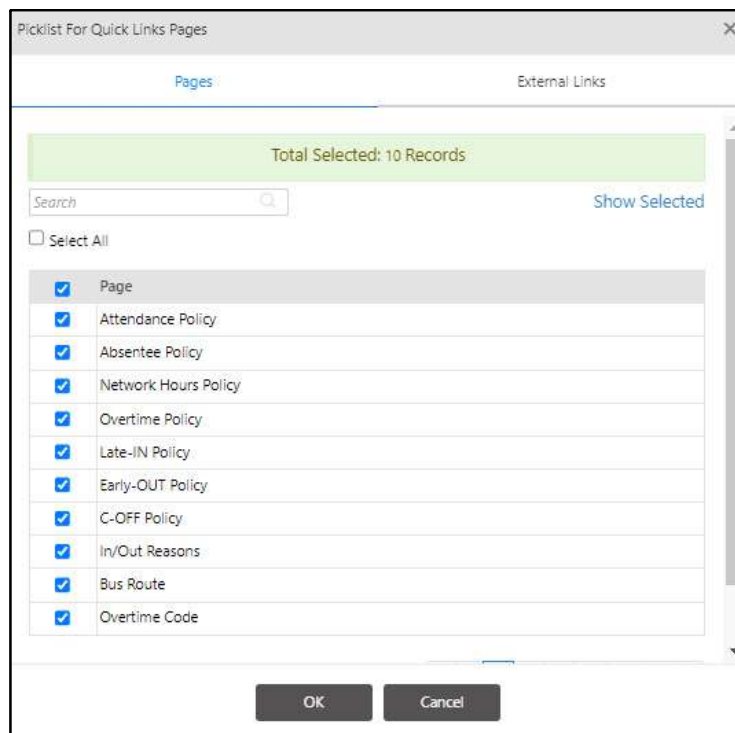


- You can either select particular page or can select all the pages at once. Maximum **20** quick links can be displayed.
- To select particular pages, select the check boxes of the desired pages.




OR

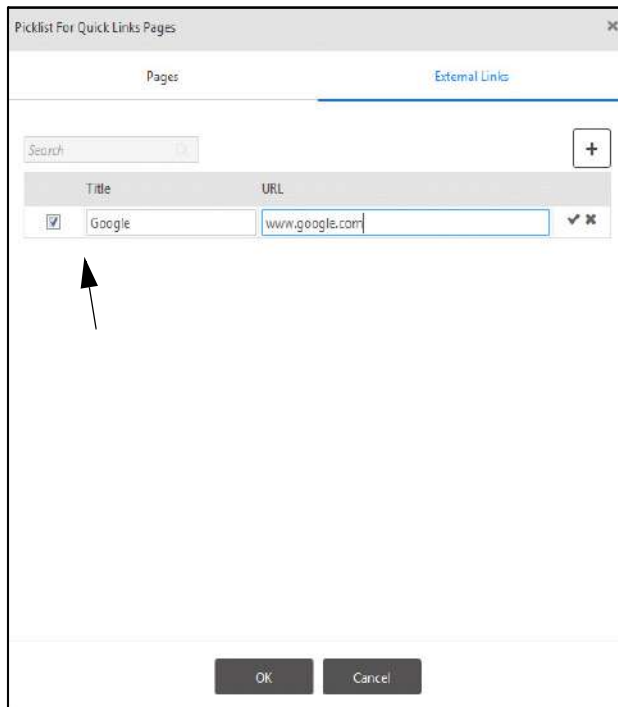
- To select all the pages at once, select the **Select All** check box. All the pages will be selected.





- Click **OK**.
- The Quick Links for selected pages appear on the Quick Link page.

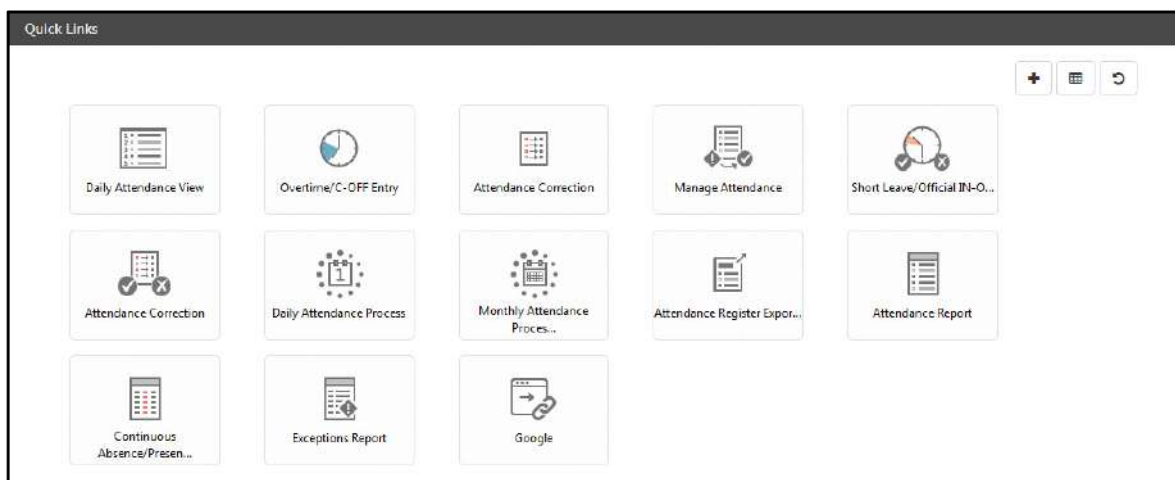
## Adding External Links,

- Select **External Link** tab and click on  button to add new external link.
- Configure the **Title** and **URL** of the external link under the respective fields. Select the checkbox to display the Quick Link for the configured link.




Title	URL
<input checked="" type="checkbox"/> Google	www.google.com

- Click **Save**  to save the configuration.
- Once you have saved the configuration, you can edit it. Click **Edit**  to edit the saved configuration.
- Click **OK** to save the configuration of the external link. The Quick Link for the external link appears on the Quick Link page.






## Select Layout

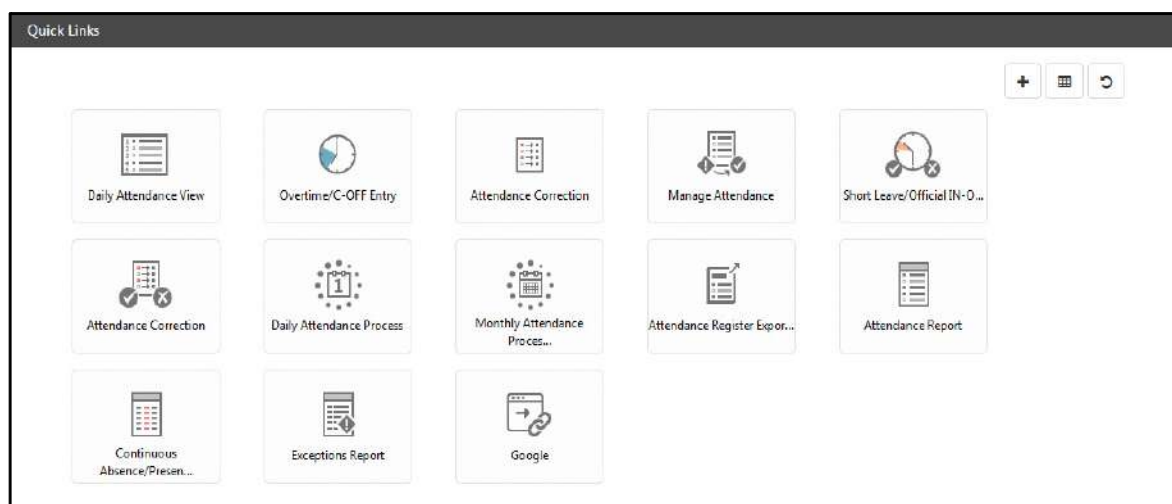
Click **Select Layout**  to select a layout for the quick links. You can select 5x4 or 4x5 layout to manage the quick links.

## Reset To Default

Click **Reset To Default**  to reset the quick links to the default quick links.

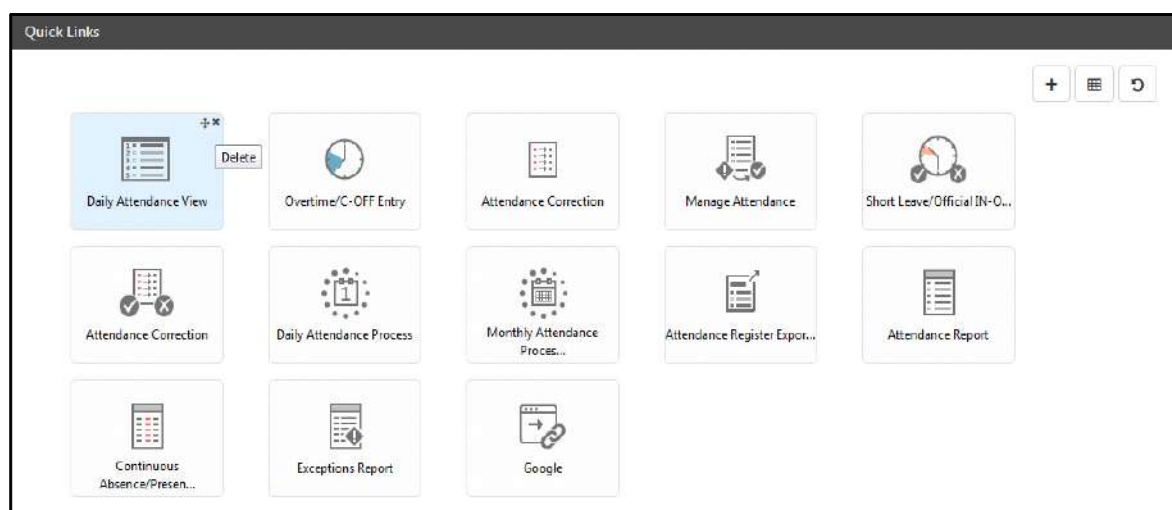
## Move the Link

To move the link from one place to another, hover on the link on top right corner and click **Move** icon as shown below. Then drag the quick link to the desired place. It will be placed at the desired location on the quick links page.



## Delete the Link


To delete a particular link, hover on the link on top right corner and click **Delete** icon as shown below.





Quick links are displayed as per rights given to System Account and ESS users.

## Time and Attendance Dashboard

To view the Dashboard, click the Dashboard button  on the **Time and Attendance** page. It displays basic information of the module under the following categories:



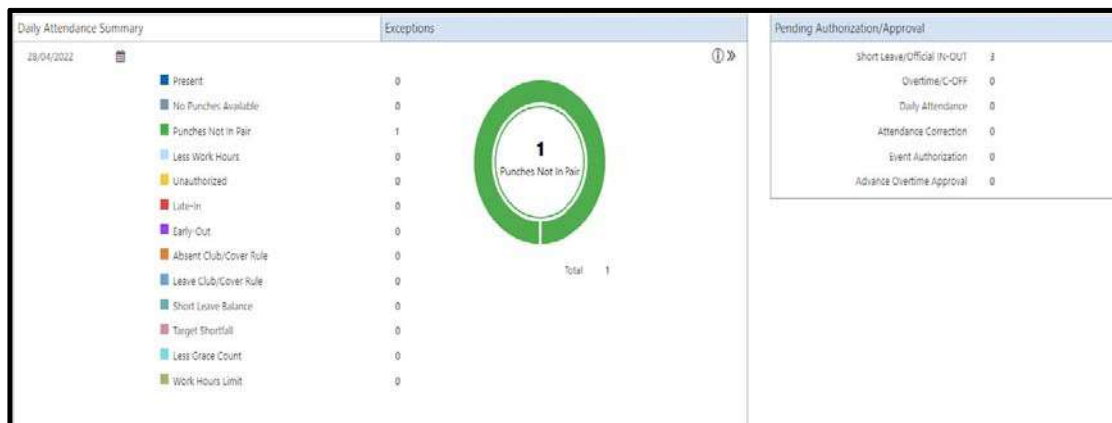
### Daily Attendance Summary

**Total Users:** Total No. of active T&A users.

- **Reported:** Total No. of users who have shifts scheduled on the current day and at least one punch as well.
- **Not Yet Reported:** Total no. of all unreported users whose punches are unavailable for current date, though their shift is scheduled and are not on Week-Off, Public Holiday, Leave or Tour.
- **On Leave:** Total No. of leaves on the current day.
- **On Tour:** Total No. of tours on the current day.
- **On Week Off:** Total No. of users on Week Off on the current day.
- **On Holiday:** Total No. of users on holiday on the current day.
- **On Field Break:** Total No. of users on field break on the current day.
- **On Rest Day:** Total No. of users on rest day on the current day.

**Scheduled Users:** Total no. of active users whose working shift is scheduled for the current day.

**Scheduled Shifts:** Total no. of scheduled shifts for the current day.




## Exceptions

- **Present:** Total No. of users who have punched for current day.
- **No Punches Available:** Total No. of users whose punches are not available for current day.
- **Punches Not in Pair:** Total No. of users whose punches are not in pair for current day.
- **Less Work Hours:** Total No. of users whose working hours are less than the required hours to complete the shift for the current day.
- **Unauthorized:** Total No. of users whose punches are not authorized for current day.
- **Late-IN:** Total No. of users who have started their shift late on the current day.
- **Early-OUT:** Total No. of users who have left their work early on the current day.
- **Absent Club/Cover Rule:** Total No. of users who are Absent due to club/cover rule on current day.
- **Leave Club/Cover Rule:** Total No. of users who are Absent due to leave club/cover rule on current day.
- **Short Leave Balance:** Total No. of users who are Absent due to exceeding limit of short leave balance.
- **Target Shortfall:** Total No. of users who are Absent due to target shortfall.
- **Less Grace Count:** Total No. of users who are Absent due to exceeding limit of allowed less grace count in flexible shift.
- **Work Hours Limit:** Total No. of users who are Absent due to exceeding work hours limit.

## Pending Authorization/Approval

- **Short Leave/ Official IN-OUT** - Total No. of pending applications for Short Leave and Official IN-OUT marking.
- **Overtime/C-OFF:** Total No. of pending applications for overtime/C-OFF approval.
- **Daily Attendance:** Total No. of all users who need to be authorized daily for attendance.
- **Attendance Correction:** Total No. of pending applications for attendance correction.
- **Event Authorization:** Total No. of events pending for authorization.

For more information on the above Dashboard options, click the respective information links on the Dashboard. The Latest values on Dashboard are updated on clicking the **Refresh**  button.

# Attendance Policy

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An Attendance Policy can be defined as a set of rules governing the attendance system that an organization follows for payroll calculation purposes. COSEC has a provision for administrators to configure such policies as per the company standards and regulations.

Different organizations follow different attendance policies, depending on which, resultant factors such as attendance period, attendance summary, attendance marking and previous attendance adjustments vary. The Attendance Policy option enables users to define policies as per site requirements. Later, each policy can be linked with a user or group of users.

[“General Parameters”](#)

[“Short Leave/Official Hours Restrictions Parameters”](#)

[“Absent Marking Rule”](#)

[“Auto Attendance Correction”](#)

[“Flexible Working Settings”](#)

[“Attendance Correction-Short Leave/Official Hours Application Restrictions”](#)

To define an Attendance Policy, Select the **Time & Attendance module > Policies> Attendance Policy**.

The **Attendance Policy** page appears on your screen as follows:

The screenshot displays the 'Attendance Policy' configuration window. At the top, there are fields for 'Attendance Policy' (ID: 1) and 'Attendance Policy-1'. Below these is a 'Default' checkbox which is checked. The 'Attendance Period' is set to 'Calendar Month'. Under 'Yearly Period For Leave Balance', the 'Start-End Month' is set from 'January' to 'December'. The bottom section contains several expandable tabs: 'General', 'Short Leave/Official Hours Restrictions', 'Absent Marking Rule', 'Auto Attendance Correction', 'Flexible Working Settings', and 'Attendance Correction-Short Leave/Official Hours Application Restrictions'.

Click the **New** button to define a new Attendance Policy.

**Attendance Policy:** Enter a user-friendly name for the Attendance Policy. The ID will auto generated by the system.

**Default:** Select this checkbox if the new Attendance Policy is to be set as default. The new users will be linked with this Attendance Policy by default. You can change the attendance policy of user from User Configuration > T&A> Policy.

**Attendance Period:** Select the attendance period for the policy as Calendar Month or Customized.

- **Calendar Month:** This option allows the user to set the attendance period as per the calendar month.

- **Customized:** This option enables the user to define the customized start date of the month. In this case the system will automatically calculate the end date as follows:

Attendance Period	Customized
Month Start-End Date	25 24

**Example1:** 25th August 2016 to 24th September 2016 is considered as the attendance month of September 2016.

The shift schedule for a user (who is joining on 1st sept) for the month of September is shown as below.

User

749

Vivek

Attendance Period

September

2016

Mon	Tue	Wed	Thu	Fri	Sat	Sun
			25	26	27	28
29	30	31	1	2	3	4
GS	GS	GS	GS	GS	GS	GS WO
5	6	7	8	9	10	11
GS	GS	GS	GS	GS	GS WO	GS WO
12	13	14	15	16	17	18
GS	GS	GS	GS	GS	GS	GS WO
19	20	21	22	23	24	
GS	GS	GS	GS	GS	GS WO	

**Example2:** If Month Start-End is 15 to 14. Then from 15th August 2016 to 14th September 2016 is considered for the September 2016. If user joins on 1st September; then only 14 days will be counted in his attendance period of September month.

- **Yearly Period For Leave Balance:** Specify the starting month of the calendar year from which the system will start calculating the Leave Balance. The system automatically calculates the ending month as shown.

Yearly Period For Leave Balance	
Start-End Month	January December

Once the above parameters have been defined, you can configure the other parameters on this page as discussed in the following sections.

## General Parameters

On the *Attendance Policy* page, expand the **General** panel. The **General** section enables the administrator to configure the following parameters.

The screenshot shows the 'General' configuration panel. It includes the following settings:

- Max Punches To Consider**: A dropdown menu set to '2'.
- Deduct Out Time**: A dropdown menu set to 'Always' and a text input field set to '1-999' Mins.
- Duplicate Punch Period (Mins)**: A text input field set to '0'.
- Out Punch From Exit Reader**: An unchecked checkbox.
- Always Mark First Punch As IN Punch**: An unchecked checkbox.
- Event Authorization**: A section header.
- Authorization Required**: A checked checkbox with an information icon.
- Event Source**: A list of checkboxes, all of which are checked: 'Device', 'ESS', 'User Assigned Locations', 'User Unassigned Locations', and 'Others'.
- Auth Required for at least one Event of the day**: An unchecked checkbox with an information icon.
- Daily Attendance Authorization Required**: A checked checkbox.
- Biometric Credential Must For Attendance**: An unchecked checkbox.
- Extra Hours Checked With Auth OT/C-OFF**: A checked checkbox.
- Auto Shift Correction**: An unchecked checkbox.

The screenshot shows the 'Attendance Process Calibration' configuration panel. It includes the following settings:

- Auto Shift Correction**: An unchecked checkbox.
- Attendance Correction In Closed Period**: A checked checkbox.
- Adjustment Generated For Closed Period**: An unchecked checkbox.
- Valid Period For Adjustment (Months)**: A text input field set to '0'.
- Attendance Process Calibration**: A section header.
- Enable**: An unchecked checkbox.
- Max Early-IN Allowed (Hrs)**: A text input field with a placeholder 'HH:MM'.
- Max Late-OUT Allowed (Hrs)**: A text input field with a placeholder 'HH:MM'.
- Priority**: A dropdown menu set to 'Early-IN (Next Shift)'.
- Max Working Hours Per Day (Hrs)**: A text input field with a placeholder 'HH:MM'.

- **Maximum Punches to Consider:** This parameter enables the user to define the maximum number of punches per day which would be considered as a valid punch to be used in the Attendance calculation of the users. The values which can be assigned to this parameter are limited to 2, 4, 6, 8, 10 or 12, N.

### Example: 4 punch user

The first and last punch of the user is displayed in First IN and Last OUT columns of Daily Attendance view. The other punches (for example: 2nd and 3rd punch for **4 punch user**) can be viewed from Attendance Correction page as shown below:

Date	Shift	First IN	Last OUT	1st Half	2nd Half
01/09/2016	GS	08:00	19:00	PR	PR

Attendance Correction

<b>1 IN</b> Date: 01/09/2016 Time: 08:00 Special Function: IN Reason: 	<b>2 OUT</b> Date: 01/09/2016 Time: 10:00 Special Function: OUT Reason: 
<b>3 IN</b> Date: 01/09/2016 Time: 11:00 Special Function: IN Reason: 	<b>4 OUT</b> Date: 01/09/2016 Time: 19:00 Special Function: OUT Reason: 

- **Deduct Out Time:** For N-punch user, you can select the option to deduct the out timings from the total work hours.
  - **Always:** When Always is selected, then out timings will be deducted always.
  - **Beyond:** For “Beyond” option, specify the time in minutes, beyond which the out timings will be deducted from the working hours.
  - **If Greater than:** For “If Greater than” option, specify the time in minutes. If out time is greater than the specified time then the out timings will be deducted from the working hours.

Punches	Punch timings	Always	Beyond 15 minutes	Greater than 15 minutes
		OUT Time	OUT Time	OUT Time
IN Punch	09:00			
OUT Punch	10:00			
IN Punch	10:30	00:30	00:15 (30 mins -15 mins)	00:30 (actual 30 min outtime)
OUT Punch	12:00			
IN Punch	15:00	03:00	02:45 (3 hrs-15 mins)	03:00 (actual 3 hrs outtime)
OUT Punch	16:00			
IN Punch	16:05	00:05		
OUT Punch	21:00			
<b>N-Punch Hours</b>		08:25 hours	09:00 hours	08:30 hours
<b>Total OUT Time</b>		03:35 hours	03:00 hours	03:30 hours

- **Duplicate Punch Period (mins):** This parameter enables the user to define the time period in minutes between punches, which would be considered by the system as a duplicate punch. If the system identifies a duplicate punch then the first punch of the day will be considered as the IN punch and the last punch of the day will be considered as the OUT punch.

Now you can click **Save** button to save the Attendance Policy as shown below.

- **Out Punch from Exit Reader:** Select this checkbox to enable OUT punches to be allowed only on an Exit Reader. Hence an employee's exit event will be identified only when the OUT punch is made at an Exit Reader. To use this functionality it is essential to have either an external reader or another DOOR which is configured as an Exit reader or DOOR.



*If this box is left unchecked, the system considers the first punch of the day as the IN punch and the last punch of the day as the OUT punch. Hence, to enable this functionality, the Administrator needs to ensure that all the out punches occur only at the readers whose mode is defined as Exit.*

If this checkbox is enabled and device is not in exit mode, then out punch will not be shown.

**For example:** The N punch user is punching on the same device. His all the punches are shown as IN punch. And the Out time is not shown.

05/09/2016	GS	09:06	IN			
06/09/2016	GS	09:05	IN			
07/09/2016	GS					

Source	IO Type	Date	Time	Out Time	Special Function	Edit	
Device - Door V3-Device-9	IN	05/09/2016	09:06				
Device - Door V3-Device-9	IN	05/09/2016	13:01				
Device - Door V3-Device-9	IN	05/09/2016	20:00				

After the Daily Attendance process, the user will be marked Absent on that day as shown below:







*This will be enabled only if Automatic OT and C-OFF authorization is disabled in corresponding policy rules in the Time & Attendance module.*

- **Auto Shift Correction:** This parameter enables the user to specify whether shift correction is required to be done manually or automatically by the system. If this option is enabled, the HR user need not go and manually edit the shift.



*Shift correction is possible only among shifts in the same schedule group.*

*If Shift Changes have been done manually for the selected dates/day, then Auto Shift Correction will not be applicable.*

- **Allow Attendance Correction in Closed Period:** If this parameter is enabled then the system will permit users to edit data of previously closed attendance period.
- **Adjustment Generated For Closed Period:** This parameter enables the user to allow the system to calculate adjustments based on the corrections made for the previous paid attendance period.
- **Valid Period for Adjustment (Months):** This parameter enables the user to specify the maximum number of attendance periods in months allowed for previous adjustment calculations.

## Attendance Process Calibration

These Attendance processing parameters can be calibrated to determine how a user's punch is posted on COSEC. Select the Enable checkbox to enable the feature for all users on whom this policy is assigned.

- **Max Early-IN Allowed (Hrs):** Maximum number of hours before shift-start time during which a punch should be considered as an Early-IN punch. Default value is 02:00 hours.
- **Max Late-OUT Allowed (Hrs):** Maximum number of hours after shift-end time during which a punch should be considered as a Late-OUT punch. Default value is 02:00 hours.
- **Priority:** This parameter assigns posting priority to an intermediate punch between two shifts. The administrator can determine whether such a punch is to be posted as an Early-IN punch for the next shift or a Late-OUT punch for the previous shift.
- **Max Working Hours Per Day (Hrs):** The maximum number of working hours to be considered per day for punch posting. All punches falling within this duration will be posted for the same day as per shift-based priority (if any). Default value is 16:00 hours.

Attendance Process Calibration parameters can also be defined at the global system level. For more details, refer to, ["Time Attendance Policy"](#) in ["Defining Global Policies"](#).

## Short Leave/Official Hours Restrictions Parameters

The administrator can define certain restrictions on employees for reporting late or leaving earlier than the official shift timings. A Short Leave is a personal time concession on official work hours, that an employee is permitted to take in addition to official breaks. This option enables the administrator to configure the parameters related to short leaves and official hours restrictions as shown.

The user can use/apply short leave when he has used late-in or early-out more than the number of times allowed. So using short leave converts the absent punches to present. See ["Applying Short leave on Late-IN occurrences"](#).



Short leave hours availed are not required to be compensated by working extra hours.

### Short Leave/Official Hours Restrictions

#### Short Leave Check In Attendance Period

Enable

☒

Maximum Minutes Allowed

180

Maximum Count Allowed

3

#### Duration Check Per Short Leave Entry

Enable

☒

Minimum Duration (In Minutes)

5

Maximum Duration (In Minutes)

60

Range Based Short Leave

☒

Search

Range (From) ▲	Range (To)	Deduction	
30	60	1	

#### Consider Grace In Short Leave

For Shift Late-IN

☐

For Shift Early-OUT

☐

For Break Late-IN

☐

For Break Early-OUT

☐

Short Leave Authorization Required

☐

Add Short Leave Hours In Work Hours

☐

Official IN/OUT Authorization Required

☐

Add Official Hours In Work Hours

☐

Club Short Leave / Official With Break

☒

## Short Leave Check In Attendance Period

- **Enable:** Select this checkbox to enable a check on the number of times a short leave can be taken over a defined period of time.
- **Maximum Minutes Allowed:** Define the maximum number of minutes in a month that can be permitted for Short Leave.
- **Maximum Count Allowed:** Define the maximum number of Short leaves to be allowed in an attendance period.

## Duration Check Per Short Leave Entry

- **Enable:** Select this checkbox if you want to enable a check on the duration of a Short Leave.
- **Minimum Duration (In Minutes):** Specify the minimum duration (in minutes) allowed in a day for Short Leave.

- **Maximum Duration (In Minutes):** Specify the maximum duration (in minutes) allowed in a day for Short Leave. This duration has to be greater than the minimum personal duration allowed.
- **Range Based Short Leave:** Select this checkbox to enable short leave deduction on the basis of availed short leave duration when a short leave is applied.
- **Range (In Minutes):** Click Add and specify the range (in minutes) for Short Leave duration based on which deduction is to be calculated.
- **Deduction:** Specify the deduction to be made from user's available short leave count for the range defined. Click the OK button to save the range and the deduction. User can define multiple ranges and save them in the policy, as shown below.

**Example:** If range is from 30min to 60min and short leave count deduction is 1; Then if user takes short leave o duration in the specified range say 45min, then 1 short leave will be deducted.

Range (From)	Range (To)	Deduction
30	60	1
61	90	2
91	180	3

## Consider Grace In Short Leave

This option enables a grace period to be considered in addition to Short Leave duration. Enable the following options for the type of grace period to be added to the short leave duration:

- For Shift Late-IN (Late entry)
- For Shift Early-OUT (Early exit)
- For Break Late-IN (Late entry after break)
- For Break Early-OUT (Early exit for break)

Say, the short leave duration is 30 minutes and the Shift Late-IN option is enabled (say, grace period is 30 minutes), then the short leave duration can be stretched upto a maximum of 120 minutes.

For Shift Late-IN	<input type="checkbox"/>
For Shift Early-OUT	<input type="checkbox"/>
For Break Late-IN	<input type="checkbox"/>
For Break Early-OUT	<input type="checkbox"/>
Short Leave Authorization Required	<input type="checkbox"/>
Add Short Leave Hours In Work Hours	<input type="checkbox"/>
Official IN/OUT Authorization Required	<input type="checkbox"/>
Add Official Hours In Work Hours	<input type="checkbox"/>
Club Short Leave / Official With Break	<input checked="" type="checkbox"/>

## Authorization for Short leave/Official hours

- **Short Leave Authorization Required:** Select this checkbox to enable a requirement for authorization in order to take a Short Leave.

**Eg:** If employee makes Entry for short leave from ESS, then his application goes for authorization to his reporting incharge.

- **Add Short Leave Hours in Work Hours:** Select the checkbox to enable the inclusion of short leave hours in work hours.

**Eg:** If shift working hrs is 9 hours, and short leave allowed is 1hour. Employee takes short leave of 1hr on 6/7/16. Then total working hours on 6th will be considered as 9 hrs though he has worked only for 8 hours.

- **Official IN/OUT Authorization Required:** Check this box if the Official hours occurrences have to be further authorized by a supervisor before regularization.

**Eg:** If employee makes Entry for Official In/OUT from ESS, then his application goes for authorization to his reporting in-charge

- **Add Official Hours In Work Hours:** In the event of this parameter being enabled the system will include the official hours in the working hours calculation.

**Eg:** If shift working hrs is 9 hours. The employee goes for official work and spends 3 hours. So If this check box is enabled then 3 hrs will be counted in total work hours.

- **Club Short Leave/Official with Break:** Select the checkbox to enable the inclusion of short leave or official hours with Break hours.

This checkbox will be enabled by default. So any 2nd and 3rd punch (official or short leave) will be considered as break punches.

If this checkbox is disabled then system will consider the punch pair as break punches when it is not accompanied with any special function or with break special function. For flexible users, Break-Duration will be calculated when 2 punches are made.

## Absent Marking Rule

This option enables the administrator to configure the parameters relating to the Late In and Early Out rules of the organization as shown.

The screenshot shows a web-based configuration window titled "Absent Marking Rule". It contains four main sections for configuring different types of absent marking rules:

- Late-IN/Early-OUT Check:** Includes "Marking Type As Per" (set to "Monthly Count") and "Mode" (set to "Independent").
- Late-IN Occurrence Check:** Includes an "Enable" checkbox (unchecked), "Maximum Allowed Count Per Month" (set to "0"), "Calculation Basis" (set to "Continuous"), and "Action on Exceeding Max Late-IN Allowed" (set to "Half Day Absent").
- Early-OUT Occurrence Check:** Includes an "Enable" checkbox (unchecked), "Maximum Allowed Count Per Month" (set to "0"), "Calculation Basis" (set to "Continuous"), and "Action on Exceeding Max Early-OUT Allowed" (set to "Half Day Absent").
- Less Working Hours Check:** Includes an "Enable" checkbox (unchecked), "Daily Allowed Limit (Min)" (set to "0"), "Mark Absent As Per" (set to "Monthly Count"), "Monthly Allowed Count" (set to "7-31"), "Absent Marking Type" (set to "Continuous"), and "Mark Absent" (set to "Half Day").

### Late-IN/Early-OUT Check

- **Marking Type As Per:** Select the desired option — Monthly Count or Monthly Duration.

If you select **Monthly Count** then maximum allowed Late-IN and Early-OUT will have to be specified in terms of count, whereas if you select **Monthly Duration**, it must be specified in terms of duration (mins).

- **Mode:** Select the desired option — Combined, Independent.

If you select **Combined** the parameters to be configured will be applicable for both Late-IN and Early-OUT.

If you select **Independent**, you need to configure the Late-IN and Early-OUT parameters independently.

## Combined Mode

If you select **Mode** as **Combined** and have selected **Monthly Count** as the **Marking Type As Per** option.



Absent Marking Rule	
<b>Late-IN/Early-OUT Check</b>	
Marking Type As Per	Monthly Count
Mode	Combined
Maximum Late-IN/Early-OUT Allowed Count	3
Calculation Basis	Slab Wise
Action on Exceeding Max Late-IN Allowed	Half Day Absent
Action on Exceeding Max Early-OUT Allowed	Half Day Absent

- **Maximum Late-IN/Early-OUT Allowed Count:** Specify the maximum allowed count for Late-IN or Early-OUT occurrences after which the configured option set in **Action on Exceeding Max Late-IN Allowed/Action on Exceeding Max Early-OUT Allowed** should be executed.
- **Calculation Basis:** Select the desired option — **Continuous** or **Slab Wise**.

If you select **Continuous**, after the **Maximum Late-IN/Early-OUT Allowed Count** is reached, every Late-IN or Early-OUT occurrence will be marked as per the option set in **Action on Exceeding Max Late-IN Allowed/Action on Exceeding Max Early-OUT Allowed**.

If you select In **Slab Wise**, after the **Maximum Late-IN/Early-OUT Allowed Count** is reached, every Late-IN or Early-OUT occurrence will be marked as per the option set in **Action on Exceeding Max Late-IN Allowed/Action on Exceeding Max Early-OUT Allowed** and then the count/duration will be reset after the Monthly Attendance Process.

Refer to the examples.

- **Action on Exceeding Max Late-IN Allowed:** After the **Maximum Late-IN/Early-OUT Allowed Count** is reached, select the desired action to be taken — Half Day Absent, Full Day Absent, Debit Half Day Leave, Debit Full Day Leave.



*For Debit Half Day Leave/Debit Full Day Leave options, make sure:*

- User is assigned a Leave Group in which any Paid Leave type with **Enable Balance Check** check box enabled.
- User is assigned a Leave Group with **Auto Debit Leave** check box enabled against the desired Paid Leave type.
- Attendance Policy with Debit Leave option configured as **Action on Exceeding Max Late-IN** or **Early-OUT** or both allowed is assigned to the user.

*If on a particular date if Half Day Absent/Full Day Absent is marked for a user due to **Action on Exceeding Max Late-IN Allowed** and a Leave is found for the same date, then in such a case the user will not be marked as Absent and the Count of Late-IN will also be reset*

- **Action on Exceeding Max Early-OUT Allowed:** After the **Maximum Late-IN/Early-OUT Allowed Count** is reached, select the desired action to be taken — Half Day Absent, Full Day Absent, Debit Half Day Leave, Debit Full Day Leave.



For Debit Half Day Leave/Debit Full Day Leave options, make sure:

- User is assigned a Leave Group in which any Paid Leave type with **Enable Balance Check** check box enabled.
- User is assigned a Leave Group with **Auto Debit Leave** check box enabled against the desired Paid Leave type.
- Attendance Policy with Debit Leave option configured as **Action on Exceeding Max Late-IN** or **Early-OUT** or both allowed is assigned to the user.

If on a particular date if Half Day Absent/Full Day Absent is marked for a user due to **Action on Exceeding Max Early-OUT Allowed** and a Leave is found for the same date, then in such a case the user will not be marked as Absent and the Count of Early-OUT will also be reset

If you select **Mode** as **Combined** and have selected **Monthly Duration** as the **Marking Type As Per** option.

- **Maximum Late-IN/Early-OUT Allowed (Min):** Specify the maximum allowed minutes for Late-IN or Early-OUT occurrences after which the configured option set in **Action on Exceeding Max Late-IN Allowed/Action on Exceeding Max Early-OUT Allowed** should be executed.
- **Calculation Basis:** Select the desired option — **Continuous** or **Slab Wise**.

If you select **Continuous**, after the **Maximum Late-IN/Early-OUT Allowed (Min)** is reached, every Late-IN or Early-OUT occurrence will be marked as per the option set in **Action on Exceeding Max Late-IN Allowed/Action on Exceeding Max Early-OUT Allowed**.

If you select In **Slab Wise**, after the **Maximum Late-IN/Early-OUT Allowed (Min)** is reached, every Late-IN or Early-OUT occurrence will be marked as per the option set in **Action on Exceeding Max Late-IN Allowed/Action on Exceeding Max Early-OUT Allowed** and then the count/duration will be reset after Monthly Attendance Process.

Refer to the examples.

- **Action on Exceeding Max Late-IN Allowed:** After the **Maximum Late-IN/Early-OUT Allowed Count/Maximum Late-IN/Early-OUT Allowed (Min)** is reached, select the desired action to be taken — Half Day Absent, Full Day Absent, Debit Half Day Leave, Debit Full Day Leave.





For Debit Half Day Leave/Debit Full Day Leave options, make sure:

- User is assigned a Leave Group in which any Paid Leave type with **Enable Balance Check** check box enabled.
- User is assigned a Leave Group with **Auto Debit Leave** check box enabled against the desired Paid Leave type.
- Attendance Policy with Debit Leave option configured as **Action on Exceeding Max Late-IN** or **Early-OUT** or both allowed is assigned to the user.

If on a particular date if Half Day Absent/Full Day Absent is marked for a user due to **Action on Exceeding Max Late-IN Allowed** and a Leave is found for the same date, then in such a case the user will not be marked as Absent and the Count of Late-IN will also be reset

- **Action on Exceeding Max Early-OUT Allowed:** After the **Maximum Late-IN/Early-OUT Allowed Count/Maximum Late-IN/Early-OUT Allowed (Min)** is reached, select the desired action to be taken — Half Day Absent, Full Day Absent, Debit Half Day Leave, Debit Full Day Leave.



For Debit Half Day Leave/Debit Full Day Leave options, make sure:

- User is assigned a Leave Group in which any Paid Leave type with **Enable Balance Check** check box enabled.
- User is assigned a Leave Group with **Auto Debit Leave** check box enabled against the desired Paid Leave type.
- Attendance Policy with Debit Leave option configured as **Action on Exceeding Max Late-IN** or **Early-OUT** or both allowed is assigned to the user.

If on a particular date if Half Day Absent/Full Day Absent is marked for a user due to **Action on Exceeding Max Early-OUT Allowed** and a Leave is found for the same date, then in such a case the user will not be marked as Absent and the Count of Early-OUT will also be reset

## Independent Mode

If you select **Mode** as **Independent**, you need to configure the Late-IN and Early-OUT parameters independently.

If you select **Mode** as **Independent** and have selected **Monthly Count** as the **Marking Type As Per** option.

**Absent Marking Rule**

**Late-IN/Early-OUT Check**

Marking Type As Per: Monthly Count

Mode: Independent

**Late-IN Occurrence Check**

Enable: ☐

Maximum Allowed Count Per Month: 0

Calculation Basis: Continuous

Action on Exceeding Max Late-IN Allowed: Half Day Absent

**Early-OUT Occurrence Check**

Enable: ☐

Maximum Allowed Count Per Month: 0

Calculation Basis: Continuous

Action on Exceeding Max Early-OUT Allowed: Half Day Absent

### Late-IN Occurrence Check

- **Enable:** Select the check box to enable. A check will be kept on the number of Late-IN occurrences within a defined attendance period.
- **Maximum Allowed Count Per Month:** Specify the maximum allowed count for Late-IN occurrences after which the configured option set in **Action on Exceeding Max Late-IN Allowed** should be executed.
- **Calculation Basis:** Select the desired option — **Continuous** or **Slab Wise**.

If you select **Continuous**, after the **Maximum Allowed Count Per Month** is reached, every Late-IN occurrence will be marked as per the option set in **Action on Exceeding Max Late-IN Allowed**.

If you select In **Slab Wise**, after the **Maximum Allowed Count Per Month** is reached, every Late-IN occurrence will be marked as per the option set in **Action on Exceeding Max Late-IN Allowed** and then the count will be reset after Monthly Attendance Process.

Refer to the examples.

- **Action on Exceeding Max Late-IN Allowed:** After the **Maximum Allowed Count Per Month** is reached, select the desired action to be taken — Half Day Absent, Full Day Absent, Debit Half Day Leave, Debit Full Day Leave.



*For Debit Half Day Leave/Debit Full Day Leave options, make sure:*

- User is assigned a Leave Group in which any Paid Leave type with **Enable Balance Check** check box enabled.
- User is assigned a Leave Group with **Auto Debit Leave** check box enabled against the desired Paid Leave type.
- Attendance Policy with Debit Leave option configured as **Action on Exceeding Max Late-IN** or **Early-OUT** or both allowed is assigned to the user.

*If on a particular date if Half Day Absent/Full Day Absent is marked for a user due to **Action on Exceeding Max Late-IN Allowed** and a Leave is found for the same date, then in such a case the user will not be marked as Absent and the Count of Late-IN will also be reset*

### Early-OUT Occurrence Check

- **Enable:** Select the check box to enable. A check will be kept on the number of Early-OUT occurrences within a defined attendance period.
- **Maximum Allowed Count Per Month:** Specify the maximum allowed count for Early-OUT occurrences after which the configured option set in **Action on Exceeding Max Early-OUT Allowed** should be executed.
- **Calculation Basis:** Select the desired option — **Continuous** or **Slab Wise**.

If you select **Continuous**, after the **Maximum Allowed Count Per Month** is reached, every Early-OUT occurrence will be marked as per the option set in **Action on Exceeding Max Early-OUT Allowed**.

If you select In **Slab Wise**, after the **Maximum Allowed Count Per Month** is reached, every Early-OUT occurrence will be marked as per the option set in **Action on Exceeding Max Early-OUT Allowed** and then the count will be reset after Monthly Attendance Process.

- **Action on Exceeding Max Early-OUT Allowed:** After the **Maximum Allowed Count Per Month** is reached, select the desired action to be taken — Half Day Absent, Full Day Absent, Debit Half Day Leave, Debit Full Day Leave.



For Debit Half Day Leave/Debit Full Day Leave options, make sure:

- User is assigned a Leave Group in which any Paid Leave type with **Enable Balance Check** check box enabled.
- User is assigned a Leave Group with **Auto Debit Leave** check box enabled against the desired Paid Leave type.
- Attendance Policy with Debit Leave option configured as **Action on Exceeding Max Late-IN** or **Early-OUT** or both allowed is assigned to the user.

If on a particular date if Half Day Absent/Full Day Absent is marked for a user due to **Action on Exceeding Max Early-OUT Allowed** and a Leave is found for the same date, then in such a case the user will not be marked as Absent and the Count of Early-OUT will also be reset

If you select **Mode** as **Independent** and have selected **Monthly Duration** as the **Marking Type As Per** option.

### Late-IN Occurrence Check

- **Enable:** Select the check box to enable. A check will be kept on the duration of Late-IN occurrences within a defined attendance period.
- **Maximum Late-IN Allowed (Min):** Specify the maximum allowed duration for Late-IN occurrences after which the configured option set in **Action on Exceeding Max Late-IN Allowed** should be executed.
- **Calculation Basis:** Select the desired option — **Continuous** or **Slab Wise**.

If you select **Continuous**, after the **Maximum Late-IN Allowed (Min)** is reached, every Late-IN occurrence will be marked as per the option set in **Action on Exceeding Max Late-IN Allowed**.

If you select In **Slab Wise**, after the **Maximum Late-IN Allowed (Min)** is reached, every Late-IN occurrence will be marked as per the option set in **Action on Exceeding Max Late-IN Allowed** and then the duration will be reset after Monthly Attendance Process.

Refer to the examples.

- **Action on Exceeding Max Late-IN Allowed:** After the **Maximum Late-IN Allowed (Min)** is reached, select the desired action to be taken — Half Day Absent, Full Day Absent, Debit Half Day Leave, Debit Full Day Leave.



*For Debit Half Day Leave/Debit Full Day Leave options, make sure:*

- User is assigned a Leave Group in which any Paid Leave type with **Enable Balance Check** check box enabled.
- User is assigned a Leave Group with **Auto Debit Leave** check box enabled against the desired Paid Leave type.
- Attendance Policy with Debit Leave option configured as **Action on Exceeding Max Late-IN** or **Early-OUT** or both allowed is assigned to the user.

*If on a particular date if Half Day Absent/Full Day Absent is marked for a user due to **Action on Exceeding Max Late-IN Allowed** and a Leave is found for the same date, then in such a case the user will not be marked as Absent and the Count of Late-IN will also be reset*

### Early-OUT Occurrence Check

- **Enable:** Select the check box to enable. A check will be kept on the duration of Early-OUT occurrences within a defined attendance period.
- **Maximum Early-OUT Allowed (Min):** Specify the maximum allowed duration for Early-OUT occurrences after which the configured option set in **Action on Exceeding Max Early-OUT Allowed** should be executed.
- **Calculation Basis:** Select the desired option — **Continuous** or **Slab Wise**.

If you select **Continuous**, after the **Maximum Early-OUT Allowed (Min)** is reached, every Early-OUT occurrence will be marked as per the option set in **Action on Exceeding Max Early-OUT Allowed**.

If you select In **Slab Wise**, after the **Maximum Early-OUT Allowed (Min)** is reached, every Early-OUT occurrence will be marked as per the option set in **Action on Exceeding Max Early-OUT Allowed** and then the duration will be reset after Monthly Attendance Process.

Refer to the examples.

- **Action on Exceeding Max Early-OUT Allowed:** After the **Maximum Early-OUT Allowed (Min)** is reached, select the desired action to be taken — Half Day Absent, Full Day Absent, Debit Half Day Leave, Debit Full Day Leave.



*For Debit Half Day Leave/Debit Full Day Leave options, make sure:*

- User is assigned a Leave Group in which any Paid Leave type with **Enable Balance Check** check box enabled.
- User is assigned a Leave Group with **Auto Debit Leave** check box enabled against the desired Paid Leave type.
- Attendance Policy with Debit Leave option configured as **Action on Exceeding Max Late-IN** or **Early-OUT** or both allowed is assigned to the user.

*If on a particular date if Half Day Absent/Full Day Absent is marked for a user due to **Action on Exceeding Max Early-OUT Allowed** and a Leave is found for the same date, then in such a case the user will not be marked as Absent and the Count of Early-OUT will also be reset.*

## Less Working Hours Check

This option enabled you to configure less working hours (shift duration-work hours) for a day and monitor the less working hours availed by the users.

Less Working Hours Check	
Enable	<input type="checkbox"/>
Daily Allowed Limit (Min)	<input type="text" value="0"/>
Mark Absent As Per	<input type="text" value="Monthly Duration"/>
Monthly Allowed Limit (Mins)	<input type="text" value="0"/>
Absent Marking Type	<input type="text" value="Continuous"/>
Mark Absent	<input type="text" value="Half Day"/>

Configure the following:

- **Enable:** Select the check box to enable.
- **Daily Allowed Limit (Min):** Specify the minutes of less working hours allowed for a day.
- **Mark Absent As Per:** Select the desired option — Monthly Count, Monthly Duration.Both.

If you wish to configure the count as well as duration, select Both and configure **Month Count** as well as **Monthly Allowed Limit (Mins)**.

- **Monthly Allowed Limit (Mins):** If you select **Month Duration** as the **Mark Absent As Per** option, configure the **Monthly Allowed Limit (Mins)**. Specify the minutes of less working hours allowed in a month.
- **Monthly Allowed Count:** If you select **Month Count** as the **Mark Absent As Per** option, configure the **Monthly Allowed Count**. Specify the number of times less working hours should be allowed in a month.
- **Absent Marking Type:** Select the desired option — **Continuous** or **Slab Wise**.
  - **Continuous type:** After the maximum count/duration is reached as configured in **Monthly Allowed Count/Monthly Allowed Limit (Mins)**, the action as configured in will user will be marked absent as per the option set in **Mark Absent** till the month end.
  - **Slab Wise:** After the maximum count/duration is reached as configured in **Monthly Allowed Count/Monthly Allowed Limit (Mins)**, the user will marked absent as per the option set in **Mark Absent**. After each slab, the count/duration will be reset after Monthly Attendance Process.
- **Mark Absent:** Select the desired option — Half Day, Full Day— when summation of user's less working hours exceed the duration set in **Monthly Allowed Limit (Mins)** or count set in **Monthly Allowed Count** per month.

## Example1:Combined Mode

### Continuous

The user is allowed for combined count of Late-IN and Early-OUT 3 times a month. For Late-IN, Half Day Absent Slab Wise Marking and for Early-OUT, Full Day Absent Slab Wise marking.

The Daily Attendance View displays the following punches of a user.

Initially the punches after 3rd late-in or early-out will be shown as present.

Daily Attendance View														
←														
User 1220 Sheetal														
Attendance Period November 2016														
View														
Date	Shift	First IN	Last OUT	1st Half	2nd Half	Late-IN	Early-OUT	Work Hours	Extra Work	Net Work	Break Hours	Actual Overtime	Authorized Overtime	Remark
01/11/2016	GS	09:10	18:30	PR	PR			08:20	00:30		01:00			
02/11/2016	GS	09:00	17:45	PR	PR		00:15	07:45			01:00			
03/11/2016	GS	09:25	19:00	PR	PR	00:15		08:35	01:00		01:00			
04/11/2016	GS	09:00	17:55	PR	PR		00:05	07:55			01:00			
05/11/2016	GS	09:27	19:30	PR	PR	00:17		09:03	01:30		01:00			
06/11/2016	GS - WO			WO	WO									
07/11/2016	GS	09:00	17:50	PR	PR		00:10	07:50			01:00			

But after the Monthly Attendance Process the user will be marked Absent due to Late-IN limit or Early-OUT limit as shown below:

Daily Attendance View															
←															
User 1220 Sheetal															
Attendance Period November 2016															
View															
Date	Shift	First IN	Last OUT	1st Half	2nd Half	Late-IN	Early-OUT	Work Hours	Extra Work	Net Work	Break Hours	Actual Overtime	Authorized Overtime	Remark	Details
01/11/2016	GS	09:10	18:30	PR	PR			08:20	00:30		01:00				
02/11/2016	GS	09:00	17:45	PR	PR		00:15	07:45			01:00				
03/11/2016	GS	09:25	19:00	PR	PR	00:15		08:35	01:00		01:00				
04/11/2016	GS	09:00	17:55	PR	PR		00:05	07:55			01:00				
05/11/2016	GS	09:27	19:30	AB	PR	00:17		09:03	01:30		01:00			1st Half AB:Late-IN Limit	
06/11/2016	GS - WO			WO	WO										
07/11/2016	GS	09:00	17:50	AB	AB		00:10	07:50			01:00			Full Day AB:Early-OUT Limit	
08/11/2016	GS	09:00	19:00	PR	PR			09:00	01:00		01:00				
09/11/2016	GS	09:00	17:40	AB	AB		00:20	07:40			01:00			Full Day AB:Early-OUT Limit	

The user is marked half day absent (for Late-IN limit) on 5/11/2016 and full day absent (for Early-OUT limit) on 7/11/2016 due to the completion of combined count.

Thereafter for each Late-IN or Early-OUT, user will be marked Absent.

## Example2: Combined mode

### Slab-Wise Marking

The user is allowed for combined count of Late-IN and Early-OUT 3 times a month. For Late-IN, Half Day Absent Slab Wise Marking and for Early-OUT, Full Day Slab Wise Marking.

The Daily Attendance View shows the following punches of a user.

Initially the punches after 3rd late-in or early-out will be shown as present. But after the Monthly Attendance Process the user will be marked Absent due to Late-IN limit or Early-OUT limit as shown below:

Date	Shift	First IN	Last OUT	1st Half	2nd Half	Late-IN	Early-OUT	Work Hours	Extra Work	Net Work	Break Hours	Actual Overtime	Authorized Overtime	Remark	Details
01/11/2016	GS	09:10	18:30	PR	PR			08:20	00:30		01:00				
02/11/2016	GS	09:00	17:45	PR	PR		00:15	07:45			01:00				
03/11/2016	GS	09:25	19:00	PR	PR	00:15		08:35	01:00		01:00				
04/11/2016	GS	09:00	17:55	PR	PR		00:05	07:55			01:00				
05/11/2016	GS	09:27	19:30	AB	PR	00:17		09:03	01:30		01:00			1st Half AB:Late-IN Limit	
06/11/2016	GS - WO			WO	WO										
07/11/2016	GS	09:00	17:50	PR	PR		00:10	07:50			01:00				
08/11/2016	GS	09:00	19:00	PR	PR			09:00	01:00		01:00			After reset, 3 counts availed again	
09/11/2016	GS	09:00	17:40	PR	PR		00:20	07:40			01:00				
10/11/2016	GS	09:20	19:00	PR	PR		00:10	08:40	01:00		01:00				
11/11/2016	GS	09:00	17:50	AB	AB		00:10	07:50			01:00			Full Day AB:Early-OUT Limit	
12/11/2016	GS			AB	AB									No Punches Available	

On 5/11/2016, user is marked half day absent (for late-IN) due to the completion of combined count.

As the marking is Slab-wise, so the user will be marked absent and the slab will be reset. And the user can now again avail maximum 3 Late-IN and Early-OUT shown on 7th,9th and 10th again.

On 11th the user is marked full day absent (for Early-OUT) and again the slab will be reset.

## Example3: Independent mode

### Slab-Wise Marking

The user is allowed for 3 Late-IN and 3 Early-OUT independently. For Late-IN, Half Day Absent marking (Continuous) and for Early-OUT, Full Day Absent Slab Wise marking.

The Daily Attendance View shows the following punches of a user.

Initially the punches after 3rd Late-IN or Early-OUT will be shown as present. But after the Monthly attendance process the user will be marked Absent due to Late-IN limit or Early-OUT limit as shown below:

Daily Attendance View

←

User

1220

Sheetal

Attendance Period

November

2016

View

Date	Shift	First IN	Last OUT	1st Half	2nd Half	Late-IN	Early-OUT	Work Hours	Extra Work	Net Work	Break Hours	Actual Overtime	Authorized Overtime	Remark	Details
01/11/2016	GS	09:10	18:30	PR	PR			08:20	00:30		01:00				<div></div>
02/11/2016	GS	09:00	17:45	PR	PR		00:15	07:45			01:00				<div></div>
03/11/2016	GS	09:25	19:00	PR	PR	00:15		08:35	01:00		01:00				<div></div>
04/11/2016	GS	09:00	17:55	PR	PR		00:05	07:55			01:00				<div></div>
05/11/2016	GS	09:27	19:30	PR	PR	00:17		09:03	01:30		01:00				<div></div>
06/11/2016	GS - WO			WO	WO										<div></div>
07/11/2016	GS	09:00	17:50	PR	PR		00:10	07:50			01:00				<div></div>
08/11/2016	GS	09:00	19:00	PR	PR			09:00	01:00		01:00				<div></div>
09/11/2016	GS	09:00	17:40	AB	AB		00:20	07:40			01:00			Full Day AB:Early-OUT Limit	<div></div>
10/11/2016	GS	09:20	19:00	PR	PR	00:10		08:40	01:00		01:00				<div></div>
11/11/2016	GS	09:00	17:50	PR	PR		00:10	07:50			01:00				<div></div>
12/11/2016	GS	09:20	19:00	AB	PR	00:10		08:40	01:00		01:00			1st Half AB:Late-IN Limit	<div></div>
13/11/2016	GS - WO			WO	WO										<div></div>
14/11/2016	GS	09:20	17:50	AB	PR	00:10	00:10	07:30			01:00			1st Half AB:Late-IN Limit	<div></div>
15/11/2016	GS	09:00	17:45	PR	PR		00:15	07:45			01:00				<div></div>
16/11/2016	GS	09:00	17:55	AB	AB		00:05	07:55			01:00			Full Day AB:Early-OUT Limit	<div></div>
17/11/2016	GS			AB	AB									No Punches Available	<div></div>

The Late-IN and Early-OUT counts are checked independently. The user can avail 3 Early-OUT and 3 Late-IN.

On 9/11/2016, fourth Early-OUT is used, so user is marked full day absent and slab is reset. So he can avail Early-OUT again.

On 12/11/2016, fourth Late-IN is used, so user is marked half day absent. Then onwards if further any Late-IN is used, then user will be marked absent continuously as marked on 14/11/2016.

### Example 3:

Calculation Basis – Slab Wise

Marking Type As Per – Monthly Count

Mode – Combined

Maximum Late-IN/Early-OUT Allowed Count – 2

Action on Exceeding Max Late-IN Allowed – Debit Full Day Leave

Action on Exceeding Max Early-OUT Allowed – Debit Full Day Leave

3 combined Late-IN & Early-OUT encountered against U1

Hence, 1 leave is debited on 3rd. On 4th occurrence, no leave will be debited. However again on 6th occurrence 1 leave will be debited and so on.

### Example4:

Calculation Basis – Continuous

Marking Type As Per – Monthly Count

Mode – Combined

Maximum Late-IN/Early-OUT Allowed Count – 2

Action on Exceeding Max Late-IN Allowed – Debit Full Day Leave

Action on Exceeding Max Early-OUT Allowed – Debit Full Day Leave



3 combined Late-IN & Early-OUT encountered against U1

Hence, 1 leave is debited on 3rd. On 4th occurrence 1 leave will be debited and so on.

## Auto Attendance Correction

This option enables auto-adjustment of user's shortfalls in working duration due to *Late-IN* or *Early-OUT* by making use of available leaves, overtime, short leaves or official hours, based on their assigned priority. Auto Correction configurations performed using this option will be reflected when the attendance data is processed for an attendance period.

**Auto Attendance Correction**

**Leaves**

Enable

**Overtime**

Enable

Previous Months For Overtime Hours: 1 ▼

**Short Leave**

Enable

**Official Hours**

Enable

**Duration Check Per Official Hour Entry**

Enable ☐

Minimum Duration (In Minutes): 0

Maximum Duration (In Minutes): 0

**Official Hours Check In Attendance Period**

Enable ☐

Maximum Minutes Allowed: 0

Maximum Count Allowed: 0

Priority	Name	Up/Down
1	Leaves	▼
2	OverTime	▲▼
3	Short Leave	▲▼
4	Official Hours	▲

- **Leaves:** Enable this option to adjust users' less working hours with available leaves in an attendance period. However, this may not work for certain leave application restrictions (for e.g. if the concerned date falls within a period when leave application is restricted).

## Auto Adjustment with Leave

### Example

Consider PL :minimum application required= 2 and SL: minimum application required=0 is enabled for auto adjustment from Leave group as shown below. PL is at priority 1 and SL is at 2.

Auto Adjustment	Priority	Code	Name	Leave Type	Up/Down	
<input checked="" type="checkbox"/>	1	PL	Privelege leave	Paid Leave	▼	
<input checked="" type="checkbox"/>	2	SL	Sick Leave	Paid Leave	▲ ▼	
<input type="checkbox"/>	3	RH	Restricted leave	Restricted Holiday	▲	

The user attendance punches are shown below.

Daily Attendance View														
←														
User: SF Shalini Fefar														
Attendance Period: September 2016														
View														
Date	Shift	First IN	Last OUT	1st Half	2nd Half	Late-IN	Early-OUT	Work Hours	Extra Work	Net Work	Break Hours	Actual Overtime	Authorized Overtime	Remark
01/09/2016	GS	09:00	17:00	PR	AB			07:00			01:00			AB:Early-OUT
02/09/2016	GS	09:15	18:00	PR	PR	00:05		07:45			01:00			
03/09/2016	GS	10:00	18:30	AB	PR			07:30	00:30		01:00			AB:Late-IN
04/09/2016	GS - WO			WO	WO									
05/09/2016	GS	09:30	16:00	PR	AB	00:20		05:30			01:00			AB:Early-OUT
06/09/2016	GS	10:00	17:00	AB	AB			06:00			01:00			AB:Early-OUT
07/09/2016	GS	11:00	18:00	AB	PR			06:00			01:00			AB:Late-IN
08/09/2016	GS	09:00	17:30	PR	AB			07:30			01:00			AB:Early-OUT
09/09/2016	GS	10:30	16:30	AB	AB			05:00			01:00			AB:Early-OUT
10/09/2016	GS - WO			WO	WO									
11/09/2016	GS - WO			WO	WO									

After processing the daily and monthly attendance of the user, the Absent days are automatically adjusted by the leave balance of the user.

On 1st AB is replaced by SL because PL has to minimum 2 as per configuration. On 5th to 7th PL is marked making Absent days as present. Similarly leaves are automatically adjusted to mark AB as PR.

Daily Attendance View															
←															
User SF Shalini Fefar															
Attendance Period September 2016															
View															
Date	Shift	First IN	Last OUT	1st Half	2nd Half	Late-IN	Early-OUT	Work Hours	Extra Work	Net Work	Break Hours	Actual Overtime	Authorized Overtime	Remark	
01/09/2016	GS	09:00	17:00	PR	SL			07:00			01:00				
02/09/2016	GS	09:15	18:00	PR	PR	00:05		07:45			01:00				
03/09/2016	GS	10:00	18:30	SL	PR			07:30	00:30		01:00				
04/09/2016	GS - WO			WO	WO										
05/09/2016	GS	09:30	16:00	PR	PL	00:20		05:30			01:00				
06/09/2016	GS	10:00	17:00	PL	PL			06:00			01:00				
07/09/2016	GS	11:00	18:00	PL	PR			06:00			01:00				
08/09/2016	GS	09:00	17:30	PR	SL			07:30			01:00				
09/09/2016	GS	10:30	16:30	SL	SL			05:00			01:00				
10/09/2016	GS - WO			WO	WO										

The number of availed leave and the closing balance can be viewed from Leave balance as shown below:

Leave Balance									
←									
User SF Shalini Fefar									
Leaves									
Period Monthly									
Balance Month-Year September 2016									
Year	Month	Code	Name	Opening	Credit	Debit	Encashment	Availed	Closing
2016	Sep	PL	Privelege leave	0.00	20.00	0.00	0.00	4.0	16.00
2016	Sep	RH	Restricted leave	0.00					0.00
2016	Sep	SL	Sick Leave	0.00	10.00	0.00	0.00	2.5	7.50
C-OFF									

**Overtime:** Enable this option to adjust users' less working hours with available overtime in an attendance period.

**Previous Months For Overtime Hours:** For attendance correction with overtime hours, specify the number of previous months here, for which the overtime should be considered. The value '1' in the field would indicate the overtime for the current month to be considered.

**Short Leave:** Enable this option to adjust users' less working hours with available short leaves in an attendance period.

## Auto Adjustment with Short Leave



The system will consider only the First and Last Punch for marking Short Leaves.

Cases wherein the system remarks mention AB: Less Work Hrs, will only be considered for auto-adjustments using Short Leave.

Short leave will be considered as per the priority set by the Admin for auto-adjustments. For example, if Admin has set Leaves as first priority and then Short Leave, then the system will consider the Leave balance for auto-adjustment and then Short Leave.

### Example 1

Configurations done are as follows:

Shift

GS: 09:00 to 18:00

Time and Attendance -> Policies -> Late In Policy

Maximum Late-IN Allowed (Min) is Disabled

Time and Attendance -> Policies -> Early-Out Policy

Maximum Early-OUT Allowed (Min) is Disabled

Shift and Schedule -> Shift Configuration -> Grace Time Details

Grace Time for Shift Late-IN (Min):0

Grace Time for Shift Early-OUT (Min):0

Time and Attendance -> Policies -> Attendance Policy -> Short Leave/Official Hours Restrictions - Duration Check Per Short Leave Entry

Minimum Duration (Min): 10

Maximum Duration (Min): 15

Time and Attendance -> Policies -> Attendance Policy -> Short Leave/Official Hours Restriction - Short Leave Check In Attendance Period

Maximum Minutes: 75

AllowedMaximum Count Allowed: 5

Date	First IN	Last OUT	1st Half	2nd Half	Late-IN	Early-OUT	Work Hours	Remark	Description for Status change after Monthly Attendance Process is run
02-01-2024	09:10	18:00	PR	AB	-	-	07:50	AB:Less Work Hrs	
After Monthly Attendance Process									

02-01-2024	09:10	18:00	PR	PR			8.00	Present	Here, Short Leave will be considered by the system automatically for in-punch as User punch is within the range set for Short Leave and 1 Short Leave Count will be consumed.Hence it will display Present.
<b>Date</b>	<b>First IN</b>	<b>Last OUT</b>	<b>1st Half</b>	<b>2nd Half</b>	<b>Late-IN</b>	<b>Early-OUT</b>	<b>Work Hours</b>	<b>Remark</b>	<b>Description for Status change after Monthly Attendance Process is run</b>
02-06-2024	09:10	17:50	PR	AB	-	-	07:40	AB:Less Work Hrs	
<b>After Monthly Attendance Process</b>									
02-01-2024	09:10	17:50	PR	PR			8.00	Present	Here, Short Leave will be considered by the system automatically for in-punch as well as out-punch as User punch is within the range set for Short Leave. Hence 2 Short Leave Counts will be consumed. Hence it will display Present.
<b>Date</b>	<b>First IN</b>	<b>Last OUT</b>	<b>1st Half</b>	<b>2nd Half</b>	<b>Late-IN</b>	<b>Early-OUT</b>	<b>Work Hours</b>	<b>Remark</b>	<b>Description for Status change after Monthly Attendance Process is run</b>
02-06-2024	09:10	17:50	PR	AB	-	-	07:40	AB:Less Work Hrs	
<b>After Monthly Attendance Process</b>									

02-06-2024	09:10	17:50	AB	AB			07:40	AB:Less Work Hrs	Here, Maximum Short Leave to be Applied Exceeds 5, hence, Short Leave will be not be considered by the system automatically for in-punch or out-punch even though the User punch is within the range set for Short Leave. Therefore the Total Working Hours will remain as 7:40. Hence it will display AB:Less Work Hrs.
Date	First IN	Last OUT	1st Half	2nd Half	Late-IN	Early-OUT	Work Hours	Remark	Description for Status change after Monthly Attendance Process is run
02-03-2024	09:00	17:30	PR	AB	-	-	07:30	AB:Less Work Hrs	
After Monthly Attendance Process									
02-03-2024	09:00	17:30	PR	AB			07:30	AB:Less Work Hrs	The User punch exceeds the range value set for Short Leave, hence the system will not consider Short Leave for adjustment, Therefore the Total Working Hours will remain as 7:30. Hence it will display AB:Less Work Hrs.

## Example 2

Configurations done are as follows:

Shift

GS: 09:00 to 18:00

Time and Attendance -> Policies -> Late In Policy

Maximum Late-IN Allowed (Min) : 10

Time and Attendance -> Policies -> Early-Out Policy

Maximum Early-OUT Allowed (Min) : 25

Shift and Schedule -> Shift Configuration -> Grace Time Details

Grace Time for Shift Late-IN (Min): 5

Grace Time for Shift Early-OUT (Min):5

Time and Attendance -> Policies -> Attendance Policy -> Short Leave/Official Hours Restrictions - Duration Check Per Short Leave Entry

Minimum Duration (Min): 10

Maximum Duration (Min): 15

Time and Attendance -> Policies -> Attendance Policy -> Short Leave/Official Hours Restriction - Short Leave  
Check In Attendance Period

Maximum Minutes: 60

AllowedMaximum Count Allowed: 4

Date	First IN	Last OUT	1st Half	2nd Half	Late-IN	Early-OUT	Work Hours	Remarks	Description for Status change after Monthly Attendance Process is run
02-01-2024	09:15	18:00	PR	AB	00:10	-	07:45	AB:Less Work Hrs	
After Monthly Attendance Process									
			PR	PR			8:00	Present	Shift hours was 8 hrs but the total working hours was "07:45" i.e. user was 15 min late to fulfill his work hours (considering both grace time and minimum hours). But User punch was within the range set min duration = 10min for Short Leave , hence the system will automatically consider Short Leave for adjustment, so user is marked present

Date	First IN	Last OUT	1st Half	2nd Half	Late-IN	Early-OUT	Work Hours	Remarks	Description for Status change after Monthly Attendance Process is run
02-03-2024	09:00	17:30	PR	AB	-	00:25	07:30	AB:Less Work Hrs	
After Monthly Attendance Process									
			PR	AB			07:30	AB:Less Work Hrs	Shift hours was 8 hrs but the total working hours was "07:30" i.e. user was 30 min late to fulfill his work hours (considering both grace time and minimum hours) User punch exceed the range value set for Short Leave, hence the system will not consider Short Leave for adjustment, so user is marked Absent

**Official Hours:** Enable this option to adjust users' less working hours with available official hours in an attendance period.

**Duration Check Per Official Hour Entry:** Enable this option to keep a check on the duration of Official Hours allowed for auto-correction in a day.

**Minimum Duration (In Minutes):** Specify the minimum duration of Official Hours (in minutes) allowed in a day for auto-correction.

**Maximum Duration (In Minutes):** Specify the maximum duration of Official Hours (in minutes) allowed in a day for auto-correction.

**Official Hours Check In Attendance Period:** Enable this option to keep a check on the total duration of Official Hours allowed for auto-correction in an attendance period.



**Maximum Minutes Allowed:** Define the maximum number of minutes in a month that can be permitted for auto-correction using Official Hours.

**Maximum Count Allowed:** Define the maximum number of times in a month that Official Hours can be used auto-correction.

- Set a priority-wise order for Leaves, Overtime, Short Leave and Official Hours, based on which preference would be shown for auto-adjustment of less work hours. Use the **Up/Down** arrow buttons to change priority as shown below.

Priority	Name	Up/Down
1	Leaves	▼
2	OverTime	▲▼
3	Short Leave	▲▼
4	Official Hours	▲

## Flexible Working Settings

This option enables attendance policy configuration for a Flexible type of user. A Flexible type user can be created from User Configuration (T&A) in *Users* module.

The screenshot displays the 'User Configuration' window for a user named Sunil sharma (ID: 430, Active). The 'Attendance' tab is selected, and the 'Policy' sub-tab is active. The 'Flexible' attendance marking type is chosen. The 'Min Working Hours Required' section shows 'Half Day' set to 02:00 and 'Full Day' set to 04:00. Other settings include 'Enable Attendance Calculation' (checked), 'Max Punches To Be Considered' (Set to Select), 'Bypass Finger/Palm For Attendance' (unchecked), 'Max Short Leaves Allowed' (empty field), and 'OT/C-OFF Eligibility' (Set to None). An arrow points to the 'Min Working Hours Required' label.

A Flexible category user's attendance is checked against his/her minimum working hours required and a "present" status is marked on the basis of fulfillment of daily, weekly or monthly targets.

Daily targets for a Flexible user may be set from the *User Configuration* page, while weekly or monthly targets can be defined using the *Attendance Policy* page.

On the **Attendance Policy** page, select the **Flexible Working Settings** tab.

**Consider Daily Hours:** Select one of the following options to determine how the daily work hours should be considered in case of a Flexible user -

- **Flexible For 24 Hrs:** If this option is selected, then user should be marked present depending on work done and irrespective of the time within which it was done.
- **From Shift Start:** If this option is selected, then work hours before shift start time should not be considered.
- **Till Shift End:** If this option is selected, then work hours after shift end time should not be considered.
- **From Shift Start To Shift End:** If this option is selected, then work hours before shift start time and after shift end time should not be considered.

### Grace For Work Hours

- **Daily Grace Limit (In Minutes) :** The value mentioned in Daily Grace Limit (In Minutes) indicates the duration for which grace should be allowed in the minimum working hours which are required in a day to mark a user half day or full day present. Hence, user should be marked present if these grace minutes are less than the required full day limit and compensating these minutes should not be required.

For e.g. say, Minimum Working Hours Required for Full Day is 5 hours and for Half Day is 3 hours, and Daily Grace Limit is 20 minutes. Now, the employee's work hours for a day is 4 hours 50 minutes. The user will be marked Full Day present.

- **Grace Count (Monthly):** It specifies the number of times in a month that grace will be allowed for the minimum required work hours of a user. For e.g. if Grace Count in the above case is 5, user can work 20 minutes less than the minimum required hours 5 days a month.

**Flexible Hours Calculation:** Specify if the Flexible hours calculation w.r.t. a user's target hours should be done on a **Weekly** or **Monthly** basis. If **None** is selected then the behavior of flexible user type should get affected only due to grace and shift boundary configuration.

### Weekly Basis

- **First Day Of Week:** For Weekly calculation, specify the day which should be considered as the starting day of the week.
- **Apply Daily Work Limit:** If this option is enabled, then user should become present based on half day and full day hours mentioned in "**User Configuration**" page. If this checkbox is unchecked for "Weekly" target and user fulfills the target then user will be marked "present" irrespective of punches.
- **Weekly Target As Per:** Select the option based on which the flexible hours of a user is calculated. One can select from **Fixed Limit** or **Days In A Week** option.
- **Target Hours:** This text-box will be displayed when *Weekly Target As Per* is chosen as **Fixed Limit**. Specify the target hours to be completed in a week by a Flexible type user to mark him "present".
- **Daily Hours (In Full Day):** This text-box will be displayed when *Weekly Target As Per* is chosen as **Days In A Week**. Specify the number of hours to be considered as full day for Flexible type of user to mark him "present" for that week.
- **Grace Hours:** If this checkbox is checked, then the used grace hours should be considered while calculating total work hours in a week.

### Monthly Basis

- **Apply Daily Work Limit:** If this option is enabled, then user should become present based on half day and full day hours mentioned in "**User Configuration**" page. If this checkbox is unchecked for "Monthly" target and user fulfills the target then user will be marked "present" irrespective of punches.
- **Monthly Target As Per:** Select the option based on which the flexible hours of a user is calculated. One can select from **Fixed Limit** or **Days In A Week** option.
- **Target Hours:** This text-box will be displayed when *Monthly Target As Per* is chosen as **Fixed Limit**. Specify the target hours to be completed in a month by a Flexible type user to mark him "present".
- **Daily Hours (In Full Day):** This text-box will be displayed when *Monthly Target As Per* is chosen as **Days In A Week**. Specify the number of hours to be considered as full day for Flexible type of user to mark him "present" for that week.
- **Grace Hours:** If this checkbox is checked, then the used grace hours should be considered while calculating total work hours in a month.

**Deduct Hours From Target:** This parameter ensures that fixed hours should get deducted from weekly/monthly target if any type of leave/tour/C-OFF, WO, PH or FB/RD occurs in a week/month. Also, it allows hours deduction from weekly/monthly target if days are prior to joining date or after leaving date occurs in a respected week or month. To avail this functionality, enable **Not Applicable Day**. Select the relevant check-boxes and enter the number of hours to be deducted against each selected option..

**Deduct Hours From Target**

Leave (Full Day Hrs)	<input checked="" type="checkbox"/>	<input type="text" value="06:00"/>
WO (Full Day Hrs)	<input checked="" type="checkbox"/>	<input type="text" value="06:00"/>
PH (Full Day Hrs)	<input type="checkbox"/>	<input type="text" value="HHMM"/>
FB/RD (Full Day Hrs)	<input type="checkbox"/>	<input type="text" value="HHMM"/>
Not Applicable Day (Full Day Hrs)	<input type="checkbox"/>	<input type="text" value="HHMM"/>

**Example 1:** If Leave occurs in week/month, then 6 hrs will be deducted from target hours. If WO occurs then again 6 hrs will be deducted. So total 12 hrs will be reduced from the target hours if both leave and WO fall in the considering week/month

When full day hours are specified for the **leave**, which is on only for **Half Day**, then [Configured Leave (Full day hours)/2] hours get deducted from target hours. Consider “Example 8: Leave Hour deduction from target Hours for 24 Hrs Flexible User.”

For some cases in which one half is either WO or PH or WO/PH and other half is a leave, then hours deduction from target hours will be based on day status marked in 1st half of the particular day. Consider Following table for understanding the same:

Case No.	1st Half	2nd Half	Deduct Hours From Target Based on
1	WO	PL	Half of Configured <b>WO</b> (Full Day Hours) & Half of Configured <b>Leave</b> (Full Day Hours)
2	PL	WO	Half of Configured <b>Leave</b> (Full Day Hours) & Half of Configured <b>WO</b> (Full Day Hours)
3	PH	PL	Half of Configured <b>PH</b> (Full Day Hours) & Half of Configured <b>Leave</b> (Full Day Hours)
4	PL	PH	Half of Configured <b>Leave</b> (Full Day Hours) & Half of Half of Configured <b>PH</b> (Full Day Hours)
5	WO/PH	PL	Half of Configured <b>WO</b> (Full Day Hours) & Half of Configured <b>Leave</b> (Full Day Hours)
6	PL	WO/PH	Half of Configured <b>Leave</b> (Full Day Hours) & Half of Half of Configured <b>WO</b> (Full Day Hours)

**Shortfall Hours Deduction:** Specify the number of hours to be deducted as Full Day Hours from the weekly/ monthly target shortfall hours, if any.

It is deduction of full day hours and accordingly half will be the half day hours (HD hrs) when target hours are not met by the user.

The shortfall hours (SF hrs) will be target hours (TH)- actual hours (AH).

No. of half days to be marked as absent =SF hrs/ HD hrs

Let us consider an example:

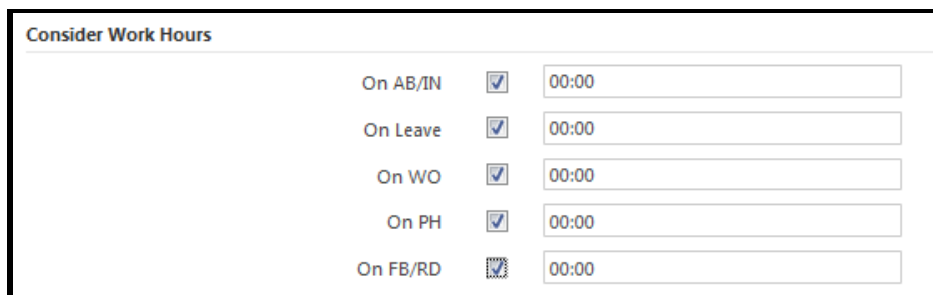
Consider Weekly Target = 40:00  
Consider Weekly Actual work hours done by user = 12:00  
So Weekly Shortfall Hours (SF)= (TH)40- (AH)12 = 28 hours

Deduct (Full Day Hrs) = 08:00  
Hence deduction of Half Day Hrs( HD) = 08:00/2 = 04:00

No. of Half Days to be deducted = (SF/HD)28:00/04:00 = 7  
Hence, 7 half days will be deducted.

### Consider Work Hours

If this checkbox is checked then work hours done on AB/IN, any type of leave/tour/C-OFF, WO, PH or FB/RD in a week/month should be considered in total work hours of that week/month. You can specify the number of hours in the box to be considered.

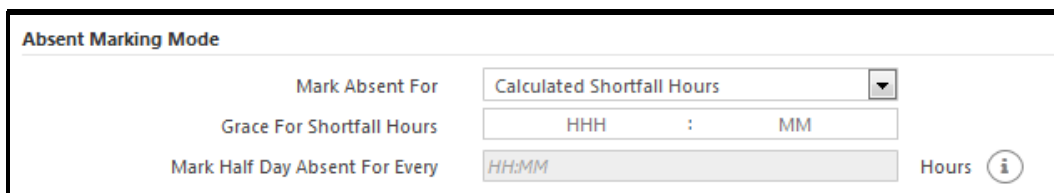


Consider Work Hours		
On AB/IN	<input checked="" type="checkbox"/>	00:00
On Leave	<input checked="" type="checkbox"/>	00:00
On WO	<input checked="" type="checkbox"/>	00:00
On PH	<input checked="" type="checkbox"/>	00:00
On FB/RD	<input checked="" type="checkbox"/>	00:00

If work hours is enabled and value is 00:00, then the actual work done as per punches will be calculated.  
If work hours is enabled and value is other than 00:00, say 08:00 hrs so 08:00 hrs is the minimum required hrs to be considered for work hours. If only 2 hrs of work is done, then it will not be considered.

### Absent Marking Mode

This parameter decides the conditions based on which a person is marked absent.



Absent Marking Mode	
Mark Absent For	Calculated Shortfall Hours
Grace For Shortfall Hours	HHH : MM
Mark Half Day Absent For Every	HH:MM Hours ⓘ

- **Mark Absent For:** Select the mode as “Calculated Shortfall Hours” or “Custom Shortfall Hours” from the drop-down list based on which a person is marked absent.
- **Grace For Shortfall Hours:** Specify the grace hours to be considered in shortfall hours. This means the shortfall hours will be calculated after deducting grace from the actual work hours.  
Shortfall hours = Target hours - Actual work hours - Grace hours
- **Mark Half Day Absent For Every:** Specify the hours after which the person will be marked as absent for half day.

Absent Marking Mode		
Mark Absent For	Custom Shortfall Hours ▼	
Grace For Shortfall Hours	005 : 00	
Mark Half Day Absent For Every	04:00	Hours ⓘ

## Flexible Process

Step1: Calculate Monthly/Weekly Target (Per day hours x No. of day)

Step2: Calculate actual work hours

Step3: Find shortfall (when work hours < target hours)

Step4: Mark AB on the basis of Shortfall

### Example1: Calculated Shortfall

- Deduct (Full day hrs)= 8:00 hrs
- Target hours= 120
- Actual work hours= 110
- Mark Absent For- Calculated Shortfall

Shortfall hours = Target hours- Actual work hours  
= 120- 110= 10 hours

Deduction for Half day hour= 8/2= 4 hours

Now 10/4= 2.5 = 3 halves

So in this case 3 halves will be marked Absent.

### Example2: Custom Shortfall

Grace for Shortfall hours=4 hrs

Mark half day absent for every = 4 hrs

Target hours= 120

Actual work hours= 110

Shortfall hours= Target hrs- Actual work hrs- Grace for shortfall hrs  
= 120- 110-4  
= 6

Deduction for Half day hour= 8/2= 4 hours

Now 6/4= 1.5 = 2 halves

So in this case 2 halves will be marked Absent.



*The Examples for Flexible Policy configuration for 24 hours flexibility is given below.*

*The flexible policy for options "From Shift Start", "Till Shift End" and " From Shift Start to Shift End" is same as " Flexible for 24 hrs"; only the calculation of daily work hours varies.*

### Example3: Flexible for 24 hrs- Target Completing

Min. working hrs for full day- **06:00**

Min. working hrs for half day- **03:00**

Daily Grace Limit= **30min**  
 Grace Count in month = **30**  
 Flexible hrs Calculation- **Weekly Basis**  
 First Day of week- **Tuesday**  
 Apply Daily Work limit- **disabled**  
 Weekly Target as Per- **Fixed Limit**  
 Target hours- **030:00**  
 Grace hours- **disabled**  
 Deduct hours from Target- **all disabled**  
 Shortfall hours deduction - **08:00**  
 Consider Work hours- **all enabled with 00:00**

The user has to complete atleast 2:30 hrs for half day and 5:30 hrs for full day utilizing grace of 30 mins.  
 If weekly work of 30 hrs is done then absent markings will be marked as Present after monthly attendance process.

The punches of the user are shown below:

Daily Attendance View

←

User 9 Nishu

Attendance Period November 2016

View

Date	Shift	First IN	Last OUT	1st Half	2nd Half	Late-IN	Early-OUT	Work Hours	Extra Work	Net Work	Break Hours	Actual Overtime	Authorized Overtime	Remark
01/11/2016	GS	07:00	09:30	PR	AB			02:30						AB:Less Work Hrs
02/11/2016	GS	13:00	15:30	AB	AB			01:30			01:00			AB:Less Work Hrs
03/11/2016	GS	10:00	16:00	PR	AB			05:00			01:00			AB:Less Work Hrs
04/11/2016	GS	09:30	20:00	PR	PR			09:30	03:30		01:00			
05/11/2016	GS	10:30	19:00	PR	PR			07:30	01:30		01:00			
06/11/2016	GS - WO	10:00	19:00	WO	WO			08:00			01:00			
07/11/2016	GS	09:00	17:00	PR	PR			07:00	01:00		01:00			

41 hrs

By calculating hours from Work hours column, actual hours is 41 hrs

Target hours = 30

As the user completes the target hours i.e. 41 hrs > 30 hrs so any absent marking will be converted into Present after the Monthly Attendance process as shown below.

Daily Attendance View														
←														
User 9 Nishu														
Attendance Period November 2016														
View														
Date	Shift	First IN	Last OUT	1st Half	2nd Half	Late-IN	Early-OUT	Work Hours	Extra Work	Net Work	Break Hours	Actual Overtime	Authorized Overtime	Remark
01/11/2016	GS	07:00	09:30	PR	PR			02:30						
02/11/2016	GS	13:00	15:30	PR	PR			01:30			01:00			
03/11/2016	GS	10:00	16:00	PR	PR			05:00			01:00			
04/11/2016	GS	09:30	20:00	PR	PR			09:30	03:30		01:00			
05/11/2016	GS	10:30	19:00	PR	PR			07:30	01:30		01:00			
06/11/2016	GS - WO	10:00	19:00	WO	WO			08:00			01:00			
07/11/2016	GS	09:00	17:00	PR	PR			07:00	01:00		01:00			

#### Example 4: Flexible for 24 hrs-Deduct WO hours;Target Completing



All configurations are same as Example3 except Deduct hours from Target

Min. working hrs for full day- **06:00**

Min. working hrs for half day- **03:00**

Daily Grace Limit= **30min**

Grace Count in month = **30**

Flexible hrs Calculation- **Weekly Basis**

First Day of week- **Tuesday**

Apply Daily Work limit- **disabled**

Weekly Target as Per- **Fixed Limit**

Target hours- **030:00**

Grace hours- **disabled**

Deduct hours from Target- **Leave- 06:00, WO-06:00**

Shortfall hours deduction - **08:00**

Consider Work hours- **all enabled with 00:00**



The punches of the user are shown below:

Daily Attendance View

31 hrs

WO is falling on 6th nov considering the week from 1nov Tuesday to 7th nov Monday. So WO hrs i.e. 6 hrs will be deducted from target hours.

Target hours configured = 30 hrs

Thus Actual Target hours = Target hrs - WO hrs

$$=30- 6= 24 \text{ hrs}$$

Actual work hours= 31:00 hrs which is greater than 24 hours.

So after monthly process, absent marking will be converted into Present as shown below.

Daily Attendance View

User

1

Roma

Attendance Period

November

2016

View

Date	Shift	First IN	Last OUT	1st Half	2nd Half	Late-IN	Early-OUT	Work Hours	Extra Work	Net Work	Break Hours	Actual Overtime	Authorized Overtime	Remark
01/11/2016	GS	09:00	16:00	PR	PR			06:00			01:00			
02/11/2016	GS	09:00	16:00	PR	PR			06:00			01:00			
03/11/2016	GS	09:00	16:00	PR	PR			06:00			01:00			
04/11/2016	GS	09:00	16:00	PR	PR			06:00			01:00			
05/11/2016	GS	09:00	11:30	PR	PR			02:30						
06/11/2016	GS - WO	16:00	18:00	WO	WO			02:00						
07/11/2016	GS	09:00	11:30	PR	PR			02:30						



In this if **Apply Daily Work Limit** is enabled, then punches on 5/11 & 7/11 will not become present.

As for full day present, minimum 6 hrs work should be done and for half day, minimum 3 hrs work should be done.



Daily Attendance View														
<div> <div>User 1 Roma</div> <div>Attendance Period November 2016</div> <div>View</div> </div>														
Date	Shift	First IN	Last OUT	1st Half	2nd Half	Late-IN	Early-OUT	Work Hours	Extra Work	Net Work	Break Hours	Actual Overtime	Authorized Overtime	Remark
01/11/2016	GS	09:00	16:00	PR	PR			06:00			01:00			
02/11/2016	GS	09:00	16:00	PR	PR			06:00			01:00			
03/11/2016	GS	09:00	16:00	PR	PR			06:00			01:00			
04/11/2016	GS	09:00	15:00	AB	AB			05:00			01:00			1st Half AB:Target Shortfall
05/11/2016	GS	09:00	11:30	AB	AB			02:30						1st Half AB:Target Shortfall
06/11/2016	GS - WO	16:00	18:00	WO	WO			02:00						
07/11/2016	GS	09:00	11:30	AB	AB			02:30						1st Half AB:Target Shortfall

#### Example 6: Flexible for 24 hrs- Including Work hours configuration; Actual Work hrs< Minimum required.



All configurations are same as Example5 except Consider Work hours

Min. working hrs for full day- **06:00**

Min. working hrs for half day- **03:00**

Daily Grace Limit= **30min**

Grace Count in month = **30**

Flexible hrs Calculation- **Weekly Basis**

First Day of week- **Tuesday**

Apply Daily Work limit- **disabled**

Weekly Target as Per- **Fixed Limit**

Target hours- **060:00**

Grace hours- **disabled**

Deduct hours from Target- **Leave- 06:00, WO-06:00**

Shortfall hours deduction - **08:00**

Consider Work hours- **all enabled with 00:00; On WO- 8:00 hrs ;On leave- 8:00 hrs**

The punches of the user are shown below:

Daily Attendance View

User

Attendance Period

Date	Shift	First IN	Last OUT	1st Half	2nd Half	Late-IN	Early-OUT	Work Hours	Extra Work	Net Work	Break Hours	Actual Overtime	Authorized Overtime	Remark
01/11/2016	GS	09:00	16:00	PR	PR			06:00			01:00			
02/11/2016	GS	09:00	16:00	PR	PR			06:00			01:00			
03/11/2016	GS	09:00	16:00	PR	PR			06:00			01:00			
04/11/2016	GS	09:00	15:00	PR	AB			05:00			01:00			AB:Less Work Hrs
05/11/2016	GS	09:00	11:30	PR	AB			02:30						AB:Less Work Hrs
06/11/2016	GS - WO	16:00	18:00	WO	WO			02:00						
07/11/2016	GS	09:00	11:30	PR	AB			02:30						AB:Less Work Hrs

28 hrs

IF WO is enabled and work of 8 hrs is done, only then included in total work hrs.

In this case as work on WO is 2 hrs, so it is not considered. Hence actual work hours is 30- WO work hrs  
= 30-2= **28 hrs.**

Target hrs= 54 hrs. (60-6= 54 hrs)

Shortfall hrs= 54- 28= **26 hrs.**

Absent marking = 26/4 = 6.5 i.e. 7 half days will be marked absent as shown below.

Daily Attendance View

</

**Example 7: Flexible for 24 hrs- Including Work hours configuration; Actual Work hrs>= Minimum required.**

Min. working hrs for full day- **06:00**

Min. working hrs for half day- **03:00**

Daily Grace Limit= **30min**

Grace Count in month = **30**

Flexible hrs Calculation- **Weekly Basis**

First Day of week- **Tuesday**

Apply Daily Work limit- **disabled**

Weekly Target as Per- **Fixed Limit**

Target hours- **060:00**

Grace hours- **disabled**

Deduct hours from Target- **Leave- 06:00, WO-06:00**

Shortfall hours deduction - **08:00**

Consider Work hours- **all enabled with 00:00; On WO- 8:00 hrs ;On leave- 8:00 hrs**

The punches of the user are shown below:

Daily Attendance View

←

User

1

Roma

Attendance Period

November

2016

View

Date	Shift	First IN	Last OUT	1st Half	2nd Half	Late-IN	Early-OUT	Work Hours	Extra Work	Net Work	Break Hours	Actual Overtime	Authorized Overtime	Remark	Details
01/11/2016	GS	09:00	16:00	PR	PR			06:00			01:00				
02/11/2016	GS	09:00	16:00	PR	PR			06:00			01:00				
03/11/2016	GS	09:00	16:00	PR	PR			06:00			01:00				
04/11/2016	GS	09:00	15:00	PR	AB			05:00			01:00			AB:Less Work Hrs	
05/11/2016	GS	09:00	11:30	PR	AB			02:30						AB:Less Work Hrs	
06/11/2016	GS - WO	12:00	21:00	WO	WO			08:00			01:00				
07/11/2016	GS	09:00	11:30	PR	AB			02:30						AB:Less Work Hrs	

36 hrs

36 hrs

User has worked 8 hrs on WO so 8 hrs will be considered. So Actual work hours= 36 hrs

Target hrs= 54 hrs

Shortfall hrs= 54-36= 18 hrs

Absent marking =  $18/4 = 4.5$  i.e. 5 half day will be marked absent.

Daily Attendance View

User1Roma

Attendance PeriodNovember2016

View

Date	Shift	First IN	Last OUT	1st Half	2nd Half	Late-IN	Early-OUT	Work Hours	Extra Work	Net Work	Break Hours	Actual Overtime	Authorized Overtime	Remark
01/11/2016	GS	09:00	16:00	PR	PR			06:00			01:00			
02/11/2016	GS	09:00	16:00	PR	PR			06:00			01:00			
03/11/2016	GS	09:00	16:00	PR	PR			06:00			01:00			
04/11/2016	GS	09:00	15:00	PR	AB			05:00			01:00			AB:Less Work Hrs
05/11/2016	GS	09:00	11:30	AB	AB			02:30						1st Half AB:Target Shortfall
06/11/2016	GS - WO	12:00	21:00	WO	WO			08:00			01:00			
07/11/2016	GS	09:00	11:30	AB	AB			02:30						1st Half AB:Target Shortfall

**Example 8: Leave Hour deduction from target Hours for 24 Hrs Flexible User:**

Consider,

Min Required Hours for Half day = **03:00**,

Min Required Hours for Full Day = **06:00**,

Apply Daily Work Limit = checked,

Weekly Target Hours = **50:00**,

For Deduct Hours From Target: WO,PH, Leave = Checked,

WO = 06:00,

PH = 06:00,

Leave = 06:00.

For Consider Work Hours: WO,PH, Leave = Checked.

Deduct (Full Day Hrs) = **06:00**.

Consider Daily View:

Day No.	First Punch	Last Punch	Work Hours	Actual Status		Updated Status		Status Summary
				1st Half	2nd Half	1st Half	2nd Half	
1	09:00	15:00	06:00	PR	PR	PR	AB	2nd half AB: Weekly hours shortfall
2	09:00	15:00	06:00	PR	PR	PR	PR	-
3	09:00	12:00	03:00	PR	PL	AB	PL	1st half AB: Weekly hours shortfall
4	09:00	17:00	08:00	PR	PR	PR	PR	No Punches Available
5	-	-	-	PH	PH	PH	PH	-
6	-	-	-	WO	WO	WO	WO	-
7	-	-	-	WO	WO	WO	WO	-

Consider following calculation:

Days considered = **3.5**

Actual Weekly Target = **29:00**

[= 50:00 - 3:00 (Day 3 2nd Half PL) - 6:00 (Day 5 PH) - 6:00 (Day 6 WO) - 6:00 (Day 7 WO)]

Weekly Work Hours = **23:00**

Weekly Shortfall Hours = **29:00 - 23:00 = 06:00**

No. of half days to be deducted = 06:00 / 3:00 = **2**

## Attendance Correction-Short Leave/Official Hours Application Restrictions

The administrator can define certain restrictions on employees applications for Attendance Correction, Short Leave and/or Official Hours. This option enables the administrator to configure the parameters related to the restrictions that will be applicable to the above mentioned applications.



*For restrictions to be applicable to Attendance Correction Application, make sure the application is applied by On Behalf System Account User from **Time and Attendance> Utilities> Attendance Correction**. For details, refer to [“On Behalf System Account User”](#).*

*For restrictions to be applicable to Short Leave/Official In-Out applications, make sure the Auto-Approve check box against Attendance Correction is disabled. For details, refer [“Roles and Rights Configuration”](#).*

Click Attendance Correction-Short Leave/Official Hours Application Restrictions collapsible panel and configure the following parameters.

- **Apply To:** Select where you want to apply the restrictions from the drop down list—Attendance Correction, Short Leave/Official In-Out, Both.
- **Minimum Days After Attendance Date:** Specify the minimum number of days after the attendance date for which the application should be allowed.
- **Maximum Days After Attendance Date:** Specify the maximum number of days after the attendance date for which the application should be allowed.
- **Restrict Application Within Specified Period:** Select this check box to apply restrictions within a specified period.
- **Restriction Type:** Select the **Restriction Type** from the drop down list— Restrict w.r.t Joining Date, Restrict till Confirmation Date.
  - **Restrict w.r.t Joining Date:** If you select this option, you must configure the Restriction Period.

**Restriction Period:** Specify the number of days or months after joining date, for which application will not be allowed. Valid Value for Days: 1 to 999. Valid Value for Months: 1 to 99.

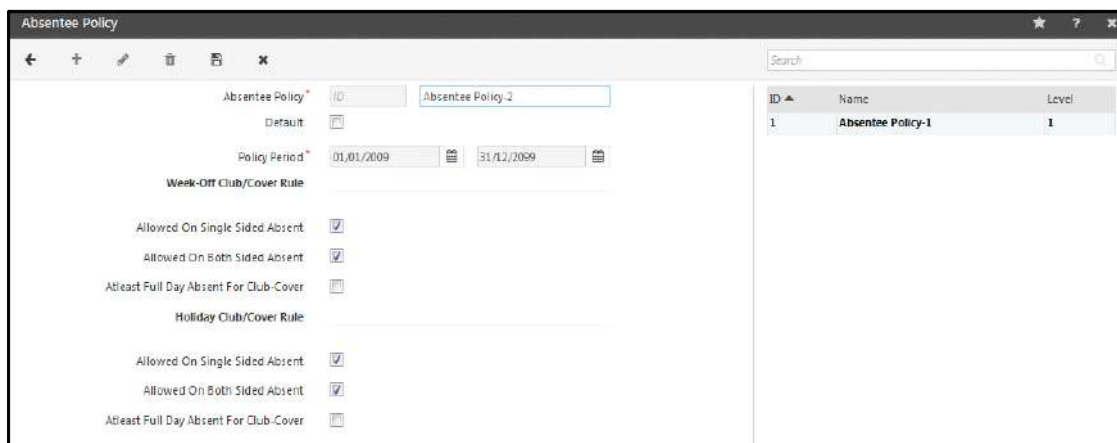
- **Restrict till Confirmation Date:** If you select this option, restriction will be applicable as per the confirmation date available in the database of the user.

# Absentee Policy

The Absentee Policy option enables the user to set rules for marking the absence of an employee in the event of an employee remaining absent on either or both sides of a holiday or week-off. The user can configure a set of rules and group them together in policies.

To define Absentee Policy, click **Time & Attendance > Policies > Absentee Policy**.

The **Absentee Policy** page appears on your screen as shown below.



ID	Name	Level
1	Absentee Policy-1	1

Click the **New** icon to define a new Absentee Policy.

Each Absentee Policy will have a unique **ID** for identification and this is generated by the system automatically when the policy is saved.

Specify a user-friendly name for the Absentee Policy in the **Name** field. Specify the parameters for the other options as described hereunder:

Select the **Default** check box if you want to set the current policy as the default. Users will be linked with this Absentee Policy by default in the event of a user not being linked to any Absentee Policy. Therefore, it is mandatory to define one default Absentee Policy.

Select a start date and the end date for the **Policy Period**.

Configure the absentee policy for **Week-Off** and **Holiday** cases where in the administrator can specify if the week-off or holiday is allowed in case of leaves on a single side or both sides.



Click the **Save** button to save the new policy to the COSEC database. The new *Absentee Policy* will now reflect in the Absentee Policy list as shown.

ID	Name	Level
1	Absentee Policy-1	1
2	Absentee Policy-2	1



Each time the user edits the date fields in an existing policy (other than Attendance Policy) the system creates a new level for the policy as shown. The system thus maintains a record of the existing policy as well as the edited one.

ID	Name	Level
1	Absentee Policy-1	1
2	Absentee Policy-2	1
2	Absentee Policy-2	2

**Example 1:** Consider Allowed on Single Sided Absent is **enabled**. This means the user is allowed to be absent on only single side of week-off. The single side can be second half of previous day or first half of next day or either of the full day.



If “Atleast Full day absent for Club-cover” is enabled, then it is must to be absent for full day for absentee policy to be applicable. See Example:4

Allowed on Both Sided Absent is **disabled**. This means the user is not allowed to be absent on both sides of week-off. The both sides can be second half of previous day and first half of next day or full day on both sides.

In case1: The user is absent on only one side of week off i.e. on 2/9/16.

In case2: The user is absent on both sides of week off i.e. on 9/9/16 and 12/9/16.

User

1320

Shruti

Attendance Period

September

2016

View

Date	Shift	First IN	Last OUT	1st Half	2nd Half	Late-IN	Early-OUT	Work Hours	Extra Work	Net Work	Break Hours	Actual Overtime	Authorized Overtime	Remark	Details
01/09/2016	GS	08:40	19:00	PR	PR			09:20	01:20	00:20	01:00				
02/09/2016	GS			AB	AB									No Punches Available	
03/09/2016	GS - WO			WO	WO										
04/09/2016	GS - WO			WO	WO										
05/09/2016	GS	09:00	19:00	PR	PR			09:00	01:00		01:00				
06/09/2016	GS	09:00	19:00	PR	PR			09:00	01:00		01:00				
07/09/2016	GS	09:15	19:00	PR	PR	00:15		08:45	01:00		01:00				
08/09/2016	GS	09:00	20:00	PR	PR			10:00	02:00		01:00				
09/09/2016	GS			AB	AB									No Punches Available	
10/09/2016	GS - WO			WO	WO										
11/09/2016	GS - WO			WO	WO										
12/09/2016	GS	09:06	10:50	AB	AB	00:06		01:44						AB:Early-OUT	

After doing monthly attendance process, the week off on 3/9/16 and 4/9/16 remains as week-off because the user was absent on single side which is allowed. And the week-off on 10/9/16 and 11/9/16 will be marked as Absent because the user was absent on both sides of week-off which is not allowed.

The user punches and Remark is shown as below:

Date	Shift	First IN	Last OUT	1st Half	2nd Half	Late-IN	Early-OUT	Work Hours	Extra Work	Net Work	Break Hours	Actual Overtime	Authorized Overtime	Remark	Details
01/09/2016	GS	08:40	19:00	PR	PR			09:20	01:20	00:20	01:00				
02/09/2016	GS			AB	AB									No Punches Available	
03/09/2016	GS - WO			WO	WO										
04/09/2016	GS - WO			WO	WO										
05/09/2016	GS	09:00	19:00	PR	PR			09:00	01:00		01:00				
06/09/2016	GS	09:00	19:00	PR	PR			09:00	01:00		01:00				
07/09/2016	GS	09:15	19:00	PR	PR	00:15		08:45	01:00		01:00				
08/09/2016	GS	09:00	20:00	PR	PR			10:00	02:00		01:00				
09/09/2016	GS			AB	AB									No Punches Available	
10/09/2016	GS - WO			AB	AB									WO-AB:Absent Cover Rule	
11/09/2016	GS - WO			AB	AB									WO-AB:Absent Cover Rule	
12/09/2016	GS	09:06	10:50	AB	AB	00:06		01:44						AB:Early-OUT	

### Example 2:

In above example if Allowed on Both Sided Absent is also **enabled**; then week-off on 10/9/16 and 11/9/16 will remain as week-off.

### Example 3:

If Allowed on Single Sided Absent is **disabled** and Allowed on Both Sided Absent is **disabled**; then both the week-offs will be marked absent.

### Example 4: Consider

Allowed on Single Sided Absent is **enabled**.

Atleast Full day absent for Club-cover is **enabled**

This means the week-off will become absent if user is full day absent on both sides of weekoff.

- If second half of previous day(Case1) or first half of next day(Case2) is absent. Then after monthly attendance process, week-off will remain as week-off.
- If full day absent on one side(Case3 & Case4), Then after monthly attendance process, week-off will remain as week-off.
- If user is full day absent on both sides of week-off(Case5). Then after monthly attendance process, week-off will become absent.

S.NO	Saturday First half	Saturday Second half	Sunday WO	Monday First half	Monday Second half	WO after monthly process
Case1	PR	AB	WO	-	-	WO
Case2	-	-	WO	AB	PR	WO
Case3	AB	AB	WO	-	-	WO
Case4	-	-	WO	AB	AB	WO
Case5	AB	AB	WO	AB	AB	AB



*The Holiday club/cover rule will work similar to the week-off club/cover rule.*

# Overtime Policy

Overtime Policy is the Policy of a company which consists of rules for providing overtime compensation to the employees.

For example, a company may allow its employees to work overtime for a duration of maximum 2 hours per working day. Hence, this may be converted by the respective HR team into an overtime policy that is applicable to all employees across the organization.

COSEC simplifies and automates such implementations by enabling administrators to configure parameters related to overtime policies.

To configure an Overtime policy, click **Time & Attendance > Policies> Overtime Policy**

Click the **New** button to define a new OT policy.

Enter a **OverTime Policy** name for the new policy in the field provided. The **ID** will be automatically generated by the system for every new policy defined.

Select the **Default** checkbox if the policy is to be stated as the default policy for the system.

Define the **Policy Period** by specifying the Start and End Dates for the span of policy.

**Network Hour Policy:** Select a network hours policy from the picklist.

**Calculation On WO/PH/FB/RD As Aer Weekday:** Select this checkbox to calculate Net-Work Hours and Overtime as per week day's configuration if nothing has been configured for WO/PH.

**Calculation On Restricted Holiday As Per PH:** Select this checkbox to calculate Net-Work Hours and Overtime as per configuration of PH if user has worked on day configured for full day RH leave. If RH is applied for half day, then it will work as per week day.

- Example: The user has worked on RH leave for 10 hours. But the Net-work hours and overtime will not be calculated when this checkbox is enabled.

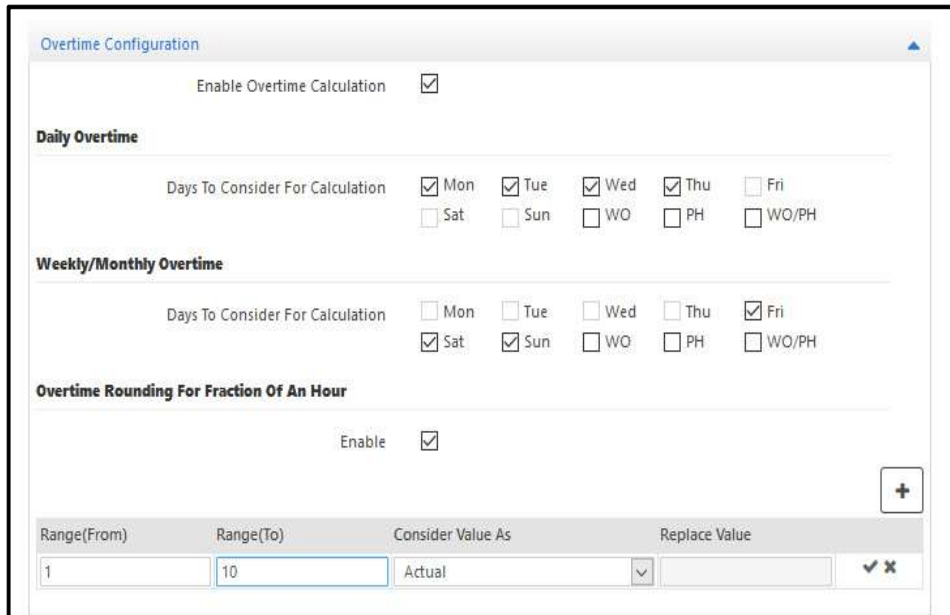
Click **Save** to add the new policy to the database successfully.

## Overtime Configuration

The Overtime Configuration allows you to configure Overtime parameters like **Daily/Weekly/Monthly** and **rounding** of overtime minutes. Refer "[Calculation of Overtime](#)".

For JPC user, refer "[OT for JPC User](#)".

- Select the **Overtime Configuration** tab as shown.



- **Enable Overtime Calculation** - Select this checkbox to enable overtime calculation for all users to whom this Net-work hours and OT policy would be applicable.
- **Daily Overtime** - Select the days of the week which are to be considered for *Daily Overtime* calculation. You can also select WO, PH or WO/PH to calculate daily overtime based on day status.
- **Weekly/Monthly Overtime** - Select the days of the week which are to be considered for *Weekly/Monthly Overtime* calculation. You can also select WO, PH or WO/PH to calculate weekly/monthly overtime based on day status.



*The Days (Mon to Sun) selected for Daily OT will be disabled for Weekly/Monthly OT Selection and vice versa.*



*WO, PH and WO/PH can be selected for both Daily as well as Weekly/Monthly Overtime.*



*For Overtime calculation, the Days will be prioritized and considered based on day status (like WO, PH, WO/PH).*


### For example:

Days selected in 'Daily Overtime > Days To Consider For Calculation' are:

- Monday
- Tuesday
- Friday

- PH

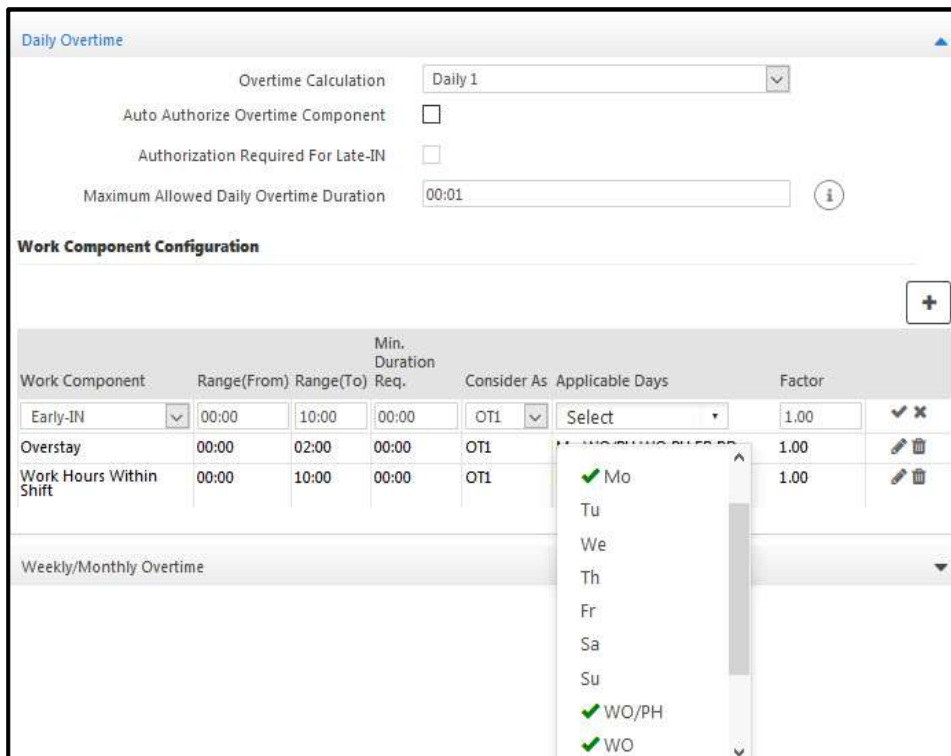
So irrespective of PH falls on any other day like Wednesday, Thursday, Saturday or Sunday, days with day status as PH should be considered in daily overtime calculation.

- **Overtime Rounding For Fraction of An Hour** - Enable this feature for users to obtain rounded values for the final calculated overtime. This allows the administrator to specify how a fractional part of an hour in the final overtime value should be considered for calculation.
  - Activate the Overtime Rounding by checking the **Enable** box.
  - Specify the **range** of overtime hours in minutes which is to be rounded off and select the **replace value** as actual or fixed value.
    - Here we have kept 1 to 10 minutes of range to be rounded off with the **actual value**.
    - If **fixed option** is selected, then mention a fixed value to replace. Suppose if a user has overtime of 8 minutes. And fixed rounding is set for range 1 to 20 minutes at value 10 minutes. Then he will get overtime of 10 minutes.
- Click **Save**  to save the overtime configuration.

## Daily Overtime

This section allows the administrator to configure Daily Overtime calculation.

- Select the **Daily Overtime** tab as shown.



Work Component	Range(From)	Range(To)	Min. Duration Req.	Consider As	Applicable Days	Factor	
Early-IN	00:00	10:00	00:00	OT1	Select	1.00	✓ ✕
Overstay	00:00	02:00	00:00	OT1		1.00	✎ ✕
Work Hours Within Shift	00:00	10:00	00:00	OT1		1.00	✎ ✕

Weekly/Monthly Overtime

- **Overtime Calculation** - Select the type of daily overtime calculation to be performed from the options of Daily1 or Daily2. You can disable the OT as well.



For Daily 1 the Work Components configured here (in Overtime Policy) will be considered for OT calculations, whereas for Daily 2 the Work Components configured in the Network Hours Policy will be considered for OT calculations.

## Overtime Calculation - Daily 1

- **Auto Authorize Overtime Component** - Select this checkbox to enable automatic authorization of daily overtime. In case it is not checked, the reporting in-charge or administrator can authorize the overtime.
- **Authorization Required for Late-IN** - Check this box in case the Late-IN is to be authorized.

### Work Component Configuration

- Click **Add** to configure the Work Components.

Select the desired component — **Early-IN, Overstay, Work hours within Shift, Official IN/OUT Duration Prior Shift, Official IN/OUT Duration Within Shift, Official IN/OUT Duration Post Shift, Short Leave Duration Prior Shift, Short Leave Duration Within Shift, Short Leave Duration Post Shift** — and configure the related parameters as shown below.













The components — **Official IN/OUT Duration Prior Shift, Official IN/OUT Duration Within Shift, Official IN/OUT Duration Post Shift, Short Leave Duration Prior Shift, Short Leave Duration Within Shift, Short Leave Duration Post Shift** — will be included in the calculation of Overtime for 2, 4, 6, 8, 10, 12, N punch users only.

- **Range (From):** Define the start time from which the work component configured is to be considered for calculation of OT.
- **Range (To):** Define the end time till which the work component configured is to be considered for calculation of OT.
- **Minimum Duration Required:** Define a minimum duration within the range which must be covered to qualify as daily overtime.
- **Consider As:** There are 5 different OT components that appear in the drop-down list. These components are used to differentiate OT calculations. For example OT1, we can add calculated values of Early-in in

this and in other component OT2, we can add calculated values of Overstay. You can assign different OT types to different work components.

- **Applicable Days:** Select the days of the week for which this overtime configuration will be applicable.
- **Factor:** Specify the multiplication factor which should be used against the total calculated overtime for a specified period for overtime pay calculation.

Refer to the example below:

Work Component Configuration							
Work Component	Range (From)	Range (To)	Minimum Duration Required	Consider As	Applicable Days	Factor	
Early-IN	00:00	23:59	00:00	OT1	Su Mo Tu We Th Fr Sa WO/PH WO PH FB RD	1.00	 
Official In/Out Duration Prior Shift	00:00	05:00	00:00	OT1	Su Mo Tu We Th Fr Sa WO/PH WO PH FB RD	1.00	 
Official In/Out Duration Prior Shift	15:00	20:00	02:00	OT1	Su Mo Tu We Th Fr Sa WO/PH WO PH FB RD	1.00	 
Official In/Out Duration Post Shift	00:00	23:59	00:00	OT1	Su Mo Tu We Th Fr Sa WO/PH WO PH FB RD	1.00	 
Short Leave Duration Prior Shift	05:00	10:00	05:00	OT1	Su Mo Tu We Th Fr Sa WO/PH WO PH FB RD	1.00	 

1 - 5 of 7 records

« < 1 2 > »

## Overtime Calculation - Daily 2

- **Auto Authorize Overtime Component:** Select this checkbox to enable automatic authorization of daily overtime. In case it is not enabled, the reporting in-charge or administrator can authorize the overtime.
- **Authorization Required for Late-IN:** Select this checkbox in case the Late-IN is to be authorized.
- **Allow Overlapping Work Components:** Select this checkbox if the overlapping of work components ranges is to be allowed. It may be useful when some Special OT is required to be granted if user works within some special time range along with the existing granted OT.
- **Special OT Time Range:** Specify the time range for eg: 21:00 hrs to 04:00 hrs for which special OT is to be given to the user who has worked within this time range. Refer [“Special OT calculation”](#).

### Work Component Configuration

Click **Add** to configure the parameters.



**Overtime Calculation**

Overtime Calculation: Daily 2

Auto Authorize Overtime Component: ☒

Authorization Required For Late-IN: ☒

Allow Overlapping Work Components: ☒

Special OT Time Range: HH:MM HH:MM

**Work Component Configuration**

Net-Work Hours Range (From)	Net-Work Hours Range (To)	Minimum Duration Required	Consider As	Applicable Days	Factor	Overtime Assignment As Per
00:00	10:00	00:00	OT1	WC/PH WO PH FB RD	1.00	Priority Work Component

- **Net work hours Range:** Define a time range for the Net-work hours in the HHH:MM format to be considered as daily overtime.
- **Min Duration Required Within Range:** Define a minimum duration within the range which must be covered to qualify as daily overtime.
- **Consider As:** There are 5 different OT components that appear in the drop-down list. These components are used to differentiate OT calculations. For example OT1, we can add calculated values of Early-in in this and in other component OT2, we can add calculated values of Overstay. You can assign different OT types to different work components.
- **Applicable Days:** Select the days of the week for which this overtime configuration will be applicable.
- **Multiplication Factor:** Specify the multiplication factor which should be used against the total calculated overtime for a specified period for overtime pay calculation.
- **Overtime Assignment As Per:** Select the option as Priority Work Component or Special Time Range. According to this selection the OT will be assigned. For eg: OT1 is given the Priority Work Component and OT2 is given the Special Time Range component.
- Click the **Save** button to save the overtime configuration.



*For overlapping range of Priority OT and Special Time range OT; if x hr OT is given for time range OT; then priority OT cannot be given for same time hrs. Eg: From 9:00 to 10:00 hrs, Special OT is given to a user. Then priority OT cannot be given for 9:00 to 10:00 hrs.*

*If user is working for more than 1 shift, say for around 24 hours at a time, then he/she should mark OUT punch using special function OT OUT if configured. See Devices> Multi Device Options> Special Functions> Special function-Overtime Out.*

## Daily1 OT and Daily2 OT Examples

Daily 1 overtime calculation will be based on Shift timings as per components Early-IN, Overstay and Work Hours Within Shift.



If configuration for WO, PH and WO/PH is available and also its respective day, then priority to WO, PH and WO/PH should be given.

*"Work Hours Within Shift" = Work Hours - Early-IN - Overstay - Short Leave Hours (if "Add Short Leave Hours In Work Hours" field is checked in "Attendance Policy" page) - Official Hours (If "Add Official Hours In Work Hours" field is checked in "Attendance Policy" page)*

*For flexible type user, only "Work Hours Within Shift" and "Overstay" value are calculated on normal day so similar behavior should be followed for WO, PH and WO/PH where these components should be calculated as per shift as done on normal day.*

*For FB/RD, only "Work Hours Within Shift" component gets calculated.*

### Example1

Shift: 09:00 to 18:30 hours

Punches: 18:00 - 20:00 hours

Work hours (on WO): 02:00

Net- work hours: 02:00 (NOTE: Consider all components for whole component range is configured)

Overtime (**Daily 1**): 00:30 (NOTE: Consider "Work Hours Within Shift" work component for whole component range is configured)

Overtime (**Daily 2**): 02:00

### Example2

Shift: 15:00 - 23:00

Punches: 07:00 - 10:00 [i.e. not within shift]

Work Hours (on WO): 03:00

Net-Work Hours: 03:00 (Early-IN) (NOTE: Consider all components for whole component range is configured)

Overtime (**Daily 1**) = 03:00 (Early-IN) (NOTE: Consider all components for whole component range is configured)

Overtime (**Daily 2**)= 03:00 (Early-IN) (NOTE: Consider "Early-IN" and "Overstay" components for whole component range is configured)

### Example3: Daily 1 with Official In-Out Duration Prior Shift, Official In-Out Duration Within Shift, Official In-Out Duration Post Shift.

You have configured Official In/Out Duration Prior Shift component, as user's official in/out duration starts before the shift start time, then the component of official duration which is prior the shift start time should be considered in Daily 1 overtime calculation.

You have configured Official In/Out Duration Within Shift component, as user's official in/out duration is within shift time, then the component of official duration within shift should be considered in Daily 1 overtime calculation.

You have configured Official In/Out Duration Post Shift component, as user's official in/out duration ends after shift end time, then the component of official duration post shift should be considered in Daily 1 overtime calculation.

### OT is enabled and Daily 1 - OT Configurations

Days To Consider	WO, PH, WO/PH
Component	Early-In, Overstay, Work Hours Within Shift, Official In-Out Duration Prior Shift, Official In-Out Duration Within Shift, Official In-Out Duration Post Shift, Short Leave Duration Prior Shift, Short Leave Duration Within Shift, Short Leave Duration Post Shift

Range:	00:00 - 23:59
Min Duration	00:00
Consider As	OT1

#### Shift = 7:00 to 15:00

Consider the following example for Official In-Out.

Punch 1 = 05:00:00 Regular IN

Punch 2 = 06:00:00 Official Out

Punch 3 = 16:00:00 Official IN

Punch 4 = 18:00:00 Regular Out

The calculations will be done as follows:

Official In-Out Duration Prior Shift = 01:00:00

Official In-Out Duration Within Shift = 08:00:00

Official In-Out Duration Post Shift = 01:00:00

Hence it is concluded that according to the configuration of the components, the Official In-Out Duration will be contributing to the overall overtime calculated hours.

#### **Example4: Daily 1 with Short Leave Duration Prior Shift, Short Leave Duration Within Shift, Short Leave Duration Post Shift.**

You have configured Short Leave Duration Prior Shift component, as user's short leave duration starts before the shift start time, then the component of short leave duration which is prior the shift start time should be considered in Daily 1 overtime calculation.

You have configured Short Leave Duration Within Shift component, as user's short leave duration is within shift time, then the component of short leave duration within shift should be considered in Daily 1 overtime calculation.

You have configured Short Leave Duration Post Shift component, as user's short leave duration ends after shift end time, then the component of short leave duration post shift should be considered in Daily 1 overtime calculation.

#### **OT is enabled and Daily 1 - OT Configurations**

Days To Consider	WO, PH, WO/PH
Component	Early-In, Overstay, Work Hours Within Shift, Official In-Out Duration Prior Shift, Official In-Out Duration Within Shift, Official In-Out Duration Post Shift, Short Leave Duration Prior Shift, Short Leave Duration Within Shift, Short Leave Duration Post Shift
Range:	00:00 - 23:59
Min Duration	00:00
Consider As	OT1

#### Shift = 7:00 to 15:00

Consider the following example for Short Leave In-Out.

Punch 1 = 05:00:00 Regular IN

Punch 2 = 06:00:00 Short Leave Out

Punch 3 = 16:00:00 Short Leave IN

Punch 4 = 18:00:00 Regular Out

The calculations will be done as follows:

Short Leave Duration Prior Shift = 01:00:00

Short Leave Duration Within Shift = 08:00:00

Short Leave Duration Post Shift = 01:00:00

Hence it is concluded that according to the configuration of the components, the Short Leave In-Out Duration will be contributing to the overall overtime calculated hours.

**Example5: Daily 2 with Official In-Out Duration Prior Shift, Official In-Out Duration Within Shift, Official In-Out Duration Post Shift.**

You have configured Official In/Out Duration Prior Shift component, as user's official in/out duration starts before the shift start time, then the component of official duration which is prior the shift start time should be considered in Network Hours and later on in overtime as Daily 2 policy is selected.

You have configured Official In/Out Duration Within Shift component, as user's official in/out duration is within shift time, then the component of official duration within shift should be considered in Network Hours and later on in overtime as Daily 2 policy is selected.

You have configured Official In/Out Duration Post Shift component, as user's official in/out duration ends after shift end time, then the component of official duration post shift should be considered in Network Hours and later on in overtime as Daily 2 policy is selected.

**Network Hours Policy Configuration**

<u>NetWork Hours Policy</u>		
<u>Network Hours Calculation</u>		
<u>Component</u>	<u>Range</u>	<u>Applicable Days</u>
Work Hours Within Shift	00:00 - 23:59	All
Early IN	00:00 - 23:59	All
Overstay	00:00 - 23:59	All
Short Leave Duration Prior Shift	00:00 - 23:59	All
Short Leave Duration Within Shift	00:00 - 23:59	All
Short Leave Duration Post Shift	00:00 - 23:59	All
Official In-Out Duration Prior Shift	00:00 - 23:59	All
Official In-Out Duration Within Shift	00:00 - 23:59	All
Official In-Out Duration Post Shift	00:00 - 23:59	All

Make sure this Network Hours Policy is assigned in the Overtime Policy.

**OT is enabled and Daily 2 - OT Configurations**

Days To Consider	WO, PH, WO/PH		
Range:	00:00 - 23:59	Applicable Days	WO, PH, WO/PH, FB, RD
Min Duration	00:00		
Consider As	OT1		

### Shift = 7:00 to 15:00

Consider the following example for Official In-Out.

Punch 1 = 05:00:00 Regular IN

Punch 2 = 06:00:00 Official Out

Punch 3 = 16:00:00 Official IN

Punch 4 = 18:00:00 Regular Out

The calculations will be done as follows:

Official In-Out Duration Prior Shift = 01:00:00

Official In-Out Duration Within Shift = 08:00:00

Official In-Out Duration Post Shift = 01:00:00

Hence it is concluded that according to the configuration of the components, the Official In-Out Duration will be contributing to the overall overtime calculated hours only if the desired components have been configured in the Network Hours Policy and the same Policy has been assigned in the Overtime Policy.

### **Example6: Daily 2 with Short Leave Duration Prior Shift, Short Leave Duration Within Shift, Short Leave Duration Post Shift.**

You have configured Short Leave Duration Prior Shift component, as user's short leave duration starts before the shift start time, then the component of short leave duration which is prior the shift start time should be considered in Network Hours and later on in overtime as Daily 2 policy is selected.

You have configured Short Leave Duration Within Shift component, as user's short leave duration is within shift time, then the component of short leave duration within shift should be considered in Network Hours and later on in overtime as Daily 2 policy is selected.

You have configured Short Leave Duration Post Shift component, as user's short leave duration ends after shift end time, then the component of short leave duration post shift should be considered in Network Hours and later on in overtime as Daily 2 policy is selected.

### **Network Hours Policy Configuration**

<u>NetWork Hours Policy</u>		
<u>Network Hours Calculation</u>		
<u>Component</u>	<u>Range</u>	<u>Applicable Days</u>
Work Hours Within Shift	00:00 - 23:59	All
Early IN	00:00 - 23:59	All
Overstay	00:00 - 23:59	All
Short Leave Duration Prior Shift	00:00 - 23:59	All
Short Leave Duration Within Shift	00:00 - 23:59	All
Short Leave Duration Post Shift	00:00 - 23:59	All
Official In-Out Duration Prior Shift	00:00 - 23:59	All
Official In-Out Duration Within Shift	00:00 - 23:59	All
Official In-Out Duration Post Shift	00:00 - 23:59	All

Make sure this Network Hours Policy is assigned in the Overtime Policy.

**OT is enabled and Daily 2 - OT Configurations**

Days To Consider	WO, PH, WO/PH		
Range:	00:00 - 23:59	Applicable Days	WO, PH, WO/PH, FB, RD
Min Duration	00:00		
Consider As	OT1		

**Shift = 7:00 to 15:00**

Consider the following example for Short Leave In-Out.

Punch 1 = 05:00:00 Regular IN

Punch 2 = 06:00:00 Short Leave Out

Punch 3 = 16:00:00 Short Leave IN

Punch 4 = 18:00:00 Regular Out

The calculations will be done as follows:

Short Leave Duration Prior Shift = 01:00:00

Short Leave Duration Within Shift = 08:00:00

Short Leave Duration Post Shift = 01:00:00

Hence it is concluded that according to the configuration of the components the Short Leave Duration will be contributing to the overall overtime calculated hours only if the desired components have been configured in the Network Hours Policy and the same Policy has been assigned in the Overtime Policy.

## Weekly/Monthly Overtime

This section allows the administrator to configure Weekly/Monthly Overtime calculation.

To configure Weekly/Monthly Overtime,

- Select the **Weekly/Monthly Overtime** tab as shown.

The screenshot shows the 'Weekly/Monthly Overtime' configuration window. It includes the following sections:

- Overtime Calculation:** A dropdown menu set to 'Weekly'.
- Week Start Day:** A dropdown menu set to 'Monday'.
- Auto Authorize Overtime Component:** A checked checkbox.
- Authorization Required For Late-IN:** A checked checkbox.
- Maximum Allowed Weekly Overtime Duration:** Two input fields showing '999' and '59'.
- Consider In Net Work Hours:** A section with four rows: 'Week Offs', 'Holidays', 'Paid Leaves', and 'Not Applicable Day'. Each row has a checkbox and a dropdown menu set to 'Shift Based'. There are also 'HHMM' input fields for each row.
- Consider Work Done on WO/PH/Paid Leaves:** A checked checkbox.
- Work Component Configuration:** A table with columns: 'Net-Work Hours Range(From)', 'Net-Work Hours Range(To)', 'Min. Duration Req.', 'Consider As', and 'Factor'. The table contains one row with values: '00:00', '100:00', '00:00', 'OT1', and '1.00'.

- **Overtime Calculation** - Select the type of overtime calculation (**weekly or monthly**) to be performed from the dropdown list. Select Disabled to disable both weekly/monthly overtime calculation.
- For **Weekly** overtime calculation, the **Week Start Day** is to be specified from the drop-down list as shown to indicate the overtime calculation cycle. So, if Monday is selected as the **Week Start Day**, the weekly overtime will be calculated till the coming Sunday.
- **Auto Authorize Overtime Component** - Select this checkbox to enable automatic authorization of weekly/monthly overtime.
- **Authorization Required for Late-IN** - Select this checkbox in case the Late-IN is to be authorized.

### Consider In Net Work Hours

Select the checkboxes to specify whether **Week Offs**, **Holidays**, **Paid Leaves** or **Not Applicable Day** are to be considered within Net Work Hours for the weekly/monthly overtime calculation.

- You can select **Shift Based** hours to consider complete shift hours in Network hours or
- You can select **Custom hours** and specify specific hours to be included in Net-work hours.

**Consider In Net Work Hours**

Week Offs	<input checked="" type="checkbox"/>	Shift Based	▼	HH:MM
Holidays	<input checked="" type="checkbox"/>	Custom Hours	▼	04:00
Paid Leaves	<input type="checkbox"/>	Shift Based	▼	HH:MM
Not Applicable Day	<input type="checkbox"/>	Shift Based	▼	HH:MM

Consider Work Done on WO/PH/Paid Leaves ☒

**Consider Work Done on WO/PH/Paid Leaves:** If this checkbox is enabled only then work done on WO/PH/Paid leaves will be considered in Net-work hours.

**Example:** If Week Offs is enabled for Shift Based and Holidays for Custom 4 hrs. And “Consider Work Done on WO/PH/Paid Leaves” is enabled:

- Then suppose user has worked for 5 hrs on WO then shift hours (say 8hrs) + work done (5 hrs ) = 13 hrs will be added to the Net work hours.
- Suppose user has done work for 6 hrs on holiday then custom hrs (4 hrs) + work done (6 hrs) will be added to the Net-work hours.

If “Consider Work Done on WO/PH/Paid Leaves” is disabled:

- Then work done on WO/Holidays wont be considered in Net-work hours and only shift hours/custom hours will be considered.
- In case of paid leave with half day present status, then work done on half day hours will be added in the net work hours.
- In case of full day paid leave status, then work done on that day will not be added in the net work hours.



*For work done on a Week Off/Public Holiday, the shift duration for a WO/PH day shall be counted in the week's total net work hours, if and only if, that day of the week is applicable for Weekly OT calculation.*

**Example:** Daily overtime is to be calculated for WO and PH days. Weekly overtime should consider custom hours of 09:00 for Not Applicable Days falling in the week. Any work above 45:00 should be considered as Overtime. Consider Work Done on WO/PH/Paid Leaves" = Unchecked.

Date	Day Type	Work hours
15-4-2019 Monday	Not Applicable	
16-4-2019 Tuesday	Not Applicable	
17-4-2019 Wednesday <b>Joining Date</b>	Normal	9:30
18-4-2019 Thursday	Normal	9:30
19-4-2019 Friday	Normal	9:15



Date	Day Type	Work hours
20-4-2019 Saturday	Week Off	5:00
21-4-2019 Sunday	Week Off	00:00

In above example:

Daily OT generated on 20/04/2019 - **05:00**

Weekly OT - **01:15** (This will be achieved since Net-Work = 09:00 (15/04/2019) + 09:00 (16/14/2019) + 09:30 (17/04/2019) + 09:30 (18/04/2019) + 09:15 (19/11/2018) = 46:15

## Work Component Configuration

- **Work Component** - Select the work component option as **Net-Work Hours**. This indicates that the weekly/monthly overtime will be calculated based on the Net-Work Hours Configuration as performed earlier.
- **Work Component Range** - Define a time range for a user's net work hours in the HHH:MM format to be considered as overtime.
- **Min Duration Required Within Range** - Define a minimum duration within the Work Component Range which must be covered, for the user's net work hours to qualify as overtime.
- **Consider Component As** - This is to designate the selected work component as an overtime type. COSEC allows the definition of up to 5 overtime types on the system - OT1, OT2, OT3, OT4 and OT5.
- **Multiplication Factor** - Specify the multiplication factor which should be used against the total calculated overtime for a specified period for overtime pay calculation.

Click the **Add** button to save the overtime configuration. The work component and its parameters are now reflected in a grid list as shown.

Work Component	Range	Consider AS	Min Duration Req.	Applicable Days	Factor	
Net-Work Hours	100:00 - 200:00	OT1	100:00		0.5	

Click **Save** .



*For users who are auto-authorized for Overtime and are assigned Net-Work Hours & Overtime Policy having Overtime as auto-authorized, an OT authorization request will still be generated if User is late to report for a shift (i.e. after Shift Start Time added with Grace Time for Shift Late-IN).*

## OT for JPC User

### Daily1

#### Example1

Consider 2 punch system, Shift timings: 9:00- 18:00, No Break Configured.

Work Component	Range	Consider as	Minimum required	Applicable days	Multiplication Factor
----------------	-------	-------------	------------------	-----------------	-----------------------

Early-IN	0:00 to 23:59	OT1	00:00	All	1
Overstay	0:00 to 23:59	OT2	00:00	All	1
Work Within Shift	0:00 to 23:59	OT3	00:00	All	1

### JPC Timesheet Transactions

#### Network and OT against transaction

Transaction start	Transaction end	Early IN	Late-OUT	Work within Shift	OT1	OT2	OT3
07:00	15:00	02:00	00:00	06:00	02:00		06:00
15:00	17:00	00:00	00:00	02:00			02:00
17:00	20:00	00:00	02:00	01:00		02:00	01:00

#### Example2

Consider 2 punch system, Shift timings: 9:00- 18:00, No Break Configured

OT	Work Component	Range	Minimum required	Applicable days	Multiplication Factor
OT1	Early-IN	00:00 to 01:00	00:00	All	1
OT2	Early-IN	01:00 to 23:59	00:00	All	1
OT1	Overstay	00:00 to 01:00	00:00	All	1
OT2	Overstay	01:00 to 23:59	00:00	All	1
OT1	Work within Shift	00:00 to 01:00	00:00	All	1
OT2	Work within Shift	01:00 to 23:59	00:00	All	1

#### T&A Transaction and Overtime

IN Punch	OUT Punch	Early IN	Late-OUT	Work within Shift	OT1	OT2
07:00	20:00	02:00	02:00	09:00	03:00	10:00

**OT1**= Early IN (1 hr) + Late-Out (1 hr) + Work within shift (1 hr) = 3 hours

**OT2**= Early IN (1 hr) + Late-Out (1 hr) + Work within shift (8 hr) = 10 hours

### JPC Timesheet Transactions

Transaction start	Transaction end	Early IN	Late-OUT	Work within Shift	OT1	OT2
07:00	15:00	02:00	00:00	06:00	02:00	06:00
15:00	17:00	00:00	00:00	02:00	00:00	02:00

17:00	20:00	00:00	02:00	01:00	01:00	02:00
-------	-------	-------	-------	-------	-------	-------

## Daily2 OT

Consider 2 punch system, Shift timings: 9:00- 18:00, No Break Configured.

Net work hours include: Early-IN, Work Hours Within Shift and Overstay (00:00-23:59)

Range	Consider as	Minimum duration	Applicable days
6:00 to 8:00	OT1	00:00	All
8:00 to 12:00	OT2	00:00	All
12:00 to 23:59	OT3	00:00	All

## No Change in JPC

T&A Punches	Network Hours	Standard Hours	OT1	OT2	OT3
09:00- IN 21:00 –OUT	12:00	06:00	2:00	4:00	-

**Normal Hours:** Hours considered in T&A's Network hours against corresponding JPC transaction i.e. the hours considered in Network hours which are distributed as per JPC's transaction.

Eg: If Network hours is 12 hours and total transactions are of 15 hours so normal hours will be 12 hours only.

**Standard Hours:** Hours not accountable for overtime calculation (Daily 2) i.e. if overtime is to be given after working hours of 9 hours, then standard hours are 9 hours. You can calculate from the Range if given. Suppose Range is 6:00 to 8:00, then OT will be given after 6 hours so the standard hours is 6 hours.

## Network and OT against transaction

Transaction start	Transaction end	Normal Hours	Standard Hours	OT1	OT2	OT3
09:00	15:00	06:00	06:00			
15:00	17:00	02:00	00:00	02:00		
17:00	21:00	04:00	00:00		04:00	

## Specified Award/Penalty against transaction

Transaction start	Transaction end	Award	Penalty
09:00	15:00	03:00	
15:00	17:00		
17:00	21:00		02:00

Network Hours= Network hours+ Award Duration-Penalty Duration  
= 12+3-1 =13:00 hours

So, Standard hours= 6:00

OT1= 2:00, OT2=4:00, OT3=1:00

## Network and OT against transaction after Award/Penalty Consideration

Transaction start	Transaction end	Award	Penalty	Normal Hours	Standard Hours	OT1	OT2	OT3
09:00	15:00	3:00		09:00	06:00	02:00	01:00	
15:00	17:00			02:00	00:00		02:00	
17:00	21:00		2:00	02:00	00:00		01:00	01:00

## OT for Overlapping Time Range

Consider 2 punch system, Special Time Range=21:00 to 04:00

Net-Work Hours include: Early-IN, Work Hours Within Shift, Overstay, Award Duration and Penalty Duration (00:00 - 23:59)

Range	Consider as	Minimum duration	Applicable days	Consider Overtime as per
9:00 to 11:00	OT1	00:00	All	Priority
11:00 to 23:59	OT3	00:00	All	Priority
9:00 to 11:00	OT2	00:00	All	Special Time Range
11:00 to 23:59	OT4	00:00	All	Special Time Range

### Example:1

T&A Punches	Network Hours	Standard Hours	Special OT	Priority OT	OT1	OT2	OT3	OT4
09:00- IN 21:00 –OUT	12:00	06:00	0:00	3:00	2:00		1:00	

### Example:2

T&A Punches	Network Hours	Standard Hours	Special OT	Priority OT	OT1	OT2	OT3	OT4
18:00- IN 06:00 –OUT	12:00	09:00	1:00	2:00	2:00			1:00

**Priority OT:** Overtime calculated against Priority OT Component Range.

**Special OT:** Overtime calculated against Special OT Time Range.

## Special OT calculation

When Daily 2 Overtime configuration is including Special OT components then first it decides the overall Special Overtime and Priority Overtime. Projected OT Start should be figured out considering Eligible Early IN that has actually contributed in the Net-Work Hours.

Net-Work Hours Calculation:

Maintain a variable as Eligible Early IN which should be calculated as sum of the early-in duration that is contributing to Net-Work Hours for the day

## Daily 2 Overtime Calculation:

Steps for figuring out Projected OT Start have been updated to consider Eligible Early IN .

### Example1: With Early IN

Shift Timings= 18:00 to 03:00

Graveyard shift time range: 21:00 to 05:00

### Network hours Configuration

Component	Range	Minimum duration	Applicable days
Early IN	0:00 to 23:59	00:00	Week days
Work within shift	0:00 to 23:59	00:00	Week days
Overstay	0:00 to 23:59	00:00	Week days

### Work Hours Duration

Range	Consider as	Minimum duration	Applicable days	Graveyard Shift
9:00 to 11:00	OT1	00:00	Week days	No
11:00 to 23:59	OT3	00:00	Week days	No
9:00 to 11:00	OT2	00:00	Week days	Yes
11:00 to 23:59	OT4	00:00	Week days	Yes

T&A PUNCHES	Network Hours	Standard Hours	Eligible Early-IN	Projected OT start	OT time range	Special OT	Priority OT	OT 1	OT 2	OT 3	OT 4
15:00- IN 17:00 – OUT 18:00-IN 06:00- OUT	14:00	09:00	2:00	1:00	01:00 to 06:00	4:00	1:00	1: 00	2: 00		2: 00

### Description:

Network hours: (Punch IN time:15:00 hrs to Punch OUT time:06:00 hrs) - (Out time from 17:00 to 18:00 hrs)  
 = 15 hrs - 1 hr  
 = 14:00 hrs

Eligible Early IN: (Punch time:15:00 hrs to Shift start time:18:00 hrs) - (Out time from 17:00 to 18:00 hrs)  
 = 3 hrs - 1 hr  
 = 2 hrs

Projected OT start= Shift start- Eligible Early IN + standard hours  
 = 18:00- 2:00+ 9:00  
 = 01:00 so OT is projected to start from 1am

Thus OT time range= Projected OT start time to OUT punch time  
 = 1 am to 6am

So Total OT is to be given for 1 am to 6am of work = 5 hrs

Special OT is to be given first. Now the special time range or Graveyard shift range is from 21:00 hrs to 05:00 hrs.  
 Hence from 1am to 5am will be given as **Special OT= 4 hrs**

Remaining 1 hr from 5am to 6am will be given as **Priority OT= 1 hr**

The Priority OT of 1 hr will be distributed among OT1 and OT3. As OT1 has range of 2 hours so OT1 will be given 1 hr.

The Special OT of 4 hrs will be distributed among OT2 and OT4. As OT2 has range of 2 hours so OT2 will be given 2 hrs and OT4 as 2 hrs.

### Example2: WithOut Early IN

Consider only work within shift and overstay in Network hours. All other configurations being same.

T&A Punches	Network Hours	Standard Hours	Eligible Early-IN	Projected OT start	OT time range	Special OT	Priority OT	OT 1	OT 2	OT 3	OT 4
15:00- IN 17:00 – OUT 18:00-IN 06:00- OUT	12:00	09:00	Do not calculate as Early-IN is not configured	3:00	03:00 to 06:00	2:00	1:00	1:00	2:00		

Projected OT start= Shift start- Eligible Early IN + standard hours  
= 18:00- 0:00+ 9:00  
= 3:00 hrs

### Example1: Daily2 OT Calculation with Priority OT and Special OT

Consider Network Hours configuration as:

Work Component	Range	Consider as	Minimum duration reqd.	Applicable days	factor	Remarks
Work hours within shift	00:00 to 10:00	work	00:00	M,T,W,Th,F Sa	1	Shift duration is counted in network hrs
Early-IN	00:00 to 02:00	work	00:10	M,T,W,Th,F Sa	1	Min 0 and Max 2 hrs of EI will be calculated for Net-work hours
Overstay	02:00 to 08:00	work	00:30	M,T,W,Th,F Sa	1	Min 2 and Max 8 hrs of Overstay will be calculated for Net-work hours

Consider Overtime Configuration as:

Daily Overtime is enabled for M, T ,W, Th

Consider Daily Overtime Configuration as:

Overtime Calculation is selected as Daily2  
Auto Authorize Overtime component is enabled  
Allow Overlapping work components is enabled  
Special OT time range is 21:00 to 04:00


Range	Consider as	Minimum duration reqd.	Applicable days	Multiplication factor	OT assignment
01:00 to 100:00	OT1	00:00	M,T,W,Th	1	Priority
02:00 to 100:00	OT2	00:10	M,T,W,Th	1	Time Range

### Consider Weekly/Monthly Overtime as Disabled

**Consider shift of the user** is 09:00 to 18:00. Shift duration is 8 hrs with break from 13:00 to 14:00. Break deviation allowed.

**To generate the overtime of the user, Daily and Monthly attendance process must be run.**

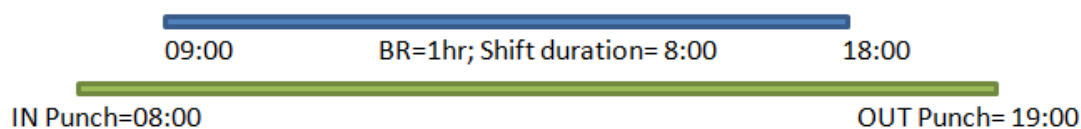
Now after the daily and monthly attendance process, the user punches in the Daily attendance view are shown below:

<div> User <input type="text" value="rf"/> Rosy  </div> <div> Attendance Period <input type="text" value="September"/> <input type="text" value="2016"/> </div> <div> View </div>														
Date	Shift	First IN	Last OUT	1st Half	2nd Half	Late-IN	Early-OUT	Work Hours	Extra Work	Net Work	Break Hours	Actual Overtime	Authorized Overtime	Remark
01/09/2016	GS	08:00	19:00	PR	PR			10:00	02:00	09:00	01:00	08:00		
02/09/2016	GS	09:00	21:00	PR	PR			11:00	03:00	09:00	01:00			
03/09/2016	GS	09:00	20:00	PR	PR			10:30	02:00	08:30	00:30			
04/09/2016	GS - WO	07:30	21:00	WO	WO			12:30	04:30		01:00			
05/09/2016	GS	08:15	19:00	PR	PR			10:30	01:45	09:30	00:15	08:30		
06/09/2016	GS	07:30	22:00	PR	PR			13:30	05:30	11:30	01:00	09:30		
07/09/2016	GS	09:15	23:30	PR	PR			14:05	05:30	12:05	00:10	10:05		
08/09/2016	GS	06:00	23:00	PR	PR			16:00	08:00	13:00	01:00	11:00		
09/09/2016	GS	09:00	23:45	PR	PR			13:45	05:45	11:45	01:00			
10/09/2016	GS - WO			WO	WO									
11/09/2016	GS - WO			WO	WO									

### Calculation of Network hours

Network hours= Early IN component + Work hours within shift + Overstay component

**On 1st**



- Early IN=1hr

- Work hours within shift=( 9hrs to 18 hr - break duration) =9-1 = 8 hrs
- Overstay= 1hr but overstay range should be minimum 2 hrs to consider for network hours so Overstay=0

So **Network hours=EI + WS+ OS = 1+ 8 +0 = 9hrs** which is shown by arrow on 1st

## 2nd

Network hours= Early IN component + Work hours within shift + Overstay component  
 $= 0 + (\text{shift duration} - \text{break hrs}) + (3-2)$   
 $= 0 + (9:00-1:00) + 1 = 8+1 = 9 \text{ hrs}$

## 3rd

Network hours= Early IN component + Work hours within shift + Overstay component  
 $= 0 + (\text{shift duration} - \text{break hrs}) + (2-2)$   
 $= 0 + (9:00- 00:30) + 0$   
 $= 8:30 \text{ hrs}$

## 4th

Network hrs is not calculated on Sunday as it is not configured for Sunday.

## 5th

Network hours= Early IN component + Work hours within shift + Overstay component  
 $= 00:45 + (\text{shift duration} - \text{break hrs}) + (1\text{hr} < \text{min reqd } 2 \text{ hr})$   
 $= 00:45 + (9:00- 00:15) + 0$   
 $= 00:45 + 8:45 = 9:30$

## 6th

Network hours= Early IN component + Work hours within shift + Overstay component  
 $= 1:30 + (\text{shift duration} - \text{break hrs}) + (4-2)$   
 $= 1:30 + (9:00- 01:00) + 2$   
 $= 1:30 + 8:00 + 2 = 11:30$

## 7th

Network hours= Early IN component + Work hours within shift + Overstay component  
 $= 0 + (\text{shift duration} - \text{break hrs}) + (5:30-2)$   
 $= 0 + [9:15 \text{ to } 18:00] - 00:10 + 3:30$   
 $= 08:35 + 3:30 = 12:05$

## 8th

Network hours= Early IN component + Work hours within shift + Overstay component  
 $= (3:00 \text{ hrs, but max allowed is } 2:00) + (\text{shift duration} - \text{break hrs}) + (5-2)$   
 $= 2:00 + (9:00- 01:00) + 3$   
 $= 2:00 + 8:00 + 3 = 13:00$

## 9th

Network hours= Early IN component + Work hours within shift + Overstay component  
 $= 0 + (\text{shift duration} - \text{break hrs}) + (5:45-2)$   
 $= 0 + (9:00- 01:00) + 3:45$   
 $= 08:00 + 3:45 = 11:45$

## Calculation of Overtime

Overtime = Network hours- Standard hours

Standard hours is the minimum hours in the Range of network hours to consider for overtime.

From range 01:00 to 100:00, Priority OT1 is configured. So here standard hours is 1:00



From range 02:00 to 100:00, Special OT2 is configured. So here standard hours is 2:00

Date	Network hours	Work done	Overlapping hours with special time range (21:00 to 04:00)	Standard hours	Daily2 on M,T,W,Th	Overtime= Network hours- Standard hours	Special OT OT2	Priority OT OT1
1/9/16	9	8:00 to 19:00	0	1	Th	9-1= 8	-	8:00
2/9/16	9	9:00 to 21:00	0	1	F	NA on Friday	-	-
3/9/16	8:30	9:00 to 20:00	0	1	Sa	NA on Saturday	-	-
4/9/16	NA on Sunday	7:30 to 21:00	0	1	Su	NA on Sunday	-	-
5/9/16	9:30	8:15 to 19:00	0	1	M	8:30	-	8:30
6/9/16	11:30	7:30 to 22:00	1:00	2	T	9:30	1:00	8:30
7/9/16	12:05	9:15 to 23:30	2:30	2	W	10:05	2:30	7:35
8/9/16	13:00	6:00 to 23:00	2:00	2	Th	11:00	2:00	9:00
9/9/16	11:45	9:00 to 23:45	2:45	2	F	NA on Friday	-	-

Here Standard hours is 1:00 when work is not done in special time range of 21:00 to 04:00; other wise standard hours considered will be 2:00 hrs as configured in the range.

Now Daily2 OT is configured from Monday to Thursday. So OT on 1st= 8 hrs. This will be Priority OT which is OT1; so OT1 for 1st = 8:00 hrs

Similarly on 5th, OT1= 9:30 -1 = 8:30 hrs.

On 6th user has worked from 21:00 to 22:00 in special time range, so 1:00 hr will be given to special OT.

Total OT= Network hrs- Standard hrs  
= 11:30 - 2 = 9:30 hrs

Out of total overtime of 9:30 hrs, Special OT **OT2= 1 hr**  
So Priority OT; **OT1=8:30 hrs**

Similarly OT1 and OT2 can be calculated for other days as shown in above table.

## Example2: Weekly OT Calculation

Consider Network Hours configuration as:

Work Component	Range	Consider as	Minimum duration reqd.	Applicable days	factor	Remarks
Work hours within shift	00:00 to 10:00	work	00:00	M,T,W,Th,F Sa	1	Shift duration is counted in network hrs
Early-IN	00:00 to 02:00	work	00:10	M,T,W,Th,F Sa	1	Min 0 and Max 2 hrs of EI will be calculated for Net-work hours
Overstay	02:00 to 08:00	work	00:30	M,T,W,Th,F Sa	1	Min 2 and Max 8 hrs of Overstay will be calculated for Net-work hours

### Consider Overtime Configuration as:

Weekly Overtime is enabled for F, Sa, Sun

### Consider Weekly/Monthly Overtime Configuration as:

Overtime Calculation is selected as Weekly

Week Start Date is selected as Monday

Auto Authorize Overtime component is enabled

Consider in Net work hours is enabled for Week-Offs

Work Component	Range	Consider as	Minimum duration reqd.	Multiplication factor
Net-work hours	00:00 to 100:00	OT3	01:00	1

**Consider shift of the user** is 09:00 to 18:00. Shift duration is 8 hrs with break from 13:00 to 14:00. Break deviation allowed.

**To generate the overtime of the user, Daily and Monthly attendance process must be run.**

Now after the daily and monthly attendance process, the user punches in the Daily attendance view are shown below:

User

rf

Rosy

Attendance Period

September

2016

View

Date	Shift	First IN	Last OUT	1st Half	2nd Half	Late-IN	Early-OUT	Work Hours	Extra Work	Net Work	Break Hours	Actual Overtime	Authorized Overtime	Remark
01/09/2016	GS	08:00	19:00	PR	PR			10:00	02:00	09:00	01:00			
02/09/2016	GS	09:00	21:00	PR	PR			11:00	03:00	09:00	01:00	03:00		
03/09/2016	GS	09:00	20:00	PR	PR			10:30	02:00	08:30	00:30	02:00		
04/09/2016	GS - WO	07:30	21:00	WO	WO			12:30	04:30		01:00	20:30		
05/09/2016	GS	08:15	19:00	PR	PR			10:30	01:45	09:30	00:15			
06/09/2016	GS	07:30	22:00	PR	PR			13:30	05:30	11:30	01:00			
07/09/2016	GS	09:15	23:30	PR	PR			14:05	05:30	12:05	00:10			
08/09/2016	GS	06:00	23:00	PR	PR			16:00	08:00	13:00	01:00			
09/09/2016	GS	09:00	23:45	PR	PR			13:45	05:45	11:45	01:00	05:45		
10/09/2016	GS - WO			WO	WO									
11/09/2016	GS - WO			WO	WO							22:00		

For weekly OT, total Net work hours is to be calculated first.

The Network hours is calculated from the components Early IN, Work hours within shift and Overstay on Friday and Saturday.

The weekly OT will be allotted on F,Sa and Su as configured from Overtime configuration.

Now Week Offs check box is enabled in "Consider in Network hours" so shift work hours on the week-off will be considered in net-work hours.

Hence Total Network hours will be calculated from Friday, Saturday and Sunday.

**Calculation of Network hours** is same as done in previous Example1. [See "Calculation of Network hours" on page 1893.](#)

Total Network hours = Friday N/w hrs + Saturday N/w hrs + Sunday shift hours  
= 9:00 + 8:30 + 8:00  
= 25:30 hours

### Calculation of Weekly OT

The total network hours of 25:30 hours will be distributed from Friday to Sunday as OT3 depending on the extra work done on the day. The left over OT will be given on the last day of the week.

On 2/9/16 Friday; Extra work hours = 03:00 so OT3 will be given as 03:00 hours.

On 3/9/16 Saturday; Extra work hours = 02:00 so OT3 will be given as 02:00 hours.

On 4/9/16 Sunday, Remaining hours = 25:30 - (OT allotted on Friday and Saturday)  
= 25:30 - (05:00)  
= 20:30 will be given as OT3; shown by arrow in above screenshot

Similarly for week 5/9/16 to 11/9/16, Total network hours = 11:45 + 8:00 + 8:00  
= 27:45 hours

Overtime can be allotted on 9/9/16 as per the extra work hours as 5:45 hours. So OT3 on 9th is 5:45 hrs.

The Remaining OT will be given to the last day(11/9/16) of the week which is = 27:45 - 05:45 hrs  
= 22:00 hours; shown by arrow in above screenshot

### Example3: Monthly OT Calculation

**Consider Network hours configuration and Overtime configuration same as Weekly OT configuration**

**Consider Weekly/Monthly Overtime Configuration as:**

Overtime Calculation is selected as Monthly

Auto Authorize Overtime component is enabled

Consider in Net work hours is enabled for Week-Offs

Work Component	Range	Consider as	Minimum duration reqd.	Multiplication factor
Net-work hours	00:00 to 100:00	OT4	01:00	1

**Consider shift of the user** is 09:00 to 18:00. Shift duration is 8 hrs with break from 13:00 to 14:00. Break deviation allowed.

**To generate the overtime of the user, Daily and Monthly attendance process must be run.**

Now after the daily and monthly attendance process, the user punches in the Daily attendance view are shown below:

User

rf

Rosy

Attendance Period

September

2016

View

Date	Shift	First IN	Last OUT	1st Half	2nd Half	Late-IN	Early-OUT	Work Hours	Extra Work	Net Work	Break Hours	Actual Overtime	Authorized Overtime	Remark
01/09/2016	GS	08:00	19:00	PR	PR			10:00	02:00	09:00	01:00			
02/09/2016	GS	09:00	21:00	PR	PR			11:00	03:00	09:00	01:00	03:00		
03/09/2016	GS	09:00	20:00	PR	PR			10:30	02:00	08:30	00:30	02:00		
04/09/2016	GS - WO	07:30	21:00	WO	WO			12:30	04:30		01:00	04:30		
05/09/2016	GS	08:15	19:00	PR	PR			10:30	01:45	09:30	00:15			
06/09/2016	GS	07:30	22:00	PR	PR			13:30	05:30	11:30	01:00			
07/09/2016	GS	09:15	23:30	PR	PR			14:05	05:30	12:05	00:10			
08/09/2016	GS	06:00	23:00	PR	PR			16:00	08:00	13:00	01:00			
09/09/2016	GS	09:00	23:45	PR	PR			13:45	05:45	11:45	01:00	05:45		
10/09/2016	GS - WO			WO	WO									
11/09/2016	GS - WO			WO	WO									

**Calculation of Network hours** is same as done in Example1. See ["Calculation of Network hours" on page 1893](#).

Now Total Network hours for the month is calculated. As Monthly OT is applicable for F, Sa and Su so Network hours for all F, Sa and Su is added.

Date	Network hours	Remarks
2/9/16	9:00	
3/9/16	8:30	
4/9/16	8:00	As WO is enabled to consider for Network hours
9/9/16	11:45	
10/9/16	8	As WO is enabled to consider for Network hours
11/9/16	8	
16/9/16	-	AB
17/9/16	-	PH
18/9/16	8	As WO is enabled to consider for Network hours
23/9/16	8	
24/9/16	8	As WO is enabled to consider for Network hours
25/9/16	8	

**Total Network hours= 84:75 hours**

### Calculation of Monthly OT

The total network hours of 84:75 hours will be distributed from Friday to Sunday as OT4; according to the extra work done on the day.

On 2/9/16 Friday; Extra work hours = 03:00 so OT4 will be given as 03:00 hours. Similarly OT4 will be given to other days (F, Sa, Su)

The left over OT will be given on the last day of the month. As monthly OT is allowed for Friday, Saturday and Sunday so left over OT will be given to last Sunday of the month.

Thus left over OT of 68:00 hours is given on 25/9/16 as shown below

22/09/2016	G5	08:00	19:00	PR	PR			10:00	02:00	09:00	01:00	
23/09/2016	G5	09:00	20:00	PR	PR			10:00	02:00	08:00	01:00	02:00
24/09/2016	G5 - WO			WO	WO							
25/09/2016	G5 - WO			WO	WO							68:00
26/09/2016	G5	09:00	18:30	PR	PR			08:30	00:30	08:00	01:00	
27/09/2016	G5	08:45	21:00	PR	PR			11:15	03:15	09:15	01:00	
28/09/2016	G5			AB	AB							
29/09/2016	G5			AB	AB							
30/09/2016	G5											

### OT Calculation for user with Not Applicable Days configuration:

#### Example 1:

For Daily Overtime, Days to consider for Overtime= WO and PH.

For Weekly Overtime, Days to consider for Overtime= **Sun, Mon, Wed, Thu, Fri, Sat** and **PH**. Also, custom hours = 09:00 for Not Applicable Days falling in the week as well as any work done above **35:00** hours is considered as Overtime.

- "Consider Work Done on WO/PH/Paid Leaves" = **Unchecked**.
- Week-Start = **Monday (15/04/2019)**, Week-End = **Sunday (21/04/2019)**
- Joining Date = **Wednesday (17/04/2019)**
- Considering following daily view:

Date	Day Type	Work Hours	Consider for Weekly/ Monthly Overtime Calculation	Remark
15/04/2019 (Monday)	Normal	-	Yes	<b>Not Applicable Day</b>

Date	Day Type	Work Hours	Consider for Weekly/ Monthly Overtime Calculation	Remark
16/04/2019 (Tuesday)	Normal	-		<b>Not Applicable Day</b>  This day will not be considered as it is not configured in "Overtime Calculation > Weekly/Monthly Overtime > Day to Consider for Calculation".
17/04/2019 (Wednesday)	Normal	9:30	Yes	<b>Joining Date</b>
18/04/2019 (Thursday)	Normal	9:30	Yes	
19/04/2019 (Friday)	Normal	9:15	Yes	
20/04/2019 (Saturday)	Week Off	05:00		
21/04/2019 (Sunday)	Week Off	00:00		

- In above mentioned scenario, OT should be generated as follows:
  - Daily OT on 20/04/2019 - **05:00**
  - Weekly OT – **02:15**
  - This should be achieved since Net-Work = **09:00** (15/04/2019) + 09:30 (17/04/2019) + 09:30 (18/04/2019) + 09:15 (19/11/2018) = **37:15**.

#### Example 2:

For Daily Overtime, Days to consider for Overtime= WO and PH.

For Weekly Overtime, Days to consider for Overtime= **Sun, Mon, Tue, Wed, Thu, Fri, Sat** and **PH**. Also, custom hours = 09:00 for **Not Applicable Days** falling in the week, as well as any work done above **45:00** hours is considered as Overtime.

- “Consider Work Done on WO/PH/Paid Leaves” = **Unchecked**.
- Week-Start = **Monday (15/04/2019)**, Week-End = **Sunday (21/04/2019)**
- Joining Date = **Wednesday (17/04/2019)**
- Considering following daily view:

Date	Day Type	Work Hours	Consider for Weekly/ Monthly Overtime Calculation	Remark
15/04/2019 (Monday)	Normal	-	Yes	<b>Not Applicable</b>
16/04/2019 (Tuesday)	Normal	-	Yes	<b>Not Applicable</b>

Date	Day Type	Work Hours	Consider for Weekly/ Monthly Overtime Calculation	Remark
17/04/2019 (Wednesday)	Normal	9:30	Yes	Joining Date
18/04/2019 (Thursday)	Normal	9:30	Yes	
19/04/2019 (Friday)	Normal	9:15	Yes	
20/04/2019 (Saturday)	Week Off	05:00		
21/04/2019 (Sunday)	Week Off	00:00		

- In above mentioned scenario, OT should be generated as follows:
  - Daily OT on 20/04/2019 - **05:00**
  - Weekly OT - **01:15**
  - This should be achieved since Net-Work = **09:00** (15/04/2019) + **09:00** (16/14/2019) + 09:30 (17/04/2019) + 09:30 (18/04/2019) + 09:15 (19/04/2018) = **46:15**

### Example 3:

For Daily Overtime, Days to consider for Overtime= WO and PH.

For Monthly Overtime, Days to consider for Overtime= **Mon** and **Tue**. Also, custom hours = 09:00 for **Not Applicable Days** falling in the month, as well as any work done above **90:00** hours is considered as Overtime.

- “Consider Work Done on WO/PH/Paid Leaves” = **Unchecked**.
- Month-Start = **Monday (01/04/2019)**, Month-End = **Tuesday (30/04/2019)**
- Joining Date = **Monday (15/04/2019)**

- Considering following daily view:

Date	Day Type	Work Hours	Consider for Weekly/ Monthly Overtime Calculation	Remark
01/04/2019 (Monday)	Normal	-	Yes	<b>Not Applicable Day</b>
02/04/2019 (Tuesday)	Normal	-	Yes	<b>Not Applicable Day</b>
03/04/2019 (Wednesday).	Normal	-		<b>Not Applicable Days</b>  These days will not be considered as it is not configured in "Overtime Calculation > Weekly/ Monthly Overtime > Day to Consider for Calculation"
04/04/2019 (Thursday)	Normal	-		
05/04/2019 (Friday)	Normal	-		
06/04/2019 (Saturday)	Week Off	-		
07/04/2019 (Sunday)	Week Off	-		
08/04/2019 (Monday)	Normal	-	Yes	<b>Not Applicable Day</b>
09/04/2019 (Tuesday)	Normal	-	Yes	<b>Not Applicable Day</b>
10/04/2019 (Wednesday)	Normal.	-		<b>Not Applicable Days</b>  These days will not be considered as it is not configured in "Overtime Calculation > Weekly/ Monthly Overtime > Day to Consider for Calculation"
11/04/2019 (Thursday)	Normal	-		
12/04/2019 (Friday)	Normal	-		
13/04/2019 (Saturday)	Week Off	-		
14/04/2019 (Sunday)	Week Off	-		
15/04/2019 (Monday)	Normal	9:30	Yes	<b>Joining Day</b>
16/04/2019 (Tuesday)	Normal	9:30	Yes	



Date	Day Type	Work Hours	Consider for Weekly/ Monthly Overtime Calculation	Remark
17/04/2019 (Wednesday)	Normal	9:30		These days will not be considered as it is not configured in "Overtime Calculation > Weekly/ Monthly Overtime > Day to Consider for Calculation".
18/04/2019 (Thursday)	Normal	9:30		
19/04/2019 (Friday)	Normal	9:30		
20/04/2019 (Saturday)	Week OFF	05:00		
21/04/2019 (Sunday)	Week OFF	-		
22/04/2019 (Monday)	Normal	9:30	Yes	
23/04/2019 (Tuesday)	Normal	9:30	Yes	
24/04/2019 (Wednesday)	Normal	9:30		These days will not be considered as it is not configured in "Overtime Calculation > Weekly/ Monthly Overtime > Day to Consider for Calculation".
25/04/2019 (Thursday)	Normal	9:30		
26/04/2019 (Friday).	Normal	9:30		
27/04/2019 (Saturday)	Week OFF	-		
28/04/2019 (Sunday)	Week OFF	-		
29/04/2019 (Monday)	Normal	9:30	Yes	
30/04/2019 (Tuesday)	Normal	9:30	Yes	

- In above mentioned scenario, OT is generated as follows:
  - Daily OT on 20/04/2019 - **05:00**
  - Monthly OT - **03:00**
  - This is achieved since Net-Work = **09:00** (01/04/2019) + **09:00** (02/04/2019) + **09:00** (08/04/2019) + **09:00** (09/11/2018) + 09:30 (15/04/2019) + 09:30 (16/04/2019) + 09:30 (22/04/2019) + 09:30 (23/04/2018) + 09:30 (29/04/2019) + 09:30 (30/04/2018) = **93:00**.

#### Example 4:

For Daily Overtime, Days to consider for Overtime= WO and PH.

For Monthly Overtime, Days to consider for Overtime= **Mon, Tue, WO** and **PH**. Also, custom hours = 09:00 for **Not Applicable Days**, 09:30 for **WO** and **08:00** for **PH** falling in the month, as well as any work done above **150:00** hours is considered as Overtime.

- “Consider Work Done on WO/PH/Paid Leaves” = **Unchecked**.
- Month-Start = **Monday (01/04/2019)**, Month-End = **Tuesday (30/04/2019)**
- Joining Date = **Monday (15/04/2019)**

- Considering following daily view:

Date	Day Type	Work Hours	Consider for Weekly/ Monthly Overtime Calculation	Remark
01/04/2019 (Monday)	Normal	-	Yes	<b>Not Applicable Day</b>
02/04/2019 (Tuesday)	Normal	-	Yes	<b>Not Applicable Day</b>
03/04/2019 (Wednesday).	Normal	-		<b>Not Applicable Days</b>  These days will not be considered as it is not configured in “Overtime Calculation > Weekly/ Monthly Overtime > Day to Consider for Calculation”
04/04/2019 (Thursday)	Normal	-		
05/04/2019 (Friday)	Normal	-		
06/04/2019 (Saturday)	Week Off	-	Yes	<b>Not Applicable Day</b>
07/04/2019 (Sunday)	Week Off	-	Yes	<b>Not Applicable Day</b>
08/04/2019 (Monday)	Normal	-	Yes	<b>Not Applicable Day</b>
09/04/2019 (Tuesday)	Normal	-	Yes	<b>Not Applicable Day</b>
10/04/2019 (Wednesday)	Normal.	-		<b>Not Applicable Days</b> These days will not be considered as it is not configured in “Overtime Calculation > Weekly/ Monthly Overtime > Day to Consider for Calculation”
11/04/2019 (Thursday)	Normal	-		
12/04/2019 (Friday)	PH	-	Yes	<b>Not Applicable Day</b>
13/04/2019 (Saturday)	Week Off	-	Yes	<b>Not Applicable Day</b>
14/04/2019 (Sunday)	Week Off	-	Yes	<b>Not Applicable Day</b>
15/04/2019 (Monday)	Normal	9:30	Yes	<b>Joining Day</b>
16/04/2019 (Tuesday)	Normal	9:30	Yes	

Date	Day Type	Work Hours	Consider for Weekly/ Monthly Overtime Calculation	Remark
17/04/2019 (Wednesday)	Normal	9:30		These days will not be considered as it is not configured in "Overtime Calculation > Weekly/ Monthly Overtime > Day to Consider for Calculation".
18/04/2019 (Thursday)	Normal	9:30		
19/04/2019 (Friday)	Normal	9:30		
20/04/2019 (Saturday)	Week OFF	05:00	Yes	
21/04/2019 (Sunday)	Week OFF	-	Yes	
22/04/2019 (Monday)	Normal	9:30	Yes	
23/04/2019 (Tuesday)	Normal	9:30	Yes	
24/04/2019 (Wednesday)	Normal	9:30		These days will not be considered as it is not configured in "Overtime Calculation > Weekly/ Monthly Overtime > Day to Consider for Calculation".
25/04/2019 (Thursday)	Normal	9:30		
26/04/2019 (Friday).	Normal	9:30		
27/04/2019 (Saturday)	Week OFF	-	Yes	
28/04/2019 (Sunday)	Week OFF	-	Yes	
29/04/2019 (Monday)	Normal	9:30	Yes	
30/04/2019 (Tuesday)	Normal	9:30	Yes	

- In above mentioned scenario, OT is generated as follows:
  - Daily OT on 20/04/2019 - **05:00**
  - Monthly OT - **27:00**
  - This is achieved since Net-Work = **09:00** (01/04/2019) + **09:00** (02/04/2019) + **09:30** (06/04/2019) + **09:30** (07/04/2018) + **09:00** (08/04/2019) + **09:00** (09/04/2018) + **08:00** (12/04/2019) + **09:30** (13/04/2018) + **09:30** (14/04/2019) + **09:30** (15/04/2019) + **09:30** (16/04/2019) + **09:30** (20/04/2018) + **09:30** (21/04/2019) + **09:30** (22/04/2019) + **09:30** (23/04/2018) + **09:30** (27/04/2018) + **09:30** (28/04/2019) + **09:30** (29/04/2019) + **09:30** (30/04/2018) = **177.00**

#### Example 5:

For Daily Overtime, Days to consider for Overtime= WO and PH.

For Weekly Overtime, Days to consider for Overtime= **Sun, Mon, Wed, Thu, Fri, Sat** and **PH**. Also, custom hours = 09:00 for **Not Applicable Days** falling in the week, as well as any work done above **40:00** hours is considered as Overtime.

- “Consider Work Done on WO/PH/Paid Leaves” = **Unchecked**.
- Week-Start = **Monday (29/04/2019)**, Week-End = **Sunday (05/05/2019)**
- Joining Date = **Wednesday (01/05/2019)**

- Considering following daily view:

Date	Day Type	Work Hours	Consider for Weekly/ Monthly Overtime Calculation	Remark
29/04/2019 (Monday)	Normal	-	Yes	<b>Not Applicable Day</b>
30/04/2019 (Tuesday)	Normal	-		<b>Not Applicable Day</b>  This day will not be considered as it is not configured in “Overtime Calculation > Weekly/ Monthly Overtime > Day to Consider for Calculation”.
01/05/2019 (Wednesday)	Normal	10:30	Yes	Joining Date
02/05/2019 (Thursday)	Normal	11:00	Yes	
03/05/2019 (Friday)	Normal	10:30	Yes	
04/05/2019 (Saturday)	Week Off	06:30		
05/04/2019 (Sunday)	Week Off	00:00		

- In above mentioned scenario, OT should be generated as follows:
  - Daily OT on 04/05/2019 - **06:30**
  - Weekly OT - **01:00**
  - This is achieved since Net-Work = **09:00** (29/04/2019) + 10:30 (01/05/2019) + 11:00 (02/05/2019) + 10:30 (03/05/2018) = **41:00**.



*For some cases when week or custom month period is overlapping in two months and leaving date falls in same week but in previous month, then monthly attendance process runs for current month & (current month +1) and updates attendance summary table.*

**Example 6:**

For Daily Overtime, Days to consider for Overtime= WO and PH.

For Monthly Overtime, Days to consider for Overtime= **Mon, Tue, WO** and **PH**. Also, custom hours = 09:00 for **Not Applicable Days**, 09:30 for **WO** and 08:00 for **PH** falling in the month, as well as any work done above **150:00** hours is considered as Overtime.

- “Consider Work Done on WO/PH/Paid Leaves” = **Unchecked**.
- Month-Start = **Monday (01/04/2019)**, Week-End = **Tuesday (30/04/2019)**
- Joining Date = **Monday (15/04/2019)**
- Schedule start Date = **Wednesday (10/04/2019)**

- Considering following daily view:

Date	Day Type	Work Hours	Consider for Weekly/ Monthly Overtime Calculation	Remark
01/04/2019 (Monday)	Normal	-	Yes	<b>Not Applicable Day</b>
02/04/2019 (Tuesday)	Normal	-	Yes	<b>Not Applicable Day</b>
03/04/2019 (Wednesday).	Normal	-		<b>Not Applicable Days</b>  These days will not be considered as it is not configured in “Overtime Calculation > Weekly/ Monthly Overtime > Day to Consider for Calculation”
04/04/2019 (Thursday)	Normal	-		
05/04/2019 (Friday)	Normal	-		
06/04/2019 (Saturday)	Week Off	-	Can't identify whether these days are week off or not as schedule start date is 10/04/2019. In such case these days will not be considered as Saturday and Sunday which are not configured in “Overtime Calculation > Weekly/Monthly Overtime > Day to Consider for Calculation”.	<b>Not Applicable Day</b>
07/04/2019 (Sunday)	Week Off	-		<b>Not Applicable Day</b>
08/04/2019 (Monday)	Normal	-	Yes	<b>Not Applicable Day</b>
09/04/2019 (Tuesday)	Normal	-	Yes	<b>Not Applicable Day</b>

Date	Day Type	Work Hours	Consider for Weekly/ Monthly Overtime Calculation	Remark
10/04/2019 (Wednesday)	Normal.	-		<b>Schedule Start Day</b>  <b>Not Applicable Days</b>  These days will not be considered as it is not configured in "Overtime Calculation > Weekly/ Monthly Overtime > Day to Consider for Calculation"
11/04/2019 (Thursday)	Normal	-		
12/04/2019 (Friday)	PH	-	Yes	<b>Not Applicable Day</b>
13/04/2019 (Saturday)	Week Off	-	Yes	<b>Not Applicable Day</b>
14/04/2019 (Sunday)	Week Off	-	Yes	<b>Not Applicable Day</b>
15/04/2019 (Monday)	Normal	9:30	Yes	<b>Joining Day</b>
16/04/2019 (Tuesday)	Normal	9:30	Yes	
17/04/2019 (Wednesday)	Normal	9:30		These days will not be considered as it is not configured in "Overtime Calculation > Weekly/ Monthly Overtime > Day to Consider for Calculation".
18/04/2019 (Thursday)	Normal	9:30		
19/04/2019 (Friday)	Normal	9:30		
20/04/2019 (Saturday)	Week OFF	05:00	Yes	
21/04/2019 (Sunday)	Week OFF	-	Yes	
22/04/2019 (Monday)	Normal	9:30	Yes	
23/04/2019 (Tuesday)	Normal	9:30	Yes	
24/04/2019 (Wednesday)	Normal	9:30		These days will not be considered as it is not configured in "Overtime Calculation > Weekly/ Monthly Overtime > Day to Consider for Calculation".
25/04/2019 (Thursday)	Normal	9:30		
26/04/2019 (Friday).	Normal	9:30		
27/04/2019 (Saturday)	Week OFF	-	Yes	

Date	Day Type	Work Hours	Consider for Weekly/ Monthly Overtime Calculation	Remark
28/04/2019 (Sunday)	Week OFF	-	Yes	
29/04/2019 (Monday)	Normal	9:30	Yes	
30/04/2019 (Tuesday)	Normal	9:30	Yes	

- In above mentioned scenario, OT is generated as follows:
  - Daily OT on 20/04/2019 - **05:00**
  - Monthly OT - **08:00**
  - This is achieved since Net-Work = **09:00** (01/04/2019) + **09:00** (02/04/2019) + **09:00** (08/04/2019) + **09:00** (09/04/2018) + **08:00** (12/04/2019) + **09:30** (13/04/2018) + **09:30** (14/04/2019) + 09:30 (15/04/2019) + 09:30 (16/04/2019) + **09:30** (20/04/2018) + 09:30 (21/04/2019) + 09:30 (22/04/2019) + 09:30 (23/04/2018) + **09:30** (27/04/2018) + **09:30** (28/04/2019) + 09:30 (29/04/2019) + 09:30(30/04/2018) = **158.00**

## Overtime Limit for Alert Message

This feature enables you to send the Overtime Exceed Alert to the respective users and group in-charges based on — Daily, Weekly and Monthly Overtime.



*If for Authorized Overtime, the Weekly/Monthly overtime option is enabled for WO, PH, WO/PH as well as Daily overtime is enabled for the same day, then in this case the Alert would be sent twice to the respective user.*

*You can also configure Push Notification for this feature.*

*Select **Time and Attendance** as the **Alert Filter** and in **Event** select **Overtime Limit Exceeded - Group-Incharge / Overtime Limit Exceeded - User**. Refer [“Configuring Alert Messages”](#) for details.*

Overtime Limit for Alert Message

Overtime Alert Calculation
Generated Overtime

Daily Overtime Limit
HH:MM

Weekly Overtime Limit
HHH : MM

Week Start Day
Monday

Monthly Overtime Limit
HHH : MM

Configure the following parameters:

- Overtime Alert Calculation:** Select the desired method of overtime calculation for alert based on — **Generated Overtime** and **Authorized Overtime**.

Generated Overtime is the time generated by the system once the user exceeds the overtime limit.  
Authorized Overtime is the overtime approved by the Admin.

- **Daily Overtime Limit:** Enter daily overtime limit time after which the Overtime Exceed Alert will be triggered.
- **Weekly Overtime Limit:** Enter time in 24 hours format to set it as Overtime exceed limit for Weekly Overtime Alert.

Make sure you have enabled **Weekly** in *Weekly/Monthly Overtime> Overtime Calculation*.

- **Week Start Day:** Select a day from the dropdown list to set it as a week start for Weekly Overtime Limit.

Make sure you have selected Weekly in *Weekly/Monthly Overtime> Overtime Calculation*.

If **Weekly** is configured under **Weekly/Monthly Overtime**, then display the selected **Week Start Day**.

- **Monthly Overtime Limit:** Enter time in 24 hours format to set it as Overtime exceed limit for Monthly Overtime Alert.

Make sure you have selected Monthly in *Weekly/Monthly Overtime> Overtime Calculation*.



The triggering of the **Overtime Limit Exceeded** Alert (Weekly/Monthly) will be dependent on the parameters set in the:

- Overtime Policy: **Weekly/Monthly Overtime Limit** set.
- Overtime Policy: **Auto Authorization of Overtime** check box enabled.
- Network Hours Policy: **Total Number of Overtime Hours** configured.

## Examples

Below given examples demonstrate the Overtime limit exceed calculations and alert triggering:

### 1. Only Daily configurations:

- Daily is configured with days Monday, Tuesday, Wednesday, Thursday, Friday, Saturday and Sunday.
- Weekly/Monthly is not configured.
- Daily Overtime Limit is 1 hour.
- Weekly Overtime Limit is 10 hours.
- Week Start Day is Monday.

Refer below given table for Overtime hours:

Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
2 Hours	2 Hours	2 Hours	2 Hours	45 Minutes	2 Hours	1 Hour 30 Minutes

- In this case Daily overtime alert will be triggered for Monday, Tuesday, Wednesday and Thursday.
- In this case Daily + Weekly alert will be triggered for Saturday and Sunday (Here Weekly is calculated based on summation of Daily Overtime hours and 10 hours threshold is violated on Saturday and Sunday, hence the alerts are triggered on both the days).



## 2. Only Weekly/Monthly configurations:

- Daily is not configured.
- Weekly/Monthly is configured with WO and PH. Saturday and Sunday are marked as week-off days. Where Monday is first day of the week.
- Weekly Overtime Limit is 2 hours.

Refer below given table for Overtime hours

Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
2 Hours	2 Hours	2 Hours	2 Hours	45 Minutes	3 Hours	1 Hour

- In this case Weekly/Monthly alert will be triggered for Saturday and Sunday (Because the limit is exceeded on Saturday it self and again it was violated on Sunday).

## 3. Both Daily and Weekly/Monthly configurations:

- Daily is configured with days Monday, Tuesday, Wednesday, Thursday, Friday, Saturday, Sunday, WO, PH and WO/PH.
- Weekly/Monthly is configured with WO, PH and WO/PH. Saturday and Sunday are marked as week-off days. Where Monday is first day of the week.
- Daily Overtime Limit is 1 hours.
- Weekly Overtime Limit is 4 hours.

Refer below given table for Overtime hours:

Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
2 Hours	2 Hours	2 Hours	2 Hours	45 Minutes	3 Hours	2 Hours

- In case Daily overtime alert will be triggered for Monday, Tuesday, Wednesday and Thursday.
- Here Saturday and Sunday are considered under WO.
- Hence, Daily + Weekly overtime alert will be triggered for Saturday and Sunday (As per Daily configuration it's violated and also, for Weekly it's violated so a single common alert would be sent)



*For calculation of a day falling under Daily and Weekly would be summation of both the Daily Overtime hours + Weekly / Monthly Overtime hours, as per existing logic. Hence user is advised to configure accordingly (In this case it would be Weekly overtime = 7 hours. As WO for Daily + total WO for Weekly).*

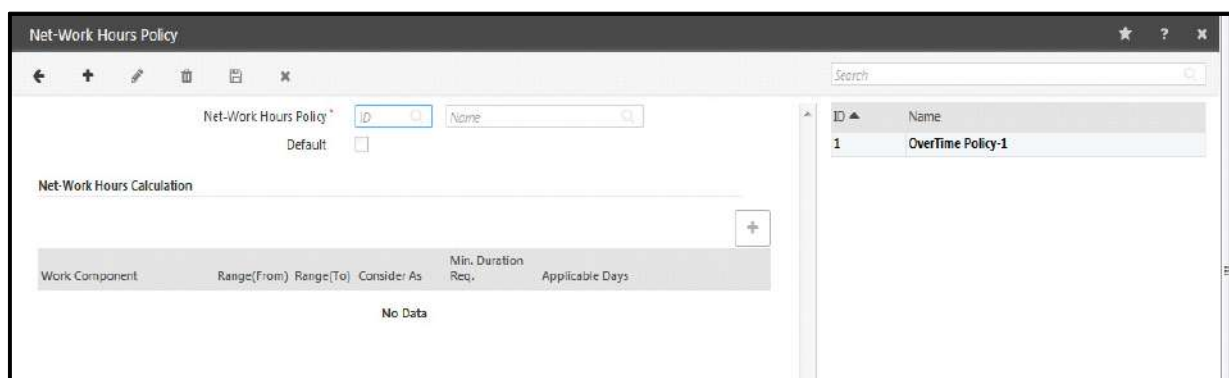
*As per existing if Saturday and Sunday are assigned week-off of Shift and under Overtime Policy if WO is checked, WO would be given priority over the days for considering Overtime component.*

# Net-Work Hours Policy

Certain organizations allow employees to work for extra hours apart from their work hours and pay compensation for the extra work done. This concept of “Overtime” can be designed as per the requirements and work culture practiced in the organization.

Net-Work hours Policy enables to calculate the Net-work hours which is the payable hours of the employee; based on which overtime can be calculated for the user.

To configure a Net-work hours policy, click **Time & Attendance > Policies> Net-Work hours Policy**

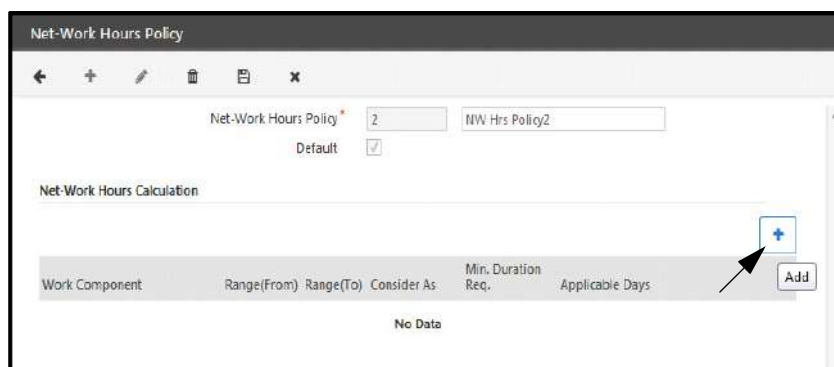


Click on **New** button from the toolbar.

Enter a **Name** for the Net-work hours policy to be created. For eg: NW Hrs Policy2

The **ID** will be auto-generated on saving the policy.

You can enable the **Default** box to make the Net-work hours policy default. When the new user is created, the default policy will be assigned directly.



## Net-Work Hours Calculation

Net-Work hours can comprise of various work components for which Employer wants to pay the employee.

To add and configure Net-Work hours components to the Net-Work hours policy; click on **Add** button as shown above.

The Work Component options are shown below.

Work Component	Range (From)	Range (To)	Consider As	Minimum Duration Required	Applicable Days	Factor
Work Hours Within Shift	HH:MM	HH:MM	Work	HH:MM	Select	1.0
Early-IN						
Overstay						
Break Hours						
Late-IN						
Early-OUT						
In-Grace						
Out-Grace						
Hourly Paid Leave Duration						
Hourly Unpaid Leave Duration						
Short Leave Duration Prior Shift						
Short Leave Duration Within Shift						
Short Leave Duration Post Shift						
Official IN/OUT Duration Prior Shift						
Official IN/OUT Duration Within Shift						
Official IN/OUT Duration Post Shift						
Short Leave Duration						
Official IN/OUT Duration						
Adjusted Work Hours						
Award Duration						

## Work Component

Select the desired Work Component — Work Hours Within Shift, Early-IN, Overstay, Break Hours, Late-IN, Early-OUT, In-Grace, Out-Grace, Hourly Paid Leave Duration, Hourly Unpaid Leave Duration, Adjusted Work Hours, Award Duration, Penalty Duration, Short Leave Duration Prior Shift, Short Leave Duration Within Shift, Short Leave Duration Post Shift, Official IN/OUT Duration Prior Shift, Official IN/OUT Duration Within Shift, Official IN/OUT Duration Post Shift, Official IN/OUT Duration, Short Leave Duration.



*The components — Official IN/OUT Duration Prior Shift, Official IN/OUT Duration Within Shift, Official IN/OUT Duration Post Shift, Short Leave Duration Prior Shift, Short Leave Duration Within Shift, Short Leave Duration Post Shift — will be included in the calculation of Net-Work Hours for 2, 4, 6, 8, 10, 12, N punch users only.*

*Short Leave Duration Prior/Within/Post Shift and Short Leave Duration cannot be configured simultaneously.*

*Official IN/OUT Duration Prior/Within/Post Shift and Official IN/OUT Duration cannot be configured simultaneously.*

Let us understand this with the example of selecting Early-IN. Further the configuration of the other parameters is done considering this.

## Range

The “From” and “To” Range is the minimum and maximum hours for which the work component will be considered for calculation of Net-Work hours.

*Example:* For Early-IN component; Enter the Range as 00:30 hrs to 02:00 hrs.

Work Component	Range(From)	Range(To)	Consider As	Min. Duration Req.	Applicable Days	Factor
Early-IN	00:30	02:00	Work	00:00	Select	1.0

This means the employee can avail Early-IN **minimum 30 minutes** before shift start and **maximum 2 hrs** before shift start.

*Example:*

Early IN Range=00:30 to 02:00 hours; Shift= 09:00 to 18:30 hours

Min Duration required within range=00:00 minutes

If shift start is at 09:00 hrs, then the timing before 08:30 hrs and after 07:00 hrs will be considered for Net-Work hours

- Case1: IN Punch at 06:30 hours -> Only 2 hrs will be considered for Net-Work hrs as Early IN range is defined for max 2 hrs.
- Case2: IN Punch at 08:00 hours-> Only 30min will be considered for Net-Work hrs. (from 08:00 to 08:30 hrs)
- Case3: IN Punch at 08:45 hours-> 15 minutes will not be considered for Net-Work hrs as minimum Early IN must be 30 mins.

### Consider As

You can assign the work component to be counted as “Work” or “No work”. If the component is considered for Work, then it will be considered in net-work hours and if No work then it will not be considered in net-work hours calculation.

### Min. Duration Required

This is the minimum duration within Work Component range which is must to be fulfilled by the employee, only then the work component will be considered in Net-Work hours calculation.

*Example:*

Early IN Range=00:00 to 02:00 hours; Shift= 09:00 to 18:30 hours

Min Duration required within range=00:10 minutes

- Case1: IN Punch at 08:45 hours-> Early IN of 15 minutes> Minimum required 10 minutes so Early IN is valid to consider in Net work hours.
- Case2 : IN Punch at 08:52 hours-> Early in of 8 minutes< Minimum required 10 minutes so Early IN is not counted in Network hours.

Work Component	Range(From)	Range(To)	Consider As	Min. Duration Req.	Applicable Days	Factor
Early-IN	00:30	02:00	Work	00:10	Select	1.0

## Applicable Days

Click the drop down and select the days for which the work component will be applicable. Then click **OK** to save the configuration and **Save** button to save the Net-Work hours policy.

Similarly, the configurations for other work components can be done.

## Calculation of Net-Work hours with different components

Consider shift of employee be 09:00 to 18:00 hours. Total duration is 09:00 hours. Break duration is 01:00 hour with deviation allowed. Shift duration is 08:00 hours.

### 1. Work Hours within Shift

Range= 00:00 to 08:00

IN Punch	OUT Punch	Working Hours	Work hours within Shift	Net-Work hours
09:00	18:30	09:00 (from 09:00 to 18:00)	08:00 Working hrs - Lunch hrs = 9-1=8	08:00

## 2. Early-IN

Range= 00:00 to 02:00

Min. duration reqd = 00:10

IN Punch	OUT Punch	Working Hours	Early-IN	Net-Work hours
08:30	18:00	09:00	00:30 Shift start time- IN Punch =9:00- 8:30 = 00:30	00:30

## 3. Overstay

Range= 00:00 to 04:00

Min. duration reqd = 02:00

IN Punch	OUT Punch	Working Hours	Overstay	Net-Work hours
09:00	21:00	12:00	03:00 OUT Punch- Shift End time =21:00- 18:00 = 03:00	03:00

## 4. Break Hours

Range= 00:00 to 01:00

Min. duration reqd = 00:10

IN Punch	Break OUT	Break IN	OUT Punch	Working Hours	Break	Net-Work hours
09:00	13:00	13:40	18:00	09:00	00:40 Break IN- Break OUT =13:40-13:00= 00:40	00:40

See "Shift Configuration> Break details" for Break duration configuration.

## 5. Late-IN

Range= 00:00 to 00:45

Min. duration reqd = 00:10

IN Punch	OUT Punch	Working Hours	Late-IN	Net-Work hours
09:20	18:30	08:40	00:20 IN Punch- Shift start =09:20-09:00= 00:20	00:20

See "Late IN Policy" for Late-IN configuration.

## 6. Early-OUT

Range= 00:00 to 00:45

Min. duration reqd = 00:10

IN Punch	OUT Punch	Working Hours	Early-OUT	Net-Work hours
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09:00	17:30	08:00	00:30 Shift End- OUT Punch =18:00-17:30= 00:30	00:30
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See "Early OUT Policy" for Early-OUT configuration.

## 7. IN Grace

Range= 00:00 to 00:45

Min. duration reqd = 00:05

IN Punch	OUT Punch	Working Hours	IN Grace	Net-Work hours
09:07	18:00	08:23	00:07 IN Punch- Shift start =09:07-09:00= 00:07	00:07

Consider Grace time for Shift Late-IN= 10min

See "Shift Configuration> Grace time details" for Grace duration configuration.

## 8. OUT Grace

Range= 00:00 to 00:45

Min. duration reqd = 00:05

IN Punch	OUT Punch	Working Hours	OUT Grace	Net-Work hours
09:00	17:55	08:25	00:05 Shift End- OUT Punch =18:00-17:55= 00:05	00:05

Consider Grace time for Shift Early-OUT= 15min

See "Shift Configuration> Grace time details" for Grace duration configuration.

## 9. Short Leave Duration

Range= 00:00 to 01:00

Min. duration reqd = 00:30

IN Punch	OUT Punch	Working Hours	Short Leave Duration	Net-Work hours
09:00	17:00	07:30	01:00 Shift End- OUT Punch =18:00-17:00= 01:00	01:00

See "Attendance Policy" for Short leave hours configuration.

Considering the components "Working hours within shift" and "Short Leave duration" together in Net work hours calculation:

Net work hours= Working hours within shift (7:30 hours) + Official IN/OUT duration (01:00hours)  
= 08:30 hours

## 10. Official IN/OUT Duration

Range= 00:00 to 08:00

Min. duration reqd = 02:00

Official IN/ OUT	IN Punch	OUT Punch	Working Hours	Official hours	Net-Work hours
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Official OUT	09:00	15:00	05:30	03:00 Shift End- OUT Punch =18:00-15:00= 03:00	03:00
Official IN	12:30	18:00	05:00	03:30 IN Punch- Shift Start =12:30- 09:00= 03:30	03:30

See "Attendance Policy" for Official hours configuration.

Considering the components "Working hours within shift" and "Official OUT" together in Net work hours calculation:  
Net work hours= Working hours within shift (5:30 hours) + Official IN/OUT duration (03:00hours)  
= 08:30 hours

## 11. Adjusted Work Hours

Range= 00:00 to 10:00

Min. duration reqd = 00:10

IN Punch	OUT Punch	Working Hours	Adjusted Work Hours	Net-Work hours
09:00	16:00	06:30	01:30 Shift Duration- OUT Punch =08:00-06:30= 01:30	01:30

Considering the components "Working hours within shift" and "Adjusted Work hours" together in Net work hours calculation:

Net work hours= Working hours within shift + Adjusted Work Hours  
=06:30 +01:30 =8:00 hours



To enable the Adjusted Work Hours feature, go to Attendance Policy> Auto Attendance Correction. check the Overtime Enable box. And select the number of months to consider as previous months for overtime hours.

For example of Official In-Out and Short Leave In-Out, refer to "Daily1 OT and Daily2 OT Examples" (numbers 5 and 6).

## Adjustment of Work hours from previous OT

Adjusting the work hours implies that available overtime from the previous selected months can be used to adjust the shortfall hours of the user to mark him present.

Suppose on 20/11/16 the employee punches out at 16:00 hours which is before the shift end time. The working hours is 06:30 hours which is less than the required 08:00 hours. So the employee is marked as Absent due to less working hours.

As the Overtime is available from previous days of the month so that OT is adjusted on 20th to make complete 8 hours and hence user is marked Present.

Hence 01:30 hours is given as adjusted work hours from the available OT hours and the employee is marked as Present.



# Late-IN Policy

Late-IN in COSEC is an attendance feature that allows special configurations for users who report later than the expected reporting time. Late-IN policies assign different rules to late-coming users based on their roles and functions. This option allows a user to define the parameters for Late-IN policies which can then be assigned to individual users or group of users.

To define Late-IN Policies, Click the **Time & Attendance Module > Policies > Late-IN Policy**.

The following **Late-IN Policy** settings page appears on your screen.

ID	Name	Level
1	Late In Policy-1	1

Click on **New** button to define a new Late-IN Policy.

**Late-IN Policy:** Specify a user-friendly name for the Late-IN Policy. The ID will be generated by the system automatically when the policy is saved.

**Default:** Select this check box if you wish to set the current policy as the default one. Users will be linked with this Late-In Policy by default in the event of a user not being linked to any Late-In Policy. Therefore, it is mandatory to define one default Late-In Policy.

**Policy Period:** Click on the calendar button and select the **From** and **To** dates. This would specify the validity period of the Late-IN policy. This can be edited only after the policy is saved.

**Late-IN Applicable:** Select this check box to enable this policy.

**Max Late-IN Allowed (Min):** Specify the maximum allowed time duration (in minutes) for which Late-IN is allowed.

**Full Day Absent Marking on Exceeding Max Late-IN Allowed (Min):** Select this check box, if you wish that the current day should be marked as full day as absent on exceeding the duration as configured in **Max Late-IN Allowed (Min)**. If this is disabled then system will consider it as Half Day Absent.



*If a system markers a user as Absent on a date due to the option **Full Day Absent Marking on Exceeding Max Late-IN Allowed (Min)** being enabled and the system also finds that the user has applied for leave for the same date, then in such a case the user will not be marked as Absent, even if Full Day Absent Marking on Exceeding Max Late-IN Allowed (Min) is enabled.*

**Enable Rounding For Fraction Of An Hour:** Select this check box to enable the rounding off rule for the Late In time.

Click **Add** and configure the following:

- In the **Range (From)** and **Range (To)** fields, specify the time duration in minutes
- In **Consider Value As** select the desired option — Actual, Fixed value of late-in to be considered.
- In **Replace Value** enter the value to be considered. This is applicable only when **Fixed** is selected in **Consider Value As**.

For example: From 1 to 10 minutes of Late In; Actual value will be considered. From 11 to 15 mins, fixed 15 mins will be considered as Late In. From 16 to 30 mins, fixed 30 mins will be considered as Late In.

Click **OK** to save the configuration.

Range (From)	Range (To)	Consider Value As	Replace Value
16	30	Fixed	30
1	10	Actual	
11	15	Fixed	15

Once the above parameters have been defined click **Save** to save the changes in the policy.

The new policy appears in the grid on the right.



*In case a particular policy is edited, the application creates a new level of the policy with the same ID and name as can be seen in the grid below. In the event of a conflict in dates or some rule then the parameters as defined in the policy with the highest level will be considered as the valid policy for that user.*

### Example1:

#### Late IN with Grace Time

Shift is from 9:00 to 18:00 hours.

If Late-in allowed is kept as 10 minutes, Grace time is included in working hours and Grace time for shift late-in as 30 minutes, then IN punch till 9:30 will be considered in grace period as shown on 1/7/16.

IN punch after completion of grace time(30 min) will be considered in late-in duration. The IN punch of 9:42 is Late-IN by 12 minutes.

Date	Shift	First IN	Last OUT	1st Half	2nd Half	Late-IN	Early-OUT	Work Hours	Extra Work	Net Work	Break Hours	Actual Overtime
01/07/2016	GS	09:15	18:00	PR	PR			07:45			01:00	
02/07/2016	GS - WO	09:00	18:00	WO	WO			05:00			01:00	
03/07/2016	GS - WO			WO	WO							
04/07/2016	GS	09:42	18:30	PR	PR	00:12		07:48	00:30		01:00	
05/07/2016	GS											

If Grace time is not included in working hours and Grace time for shift late-in is 0, then punch after 9:00hrs will be marked as Late-IN as shown below: See Grace time configuration in Shift Configuration.

06/07/2016	GS	09:05	18:30	PR	PR	00:05		08:25	00:30		01:00
07/07/2016	GS	09:25	18:30	PR	PR	00:25		08:05	00:30		01:00

## Example2:

### *Applying Short leave on Late-IN occurrences*

#### Shift

- 09:00 to 18:00 hours; Min required for half day- 2hrs, full day- 4 hrs

#### Grace Time (Go to Shifts & Schedules> Shift Configuration)

- Include Grace time in working hrs enabled
- Grace time for shift late-IN - 30min

#### Late-IN Policy (Go to T&A> Late- IN policy)

- Maximum Late-IN allowed- 30 min
- Full Day Absent Marking on Exceeding Max Late-IN Allowed (Min) - Enabled

#### Short leave allowed (Go to Attendance Policy> Short Leave/ Official Hours Restriction)

- Maximum minutes allowed- 180
  - Maximum count allowed- 3
- Duration check per short leave entry:
- minimum- 5 min,
  - maximum-60 min

#### Absent Marking Rule (Go to Attendance Policy >Absent marking rule)

##### Under Late-IN/Early-OUT Check

- Marking Type As Per- Monthly Count
- Mode- Independent

##### Under Late-IN Occurrence Check

- Select the Enable check box to enable Late-IN occurrences check
- Maximum Allowed Count Per Month- 3
- Calculation Basis - Continuous
- Action on Exceeding Max Late-IN Allowed- Full Day Absent

The user punches are shown below:

Daily Attendance View														
<div> <div>User 1220 Sheetal</div> <div>Attendance Period October 2016</div> <div>View</div> </div>														
Date	Shift	First IN	Last OUT	1st Half	2nd Half	Late-IN	Early-OUT	Work Hours	Extra Work	Net Work	Break Hours	Actual Overtime	Authorized Overtime	Remark
01/10/2016	MS	09:25	20:00	PR	PR			10:35	02:00	10:35		05:00		
02/10/2016	MS - WO			WO	WO									
03/10/2016	MS	09:25	22:30	PR	PR			13:05	04:30	13:05		07:30		
04/10/2016	MS	09:20	21:00	PR	PR			11:40	03:00	11:40		06:00		
05/10/2016	MS	09:45	22:00	PR	PR	00:15		12:15	04:00	12:15		07:00		
06/10/2016	MS	09:50	19:00	PR	PR	00:20		09:10	01:00	09:10		04:00		
07/10/2016	MS	09:55	19:00	PR	PR	00:25		09:05	01:00	09:05		04:00		
08/10/2016	MS	09:56	19:00	AB	AB	00:26		09:04	01:00	09:04		04:00		Full Day AB:Late-IN Limit
09/10/2016	MS - WO			WO	WO									
10/10/2016	MS	09:46	19:30	AB	AB	00:16		09:44	01:30	09:44		04:30		Full Day AB:Late-IN Limit
11/10/2016	MS	09:59	19:45	AB	AB	00:29		09:46	01:45	09:46		04:45		Full Day AB:Late-IN Limit
12/10/2016	MS	09:37	20:00	AB	AB	00:07		10:23	02:00	10:23		05:00		Full Day AB:Late-IN Limit

The user is allowed to take grace period of 30 minutes i.e. he can come upto 9:30 without being marked as Late-IN. When the user comes after 9:30, he will be marked present with Late-IN.

Also when user comes after 9.30, for example 9.31, then for the current day he/she is marked as Full Day Absent and this is not counted in Late-IN.

The user can take late-ins for 3 times in a month as configured. When he comes late for 4th time, his punch will be marked present. But after processing monthly attendance, he will be marked absent as full day absent as configured in the Absent Marking Rule.

So, on 4th late-IN on 8-10-16, the user will be marked as absent as shown above.

If you are allowed to avail short leave hours, then you can apply the short leave on 8-10-16 which will convert your absent to present.

To apply Short Leave, go to T&A >Utilities> Attendance Correction as shown below.

Attendance Correction

Save (Alt+S) User: 1220 Sheetal

Attendance Date: 08/10/2016

Shift/Day: MS-Morning Normal

Attendance Status: AB AB

Manual Status Marking: None

Status Summary: Full Day AB:Late-IN Limit

Remark: Events

Attendance Details

Attendance Correction

IN 1 Date: 08/10/2016 Time: 09:56 Special Function: ShortLeave IN IN Reason:

OUT 2 Date: 08/10/2016 Time: 19:00 Special Function: OUT Reason:

Break Correction

Date	Shift	1st Half	2nd Half	Work Hours
20/10/2016	MS	AB	AB	
19/10/2016	MS	AB	AB	
18/10/2016	MS	AB	AB	
17/10/2016	MS	AB	AB	
16/10/2016	MS - WO	WO	WO	
15/10/2016	MS	AB	AB	
14/10/2016	MS	AB	AB	
13/10/2016	MS	AB	AB	
12/10/2016	MS	AB	AB	10:23
11/10/2016	MS	AB	AB	09:46
10/10/2016	MS	AB	AB	09:44
09/10/2016	MS - WO	WO	WO	
08/10/2016	MS	AB	AB	09:04
07/10/2016	MS	PR	PR	09:05
06/10/2016	MS	PR	PR	09:10
05/10/2016	MS	PR	PR	12:15

1 2

The short leave is allowed for only 3 days. After applying short leave, the absent days will be marked as present shown by rectangle in below screenshot.

If you apply short leave for 4th day, you will be able to apply it. But after the monthly attendance process, it will be marked as absent as shown below.

Daily Attendance View

User: 1220 Sheetal

Attendance Period: October 2016

View

Date	Shift	First IN	Last OUT	1st Half	2nd Half	Late-IN	Early-OUT	Work Hours	Extra Work	Net Work	Break Hours	Actual Overtime	Authorized Overtime	Remark
01/10/2016	MS	09:25	20:00	PR	PR			10:35	02:00	10:35		05:00		
02/10/2016	MS - WO			WO	WO									
03/10/2016	MS	09:25	22:30	PR	PR			13:05	04:30	13:05		07:30		
04/10/2016	MS	09:20	21:00	PR	PR			11:40	03:00	11:40		06:00		
05/10/2016	MS	09:45	22:00	PR	PR	00:15		12:15	04:00	12:15		07:00		
06/10/2016	MS	09:50	19:00	PR	PR	00:20		09:10	01:00	09:10		04:00		
07/10/2016	MS	09:55	19:00	PR	PR	00:25		09:05	01:00	09:05		04:00		
08/10/2016	MS	09:56	19:00	PR	PR			09:04	01:00	09:04		04:00		SHORT LEAVE
09/10/2016	MS - WO			WO	WO									
10/10/2016	MS	09:46	19:30	PR	PR			09:44	01:30	09:44		04:30		SHORT LEAVE
11/10/2016	MS	09:59	19:45	PR	PR			09:46	01:45	09:46		04:45		SHORT LEAVE
12/10/2016	MS	09:37	20:00	AB	PR			09:46	02:00	10:23		05:00		SHORT LEAVE

### Example3:

#### Shift

- Shift Time: 09:45 – 17:45

#### Late-IN Policy (Go to T&A> Late- IN policy)

- Maximum Late-IN Allowed (Min): 30 minutes (10:15-10:45)
- Full Day Absent Marking on Exceeding Max Late-IN Allowed (Min) - Enabled

#### Grace Time

- Grace Time for Shift Late-IN (Min): 30 minutes (09:45-10:15)

U1 Punch Time: 10:46- 17:25

As the IN-punch time exceeds the allowed Late-IN time duration, U1 is marked as Full Day Absent. Here even though the minimum work hours are fulfilled, but end user will be marked Full Day Absent due to enabling of flag- Full Day Absent Marking on Exceeding Max Late-IN Allowed (Min).

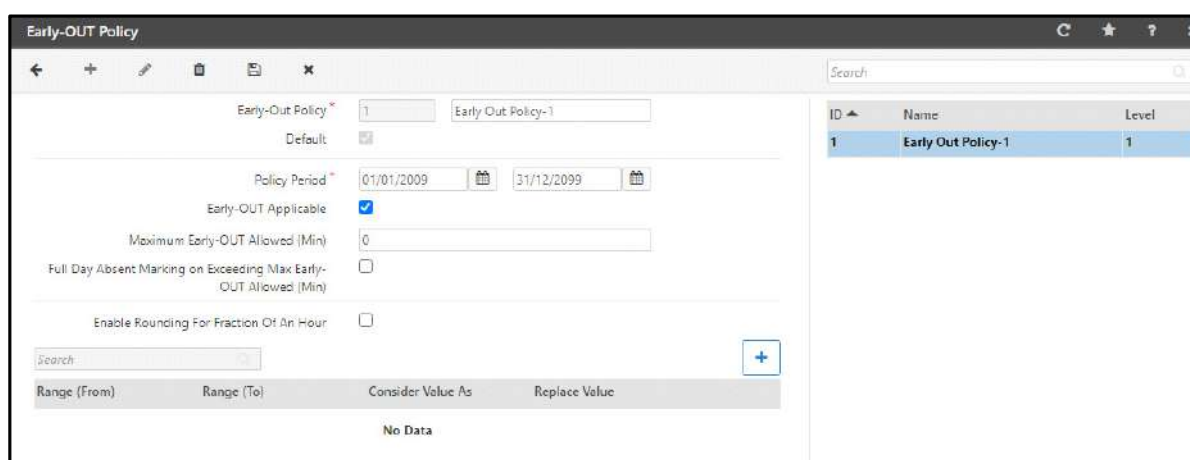
# Early-OUT Policy

Early-OUT in COSEC is an attendance feature that allows special configurations for users who exit the workplace earlier than the expected time. The application provides the functionality to assign different Early-OUT rules to users based on their roles and functions. This option allows user to define the parameters for the Early-OUT policies which can then be assigned to individual users or group of users.

An Early-OUT policy involves grouping of set of rules with varying parameters related to the early punching out of employees.

To configure an Early-OUT Policy, Click the **Time and Attendance Module > Policies > Early-OUT Policy**.

The **Early-OUT Policy** page appears on your screen as shown below.



ID	Name	Level
1	Early Out Policy-1	1

- Click **New** to define a new Early-Out Policy.
- Configure the following options as required:
  - **ID**: Each Early-OUT Policy will have a unique ID for identification and this is generated by the system automatically when the policy is saved.
  - **Name**: Specify a user-friendly name for the Early-Out Policy.
  - **Default**: Select this check box if you wish to set the current policy as the default one. Users will be linked with this Early-Out Policy by default in the event of a user not being linked to any Early-Out Policy. Therefore, it is mandatory to define one default Early-Out Policy.
  - **Policy Period**: Click on the Calendar picker button to select the **From** and **To** dates. This would specify the period of validity for the Early-Out policy. This can be edited only after the policy is saved.
  - **Early-OUT Applicable**: Select this check box to enable this policy.
  - **Max Early-OUT Allowed (Min)**: Specify the maximum time in minutes for which the early out is allowed.
  - **Full Day Absent Marking on Exceeding Max Early-OUT Allowed (Min)**: Select this check box, if you wish that the current day should be marked as full day as absent on exceeding the duration as

configured in **Max Early-OUT Allowed (Min)**. If this is disabled then system will consider it as Half Day Absent.



*If a system markers a user as Absent on a date due to the option **Full Day Absent Marking on Exceeding Max Early-OUT Allowed (Min)** being enabled and the system also finds that the user has applied for leave for the same date, then in such a case the user will not be marked as Absent, even if Full Day Absent Marking on Exceeding Max Early-OUT Allowed (Min) is enabled.*

- **Enable Rounding For Fraction Of An Hour:** Check this box to enable the rounding off rule for the Early-Out time.
- Click **Add** and configure the following:
  - In the **Range (From)** and **Range (To)** fields, specify the time duration in minutes.
  - In **Consider Value As** select the desired option — Actual, Fixed value of late-in to be considered
  - In Replace Value enter the value to be considered. This is applicable only when Fixed is selected in **Consider Value As**.

For example: From 1 to 10 minutes of Early Out; Actual value will be considered. From 11 to 15mins, fixed 15 mins will be considered as Early Out. From 16 to 30 mins, fixed 30 mins will be considered as Early Out.

Click **OK** to save the configuration.

Range (From)	Range (To)	Consider Value As	Replace Value
16	30	Fixed	30
1	10	Actual	
11	15	Fixed	15

- Once the above parameters have been defined click **Save** to save the changes in the policy.
- The new policy appears in the grid on the right.

ID	Name	Level
1	Late In Policy-1	1
2	Late In Policy-2	1



## Example1

### Early Out with Grace time

Shift is from 9:00 to 18:00 hours

If Early-Out allowed is configured as 10 minutes, Grace time is included in working hours and Grace time for shift Early-Out as 30 minutes, then Out punch before 30 mins of shift end i.e. till 17:30 will be considered in grace period as shown on 1/2/17 and 2/2/17.

Also the Full Day Absent Marking on Exceeding Max Early-OUT Allowed (Min) is enabled then in such cases if the Early-Out time exceeds the user will be marked as Full Day Absent and this will not be counted in Early-Out.

Early-OUT Policy

Early-Out\* 2 Early Out Policy-2

Default ☒

Policy Period\* 01/01/2009 31/12/2099

Early-OUT Applicable ☒

Max Early-OUT Allowed (Min) 10

Enable Rounding For Fraction Of An Hour ☒

Shift Configuration

Shift\* 12 Early Out Shift

Shift Type Normal

Shift Timings\* 09:00 18:00 08:00

Minimum Required Hours

For Half Day\* 02:00

For Full Day\* 04:00

Min. Hours Required Within Shift Duration ☐

Shift Allowance ☐

Break Details

Grace Time Details

Include Grace Time In Working Hours ☒

Grace Time For Shift Late-IN 0

Overlap Grace Time With Shift Late-IN ☐

Grace Time For Shift Early-OUT 30

Overlap Grace Time With Shift Early-OUT ☐

Out punch after availing grace time(30 min) will be considered as Early-Out duration.

The Out punch of 17:20 is Early-Out by 10 minutes which is within the max allowed limit of 10 mins. So the Out punch is marked PR on 3/2/17.

Taking this same example further if Full Day Absent Marking on Exceeding Max Early-Out is enabled and the user punches at 17:21. In this case user will be marked as full day absent and it will not be considered as Early-Out.

The Out punch of 17:15 is Early-Out by 15 minutes which is beyond the max allowed limit of 10 mins. So the Out punch is marked AB on 4/2/17 with Remark of AB: Early -Out.



To apply Short Leave, go to T&A >Utilities> Attendance Correction.

User \*

3

Isha

Attendance Period

February

2017

Search

Date ▲	Shift	First IN	Last OUT	1st Half	2nd Half	Late-IN	Early-OUT	Work Hours	Extra Work	Net Work	Break Hours	Actual Overtime	Authorized Overtime	Remark
01/02/2017	12	09:00	17:30	PR	PR			08:30						
02/02/2017	12	09:15	17:45	PR	PR	00:15		08:30						
03/02/2017	12	09:05	17:20	PR	PR	00:05	00:10	08:15						
04/02/2017	12	09:00	17:15	PR	AB			08:15						AB:Early-OUT
05/02/2017	12 - WO			WO	WO									
06/02/2017	12	09:15	17:16	PR	PR	00:15		09:00						SHORT LEAVE

### Example-3

Shift Time: 09:45 – 17:45

Grace Time for Shift Early-OUT (Min): 30 minutes (17:15-17:45)

Maximum Early-OUT Allowed (Min): 30 minutes (16:45-17:15)

Full Day Absent Marking on Exceeding Max Early-OUT Allowed (Min): Enabled

U1 Punch Time: 09:00- 16:00

As the OUT-punch time exceeds the allowed Early-OUT time duration, U1 is marked as Full Day Absent. Here even though the minimum work hours are fulfilled, but end user will be marked Full Day Absent due to enabling of flag- Full Day Absent Marking on Exceeding Max Early-OUT Allowed (Min).

# C-OFF Policy

A Compensatory-Off (C-OFF) can be defined as paid time-off awarded to an eligible employee in return for working additional hours during an attendance period. Accrued compensatory leave may be used to provide time-off from work at a later date of the employee's choice, but within a valid time period.

To define a C-OFF Policy, click **Time & Attendance > Policies > C-OFF Policy**.

The **C-OFF Policy** page opens as shown below.



ID	Name	Level
1	COFF Policy-1	1

Click on **New** button to define a new C-OFF Policy.

**C-OFF Policy**- Specify a user-friendly name for the C-OFF Policy. The ID will be generated by the system automatically when the policy is saved.

**Default** - Select this checkbox to mark the C-OFF Policy as default.

**Policy Period** - Click on the calendar button and select the **From** and **To** dates. This would specify the period of validity for the C-OFF policy. This can be edited only after the policy is saved.

**Minimum Overtime Required for C-OFF** - Specify the minimum number of overtime hours in HH:MM format which would be required for granting C-OFF to the user.

**C-OFF Authorized in Multiples Of** - Specify the multiples of timing as per which C-OFF will be authorized to the employee. Example If 01:00 is set here, then C-OFF can be authorized in multiples of 1h. This means you cannot give 2h 30 mins as C-OFF but 2h or 3 h is allowed.

**C-OFF Validity Type** - The C-OFF Validity Type can be either **Monthly**, **Yearly** or in terms of **Days**.

On selecting the **Monthly** (or **Days**) option, specify the maximum number of months (or days) in the **C-OFF Validity** field, before which the C-OFF has to be availed. For the **Yearly** option, select the day and month of the year when the available C-OFFs will lapse.

- **Minimum C-OFF For Half Day Off** - Specify the hours in HH:MM format which would be the minimum hours required for half day marking.
- **Minimum C-OFF For Full Day Off** - Specify the hours in HH:MM format which would be the minimum hours required for full day marking.

- **Auto Authorize C-OFF** - Select this checkbox for automatic authorization of C-OFF.

Click **Save** button to add the new policy.

## Configuration to give OT and C-OFF to user

### Example1: If Only Overtime is to be given to user

Select **OT/C-OFF Eligibility** for the user as **Only Overtime** from the drop down options as shown below.

The screenshot shows the 'User Configuration' window for user '2 Chirag Active'. The 'Attendance' tab is selected. In the 'Policy' section, the 'OT/C-OFF Eligibility' dropdown menu is open, displaying the following options: 'Only Overtime', 'None', 'Only Overtime' (which is highlighted in blue), 'Only C-OFF', and 'Both'. Other settings visible include 'Enable Attendance Calculation' (checked), 'Attendance Marking Type' (Normal), 'Max Punches To Be Considered' (Select), 'Bypass Finger/Palm For Attendance' (unchecked), 'Max Short Leaves Allowed' (empty), 'Authorize C-OFF On' (unchecked), 'Bus Route' (empty), 'Enable Auto Tour Application' (unchecked), 'Tour' (empty), 'Base Site Selection' (ID, Name), and 'Auto Authorize Tour Application' (unchecked). The left sidebar contains links for Profile, Devices, Credentials, Group, T&A, Access Control, ESS, Cafeteria, Job Costing, and Field Visit Management.

**The Overtime Policy configuration for user is:**

**Overtime Configuration:** Daily Overtime is enabled for Monday to Saturday.

**Daily Overtime:** Daily1

Work Component	Range	Consider as	Minimum duration reqd.	Applicable days	Multiplication factor
Early-IN	00:00 to 04:00	OT1	00:00	M,T,W,Th,F,Sa	1
Overstay	00:00 to 04:00	OT2	00:00	M,T,W,Th,F,Sa	1

**Auto Authorize Overtime Component** must be disabled.

The **Daily Attendance View** shows the user punches and generated overtime as shown below.

Daily Attendance View

★

←

User \*

2

Chirag

☰

Attendance Period

May

▼

2017

▼

Search

🔍

Date ▲	Shift	First IN	Last OUT	1st Half	2nd Half	Late-IN	Early-OUT	Work Hours	Extra Work	Net Work	Break Hours	Actual Overtime	Authorized Overtime	Remark	Details
01/05/2017	GS	09:00	20:00	PR	PR			10:00	01:30	01:30	01:00	01:30			☰
02/05/2017	GS	08:40	19:00	PR	PR			09:20	00:50	00:50	01:00	00:50			☰
03/05/2017	GS	08:45	21:00	PR	PR			11:15	02:45	02:45	01:00	02:45			☰
04/05/2017	GS	09:00	19:30	PR	PR			09:30	01:00	01:00	01:00	01:00			☰

Now to authorize overtime hours go to T&A> Authorization/Approval> OT/C-OFF. The Pending collapsible panel shows the Total overtime hours which can be authorized as **Overtime**.

Pending (4)

User

2

Chirag

Attendance Date

03/05/2017

Overtime Type

OT2

OT2 Hours

02:30

Authorize As Overtime

001 : 00

Authorize As C-OFF

000 : 00

Remarks

1 hr is authorized as OT2

Authorize

Search

User ID	Name	Date	Shift	1st Half	2nd Half	Gross Work	Extra Work	Net Work	Total Overtime	Auth As Overtime	Auth As C-OFF	Details
2	Chirag	01/05/2017	GS	PR	PR	10:00	01:30	01:30	01:30			
2	Chirag	02/05/2017	GS	PR	PR	09:20	00:50	00:50	00:50			
2	Chirag	03/05/2017	GS	PR	PR	11:15	02:45	02:45	02:45			
2	Chirag	04/05/2017	GS	PR	PR	09:30	01:00	01:00	01:00			

Select the **Overtime Type** component, for eg: OT2 has 02:30 hours and OT1 has 00:15 hrs.  
Enter the number of hours to be given as overtime. Here 001:00 hrs is authorized as OT as shown below.

Here C-OFF will be disabled as “Only Overtime” is selected from user configuration. so after giving 1 hrs as overtime, it will be reflected in “Auth As Overtime” column as shown below.

<div>Search</div>												
User ID ▲	Name	Date	Shift	1st Half	2nd Half	Gross Work	Extra Work	Net Work	Total Overtime	Auth As Overtime	Auth As C-Off	Details
2	Chirag	01/05/2017	GS	PR	PR	10:00	01:30	01:30	01:30			
2	Chirag	03/05/2017	GS	PR	PR	11:15	02:45	02:45	02:45	01:00		
2	Chirag	04/05/2017	GS	PR	PR	09:30	01:00	01:00	01:00			

**Example2: If Only C-OFF is to be given to user**

Select **OT/C-OFF Eligibility** for the user as **Only C-OFF** from the drop down options as shown below.

**User Configuration**

Search User ID or Name

**Attendance Policy**

Enable Attendance Calculation ☒

Attendance Marking Type: Normal

Max Punches To Be Considered: Select

Bypass Finger/Palm For Attendance ☐

Max Short Leaves Allowed:

OT/C-OFF Eligibility: Only C-OFF

Authorize C-OFF On: None, Only Overtime, Only C-OFF, Both

Bus Route:

Enable Auto Tour Application ☐

Tour:

Base Site Selection: ID, Name

Auto Authorize Tour Application ☐

VO/PH: ☐ Normal Day

The **C-OFF Policy** configuration for user is:

Minimum Overtime required for C-OFF: 01:00 hr

C-OFF authorized in multiples of: 01:00 hr

Minimum C-OFF for half day off: 04:00 hr

Minimum C-OFF for full day off: 08:00 hr

The **Daily Attendance View** shows the user punches and actual overtime as shown below.

**Daily Attendance View**

User: NP Nisha

Attendance Period: May 2017

Search

Date	Shift	First IN	Last OUT	1st Half	2nd Half	Late-IN	Early-OUT	Work Hours	Extra Work	Net Work	Break Hours	Actual Overtime	Authorized Overtime	Remark	Details
01/05/2017	GS	08:45	21:00	PR	PR			11:15	02:45	02:45	01:00	02:45			
02/05/2017	GS	08:00	22:00	PR	PR			13:00	04:30	04:30	01:00	04:30			
03/05/2017	GS	07:56	21:00	PR	PR			12:04	03:34	03:34	01:00	03:34			
04/05/2017	GS	09:00	19:45	PR	PR			09:45	01:15	01:15	01:00	01:15			

Now to authorize overtime hours go to T&A> Authorization/Approval> OT/C-OFF. The Pending collapsible panel shows the Total overtime hours which can be authorized as **C-OFF**.

**Overtime/C-OFF Authorization**

Date\* 10/04/2017 11/05/2017

Filter Users Individual

User NP Nisha

View

Pending (1)

User NP Nisha

Attendance Date 02/05/2017

Overtime Type OT2

OT2 Hours 03:30

Authorize As Overtime 000 : 00

Authorize As C-OFF 002 : 00

Remarks COFF for 2 hrs authorized

Authorize

Search

User ID	Name	Date	Shift	1st Half	2nd Half	Gross Work	Extra Work	Net Work	Total Overtime	Auth As Overtime	Auth As C-OFF	Details
NP	Nisha	01/05/2017	GS	PR	PR	11:15	02:45	02:45	02:45			
NP	Nisha	02/05/2017	GS	PR	PR	13:00	04:30	04:30	04:30			
NP	Nisha	03/05/2017	GS	PR	PR	12:04	03:34	03:34	03:34			
NP	Nisha	04/05/2017	GS	PR	PR	09:15	01:15	01:15	01:15			

After the C-Off is authorized, it will be shown in Authorized column.



*If all the available overtime hours are authorized as C-OFF or OT, then the transaction will be shown in Authorized panel. If only few hours are authorized then it will be shown in Pending panel only.*

Now this 4 hrs C-OFF will be shown in available C-OFF in Leave balance page as shown below. The user can apply for C-OFF leave from C-OFF application. For example: user can avail half day with 4 hrs of C-OFF.

**Leave Balance**

User ID NP Nisha

Leaves

C-OFF

Validity Period 11/03/2017 11/05/2017

Total Hours 02:00

Available C-OFF Details

Search

Date	Authorized	Manual Credit	Manual Debit	Encashed	Availed	Available
02/05/2017	02:00					02:00



**Example3: If Both OT & C-OFF are to be given to user.**  
**(How to give OT on week days and C-OFF on WO automatically?)**

Select **OT/C-OFF Eligibility** for the user as **Both** from the drop down options. Select **Authorize C-OFF on** as “WO” as shown below. So OT will be given from Monday to Saturday as configured from Overtime Configuration and C-OFF will be given on Sunday.

The screenshot shows the 'User Configuration' window for a user named 'Isha'. The 'Attendance' tab is selected, showing the 'Policy' section. The 'OT/C-OFF Eligibility' is set to 'Both'. The 'Authorize C-OFF On' section has 'WO' checked, and 'PH', 'FB', 'RD', 'WO/PH', and 'Normal Day' are unchecked. The 'Enable Attendance Calculation' checkbox is checked, and the 'Attendance Marking Type' is set to 'Normal'. The 'Max Punches To Be Considered' is set to 'Select'. The 'Bypass Finger/Palm For Attendance' checkbox is unchecked. The 'Max Short Leaves Allowed' is set to 'Both'. The 'Bus Route' section has 'ID' and 'Name' fields. The 'Enable Auto Tour Application' checkbox is unchecked, and the 'Base Site Selection' has 'ID' and 'Name' fields. The 'Auto Authorize Tour Application' checkbox is unchecked.

**Overtime Policy & Daily Overtime**

Enable “Calculation on WO/PH/FB/RD as per Weekday”  
Daily1 components are configured from Sunday to Saturday  
For auto-authorizing overtime, enable “Auto Authorize Overtime component”.

The screenshot shows the 'Overtime Policy' window. The 'OverTime Policy' is set to '2' and 'OT Policy-Daily1'. The 'Default' checkbox is checked. The 'Policy Period' is set to '01/01/2009' to '31/12/2099'. The 'Net-Work Policy' is set to '1' and 'OverTime Policy-1'. The 'Calculation On WO/PH/FB/RD As Per Weekday' checkbox is checked. The 'Calculation On Restricted Holiday As Per PH' checkbox is unchecked. The 'Overtime Configuration' section is expanded, showing the 'Daily Overtime' section. The 'Overtime Calculation' is set to 'Daily 1'. The 'Auto Authorize Overtime Component' checkbox is checked. The 'Authorization Required For Late-IN' checkbox is unchecked. A table on the right lists the policies: '1 OverTime Policy-1', '2 OT Policy-Daily1', and '3 OT Policy-Daily2'.

**Daily Overtime**

Overtime Calculation: Daily 1

Auto Authorize Overtime Component: ☒

Authorization Required For Late-IN: ☐

**Work Component Configuration**

Work Component	Range(From)	Range(To)	Min. Duration Req.	Consider As	Applicable Days	Factor	
Early-IN	00:00	04:00	00:00	OT1	Su Mo Tu We Th Fr Sa	1.0	
Overstay	00:00	04:00	00:00	OT2	Su Mo Tu We Th Fr Sa	1.0	

## C-OFF Policy

Enable "Auto Authorize C-OFF"

**C-OFF Policy**

C-OFF Policy: 2 COFF Policy-2

Default: ☐

Policy Period: 01/01/2009 to 31/12/2099

Minimum Overtime Required For C-OFF: 01:00

C-OFF Authorized In Multiples Of: 01:00

C-OFF Validity Type: Monthly

C-OFF Validity (Months): 2

Minimum C-OFF For Half Day Off: 04:00

Minimum C-OFF For Full Day Off: 08:00

Auto Authorize C-OFF: ☒

ID	Name	Level
1	COFF Policy-1	1
2	COFF Policy-2	1

## Daily Attendance View

The punch details of the user is shown below. The overtime of 3:30 hrs on 6-5-17 will be given as OT and 1:30 hrs on 7-5-17 (Week-off) will be given as C-OFF.

**Daily Attendance View**

User: 3 Isha

Attendance Period: May 2017

Date	Shift	First IN	Last OUT	1st Half	2nd Half	Late-IN	Early-OUT	Work Hours	Extra Work	Net Work	Break Hours	Actual Overtime	Authorized Overtime	Remark	Details
01/05/2017	GS	08:15	19:00	PR	PR		09:45	01:15	01:15	01:00	01:15	01:15			
02/05/2017	GS	09:00	22:00	PR	PR		12:00	03:30	03:30	01:00	03:30	03:30			
03/05/2017	GS	08:00	21:00	PR	PR		12:00	03:30	03:30	01:00	03:30	03:30			
04/05/2017	GS	09:00	20:00	PR	PR		10:00	01:30	01:30	01:00	01:30	01:30			
05/05/2017	GS	08:00	21:00	PR	PR		12:00	03:30	03:30	01:00	03:30	03:30			
06/05/2017	GS	08:30	21:30	PR	PR		12:00	03:30	03:30	01:00	03:30	03:30			
07/05/2017	GS - WO	09:00	20:00	WO	WO		10:00	01:30	01:30	01:00	01:30	01:30			
08/05/2017	GS	09:00	20:00	PR	PR		10:00	01:30	01:30	01:00	01:30	01:30			

The authorized OT is shown by pink arrow which will be given from Monday to Saturday and authorized C-OFF is shown by green arrow which is given on Sunday.  
The C-OFF authorized is of 1hrs as it has to be in multiples of 1 hr as configured from C-OFF Policy.

Overtime/C-OFF Authorization

Date \*

10/04/2017

11/05/2017

Filter Users

Individual

User

3

Isha

View

Pending (0)

Authorized (8)

User

3

Isha

Attendance Date

06/05/2017

Overtime Type

OT1

OT1 Hours

000:30

Authorize As Overtime

000

:

30

Authorize As C-OFF

000

:

00

Remarks

Authorize

Search

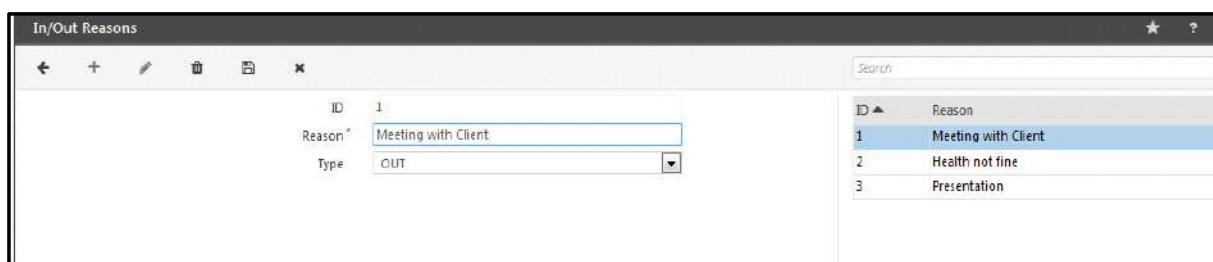
User ID	Name	Date	In	Out	In	Out	Shift	OT	Auth OT	Auth OT Date	Auth C-OFF	Auth C-OFF Date	Auth By	Details
3	Isha	06/05/2017	08:30	21:30			G5	03:30	03:30					
3	Isha	07/05/2017	09:00	20:00			G5	01:30			01:00			
3	Isha	08/05/2017	09:00	20:00			G5	01:30	01:30					

# In/Out Reasons

In some organizations, employees may be required to offer valid reasons for In/Out punch events or to explain attendance exceptions. Such valid reasons can be pre-defined by the system administrator as per the organizational policies and requirement. These pre-defined In/Out reasons can be then used for manual attendance correction by HR users or for personal/official entry marking by employees using the **Employee Self Service** module.

To define a new In/Out Reason, click **Time & Attendance > Masters > In/Out Reasons**.

The **In/Out Reasons** page will appear as shown.



ID	Reason
1	Meeting with Client
2	Health not fine
3	Presentation

Click **New** button to create new reason.

The In/Out Reason **ID** is automatically system-generated for every new reason created.

Enter a brief description of the In/Out Reason in the **Reason** field. This can be of a maximum length of 30 characters (For e.g. "Sickness" or "Meeting with Client").

In the **Type** field, select **IN** or **OUT** to specify the type of punch with which the reason is to be associated.

Click **Save** button to save the new In/Out reason.



*Maximum number of In/Out Reasons that can be created on COSEC is 999.*



*While applying for the Attendance correction, you can select the In/OUT reason for the respective punches.*

# Bus Route

---

The COSEC application allows the administrator to define bus routes which in turn can then be assigned to users from the **User Configuration** option of the **Users** module.

To define a new Bus Route, click **Time & Attendance > Masters > Bus Route**.

The **Bus Route** page appears on your screen as follows:



The screenshot shows the 'Bus Route' configuration page. It features a toolbar with icons for back, add, edit, delete, save, and close. A search bar is located in the top right. The main form has a 'Bus Route' label with an asterisk, followed by an 'ID' field containing 'Waghodia Route' and an 'Active' checkbox that is checked. On the right, there is a table with two columns: 'ID' and 'Name'. The table contains one row with the ID '1' and the Name 'Makarapura Route'.

ID	Name
1	Makarapura Route

Click **New** to enter the details of a new Bus Route.

Each Bus Route will have a unique **ID** for identification and this is generated by system automatically when the bus route is saved.

Specify a name for the Bus Route in the **Name** field which can be a maximum of 30 characters.

Select the **Active** checkbox to enable the Bus Route.


Click **Save** to save the configured bus route.

# Overtime Code

Each Overtime type defined in COSEC can be re-labelled as per the site requirement using the *Overtime Code* functionality. For example, an organization may wish to rename the overtime type “OT1” as “OThlf” based on a “0.5” multiplication factor they implement for pay calculation. Such overtime codes can be up to 5 *characters* long.

To do this, click **Time & Attendance > Masters > Overtime Code**.

The **Overtime Code** page appears as follows:

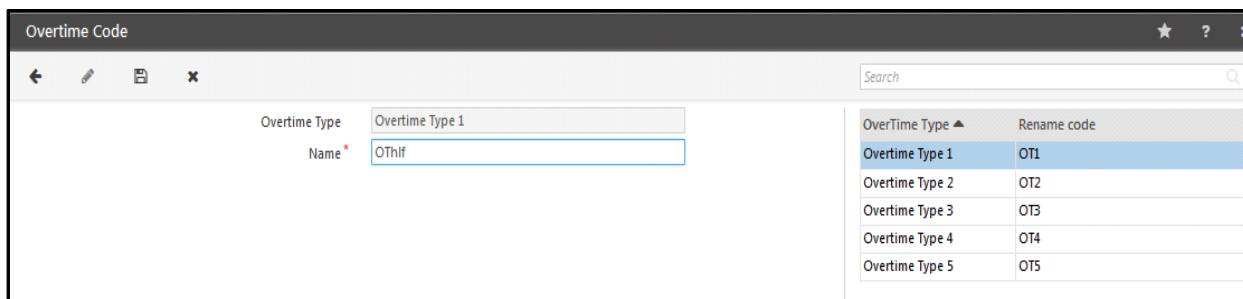


OverTime Type	Rename code
Overtime Type 1	OT1
Overtime Type 2	OT2
Overtime Type 3	OT3
Overtime Type 4	OT4
Overtime Type 5	OT5

Select an **Overtime Type** from the list on the right-hand side of the page (say, “Overtime Type1”).

In the **Name** field, enter a new overtime code.

Click **Save** button. The new overtime code will appear on the overtime type list as follows:



OverTime Type	Rename code
Overtime Type 1	OT1
Overtime Type 2	OT2
Overtime Type 3	OT3
Overtime Type 4	OT4
Overtime Type 5	OT5



OverTime Type	Rename code
Overtime Type 1	OThlf
Overtime Type 2	OT2
Overtime Type 3	OT3
Overtime Type 4	OT4
Overtime Type 5	OT5

# Attendance Summary

The **Attendance Summary** summarizes and displays all attendance data of a user for the chosen attendance period. It provides easy viewing of attendance details to the HR administrator.

To access this functionality, click **Time & Attendance > Utilities > Attendance Summary**.

The **Attendance Summary** page will appear as follows:

The screenshot shows the 'Attendance Summary' page with a title bar containing a star and a question mark. Below the title bar are navigation arrows. The main content area has two filters: 'User' with a text input '1690' and a dropdown 'Priyank Bora', and 'Attendance Period' with a month dropdown 'March' and a year dropdown '2017'. Below these filters are two tabs: 'Summary' (selected) and 'Details'.

**User:** Select a user from the picklist whose attendance summary is to be viewed.

**Attendance Period:** Select the month and year as the Attendance Period for which the summary is to be obtained.


## Viewing Attendance Summary

To view the *Attendance Summary* for a user, click the **Summary** section as shown below.

The screenshot shows the 'Attendance Summary' page with the 'Summary' tab selected. The filters are the same as in the previous screenshot. The main content area displays attendance data for March 2017. On the left, there are input fields for 'Presents' (1.0), 'Absents' (20.0), 'Paid Leaves' (0.0), 'Unpaid Leaves' (0.0), 'Tours' (0.0), 'Week-Offs' (8), and 'Holidays' (2). On the right, there is a calendar for March 2017. Below these, there are input fields for 'Work Hours' (00:18), 'Extra Work' (00:18), 'Net Work Hours' (HH:MM), 'Break Hours' (HH:MM), 'Authorized Overtime' (HH:MM), and 'Generated Overtime' (00:18). At the bottom, there is a section for 'Available Short Leaves' (0), 'Available Short Leave Duration' (00:00), 'Late-IN' (0), 'Early-OUT' (0), and 'Availed/Allowed Less Work Duration (Mins)' (0/0).

Mo	Tu	We	Th	Fr	Sa	Su
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31		

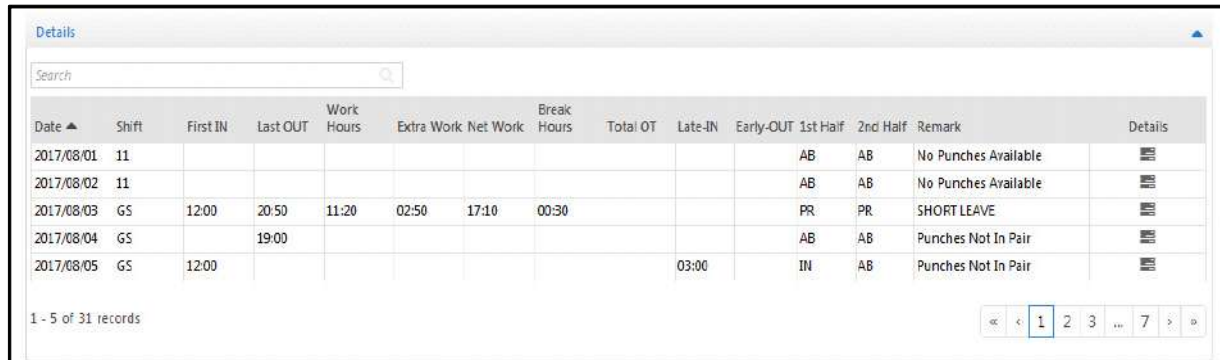
The attendance summary of the selected user appears with the corresponding number of days or hours for each field as shown above.






The administrator can also view a detailed overtime summary by clicking the overtime summary  button next to the **Generated Overtime** field.

The Overtime Summary presents the individual overtime hours for OT1, OT2, OT3, OT4 and OT5 and the respective Authorized overtime. It also displays other overtime details such as Total unauthorized and authorized overtime, total manual debit/credit, availed and available overtime for the selected user.

## Viewing Attendance Details


To view attendance details for the selected user, click the **Details** section as shown below.

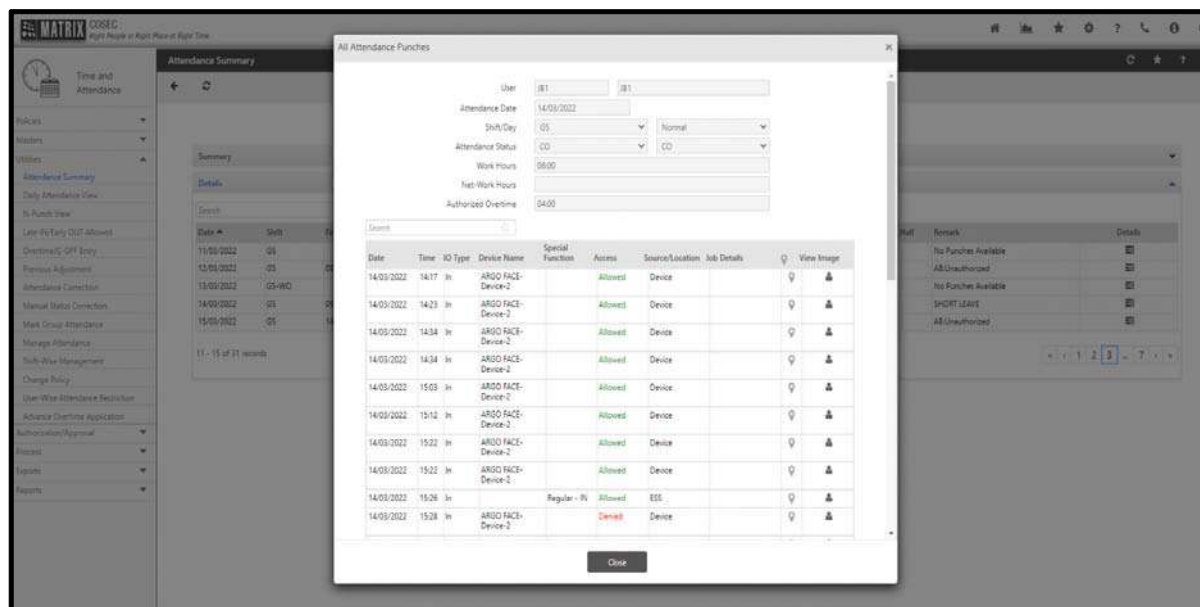












Date	Shift	First IN	Last OUT	Work Hours	Extra Work	Net Work	Break Hours	Total OT	Late-IN	Early-OUT	1st Half	2nd Half	Remark	Details
2017/08/01	11										AB	AB	No Punches Available	
2017/08/02	11										AB	AB	No Punches Available	
2017/08/03	GS	12:00	20:50	11:20	02:50	17:10	00:30				PR	PR	SHORT LEAVE	
2017/08/04	GS		19:00								AB	AB	Punches Not In Pair	
2017/08/05	GS	12:00							03:00		IN	AB	Punches Not In Pair	

1 - 5 of 31 records

The **Details** section displays the attendance details for individual days of the defined attendance period for the selected employee.

To view the details of attendance punches for a day, click the **Details**  icon corresponding to the respective **Date** row. The **All Attendance Punches** window appears as shown.



Date	Time	IO Type	Device Name	Special Function	Access	Source/Location	Job Details	View Image
14/09/2022	14:17	In	ARGO FACE-Device-2		Allowed	Device		
14/09/2022	14:23	In	ARGO FACE-Device-2		Allowed	Device		
14/09/2022	14:34	In	ARGO FACE-Device-2		Allowed	Device		
14/09/2022	14:34	In	ARGO FACE-Device-2		Allowed	Device		
14/09/2022	15:03	In	ARGO FACE-Device-2		Allowed	Device		
14/09/2022	15:10	In	ARGO FACE-Device-2		Allowed	Device		
14/09/2022	15:22	In	ARGO FACE-Device-2		Allowed	Device		
14/09/2022	15:22	In	ARGO FACE-Device-2		Allowed	Device		
14/09/2022	15:26	In	Regular - IN		Allowed	ESS		
14/09/2022	15:28	In	ARGO FACE-Device-2		Denied	Device		

Click **Close** to close the window.



If Map is not loaded; check the network connection of your PC or check the value of Google API Key from Admin Module > System Configuration > Global Policy > Basic tab.



# Daily Attendance View

The Daily Attendance View displays all attendance data of a user for a chosen Attendance Period. This feature in COSEC provides easy viewing of attendance details for the HR administrator.

To access this functionality, click **Time & Attendance > Utilities > Daily Attendance View** and the following screen appears.

There are two tabs displayed namely:

- View
- Template Configuration



To customize the Template Configuration, make sure you have the Daily Attendance View - Add, Edit, Delete rights. For details, refer to [“Roles and Rights Configuration”](#). These rights are applicable only to the Template Configuration tab.

For the View tab, only Daily Attendance View - View right is applicable.

Select **Template Configuration** tab to customize the view that you want to see in **Daily Attendance View Page**.

In the right pane, the **Default View** template is displayed.

You can either edit the **Default View** Template or add a new template as per your requirement.

## Editing the Default View Template

Click Default View Template in the right pane.

In Template, by default the name displayed is **Default View**. You can change it if required.

The template parameters are displayed under **Field Configuration**.

**Field Type:** Select the type from the options - **Database** and **Custom**.

**Field Value:** This will be displayed according to the Field Type you select:

- If you select **Database**, select the desired value from the drop down list.
- If you select **Custom**, configure the desired value. To do so, enter “~” and the list appears. Select the desired parameters from this list or you can also configure any sql expression here. If you want to enter parameters other than those from the selection list make sure you add these within the square bracket, for example [Day Type].



*Few fields have been removed from Template mapping in this release. If you get an error while accessing a **Default View** existing template, then you need to create a new template.*

**Display Name:** Configure the desired name you wish to assign to the selected Field Value.

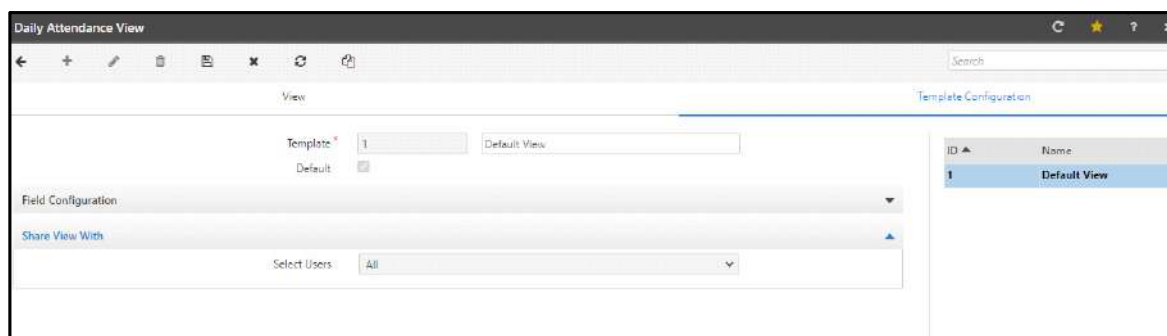
According to the configuration you have set, the details will be displayed in the grid.

The Parameters in the grid are:


- **View/Export:** Clear the check boxes of the respective parameters, if you do not wish to view or export it. By default, it is enabled (selected). The Date parameter cannot be edited. If you wish to disable the **View/Export** for all the parameter, clear the check box in the header row under **View/Export**.
- **Display Summary:** Clear the check boxes of the respective parameters, if you do not wish to display their summary. By default, it is enabled (selected). If you wish to disable the **Display Summary** for all the parameter, clear the check box in the header row under **Display Summary**.
- Click **Delete**, if you wish to delete the parameter.

- **UP/Down:** Click the Up or Down arrow to change the sequence of the desired parameter in the list.

**Share View With:** You can share this template with others. In **Default View**, by default it is applicable to all users.



Click **Save**.

In case you overwrote a Default View Template and you desire to restore it again, then select the **Reset**  , in the top menu bar.

## Adding a New Template

In the **Template Configuration** tab, click Add button to add a new template and configure the following parameters:

**Template:** Configure the desired name you wish to assign to the new template.

**Default:** Select the checkbox if **Default View** template parameters are to be restored as configuration in the new template.

The template parameters are displayed under **Field Configuration**

**Field Type:** Select the type from the option - **Database** and **Custom**.

**Field Value:** This will be displayed according to the Field Type you select:

- If you select **Database**, select the desired value from the drop down list.
- If you select **Custom**, configure the desired value. To do so, enter“~” and the list appears. Select the desired parameters from this list or you can also configure any sql expression here.



*You can also create a **Custom Column Name** by creating formula with **Field Value** selection as per your choice.*

*For example if you have selected three **Field Values**: ~ First In~ ~ Last Out~ ~Punch Date~*

*You can provide the **Display Name** for above selected field values as 'Total Duration' which should be considered as **Custom Column Name**.*

*Few fields have been removed from Template mapping in this release. If you get an error while accessing an existing template, then you need to create a new template.*

**Display Name:** Configure the desired name you wish to assign to the selected Field Value.

According to the configuration you have set, the details will be displayed in the grid.

The parameters in the grid are:

**View/Export:** Select the check boxes of the desired fields, if these should be displayed in the Daily Attendance View Page. The Date parameter cannot be edited.

**Display Summary:** Click the checkboxes of the desired parameters to view as summary. It will only display the summary for the parameters that have time calculations.

Click **Delete**, if you wish to delete the parameter.

**UP/Down:** Click the Up or Down arrow to change the sequence of the desired parameter in the list.

Fields	Field Type	View/Export	Display Summary	Up/Down
Date	Database	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Morning	Database	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Afternoon	Database	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Overtime	Database	<input checked="" type="checkbox"/>	<input type="checkbox"/>	

**Share View With:** You can share this template with others. Select the desired option – **Group Wise**, **User Wise** or **All**.

If you select **Group Wise**, select the Group and Organization.

If you select **User Wise**, select the user.

Select Users: All

Click **Save**.

This new template will appear in the right pane

Now Click the **View** tab to display the configured template.

**User:** Select the user from the picklist whose Attendance details are to be viewed.

**Attendance Period:** Attendance Period can be selected in two ways: Month-wise and Date-wise.

- **Month-wise:** Selecting this option will display the attendance of the particular month. Select the month and year from the drop down list for which the daily attendance is to be viewed.
- **From/To Date:** Selecting this option will display the attendance of the range selected in the Attendance Period. Select the starting and ending date using the date selection button for which the daily attendance is to be viewed. For a single day select the same date in both the fields.

**Display View as Per:** Select the type of view you desire from the drop down list. All the created templates will appear in the list.

**Display Summary:** Select the desired option — **Week-Wise, Overall, Both** or **None**.

- If you select **Week- Wise**, it will display the total weekly summary.
- If you select **Overall**, it will display the data summary as per the Attendance Period set.
- If you select **Both**, it will display both weekly as well as monthly summary.
- If you select **None**, it will display the users data without any details of total. According to the configuration you have set and the type of template selected, the details will be displayed in the grid.

**Starting Day of the Week:** Select the starting day of the week from the drop down list. Based on the day selected, weekly attendance view will be shown in the grid.

The attendance details with In time, Out time, Work hours, Extra work hours and other shift details appear in the grid.

Date	Shift	First IN	Last OUT	1st Half	2nd Half	Late-IN	Early-OUT	Work Hours	Extra Work	Net-Work	Break Hours	Generated Overtime	Authorized Overtime	Remark	Details
01/01/2020	GS-Normal	08:41	18:13	PR	PR		00:17	09:02	00:19	09:02	00:30				
02/01/2020	GS-Normal	08:08	12:40	PR	PL			04:34	00:54	04:34					
03/01/2020	GS-Normal			PL	PL										
04/01/2020	GS-WO			WO	WO										
05/01/2020	GS-WO			WO	WO										
06/01/2020	GS-Normal	08:49	18:43	PR	PR			09:24	00:24	09:24	00:30				
07/01/2020	GS-Normal	09:03	18:44	PR	PR			09:11	00:14	09:11	00:30				
08/01/2020	GS-Normal	08:29	13:05	PR	AB			04:36	00:31	04:36				AB:Early-OUT	
09/01/2020	GS-Normal	08:52	13:24	PR	AB			04:32	00:08	04:32				AB:Early-OUT	
10/01/2020	GS-Normal			AB	AB									No Punches Available	
11/01/2020	GS-WO			WO	WO										
Total							01:08	82:37	05:10	82:37	03:30				

The last row of the grid displays the total hours of all days for the respective columns.

You can apply for the attendance correction option by clicking on the AB punch marking as shown below.

Date	Shift	First IN	Last OUT	1st Half	2nd Half
01/01/2020	GS-Normal	08:41	18:13	PR	PR
02/01/2020	GS-Normal	08:08	12:40	PR	PL
03/01/2020	GS-Normal			PL	PL
04/01/2020	GS-WO			WO	WO
05/01/2020	GS-WO			WO	WO
06/01/2020	GS-Normal	08:49	18:43	PR	PR
07/01/2020	GS-Normal	09:03	18:44	PR	PR
08/01/2020	GS-Normal	08:29	13:05	PR	AB
09/01/2020	GS-Normal	08:52	13:24	PR	AB
10/01/2020	GS-Normal			AB	AB

Correction Options

- Apply Leave
- Apply C-OFF
- Apply Tour
- Short Leave/Official In-Out
- Attendance Correction

Click on the **Details** to view all the Attendance Punches as shown below.

All Attendance Punches

User

JB1

JB1

Attendance Date

15/03/2022

Shift/Day

GS

Normal

Attendance Status

AB

AB

Work Hours

00:19

Net Work Hours

Authorized Overtime

Search

Date	Time	IO Type	Device Name	Special Function	Access	Source/Location	Job Details		View Image
15/03/2022	14:08	In	ARGO FACE-Device-2		Allowed	Device	J1 - Job1		
15/03/2022	14:09	In	ARGO FACE-Device-2		Denied	Device			
15/03/2022	14:14	In	ARGO FACE-Device-2		Allowed	Device	J1 - Job1		
15/03/2022	14:19	In	ARGO FACE-Device-2		Denied	Device			
15/03/2022	14:25	In	ARGO FACE-Device-2		Denied	Device			
15/03/2022	14:27	In	ARGO FACE-Device-2		Allowed	Device	J4 - Job4		
15/03/2022	14:27	In	ARGO FACE-Device-2		Allowed	Device	J4 - Job4		

Close



If Map is not loaded; check the network connection of your PC or check the value of Google API Key from Admin Module > System Configuration > Global Policy > Basic tab.

# N-Punch View

The term *N-Punch* stands for “n” number of punches and is a system for punch calculation on COSEC. This means that all the available attendance punches of a user on a particular day will be considered for his work hours calculation. The **N-Punch View** functionality enables you to view the details of punch timings and manually edit details if required for a selected date. This is applicable only to users for whom the N-Punch calculation is enabled in their respective Attendance Policies.



To enable the N-Punch system for a user, go to **Time and Attendance > Policies > Attendance Policy**. Select the applicable policy and set the **Max Punches to Consider** parameter. For details, refer to [“Attendance Policy”](#).

To access this functionality, click **Time & Attendance > Utilities > N-Punch View**.

The page will be displayed on your screen as follows:

Source	IO Type	Date	Time	Out Time	Special Function	Edit	
Device - NGT Direct Door-Device-1	IN	03/05/2017	09:10				
Device - NGT Direct Door-Device-1	OUT	03/05/2017	13:00				
Device - NGT Direct Door-Device-1	IN	03/05/2017	14:00	01:00			
Device - NGT Direct Door-Device-1	OUT	03/05/2017	19:00				

Gross Work Hours: 09:50   Total Out Time: 01:00   N-Punch Work Hours: 08:50   Extra Work Hours: 00:30   Authorized Overtime: 09:30   Status: PR AB

**User:** Select a user from the **User** picklist. This picklist will show only N punch users.

**Attendance Date:** Select the Attendance Date for which user punches are to be viewed. Click the button to specify a custom period for date selection. All punches for the selected date are displayed as shown in the grid.

To add a punch manually, Click the **ADD** button. The new row in the grid will appear.

Source	IO Type	Date	Time	Out Time	Special Function	Edit	
		03/05/2017	20:00				
Device - NGT Direct Door-Device-1	IN	03/05/2017	09:10				
Device - NGT Direct Door-Device-1	OUT	03/05/2017	13:00				
Device - NGT Direct Door-Device-1	IN	03/05/2017	14:00	01:00			
Device - NGT Direct Door-Device-1	OUT	03/05/2017	19:00				




Enter the timing for the punch. Then click OK. The punch will be automatically saved as IN punch and it will be added to the grid list as a *Manual Entry*.

The screenshot shows the 'N-Punch View' window. At the top, there are fields for 'User' (4), 'Attendance Date' (03/05/2017), and 'Shift' (G5). Below these is a table with columns: Source, IO Type, Date, Time, Out Time, Special Function, Edit, and a trash icon. The table contains five rows of device punches and one 'Manual Entry' row. The 'Manual Entry' row is highlighted in blue, and an arrow points to it.

Source	IO Type	Date	Time	Out Time	Special Function	Edit	
Device - NGT Direct Door-Device-1	IN	03/05/2017	09:10				
Device - NGT Direct Door-Device-1	OUT	03/05/2017	13:00				
Device - NGT Direct Door-Device-1	IN	03/05/2017	14:00	01:00			
Device - NGT Direct Door-Device-1	OUT	03/05/2017	19:00				
Manual Entry	IN	03/05/2017	20:00				



The **IO** dropdown list will appear (for punch type selection) only if the **Out Punch From Exit Reader** option is enabled during Attendance Policy configuration of the selected user. Else, the day's first punch will automatically be counted as an IN punch, the second as OUT punch, the third as IN punch and so on.

To edit a punch, click the  button. Edit the punch data and add a special function if required. Click OK to save the changes.

The screenshot shows the 'N-Punch View' window with the 'Manual Entry' row selected. A dropdown menu is open for the 'Special Function' column, showing options: Select, Select, Official Out, Short Leave Out, Early-Out Allowed, Overtime Out, and Regular Out. Below the table, there are summary fields: Gross Work Hours (10:50), Total Out Time (01:00), N-Punch Work Hours (09:50), Extra Work Hours (01:30), Authorized Overtime (01:30), and Status (PR, PR).

Source	IO Type	Date	Time	Out Time	Special Function	Edit	
Device - NGT Direct Door-Device-1	IN	03/05/2017	09:10				
Device - NGT Direct Door-Device-1	OUT	03/05/2017	13:00				
Device - NGT Direct Door-Device-1	IN	03/05/2017	14:00	01:00			
Device - NGT Direct Door-Device-1	OUT	03/05/2017	19:00				
Manual Entry	IN	03/05/2017	20:00				

Source	IO Type	Date	Time	Out Time	Special Function	Edit	
Device - NGT Direct Door-Device-1	IN	03/05/2017	09:10				
Device - NGT Direct Door-Device-1	OUT	03/05/2017	13:00				
Device - NGT Direct Door-Device-1	IN	03/05/2017	14:00	01:00			
Manual Entry	OUT	03/05/2017	19:00		Official OUT		
Manual Entry	IN	03/05/2017	20:00				

The N-Punch data can be exported in Excel format. Click the Export button. You can open or save the file at the desired location.

	A	B	C	D	E	F
	Source	IO Type	Date	Time	Out Time	Special Function
2	Device - NGT Direct Door-Device-1	IN	03/05/2017	09:10		
3	Device - NGT Direct Door-Device-1	OUT	03/05/2017	13:00		
4	Device - NGT Direct Door-Device-1	IN	03/05/2017	14:00	01:00	
5	Manual Entry	OUT	03/05/2017	19:00		Official OUT
6	Manual Entry	IN	03/05/2017	20:00	01:00	
7	Manual Entry	OUT	03/05/2017	20:30		
8						
9	<b>Summary</b>					
10						
11	<b>Gross Work Hours: 12:20</b>					
12	<b>Total Out Time: 02:00</b>					
13	<b>N-Punch Work Hours: 10:20</b>					
14	<b>Extra Work Hours: 02:00</b>					
15	<b>Overtime Hours: 02:00</b>					
16	<b>Status: PR PR</b>					

# Late-IN/Early-OUT Allowed

An HR administrator may, at times, be required to provide special allowance for employees to come in late or leave early on a particular day. Such a requirement may arise due to various reasons such as bus service failure, unnatural weather conditions, red alerts or festivities. On such an occasion, the administrator can use the **Late-IN/Early-OUT Allowed** functionality to allow all Late-IN or Early-OUT punches for the specified day.

To access this functionality,

click **Time & Attendance > Utilities > Late-IN/Early-OUT Allowed**.

The **Late-IN/Early-OUT Allowed** page appears as shown below:

ID	Date	Type	Start Time	End Time
No Data				

Select a date from the date selection picklist in the **Override On** field, on which the Late-IN/Early-OUT Policy is to be overridden.



*System will allow the application of this feature only on a day on or before the current date.*

Select **LateIn** or **EarlyOut** as the **Override Policy** to be applied.

Enter the start and end time in the **Start Time - End Time** fields in the HH:MM format. This defines the duration for which the override policy will be allowed on the chosen date.

The **Reason** field is available only for the **LateIn** policy. Select the reason from the drop down list as **Other** or **BusLate** as shown.

Reason	Other
Bus Route	Other
Remark	BusLate

If the reason for Late-IN is due to the late arrival of bus, then the **BusLate** option should be selected. For all other reasons, **Other** can be selected.

For **BusLate**, select the particular bus route from the **Bus Route** detail picklist.

Add a remark on the Late-IN if required in the **Remark** field.

In the **Device Selection** section, select a **Panel/Direct Door** from the drop down list and select the door. This is the door on which user would be punching. The Late-In punch will be updated after monthly attendance process.

Click **Save** button to save the changes.

The screenshot displays a web application interface for managing attendance overrides. The main form is titled "Late-IN/Early-OUT Allowed" and includes a green status bar at the top indicating "Saved Successfully". The form is divided into several sections:

- Override On:** A date field set to "08/05/2017".
- Override Policy:** A dropdown menu set to "Late-IN".
- Start Time - End Time:** Two time fields set to "09:00" and "10:00".
- Reason:** A dropdown menu set to "BusLate".
- Bus Route:** A dropdown menu set to "Makarpura Route".
- Remark:** A text field containing "Bus Puncture".
- Device Selection:** Two dropdown menus: "Panel/Direct Door" set to "NGT Direct Door-Device-1" and "Door" set to "All".

On the right side of the form, there is a table with the following columns: ID, Date, Type, Start Time, and End Time. The table contains one entry:

ID	Date	Type	Start Time	End Time
1705090001	08/05/2017	Late-IN	09:00	10:00

# Overtime/C-OFF Entry

This option enables the HR administrator to manually enter Overtime/C-OFF details for an employee as well as credit/debit OT/C-OFF in cases where an employee has not been able to mark the entry or exit times.



*Authorized Overtime = Authorized OT + Manual Credit OT - Manual Debit OT*

To access this functionality, click **Time & Attendance > Utilities > Overtime/C-OFF Entry**.

The **Overtime/C-OFF Entry** page appears as follows:

1. Select a **User** from the picklist for whom the manual Overtime/C-OFF entry is to be made.
2. Select the **Attendance Date** from the calendar button. Click the “Modification Allowed” button to specify the period within which overtime/C-OFF entry should be allowed.
3. On the selection of the **Custom Period** option, the system allows you to enter the number of months prior to the current date for which the attendance details can be viewed.

Once the attendance period is defined, the Overtime/C-OFF Entry page appears as follows.

4. Select the date from the right grid or by calendar button for which OT/ C-OFF entry is to be made.

5. To view attendance details for the selected date, select the **Attendance Details** section as shown. It shows the work hours details and Total Available Overtime of the user.

6. In the **Manual Overtime/C-OFF Entry** section, select the **Component** for which manual entry is to be done. For e.g. to make an entry for "OT4", select component **OT4**.
7. Specify the **Entry Type** as **Credit** or **Debit**.
8. Enter a **Value** for the hours which are to be credited or debited to the selected component in the HH:MM format as shown.

**Manual Overtime/C-OFF Entry**

Search

Component	Processed	Authorized	Manual Credit	Manual Debit
OT1	-	-	-	-
OT2	-	-	-	-
OT3	-	-	-	-
OT4	-	-	-	-
OT5	-	-	-	-
C-OFF	-	-	-	-

Component: OT4

Entry Type: Credit

Value: 02:00

Process

- Click the **Process** button to save the manual entry for the selected date.

The credited OT will be shown in Total Available Overtime and Manual credited value as shown below.

**Overtime/C-OFF Entry**

User: 4 Siveta

Attendance Date: 02/02/2017

**Attendance Details**

Shift/Day: GS

Attendance Status: PR

Status Summary: Present

Work Hours: 11:00

Extra Work Hours: 02:00

Net Work Hours: 11:00

Adjusted Work Hours: 00:00

Total Available Overtime: 02:00

**Manual Overtime/C-OFF Entry**

Search

Component	Processed	Authorized	Manual Credit	Manual Debit
OT1	-	-	-	-
OT2	-	-	-	-
OT3	-	-	-	-
OT4	-	-	02:00	-
OT5	-	-	-	-
C-OFF	-	-	-	-

**Summary Table**

Date	Total OT Credit	Total OT Debit	Total C-OFF Credit	Total C-OFF Debit
13/02/2017				
12/02/2017				
11/02/2017				
10/02/2017				
09/02/2017				
08/02/2017				
07/02/2017				
06/02/2017				
05/02/2017				
04/02/2017				
03/02/2017				
02/02/2017	02:00			
01/02/2017				

16 - 28 of 28 records

« 1 2 »

The manual entry will now reflect in the OT/C-OFF balance for the selected user and can be used for encashment, leave application etc.

# Previous Adjustment

This option enables the HR user to update previous adjustment data of an employee (from a closed attendance period) in the current attendance records. This may include entry for adjustment in attendance days, OT hours, working hours and shifts allowance. Such adjustment is then reflected in the attendance data of the current attendance period. This feature can be useful to the HR user for effective payroll calculation.

Previous Adjustment entry can be of two types:

- System Generated - Previous adjustment entry is automatically generated by the system in the following cases:
  - After Leave Application and Approval
  - Tour Application and Approval
  - Manual Correction in Attendance Period
  - Shift Count (More than 1 shift attended by employee)
- Manual - Previous adjustment entry is manually done by the HR user for an employee.




A “closed” attendance period in COSEC, is a previous attendance period for which attendance data has already been processed and changes can no longer be made. This is based on the Monthly Process configuration for an attendance period. To enable attendance correction or attendance adjustment for a closed attendance period, go to **Time & Attendance > Attendance Policy > General**.

To manually enter previous adjustment data, click **Time & Attendance > Utilities > Previous Adjustment**.

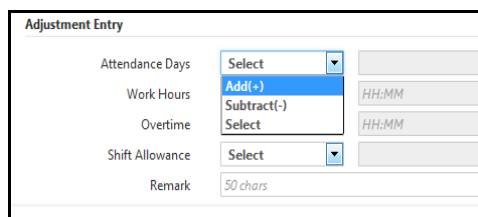
The **Previous Adjustment** page is displayed as shown.

The screenshot shows the 'Previous Adjustment Entry' form. At the top, there's a 'User' section with 'ID' and 'Name' fields. Below that is 'Previous Attendance Date For Adjustment' with a 'From Date' field. The 'Attendance Details' section includes 'Current', 'First Half', 'Second Half', 'Work Hours', 'Extra Work Hours', and 'Shift Allowance'. The 'Target Month For Adjustment Values' section shows 'October' and '2019'. The 'Adjustment Entry' section has 'Attendance Days', 'Work Hours', 'Overtime', and 'Shift Allowance' fields, each with a 'Select' dropdown and a text input. The 'Remark' field is at the bottom with a '50 chars' limit. A 'Previous Adjustment Records' link is at the bottom left.

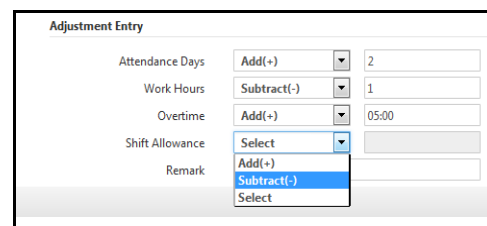
1. Click **New** .
2. In the **User** field, enter a user ID or select a user by clicking the picklist button.




3. In the **Previous Attendance Date for Adjustment** field, enter a date by clicking the date selection button. This is the previous date for which the adjustment is to be done.
4. In the **Attendance Details** field, select **Current** or **Previous** to load the current or previous attendance details for system-generated adjustment. These details will include **First Half**, **Second Half**, **Working Hours**, **Extra Work Hours** and **Shift Allowance**.
5. In the **Target Month For Adjustment Values**, select the month and year in which the previous adjustment is to be reflected.
6. Under **Adjustment Entry**, there are four options for which adjustment entry can be made - Attendance Days, Work Hours, Overtime and Shift Allowance. Select “**Add(+)**” or “**Subtract(-)**” from the dropdown list against each entry to add or deduct the respective field value. This can be assigned in the adjoining fields as shown. Add a **Remark** if required.



The screenshot shows the 'Adjustment Entry' form. It has four rows: 'Attendance Days', 'Work Hours', 'Overtime', and 'Shift Allowance'. Each row has a dropdown menu and a text input field. The 'Work Hours' dropdown is open, showing 'Add(+)' and 'Subtract(-)' options. The 'Remark' field at the bottom has a placeholder text '50 chars'.



The screenshot shows the 'Adjustment Entry' form with values entered. 'Attendance Days' is set to 'Add(+)' with a value of '2'. 'Work Hours' is set to 'Subtract(-)' with a value of '1'. 'Overtime' is set to 'Add(+)' with a value of '05:00'. 'Shift Allowance' is set to 'Select'. The 'Remark' field is empty. The 'Work Hours' and 'Shift Allowance' dropdowns are open, showing 'Add(+)', 'Subtract(-)', and 'Select' options.

7. Click **Save**  to save the adjustment. The saved record will appear under the **Previous Adjustment Records** collapsible panel.

# Attendance Correction

Attendance corrections are required in the event of modifications being needed in the entry or exit times posted in the daily attendance data of users, or if new entry or exit data for a user is needed to be entered for a particular date manually. This feature is often useful for HR users in rectifying reported issues of missing or forgotten punches.

Attendance correction can be executed by — “[System Admin](#)” or an “[On Behalf Account User](#)”.

The System Admin can modify the attendance time as well as assign Special functions for the user in the same application.

The On Behalf Account User can modify the attendance time as well as the Short Leave IN/Out time. For this two separate applications need to be made. Refer “[Attendance Correction Application](#)” and “[Short Leave/Official IN-OUT Application](#)”.

To create and assign roles and rights to the System Admin User or On Behalf Account User, refer to “[Managing System Accounts](#)”.

## System Admin

To correct employee attendance manually, click **Time & Attendance > Utilities > Attendance Correction**.

The **Attendance Correction** page will open as follows:

The screenshot shows the 'Attendance Correction' application window. On the left, there is a form with the following fields: 'User' (with a picklist showing 'ID' and 'Name'), 'Attendance Date' (with a date picker and 'Custom Months' dropdown), 'Shift/Day' (with a dropdown showing 'GS' and 'Normal'), 'Attendance Status' (with a dropdown showing 'None'), 'Manual Status Marking' (with a dropdown), 'Status Summary' (with a text area), and 'Remark' (with a text area). Below these fields are three expandable sections: 'Attendance Correction', 'Break Punches', and 'Attendance Details'. On the right, there is a table with columns: 'Date', 'Shift', '1st Half', '2nd Half', 'First IN', 'Last OUT', and 'Work Hours'. The table currently displays 'No Data'.

**User:** Select a User from the user selection picklist whose attendance correction is to be done. The selected user's attendance data for the last attendance period will be loaded in the right side grid.

Date	Shift	1st Half	2nd Half	First IN	Last OUT	Work Hours
08/02/2017	GS	PR	AB	08:45	17:00	07:15
06/02/2017	GS	AB	AB			
04/02/2017	GS	AB	AB	09:00	16:00	06:00
02/02/2017	GS	AB	PR	08:45	19:00	08:15
01/02/2017	GS	AB	AB			

**Attendance Date:** Select the date from the calendar button or select the date from the right grid for which manual correction is to be done.

By default, attendance correction for the selected user will be allowed for any date within the last attendance period. However, to change this, click the *Set Modification Allowed Selection* button to define a period within which attendance correction should be allowed. You can select custom period of week or months by selecting the required option.

Click the **Events** button to view all attendance punches for the selected user on the selected date. The Attendance punches along with location is shown as below.

Date	Time	ID Type	Device Name	Special Function	Access	Source/Location	Job Details
14/03/2022	14:17	In	ARGO FACE-Device-2		Allowed	Device	
14/03/2022	14:23	In	ARGO FACE-Device-2		Allowed	Device	
14/03/2022	14:34	In	ARGO FACE-Device-2		Allowed	Device	
14/03/2022	14:34	In	ARGO FACE-Device-2		Allowed	Device	
14/03/2022	15:03	In	ARGO FACE-Device-2		Allowed	Device	
14/03/2022	15:12	In	ARGO FACE-Device-2		Allowed	Device	
14/03/2022	15:22	In	ARGO FACE-Device-2		Allowed	Device	
14/03/2022	15:22	In	ARGO FACE-Device-2		Allowed	Device	
14/03/2022	15:22	In	ARGO FACE-Device-2		Allowed	Device	
14/03/2022	15:26	In	ARGO FACE-Device-2	Regular - IN	Allowed	ESS	
14/03/2022	15:28	In	ARGO FACE-Device-2		Denied	Device	
14/03/2022	15:28	In	ARGO FACE-Device-2		Allowed	Device	J1 - Job1
14/03/2022	15:48	In	ARGO FACE-Device-2		Allowed	Device	J1 - Job1
14/03/2022	15:50	In	ARGO FACE-Device-2		Allowed	Device	J1 - Job1
14/03/2022	15:54	In	ARGO FACE-Device-2		Allowed	Device	J1 - Job1



If Map is not loaded; check the network connection of your PC or check the value of Google API Key from Admin Module > System Configuration > Global Policy > Basic tab.

In the following example, the user's attendance status for the selected date is "AB" (absent) for the second half, and is to be marked present.

Date	Shift	1st Half	2nd Half	First IN	Last OUT	Work Hours
03/02/2017	GS	PR	AB	08:45	17:00	07:15
06/02/2017	GS	AB	AB			
04/02/2017	GS	PR	AB	09:00	16:00	06:00
02/02/2017	GS	AB	PR	09:45	19:00	08:15
01/02/2017	GS	AB	AB			

Change the **Shift/Day** marking and **Manual Status Marking**, if required.



*Shifts changed from Attendance Correction will be treated as Attendance Correction Applications. The Shift Change Alert will be triggered, if configured. For details, refer to ["Configuring Alert Messages"](#).*

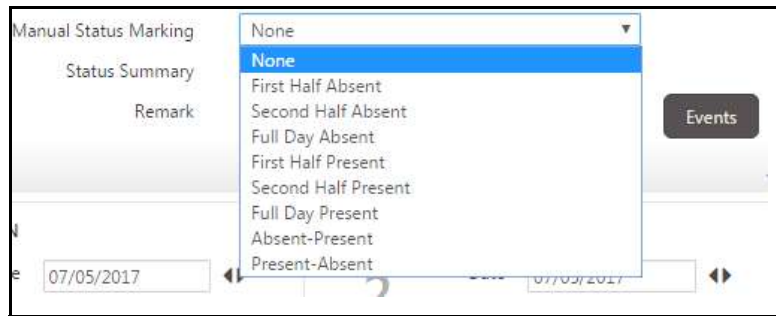
*Shifts are changed from multiple locations, then in such cases the last approved shift change will be taken into consideration. To know more refer to ["Shift Change Application/Approval"](#).*

Shifts can be changed from:

- **Shift Change Application:** When shifts are changed from this page then Shift Change Application requests will be generated only if the Auto Approve check box is disabled. For details, refer to ["Shift Change Application/Approval"](#).
- **Manage Shift:** When shifts are changed from this page then Shift Change Application requests will be generated only if the Auto Approve check box is disabled. For details, refer to ["Manage Shift"](#).
- **Manage Attendance:** When shifts are changed from this page then Shift Change Application requests will not be generated. For details, refer to ["Manage Attendance"](#).
- **Import from:**
  - Admin Module > System Utilities > Import Data > Import Data For (Shift Schedule)
  - Shift and Schedules Module > Utilities > Manual Schedule Import
  - In Shift and Schedules Module > Utilities > Manage Shift > Import > Change Shift with Import File

From Import the Shift Change Application requests will be generated only if the Auto Approve check box of the respective page is disabled. For details, refer to ["Importing Data"](#), ["Manual Schedule Import"](#) and ["Manage Shift"](#).

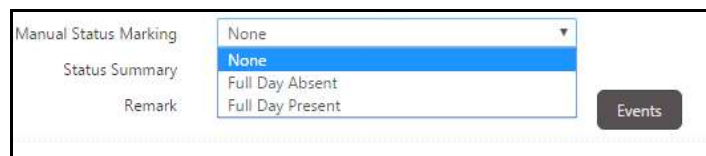
**Manual Status Marking** has following options:



The screenshot shows the 'Manual Status Marking' interface. A dropdown menu is open, displaying the following options: None, First Half Absent, Second Half Absent, Full Day Absent, First Half Present, Second Half Present, Full Day Present, Absent-Present, and Present-Absent. The 'None' option is currently selected. To the right of the dropdown is an 'Events' button. Below the dropdown, there are date fields showing '07/05/2017' and '07/03/2017'.



For a particular user, if **Restrict Half Day Considerations** is enabled in the page User > User configuration > T&A, then in **Manual Status Marking** drop down list, only full day attendance options will be visible and all the other half day options will be restricted for that particular user as shown in the screen below.



The screenshot shows the 'Manual Status Marking' interface with the dropdown menu open. Only three options are visible: None, Full Day Absent, and Full Day Present. The 'None' option is selected. An 'Events' button is visible to the right of the dropdown.

You have to add a **Remark** to the application in the respective field.

## Attendance Correction/Special Functions

Expand the Attendance Correction panel to manually enter/edit the IN and OUT punch timings as required in the **Time** field.

You can also specify a **Special Function** such as a *Short Leave IN*, *Early-OUT Allowed* etc. to mark the entry or exit. An IN/OUT Reason can be selected if required.



The screenshot shows the 'Attendance Correction' panel. It is divided into two sections: '1' for IN and '2' for OUT. Each section has fields for Date, Time, Sp. Function, and Reason. In the IN section, the Date is 04/02/2017 and the Time is 09:00. In the OUT section, the Date is 04/02/2017 and the Time is 18:30. The Sp. Function and Reason fields are currently set to 'Select'.

The punch correction will be authorized automatically if it is done by system administrator.

Example:

Consider a user having following attendance correction for 03/08/2019(Week-Off) and 04/08/2019(Week-Off) on special function selected as Official Work Hour and Short Leave respectively. The punches are corrected as shown below:

For 03/08/2019:

Attendance Correction

1 IN  
Date 03/08/2019  
Time 11:00  
Sp. Function Official IN  
In Reason Select

2 OUT  
Date 03/08/2019  
Time 15:00  
Sp. Function Official OUT  
Out Reason Select

For 04/08/2019:

Attendance Correction

1 IN  
Date 04/08/2019  
Time 10:00  
Sp. Function ShortLeave IN  
In Reason Select

2 OUT  
Date 04/08/2019  
Time 17:30  
Sp. Function ShortLeave OUT  
Out Reason Select

## Break Punches

Expand the **Break Correction** panel to manually edit/enter punch timings for Break Start and Break End. To do this select an existing punch from the **Break Start** dropdown list as shown.

Break Correction

Break Start  
Punch  
Date  
Time

Punch1-08:30  
Punch2-12:08  
Punch3-12:32  
Punch4-17:02  
Punch5-  
Punch6-  
Punch7-  
Punch8-

The next available punch will automatically be selected as the **Break End** punch (vice versa, when editing the Break End punch timing i.e. the previous available punch is selected for Break Start).

Break Correction

Break Start  
Punch Punch2-12:08  
Date 04/10/2013  
Time 12:08

Break End  
Punch Punch3-12:32  
Date 04/10/2013  
Time 12:32

If no punch is available before or after the selected punch, a new punch can be created by manually entering the punch timing.


1. Enter/Edit the selected punch timing as shown.



For N punch user, break punch correction is done from All Punches window from Attendance Correction.

2. Click **Save**  to successfully update the manual corrections on the system.

## Attendance Details

Expand the **Attendance Details** panel to view details such as the user's Work Hours, Break Hours, Authorized Overtime Hours etc. for the selected date. Select the  button to view additional details.



$\text{Authorized Overtime} = \text{Authorized OT} + \text{Manual Credit OT} - \text{Manual Debit OT}$

Now let us see an example to understand how punch posting works when Break and Short Leave/Official Hours are taken consecutively,

Consider Shift Start = 09:00, Shift End = 18:30, Break Start = 13:00 and Break End = 13:50 , Break Deduction Type is set as Actual Break Duration. Short Leave Authorization is required.

Punch1	Punch2	Punch3	Punch4
09:00	12:00 Short leave Out	14:00 Break End	19:00

Punch1	Punch2	Punch3	Punch4
	Application with 'Short Leave Start' as 12:00 and 'Short Leave End' as 13:00 (Configured Break Start) is created.	When punch of 14:00 arrives, a new application with Short Leave start as 12:00 and Short Leave end as 14:00 will be sent. Also the punch at 12:00 is copied at Break start field. Hence the break hours are calculated as per the configurations.	

Break Details	Punch1	Punch2	Punch3	Punch4	Break duration	Short leave duration
Break deviation is allowed	09:00	12:00 Short leave Out	13:50 Break End	19:00	00:50 (From 13:00 to 13:50)	01:00 (From 12:00 to 13:00)
Break deviation is not allowed	09:00	12:00 Short leave Out	13:30 Break End	19:00	00:30 (From 13:00 to 13:30)	01:00 (From 12:00 to 13:00)



*If the Applied duration (End time of short leave - Start of short leave) is greater than the maximum limit of short leave or less than the Minimum limit of short leave then Posted duration will be 00:00 hours.*

Suppose the range of short leave is 00:01 to 00:90 hours.

Punch1	Punch2	Punch3	Punch4	Applied Duration	Posted Duration
09:00	13:00	13:30	16:00 Short leave Out	02:30	00:00 (As 02:30 00:90)



*If the Grace in Shift Late-IN is allowed then the grace duration will be added to the short leave duration provided the total short leave duration does not exceed the maximum range of short leave allowed.*

Suppose the grace for Late-IN is 30 minutes. Short leave duration is of 90 minutes.

Punch1	Punch2	Punch3	Punch4	Short leave duration
09:30 (30 minutes from shift start)	13:00	13:30	17:30 Short leave Out (60 minutes before the shift ends)	00:90 (30 minutes + 60 minutes)

Case1: If the Punch1 is at 09:40 then it will not be added to the short leave duration.

Case2: If the Punch4 is at 17:00 then 90 minutes of short leave is utilized so no more addition of 30 minutes of grace.



## On Behalf Account User

### Attendance Correction Application

To correct the attendance manually for the desired user, click **Time & Attendance > Utilities > Attendance Correction**.



*Attendance Corrections application restrictions will be applicable as configured in the Attendance Policy. To know more refer to. [“Attendance Correction-Short Leave/Official Hours Application Restrictions”](#)*

The **Attendance Correction** page will open as follows:

Date	Shift	1st Half	2nd Half	First IN	Last OUT	Work Hours
06/10/2021	AB	AB				
07/10/2021	AB	AB				
08/10/2021	AB	AB				
09/10/2021	AB	AB				

**User:** Select a User from the user selection picklist whose attendance correction is to be done. The selected user's attendance data for the last attendance period will be loaded in the right side grid.

**Attendance Date:** Select the date from the calendar button or select the date from the right grid for which manual correction is to be done.

By default, attendance correction for the selected user will be allowed for any date within the last attendance period. However, to change this, click the *Set Modification Allowed Selection* button to define a period within which attendance correction should be allowed. You can select custom period of week or months by selecting the required option.

Change the **Shift/Day** marking, if required.



*If shifts are updated from Attendance Correction, these will be treated as Attendance Correction Application.*

*If shifts are changed from Attendance Correction and an existing Shift Change Application for the same is pending, then a validation message will appear and the same will not be possible from Attendance Correction.*

*Shifts are changed from multiple locations, then in such cases the last approved shift change will be taken into consideration. To know more refer to [“Shift Change Application/Approval”](#).*

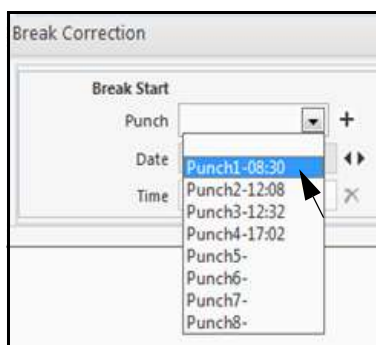
You have to add a **Remark** to the application in the respective field.

Click to expand the **Attendance Correction** collapsible panel to manually enter/edit the IN and OUT punch timings as required in the **Time** field.

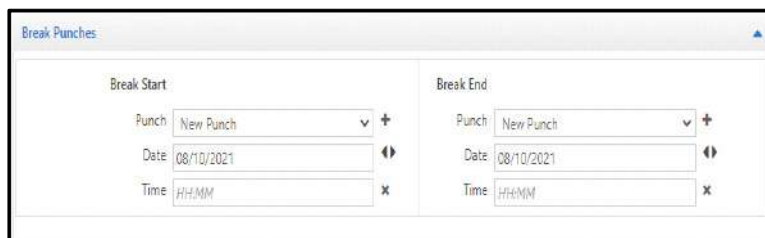
The correction application will be sent to the RIC or will be authorized automatically, depending on the rights assigned to the On Behalf Account User. For more details refer "[On Behalf System Account User](#)". To receive a notification alert once the final verdict for such application is provided by the RIC, make sure you have configured the desired Mobile Number/Email ID in "[Optional](#)" as well as configure the Attendance Correction Approval/Rejection Alert parameters. For details refer to "[Configuring Alert Messages](#)".

### Break Punches

Click to expand the **Break Correction** collapsible panel to manually edit/enter punch timings for Break Start and Break End. To do this select an existing punch from the **Break Start** dropdown list as shown.

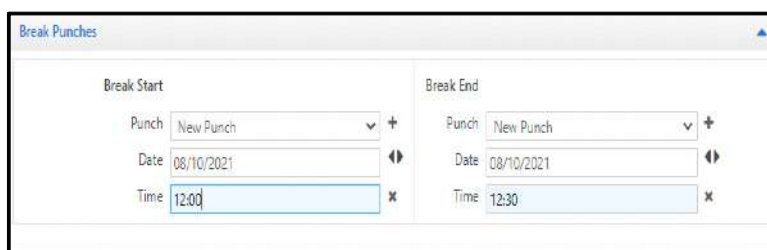



The next available punch will automatically be selected as the **Break End** punch (vice versa, when editing the Break End punch timing i.e. the previous available punch is selected for Break Start).




If no punch is available before or after the selected punch, a new punch can be created by manually, by clicking **Add** or selecting the **New Punch** option and then entering the punch timing.

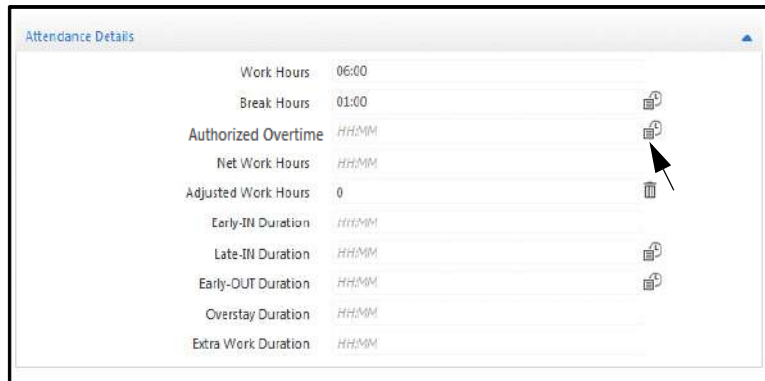
Enter/Edit the selected punch timing as shown.



Click **Save**  to successfully update the manual corrections on the system.

## Attendance Details

Expand the **Attendance Details** panel to view details such as the user's Work Hours, Break Hours, Authorized Overtime Hours etc. for the selected date. Select the  button to view additional details.



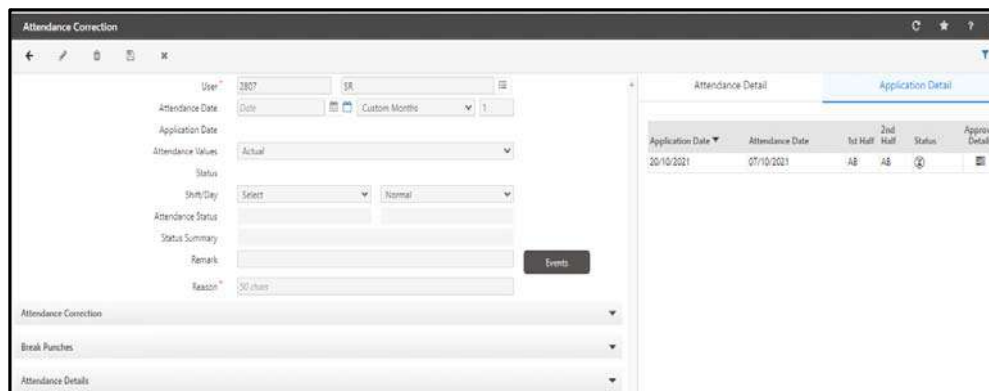
The 'Attendance Details' form displays various time-related fields for a selected user and date. The fields are arranged in a list with corresponding input types (text, time, or duration). A mouse cursor is pointing at the document icon next to the 'Authorized Overtime' field.

Field	Value
Work Hours	06:00
Break Hours	01:00
Authorized Overtime	HH:MM
Net Work Hours	HH:MM
Adjusted Work Hours	0
Early-IN Duration	HH:MM
Late-IN Duration	HH:MM
Early-OUT Duration	HH:MM
Overstay Duration	HH:MM
Extra Work Duration	HH:MM



*Authorized Overtime = Authorized OT + Manual Credit OT - Manual Debit OT*

To view the status of the application, click the **Application Details** tab in the right grid.



The 'Attendance Correction' form is divided into two main sections. The left section contains input fields for user selection, application date, attendance values, status, shift/day, attendance status, status summary, remark, and reason. The right section contains a tabbed interface with 'Attendance Detail' and 'Application Detail' tabs. The 'Application Detail' tab is active, showing a table with columns for Application Date, Attendance Date, 1st Half, 2nd Half, Status, and Approval Details.

Application Date	Attendance Date	1st Half	2nd Half	Status	Approval Details
20/10/2021	07/10/2021	AB	AB		

## Short Leave/Official IN-OUT Application

To apply for Short Leave/Official IN-OUT Application manually for the desired user, click **Time & Attendance > Utilities > Short Leave/Official IN-OUT Entry**

The **Short Leave/Official IN-OUT Entry** page will open as follows:

Date	Shift	1st Half	2nd Half	First IN	Last OUT	Work Hours
06/10/2021	AB	AB		10:58	11:46	00:48
07/10/2021	AB	AB		14:47	19:25	03:38

**User:** Select a User from the user selection picklist whose Short Leave/Official IN-OUT Application is to be done. The selected user's data for the last attendance period will be loaded in the right side grid.

**Attendance Date:** Select the date from the calendar button or select the date from the right grid for which manual correction is to be done.

By default, Short Leave/Official IN-OUT for the selected user will be allowed for any date within the last attendance period. However, to change this, click the *Set Modification Allowed Selection* button to define a period within which correction should be allowed. You can select custom period of week or months by selecting the required option.

Click to expand the **Short Leave/Official Hours Entry** collapsible panel.

Under **IN/ OUT**, select the desired **Special Function** — *Short Leave IN, Official IN or Short Leave-OUT Official-OUT* to mark the entry or exit.






If required, you can enter the **Reason**. To do so, click **Edit** and enter the reason.

The correction application will be sent to the RIC or will be authorized automatically, depending on the rights assigned to the On Behalf Account User. For more details refer "[On Behalf System Account User](#)". To receive a notification alert once the final verdict for such application is provided, make sure you have configured the desired Mobile Number/Email ID in "[Optional](#)" as well as configure the Short Leave / Official Approval/ Rejection Alert parameters. For details refer to "[Configuring Alert Messages](#)".

## Attendance Details

Expand the **Attendance Details** panel to view details such as the user's Work Hours, Break Hours, Authorized Overtime Hours etc. for the selected date. Select the button to view additional details.

**Attendance Details**

Work Hours	06:00	
Break Hours	01:00	
Authorized Overtime	HH:MM	
Net Work Hours	HH:MM	
Adjusted Work Hours	0	
Early-IN Duration	HH:MM	
Late-IN Duration	HH:MM	
Early-OUT Duration	HH:MM	
Overstay Duration	HH:MM	
Extra Work Duration	HH:MM	



*Authorized Overtime = Authorized OT + Manual Credit OT - Manual Debit OT*

Click **Save**  to successfully update the corrections on the system.

To view the status of the application, click the **Application Summary** collapsible panel.

**Short Leave/Official IN-OUT Entry**

User: 2807 SR

Attendance Date: 08/10/2021

Shift/Day: GS Normal

Attendance Status: AB AB

Status Summary: AB Early-OUT


Events

Short Leave/Official Hours Entry

Attendance Details

Application Summary

Search

Start	End	Applied Duration	Posted Duration	Special Function	Status	Details
09:00	10:58	01:58	00:00	Short Leave	Approved	

Available Short Leave (Oct)

Date	Shift	1st Half	2nd Half	First IN	Last OUT	Work Hours
08/10/2021	GS	AB	AB	10:58	11:46	00:48
07/10/2021	GS	AB	AB	14:47	18:25	03:38

# Manual Status Correction

The *Manual Status Correction* functionality is applicable when the attendance status of multiple users is to be updated simultaneously for a selected date range. This allows the administrator to make uniform status changes (e.g. To mark all users “present”) for the same dates and apply it to all or selected users on COSEC.

To perform Manual Status Correction, click **Time & Attendance >Utilities > Manual Status Correction**.

The page will open as follows:

The screenshot shows the 'Manual Status Correction' web application interface. At the top, there are date selection fields for 'Date' with a range from 13/09/2020 to 13/09/2020. Below this is a 'Manual Status Marking' dropdown menu set to 'Full Day Present', and a 'Remark' text field containing 'Marked Status Manually'. The 'User Selection' section includes a 'Select Users' dropdown set to 'User Wise', and a search bar. Below the search bar is a table with columns 'User ID', 'Name', and a delete icon. The table contains five rows of data: (1, Athira), (10, Utsook), (11, Raj), (2, Rushi), and (3, Vipul). At the bottom of the table, it says '1 - 5 of 10 records'. A 'Process' button is located at the bottom center of the interface.

User ID	Name
1	Athira
10	Utsook
11	Raj
2	Rushi
3	Vipul

**Date:** Select a date range for the Manual Status Correction of selected users.

**Manual Status Marking:** Select a Manual Status Marking option depending upon the new status to be applied for the users.

**Remark:** Add a **Remark** while marking the status correction.

**Select Users:** Select the user by filtering the option of **User Wise**, **Group Wise** or **All** for whom the status correction is to be applied.

Click the **Process** button. The status for all selected users will be updated once the processing is complete. In the figure below, all the selected users will be marked **Full Day Present**.

**Manual Status Correction**

Date: 13/09/2020

Manual Status Marking: Full Day Present

Remark: Marked Status Manually

**User Selection**

Select Users: User Wise

User ID: 10 Name: Raj

Processing User - 8 [ 100% ]

Cancel

1 - 5 of 10 records

Process

Error List

The status for the user will be marked as PR as shown below:

**Daily Attendance View**

User: 1 Shalini

Attendance Period: May 2017

Date	Shift	First IN	Last OUT	1st Half	2nd Half	Late IN	Early OUT	Work Hours	Extra Work	Net Work	Break Hours	Actual Overtime	Authorized Overtime	Remark	Details
01/05/2017	GS			PR	PR										
02/05/2017	GS			PR	PR										
03/05/2017	GS			PR	PR										
04/05/2017	GS			PR	PR										
05/05/2017	GS			PR	PR										
06/05/2017	GS			PR	PR										
07/05/2017	GS - WO			—	—										
08/05/2017	GS			PR	PR										
09/05/2017	GS			PR	PR										
10/05/2017	GS			PR	PR										
11/05/2017	GS			PR	PR										
12/05/2017	GS			—	—										
13/05/2017	GS			—	—										
14/05/2017	GS - WO														

# Mark Group Attendance

The Mark Group Attendance page allows the SA to mark the attendance of group of people in a single go.

SA can upload group images of users and the system will recognize each user from the image and then it will mark their attendance automatically.



*For Group FR feature to work in ARGO FACE, ensure that:*

- *Free Scan is selected as the Capturing Mode.*
- *Server Assisted is selected as the FR Mode.*
- *the desired Identification Service is selected in COSEC Admin > License and Service. For more details refer Admin Management Portal User Manual.*


*For Group FR feature to work in ARGO and VEGA, ensure that*

- *Free Scan is selected as the Capturing Mode.*
- *Local or Server Assisted is selected as the FR Mode.*
- *if you select Server Assisted as the FR Mode, then the desired Identification Service is selected in COSEC Admin > License and Service. For more details refer Admin Management Portal User Manual.*

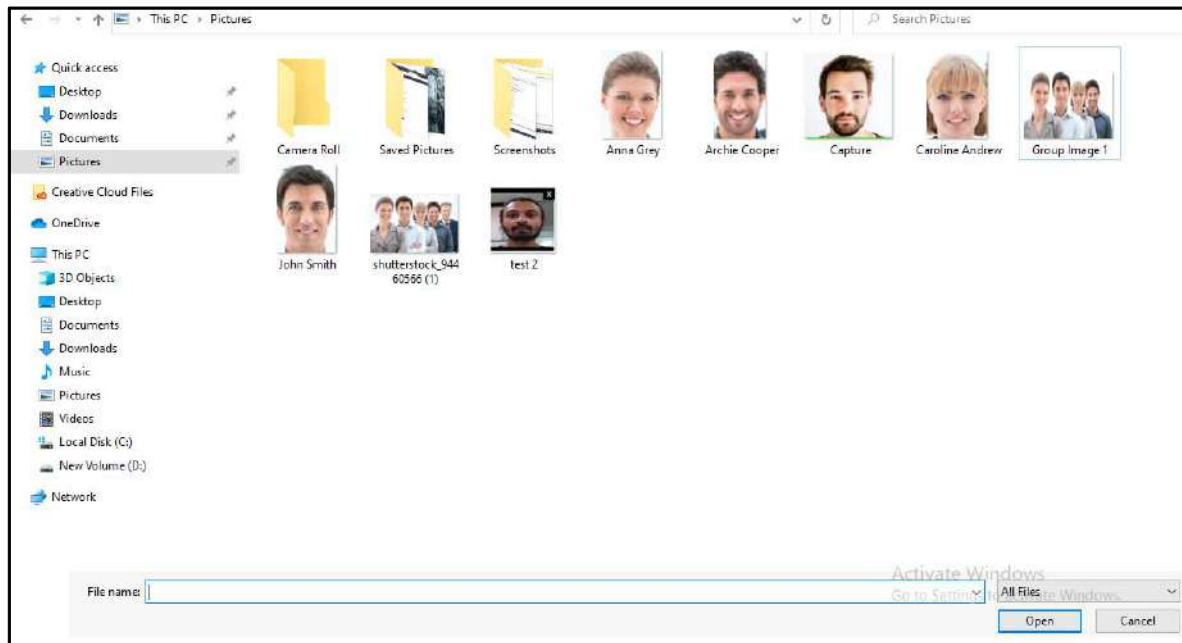
*For details refer to “[ARGO Door](#)”, “[VEGA Door](#)” and “[ARGO FACE Door](#)”.*

To perform Mark Group Attendance, click **Time & Attendance > Utilities > Mark Group Attendance** and the following page appears:

Click **Add** to upload a new group image and configure the following parameters:

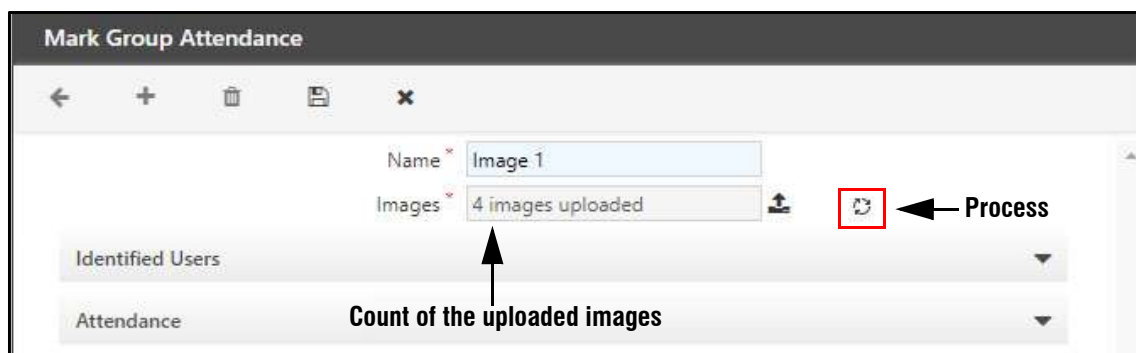
- **Name:** Enter the desired **Name**.
- **Images:** To upload group image/s of users, click **Upload File**  and the dialog box appears as shown below.





Now select the desired image/s. Here, the image format supported are .jpg, and the size of a single image must be a maximum of 15 MB.


You can upload maximum of 20 photos at a time. The text box displays the count of the uploaded images.




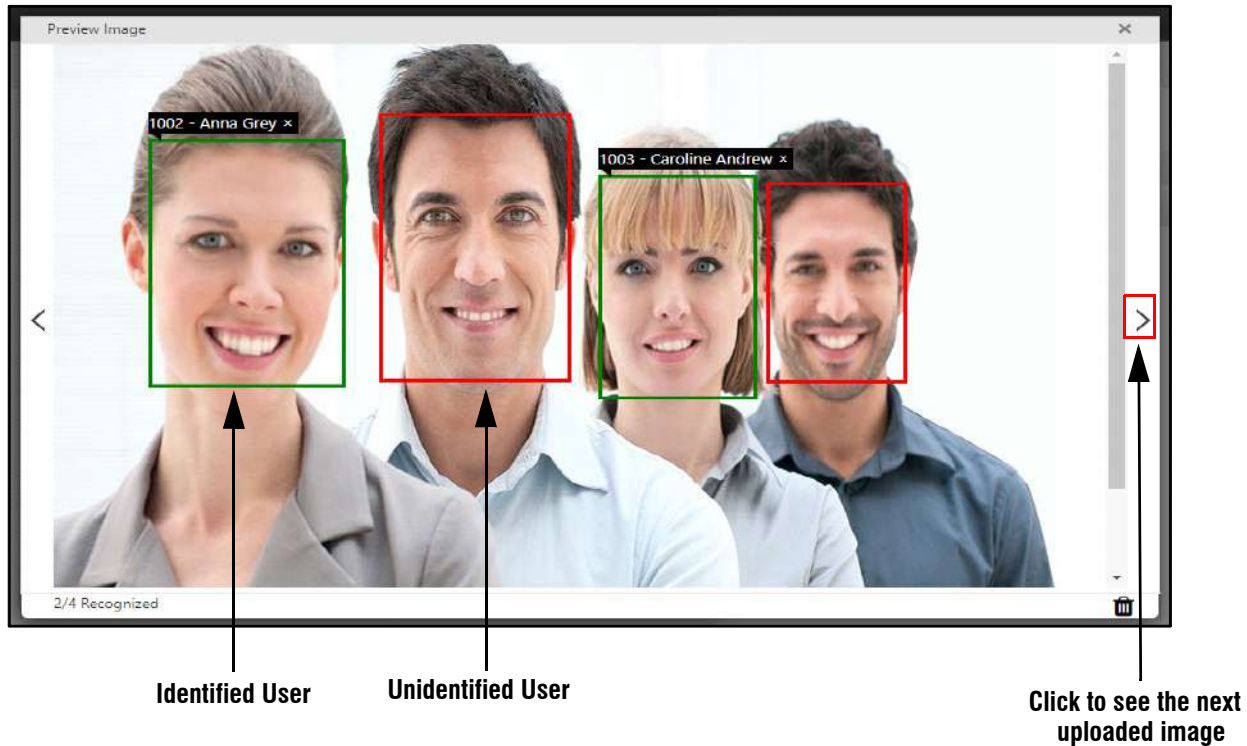
Once you upload the image/s, **Process**  icon will be visible.

Click **Process** to perform the Face Recognition (FR) process on the uploaded image/s.

Once the FR process is successfully performed on these images, the list of recognized users will be added and displayed in the **Identified Users** list. For more information, refer ["Identified Users"](#).

After the FR process, the **Preview**  icon will be visible which will allow you to preview the uploaded group image/s.

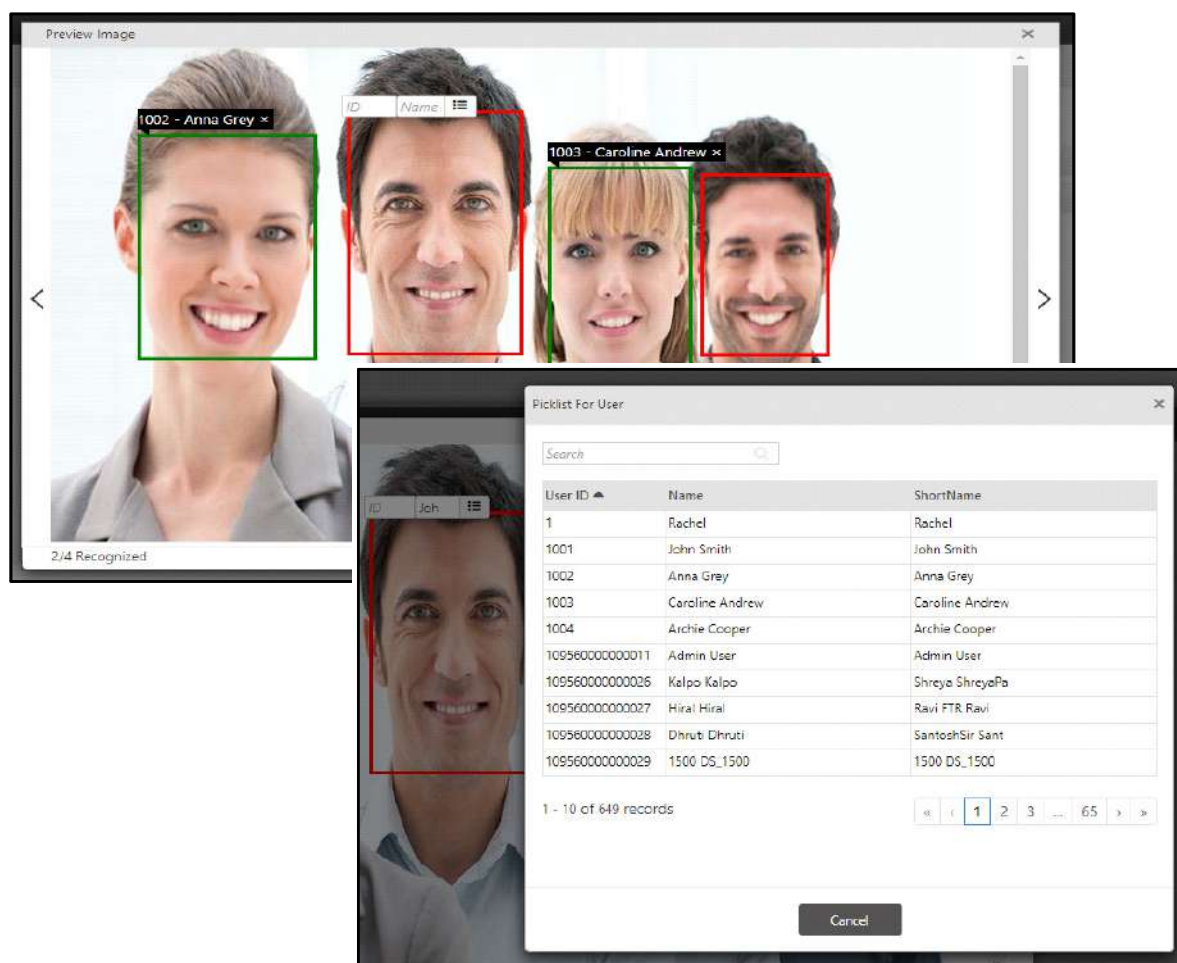
Click **Preview**  icon and the **Preview Image** window appears with the uploaded image/s as shown below.



The faces identified by the system will have a green frame with a name and ID tag mentioned.

Now, there can be few faces in the group image/s which are not identified by the system. Such faces will have a red frame. You can manually tag the name against such faces of the users from the **Preview Image** window.

To manually tag the names against the faces of the users, click on the red frame and a user picklist will be displayed as shown below.

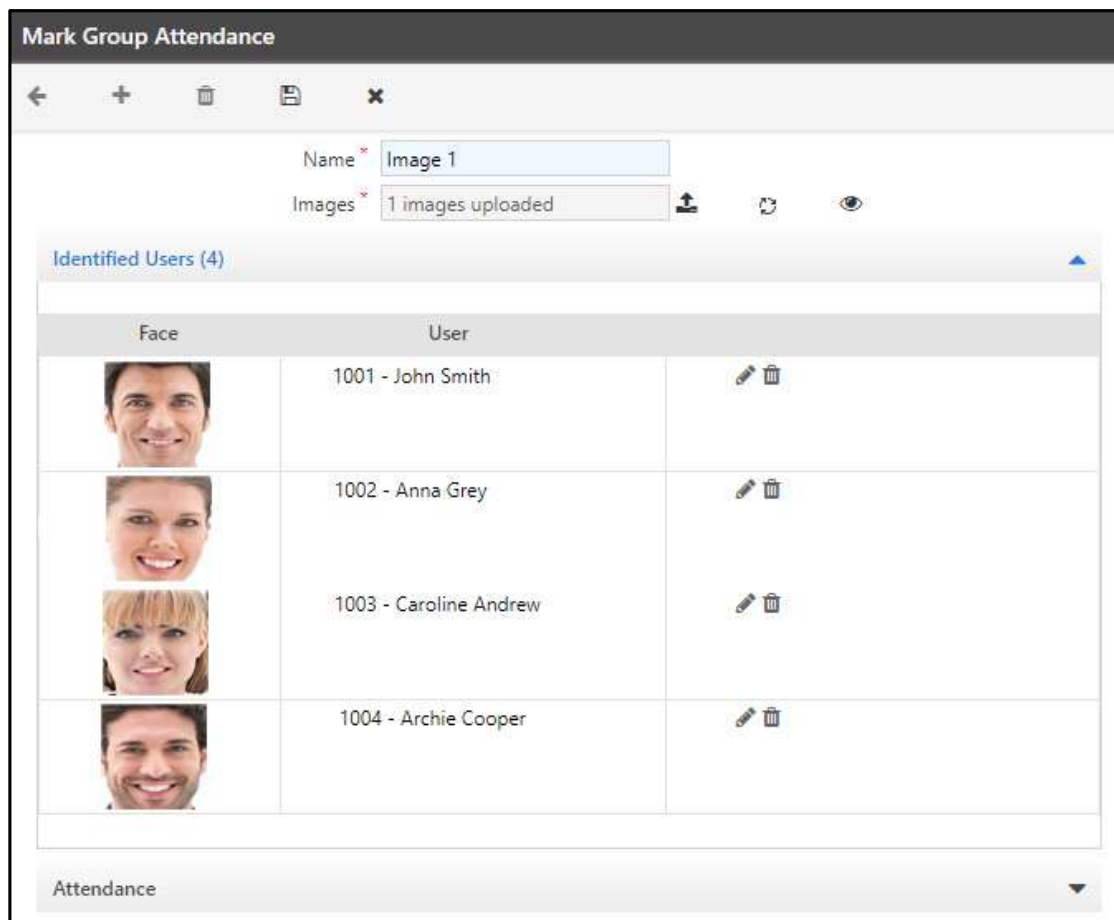



Select the respective user name from the picklist or manually enter the user name/ID.

Then these faces will be added to the **Identified Users** list along with the system identified users.

## Identified Users

- It displays the list of the identified users after the FR Process. For SA, all recognized users will be displayed in this list.



- Identified Users include system recognized users as well as manually tagged users from the photos.
- Attendance will be marked for only those users that are displayed in this list.
- Single face of the user will be displayed in the grid along with the User's ID and Name for SA to authenticate the list.
- You can also edit the user name against the faces of users available in the image. To edit, click **Edit**  icon.

←

+

🗑️

💾

✕

Name

Image 1

Images

4 images uploaded





👤

🔄

👁️

Identified Users (4)

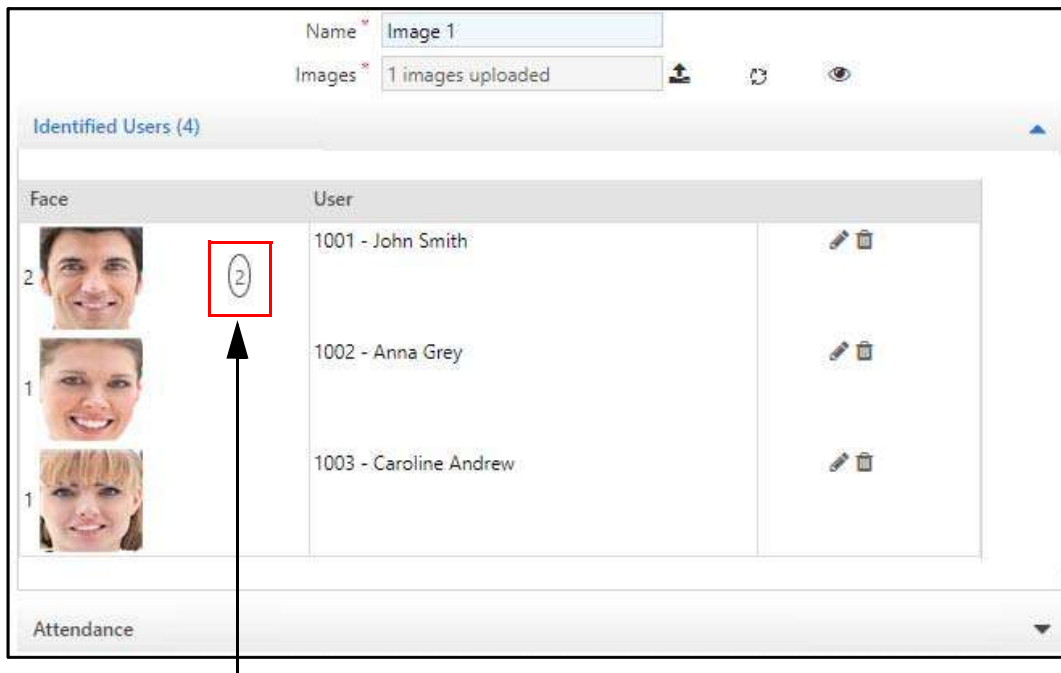
▲

Face	User	
	<div>1001</div> <div>John Smith</div> <div>☰</div>	<div>✓ ✕</div>
	1002 - Anna Grey	✎ 🗑️
	1003 - Caroline Andrew	✎ 🗑️
	1004 - Archie Cooper	✎ 🗑️

Attendance

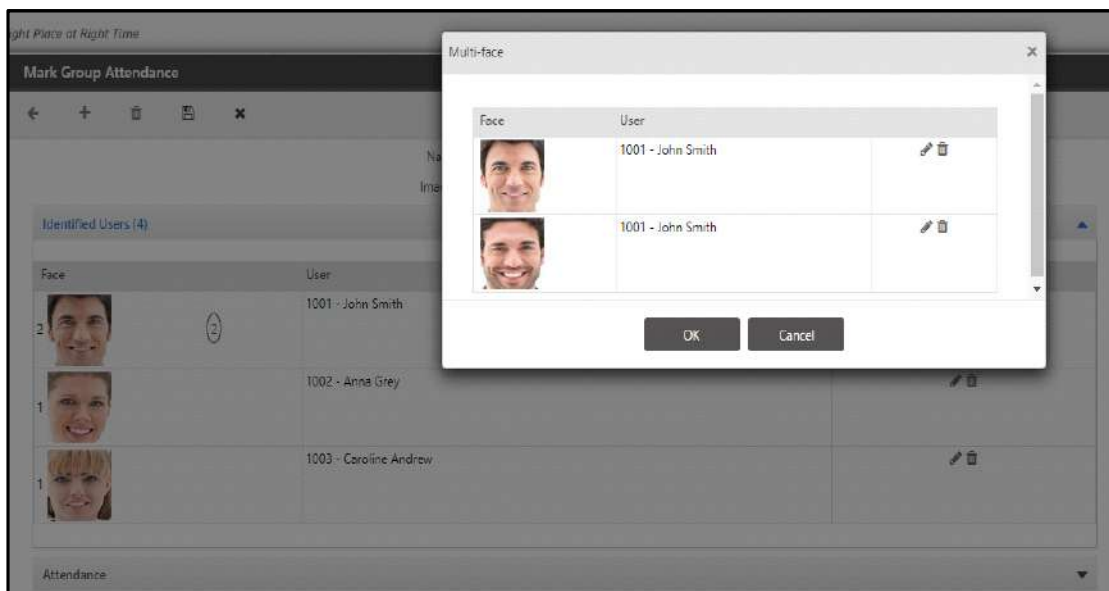
▼




- Select the respective user name from the picklist again or manually enter the desired user name/ID. Then click **OK** ✓. To discard, click **Cancel** ✕.
- If multiple faces of the same user are identified, then only single face will be displayed in the grid and the number of faces identified will be displayed as shown below.




#### Number of faces identified of a single user

- To view other identified faces of the same user, click on the numeric value of the identified faces of the user.
- Multi-face** window appears where you will be able to view more images of that user.




- You can also edit the user name against the faces in case of false identification. To edit, click **Edit** .
- Select the respective user name from the picklist again or manually enter the desired user name/ID. Then click **OK** . To discard, click **Cancel** .

- If same user is tagged against multiple faces, then entry of those faces will be merged and displayed as a single entry in the grid.
- To delete any entry of the identified user from the list, click **Delete** .

When any entry is deleted from the list, then the user tagged against that face will be untagged and that face will be considered as detected but not recognized.

## Attendance

To mark the attendance of the users in the group:

- Make sure there are one or more entries in the **Identified User** list to configure **Attendance**.
- Enter the desired **Date** and **Time** for which the attendance of the user is to be marked.
- Select the desired **Event** from the options — IN Punch or Out Punch.
- Select the desired **Special Function**.
- Select the desired **Location Selection** from the options — Configured Location or Custom.
  - If **Location Selection** is selected as Configured Location, then select the desired configured **Location** from the picklist.
  - If **Location Selection** is selected as Custom, then enter the Latitude/Longitude co-ordinates or click on the  icon and select the location manually.
- Enter the desired **Remark** for marking the attendance for the user.
- Click on the **Save** button. Once saved SA will be able to view the added entry but will not be allowed to edit the entry.
- SA can delete a group attendance entry by clicking on the **Delete**.
- On delete, images uploaded and Identified User list should be cleared for database.

# Manage Attendance

This page allows admin to handle single as well as multiple users' attendance efficiently. It allows various provisions like changing shift, applying leave/ tour/ c-off, marking status manually and regularizing user's attendance as well as shifting the punches automatically. Also you can do editing of Punches, viewing users' count based on filtering of exceptions and applying latest changes to other user's records.

Click **Time & Attendance > Utilities > Manage Attendance**. The Manage Attendance page is shown as below.

The screenshot shows the 'Manage Attendance' interface. At the top, there are navigation icons (back, forward, refresh). Below these, there are two date pickers: 'Date' with '01/08/2023' and '24/08/2023'. There are also two user picklists, both showing 'U2'. A 'View' button is located below the user picklists.

**Date:** Select the From and To Date to view the attendance data for the selected date range.

**User:** Select the user from the picklist for whom the attendance data is to be viewed and managed.

Click the **View** button to view the attendance data in the grid. The user punches for the selected date are shown in the grid. When a single user is selected, the Attendance summary is displayed on the right side as shown below.

The screenshot shows the 'Manage Attendance' page with the 'View' button clicked. The main area displays a grid of attendance data for user 'U2' from 01/08/2023 to 07/08/2023. The grid has columns for each day of the week. The status for each day is shown in a colored box: 'PR' (Present) in green, 'AB' (Absent) in red, 'WO' (Week-Off) in blue, and 'H' (Holiday) in yellow. To the right of the grid, there is an 'Attendance Summary For 01/08/2023 - 24/08/2023' section. It includes a user profile icon and a list of attendance metrics.

User ID	User Name	01-Aug Tue	02-Aug Wed	03-Aug Thu	04-Aug Fri	05-Aug Sat	06-Aug Sun	07-Aug Mon
U2	U2	PR	PR	AB	AB	AB	WO	AB

Attendance Summary For 01/08/2023 - 24/08/2023	
Present	2
Absent	19
Leave	0
Tour	0
Week-Off	3
Holiday	0
Field Break	0
Rest Day	0
Work Hours	16:00
Extra Work	00:00
Net-Work Hours	00:00
Break Hours	02:00
Authorized Overtime	00:00
Generated Overtime	00:00
Hourly Paid Leave	00:00
Hourly Unpaid Leave	00:00

Click on **Filter**  to select the multiple users based on Exceptions or Enterprise groups.

See ["Exception Selection" on page 1986](#).

## User Selection

For multiple user selection, the options are:

- **User wise:** Individual user can be selected from the picklist
- **Group wise:** Users can be selected based on the selection of enterprise group.
- **All:** All the active users can be selected.



More Filter

Exception Selection      User Selection

Select Users: User Wise

User\* User Wise  
Group Wise  
All

Apply    Cancel

More Filter

Exception Selection      User Selection

Select Users: User Wise

User\* ID    Name

Search

User ID	Name	
3	Nilam	
4	Shalini	
5	Chirag	

Apply    Cancel

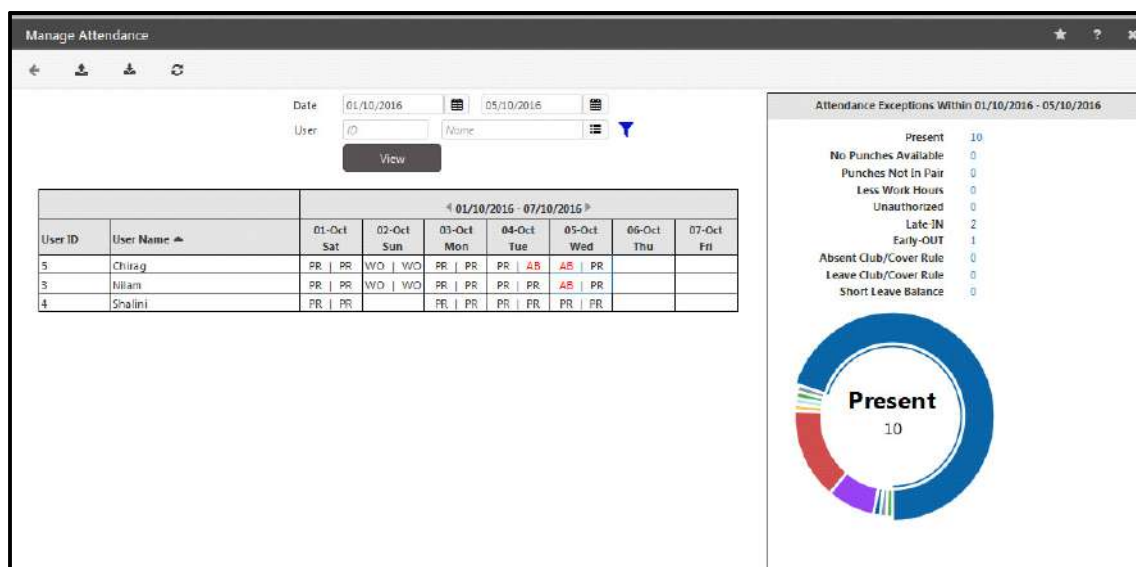
After **applying** the multiple user selection, click **View** button to view the attendance status of multiple user for selected date.

Date 01/10/2016    05/10/2016

User ID    Name

View

When multiple users are selected, Count of users according to the configured exceptions and selected date-range is displayed on right side as shown below.



## Shift Punch



This is applicable when **Maximum Punches to be considered** is set as 2,4,6,8 or 12. For details, refer to "T&A" in "Configuring Users".

There may be multiple shifts in an organization. In such cases, if any user punches after a long overstay in the night shift, then the last OUT punch will be considered in the next day. For rectification, you have to delete that particular punch from next day and add it in the same day manually.

To shift punches you need to manually adjust the entire, this is tedious and time consuming, hence the provision to shift punches automatically has been provided.

Let us understand this with the help of an example:

Shift 1: 19:00 to 03:00

Shift 2: 04:00 to 12:00

U1 IN-Punch on 01-08-2023:1900

U1 OUT-Punch on 02-08-2023: 11.00

The system considers IN-Punch for 01-08-2023 as 19:00. But instead of considering 11.00 as OUT-Punch for 01-08-2023, it considers it as IN-Punch for 02-08-2023.



In this case the you need to adjust the entries manually. Two manual entries need to be made, one for OUT-Punch on 01-08-2023 and another for the IN-Punch on 02-08-2023.

To avoid this the there are two buttons provided as **PREVIOUS** and **NEXT**.

If you wish to move the Punches of 02-08-2023 to 01-08-2023, click the **PREVIOUS** button. The punch time along with the date will be shifted to 01-08-2023.

Manage Attendance

Date: 01/08/2023 28/08/2023  
User: U1 U1  
View

User ID	User Name	01-Aug Tue	02-Aug Wed	03-Aug Thu	04-Aug Fri	05-Aug Sat	06-Aug Sun	07-Aug Mon
U1	U1	IN   AB	IN   AB	AB   AB	AB   AB	AB   AB	WO   WO	AB   AB

02/08/2023 - Punches Not In Pair

U1 - U1  
NS IN AB

Attendance Details  
Work Hours: 14:34M  
Break Hours: 14:34M

Actual Punches  
Date: 02/08/2023 Time: 06:00  
Sp. Function: Select In Reason: Select  
Date: 02/08/2023 Time: 14:34M  
Sp. Function: Select Out Reason: Select  
<< PREVIOUS NEXT >>

Suggested Changes  
Regularizing With: Manual Entry  
Target Work Hours: 0

If you wish to move the punches of 01-08-2023 to 02-08-2023, then click the **NEXT** button. The punch time along with the date will be shifted to 02-08-2023.

In this way at the click of a button the punches are shifted to either previous day or next day. In this case the punches are shifted to 01-08-2023.

Manage Attendance

Date: 01/08/2023 28/08/2023  
User: U1 U1  
View

User ID	User Name	01-Aug Tue	02-Aug Wed	03-Aug Thu	04-Aug Fri	05-Aug Sat	06-Aug Sun	07-Aug Mon
U1	U1	PR   PR	AB   AB	AB   AB	AB   AB	AB   AB	WO   WO	AB   AB

01/08/2023 - Present

U1 - U1  
NS PR PR

Attendance Details  
Work Hours: 11:00  
Break Hours: 14:34M

Actual Punches  
Date: 01/08/2023 Time: 10:00  
Sp. Function: Select In Reason: Select  
Date: 02/08/2023 Time: 06:00  
Sp. Function: Select Out Reason: Select  
<< PREVIOUS NEXT >> << PREVIOUS NEXT >>

Suggested Changes  
Regularizing With: Manual Entry  
Target Work Hours: 0




While shifting punches, Special Functions will not be considered.

If multiple punches are there then on click of **PREVIOUS**, all punches prior to the selected punch will also be shifted. The same functionality is also applicable if **NEXT** is clicked.

If **Exit Reader** check box is enabled, in such cases when punch shifting is been done accordingly sorting of punch will be performed and IN punch will be posted to IN position and OUT punch will be posted to OUT position.

## Exception Selection

Click the filter  button to configure the exceptions to filter users based on those exceptions.

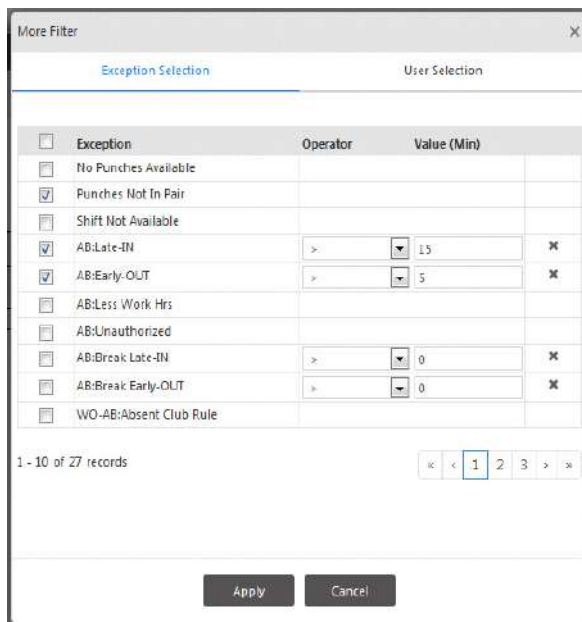
Check the boxes from **Exception Selection** list as shown below as per which the users will be filtered. Now select the users from the **User Selection**.

Then click **Apply** to save the selection. The users will be displayed based on configuration of exceptions.



*The filter applied on Date and exceptions will appear on OR condition.*

**Eg:** Suppose 5 users are selected from User selection but exceptions are available for only 3 users; then data for 3 users will be generated.



Exception	Operator	Value (Min)	
<input type="checkbox"/> No Punches Available			
<input checked="" type="checkbox"/> Punches Not In Pair			
<input type="checkbox"/> Shift Not Available			
<input checked="" type="checkbox"/> AB:Late-IN	>	15	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> AB:Early-OUT	>	5	<input checked="" type="checkbox"/>
<input type="checkbox"/> AB:Less Work Hrs			
<input type="checkbox"/> AB:Unauthorized			
<input type="checkbox"/> AB:Break Late-IN	>	0	<input checked="" type="checkbox"/>
<input type="checkbox"/> AB:Break Early-OUT	>	0	<input checked="" type="checkbox"/>
<input type="checkbox"/> WO-AB:Absent Club Rule			

1 - 10 of 27 records

1 2 3 >

Apply Cancel


**Exceptions** are those instances where the punch behavior of a user deviates from the expected organizational practice and requires a need for manual intervention by the HR administrator.

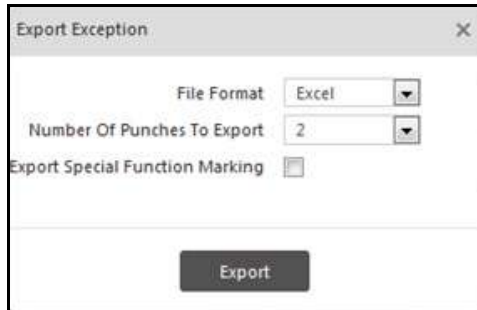
- For instance, absence of punches for a working day or a missing punch may be considered as an attendance exception. So if an employee forgets to punch IN/OUT on a particular working day and is marked absent for the whole day, the punches can be updated by the HR administrator by manual correction from "Manage Attendance".
- For exceptions related to time eg: AB:Late-IN, the operator can be selected and minimum value can be specified; comparing which the exceptions will be generated. The exceptions can be exported in excel sheet which can be manually corrected and then the sheet can be imported.
- Example: AB: Late-IN >15mins. The users who are marked Absent due to late-in of 15 mins or more within the selected date-range would be considered in exception.

## Export & Import

The user can export the exception data in XLS format to the local drive of a computer. This data can then be manually corrected and updated on the system by importing the excel sheet.

## Export

The data to be exported can be configured and selected from the “[Exception Selection](#)” filter. After selecting the exceptions, select the user from “[User Selection](#)” filter. Now click Export  button. The Export Exception page appears as shown below.



The dialog box titled "Export Exception" contains the following fields:

- File Format: Excel (dropdown menu)
- Number Of Punches To Export: 2 (dropdown menu)
- Export Special Function Marking: ☐
- Export button

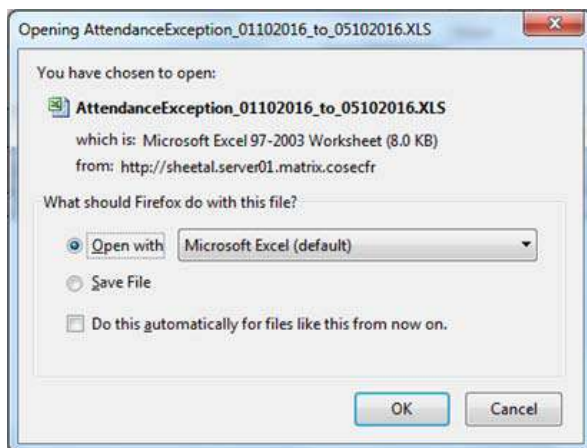
Select the file format as Excel, CSV or XLSX.

Select the **Number of Punches To Export** for each user using the drop-down list.

Select the **Export Special Function Marking** to export special Function IDs with Punches.

Click the **Export** button.

The following pop up window will appear prompting to open or save the file on a local drive.




After saving the file, click the download folder and open the file.

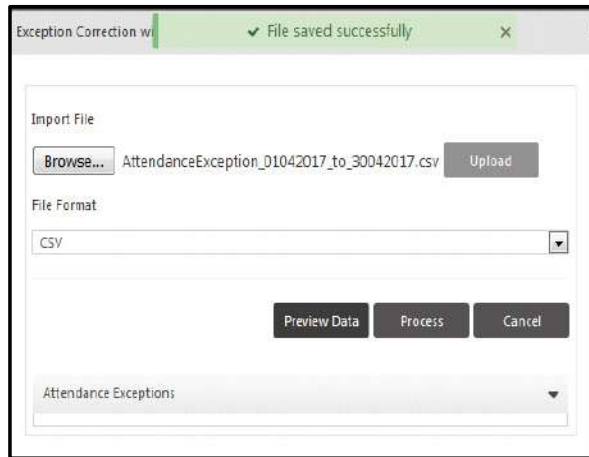
The exported exception file is shown as below.

A	B	C	D	E	F	G	H	I	J
Attendance Date	UserId	User Name	Shift	WO	PH	Punch1	Punch2	BreakStart	BreakEnd
04/10/2016	5	Chirag	GS	0	0	04/10/2016 09:00:00	04/10/2016 14:00:00		
05/10/2016	5	Chirag	GS	0	0	05/10/2016 14:00:00	05/10/2016 21:00:00		
05/10/2016	3	Nilam	GS	0	0	05/10/2016 13:45:00	05/10/2016 20:00:00		
01/10/2016	1	Rosy	GS	0	0	01/10/2016 09:45:00	01/10/2016 18:30:00		
05/10/2016	4	Shalini	GS	0	0	05/10/2016 09:30:00	05/10/2016 18:30:00		

## Import

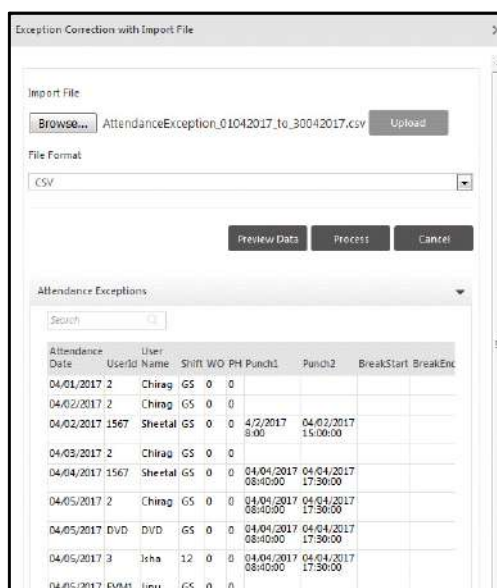
You can make the necessary manual corrections to the exported file. Save the file and note down the file location.

Click the **Import**  icon to import the exception file.



**Browse** the file and click **Upload** button to upload the manually corrected exception file.

Select a **File Format** (XLS or CSV) for uploading. You can preview the data by clicking **Preview Data** button. The changes made in data will be shown as below.



Attendance Date	User Id	User Name	Shift	WO	PH	Punch1	Punch2	BreakStart	BreakEnd
04/01/2017	2	Chirag	GS	0	0				
04/02/2017	2	Chirag	GS	0	0				
04/02/2017	1567	Sheetal	GS	0	0	4/2/2017 8:00	04/02/2017 15:00:00		
04/03/2017	2	Chirag	GS	0	0				
04/04/2017	1567	Sheetal	GS	0	0	04/04/2017 08:40:00	04/04/2017 17:30:00		
04/05/2017	2	Chirag	GS	0	0	04/04/2017 08:40:00	04/04/2017 17:30:00		
04/05/2017	DVD	DVD	GS	0	0	04/04/2017 08:40:00	04/04/2017 17:30:00		
04/05/2017	3	Isha	12	0	0	04/04/2017 08:40:00	04/04/2017 17:30:00		
04/05/2017	PMM	Jimu	GS	0	0				

Click **Process** button to process the imported data.

## Managing Attendance and Exceptions

### To view Attendance Exception count

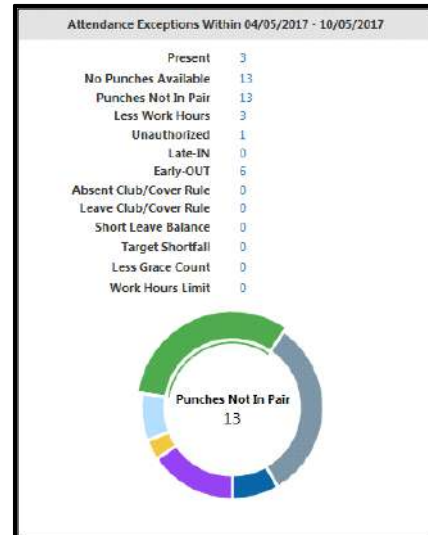
Admin can filter out the selected users on the basis of applied exceptions.

Example: The exceptions for multiple users are selected as shown below. The updated Attendance Exception count will be displayed after clicking Refresh button as shown below.

Exception	Operator	Value (Min)	
<input type="checkbox"/> No Punches Available			
<input type="checkbox"/> Punches Not In Pair			
<input type="checkbox"/> Shift Not Available			
<input checked="" type="checkbox"/> AB:Late-IN	=	0	%
<input checked="" type="checkbox"/> AB:Early-OUT	>	0	%
<input checked="" type="checkbox"/> AB:Less Work Hrs			
<input checked="" type="checkbox"/> AB:Unauthorized			
<input type="checkbox"/> AB:Break Late-IN	>	0	%
<input type="checkbox"/> AB:Break Early-OUT	>	0	%
<input type="checkbox"/> WO-AB/Absent Club Rule			

1 - 10 of 35 records

Apply Cancel



### To view user's attendance summary

To view user's attendance summary for selected date-range by clicking on User ID.

The Attendance displays — Work hours, Break hours, Late duration, Early duration, Overtime details, Present, Absent, Leave, Tour, Week Off, Holiday, Field Break, Rest Day, Extra work, Net Work Hours.

01/08/2023 - Present

User ID: U2 - U2

Buttons: GS, PR, PR

**Attendance Details**

Work Hours: 08:00  
Break Hours: 01:00


**Actual Punches**

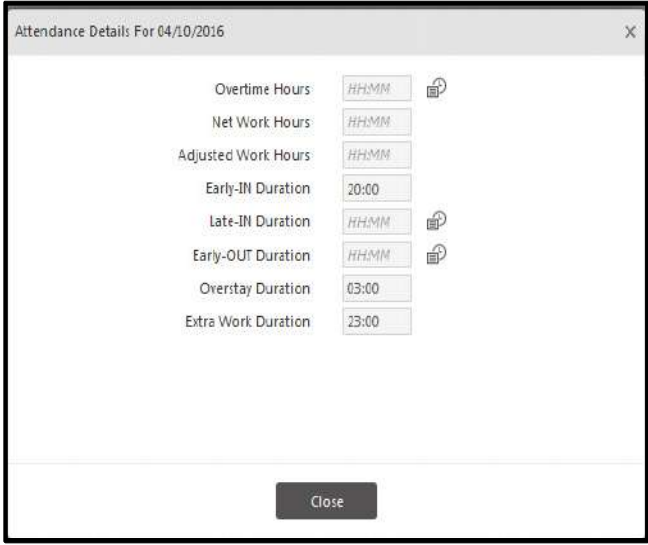
Date: 01/08/2023  
Time: 09:00  
Sp. Function: Select  
In Reason: Select

Date: 01/08/2023  
Time: 18:00  
Sp. Function: Select  
Out Reason: Select




**Suggested Changes**

Regularizing With: Manual Entry  
Target Work Hours: 0


The **Attendance Details** can be viewed by clicking More Attendance Details icon 

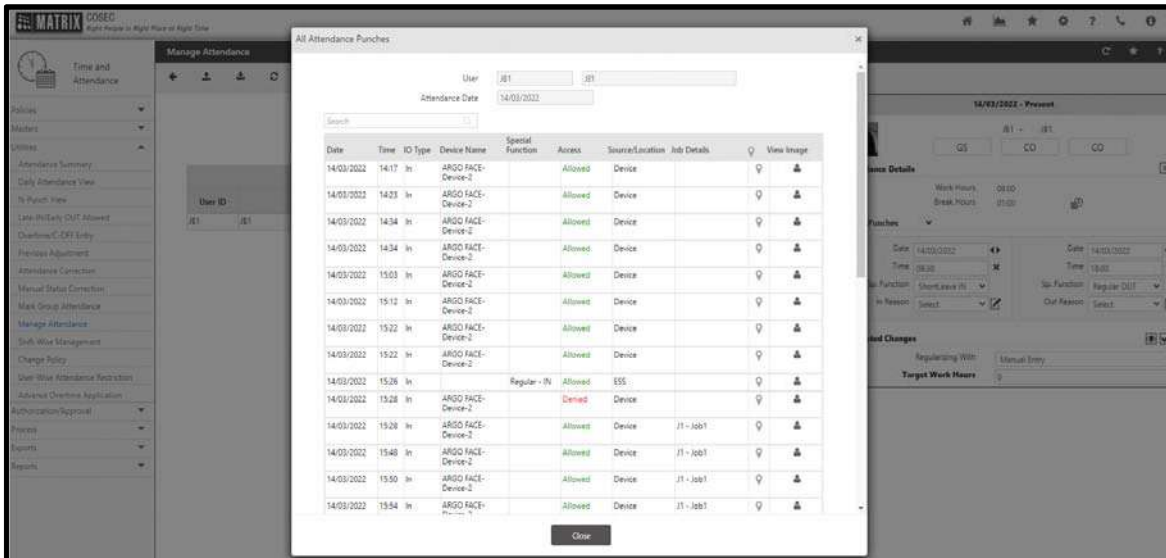


Attendance Details For 04/10/2016

Overtime Hours	HH:MM	
Net Work Hours	HH:MM	
Adjusted Work Hours	HH:MM	
Early-IN Duration	20:00	
Late-IN Duration	HH:MM	
Early-OUT Duration	HH:MM	
Overstay Duration	03:00	
Extra Work Duration	23:00	

Close

The **Attendance events** can be viewed by clicking 



Matrix COSEC















Manage Attendance

User ID: J81

All Attendance Punches

User: J81

Attendance Date: 14/03/2022

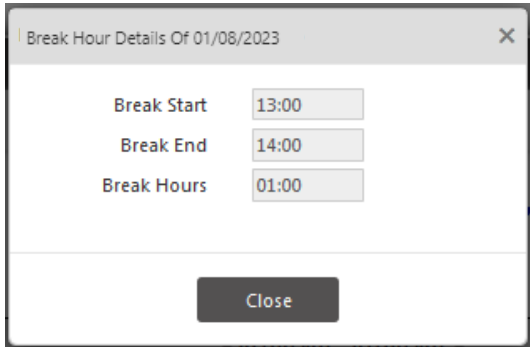
Date	Time	IO Type	Device Name	Special Function	Access	Source/Location	Job Details	View Image
14/03/2022	14:17	In	ARGO FACE-Device-2		Allowed	Device		
14/03/2022	14:23	In	ARGO FACE-Device-2		Allowed	Device		
14/03/2022	14:34	In	ARGO FACE-Device-2		Allowed	Device		
14/03/2022	14:34	In	ARGO FACE-Device-2		Allowed	Device		
14/03/2022	15:03	In	ARGO FACE-Device-2		Allowed	Device		
14/03/2022	15:12	In	ARGO FACE-Device-2		Allowed	Device		
14/03/2022	15:22	In	ARGO FACE-Device-2		Allowed	Device		
14/03/2022	15:22	In	ARGO FACE-Device-2		Allowed	Device		
14/03/2022	15:26	In	ARGO FACE-Device-2	Regular - IN	Allowed	ESS		
14/03/2022	15:28	In	ARGO FACE-Device-2		Denied	Device		
14/03/2022	15:28	In	ARGO FACE-Device-2		Allowed	Device	J1 - Job1	
14/03/2022	15:48	In	ARGO FACE-Device-2		Allowed	Device	J1 - Job1	
14/03/2022	15:50	In	ARGO FACE-Device-2		Allowed	Device	J1 - Job1	
14/03/2022	15:54	In	ARGO FACE-Device-2		Allowed	Device	J1 - Job1	

Close



If Map is not loaded; check the network connection of your PC or check the value of Google API Key from Admin Module > System Configuration > Global Policy > Basic tab.

The **Break hour** details can be viewed by clicking . The break start and break end is shown as below.



Break Hour Details Of 01/08/2023

Break Start	13:00
Break End	14:00
Break Hours	01:00

Close



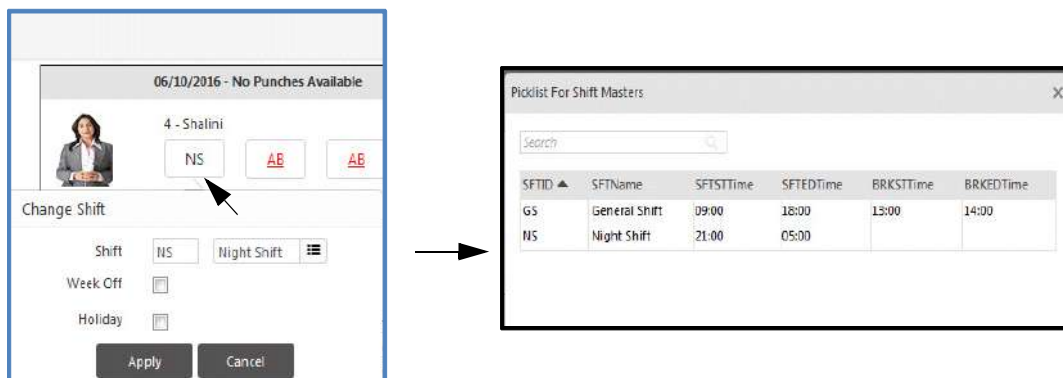
## To do Attendance Correction

Selecting any date from user's daily attendance grid and correct it using available options.

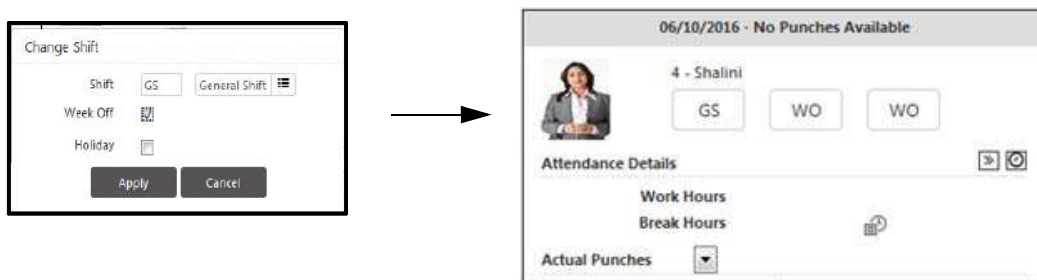
- **Change Shift:**

If no shift has been assigned to the user then you can assign the shift. You can change and assign another shift. Also WO/Holiday can be assigned on the selected day.

Click on the shift to be changed as shown below. The **Change Shift** pop up appears. Click the picklist  and select the shift to be replaced.



The GS shift is selected and Week Off is enabled as shown below. Click on Apply. The shift on 6/10/16 changes to GS-WO.



*If Shifts are changed from Manage Attendance, these requests will be auto-approved and the shifts will be updated. The Shift Change Alert will be triggered, if configured. For details, refer to [“Configuring Alert Messages”](#).*

*Shifts are changed from multiple locations, then in such cases the last approved shift change will be taken into consideration. To know more refer to [“Shift Change Application/Approval”](#).*

- **Mark Manual Status:**

The user's attendance status for the selected date is "AB" (absent) for the first half, and is to be marked present.

		01/08/2023 - 07/08/2023						
User ID	User Name	01-Aug Tue	02-Aug Wed	03-Aug Thu	04-Aug Fri	05-Aug Sat	06-Aug Sun	07-Aug Mon
U2	U2	PR   PR	PR   PR	AB   PR	AB   AB	AB   AB	WO   WO	AB   AB

AB:Late-IN

Click on AB and select the option **Mark Status Manually**. Now select the required option for **Manual Status Marking** from the drop down options. Here "First Half Present" is selected as shown below. Then click Apply.

After the manual status is selected and applied, the punch status will be changed from AB to PR as shown below.

Manage Attendance

✓ Saved Successfully

Date: 01/08/2023 to 24/08/2023

User: U2

View

User ID	User Name	01-Aug Tue	02-Aug Wed	03-Aug Thu	04-Aug Fri	05-Aug Sat	06-Aug Sun	07-Aug Mon
U2	U2	PR   PR	PR   PR	PR   PR	AB   AB	AB   AB	WO   WO	AB   AB

03/08/2023 - AB:Late-IN

U2 - U2

GS PR PR

Attendance Details

Work Hours: 05:00  
Break Hours: 01:00

Actual Punches

Date: 03/08/2023  
Time: 12:00  
Sp. Function: Select  
In Reason: Select

Date: 03/08/2023  
Time: 18:00  
Sp. Function: Select  
Out Reason: Select

Suggested Changes

Regularizing With: Manual Entry  
Target Work Hours: 0



For a particular user, if **Restrict Half Day Considerations** is enabled in the page **User > User configuration > T&A**, then in **Manual Status Marking** drop down list, only full day attendance options will be visible and all the other half day options will be restricted for that particular user as shown in the screen below

- **Apply Leave/Tour/C-OFF**

The user's attendance status for the selected date is "AB" (absent), and is to be applied for full day leave. Click on AB and select the option **Apply Leave**.

		01/08/2023 - 07/08/2023						
User ID	User Name	01-Aug Tue	02-Aug Wed	03-Aug Thu	04-Aug Fri	05-Aug Sat	06-Aug Sun	07-Aug Mon
U2	U2	PR   PR	PR   PR	PR   PR	AB   AB	AB   AB	WO   WO	AB   AB

No Punches Available

Manage Attendance

04/08/2023 - No Punches Available

U2 - U2

GS AB AB

Attendance Details

Work Hours: 05:00  
Break Hours: 01:00

Actual Punches

Date: 04/08/2023  
Time: 10:00  
Sp. Function: Select  
In Reason: Select

Date: 04/08/2023  
Time: 18:00  
Sp. Function: Select  
Out Reason: Select

Suggested Changes

Regularizing With: Leave  
Leave: Select  
Current Balance: 000  
Reason: 00 Other

Now select the leave to be applied from the drop down list. You can select the first half/second half /full day. The available leave balance for the selected leave is shown in **Current balance**. You can mention the reason for applying the leave.

Then click **Apply**. The leave will be applied on the selected date as shown below.

		01/08/2023 - 07/08/2023						
User ID	User Name	01-Aug Tue	02-Aug Wed	03-Aug Thu	04-Aug Fri	05-Aug Sat	06-Aug Sun	07-Aug Mon
U2	U2	PR   PR	PR   PR	PR   PR	SL   SL	AB   AB	WO   WO	AB   AB



*The user must have leave balance to be applied for leave application.*

*Also the medical certificate is required for applying certain leave eg: Sick leave. The requirement of the certificate depends on the leave configuration of the company.*


*The application for Tour/ C-OFF can be done in same way as applying for Leave.*

#### • **Edit Regular and Break Punches**

Regular Punches can be modified in two ways:

- Select each punch and edit each punch  
OR
- Using the Shift Punches to Previous or Next Day feature

#### **Editing Punches Manually**

1. To add or Edit **Regular Punches**, Select "Actual Punches" by clicking .

Enter the **time** for Punch IN and Punch OUT as shown below. You can select any special function for eg: Official IN/OUT, Short leave IN/OUT while adding or editing the punches.

**05/08/2023 - No Punches Available**

U2 - U2

GS AB AB

**Attendance Details** » ⌂

Work Hours HH:MM  
Break Hours HH:MM

**Actual Punches** ▾ ✓ ✕

Date	05/08/2023	⏪ ⏩	Date	05/08/2023	⏪ ⏩
Time	09:00	✕	Time	18:00	✕
Sp. Function	Select ▾		Sp. Function	Select ▾	
In Reason	Select ▾	✍	Out Reason	Select ▾	✍

**Suggested Changes** 👁 ✓ ✕

Regularizing With Leave ▾

Leave SL-Sick Lez ▾ Full Day ▾

Current Balance 1.00

Reason\* Sick

Click **Apply Changes** ☒ to save the regular punches. The user status will become Present as shown below.

**Present**

U2 - U2

GS PR PR

**Attendance Details** » ⌂

Work Hours 08:00  
Break Hours 01:00


**Actual Punches** ▾

Date	05/08/2023	⏪ ⏩	Date	05/08/2023	⏪ ⏩
Time	09:00	✕	Time	18:00	✕
Sp. Function	Select ▾		Sp. Function	Select ▾	
In Reason	Select ▾	✍	Out Reason	Select ▾	✍
<< PREVIOUS			<< PREVIOUS		
NEXT >>			NEXT >>		

**Suggested Changes** 👁 ✓ ✕

Regularizing With Manual Entry ▾

**Target Work Hours** 0

- To add **Break Punches**, Select "Break Punches" by clicking .

The screenshot shows the 'Present' interface for user U2. The 'Attendance Details' section displays Work Hours as 08:00 and Break Hours as 01:00. The 'Actual Punches' dropdown menu is open, showing options: 'Actual Punches', 'Break Punches' (highlighted), and 'Regularized Punches'. Below the menu, there are fields for Date (05/08/2023), Time (18:00), Sp. Function, In Reason, Out Reason, and navigation buttons for '<< PREVIOUS' and 'NEXT >>'. The 'Suggested Changes' section at the bottom shows 'Regularizing With' set to 'Manual Entry' and 'Target Work Hours' set to 0.

The screenshot shows the 'Present' interface for user U2. The 'Attendance Details' section displays Work Hours as 08:00 and Break Hours as 01:00. The 'Break Punches' section is expanded, showing two punch entry fields. Each field has a 'Punch' dropdown (set to 'Select'), a 'Date' field (05/08/2023), and a 'Time' field (HH:MM). There are also '+' and 'x' buttons for each field.

Enter the Break Start time and Break End time. Click **Apply Changes** ☒ to save the added break time

The screenshot shows the 'Present' interface for user U2. The 'Attendance Details' section displays Work Hours as 08:00 and Break Hours as 01:00. The 'Break Punches' section is expanded, showing two punch entry fields. Each field has a 'Punch' dropdown (set to 'Select'), a 'Date' field (05/08/2023), and a 'Time' field (13:00 and 14:00 respectively). There are also '+' and 'x' buttons for each field.

### Shift Punches to Previous or Next Day

This feature enables you to shift all the punches on a day either to a previous day or a next day.

Let us understand this with the help of an example:

There are two shifts in a company

Shift 1: 20:00 to 04:00

Shift 2: 5:00 to 13:00

User A is assigned a Shift1 as well as Shift 2

For example: on the date 21-07-2023 he punches at 20:00 and the system considers this as the in-punch

Now, after completing the first shift , he punches at 04:30 (date changes to 22-07-2023), now the system considers this as the in-punch for Shift2 which is wrong.

To correct this you must click the previous button.

### Suggested Changes

The system shows the suggestions using which the exception can be eliminated and the selected user can be marked present.

The suggestions available for regularizing are:

- **Shift** - To regularize a record by assigning the suggested shift. Any other suitable shift can also be selected and assigned.
- **Leave** - To regularize a record by using suggested leaves. A half day or full day leave will be suggested depending on the number of hours to be covered. If leave balance is available, the leave will be approved instantly.



*This is applicable for only paid leaves and c-off. Other leave types where balance is not required can also be applied. Tour can also be applied.*

However, this may not work for certain leave application restrictions (for e.g. if the date of regularization falls within a period when leave application is restricted.).

- **Late-IN** - To regularize a record using the *Late-IN Allowed* special function. Using this special function will not affect the user's available *Late-IN*.
- **Early-OUT** - To regularize a record using the *Early-OUT Allowed* special function. Using this special function will not affect the user's available *Early-OUT*.
- **Available Overtime** - To regularize a record using the *available overtime* of the user (sum total of user's *authorized overtime* and *manually credited overtime*). However, no partial adjustment will be done, i.e. if 3 hours are to be adjusted but available overtime is 2.5 hours, no adjustment will be allowed.



*The total available overtime will be considered for the period specified for overtime adjustment in the **Attendance Correction with Overtime** option in the user's Attendance Policy. If this option is disabled, the available overtime will be considered for the previous month only.*

- **Short Leave** - To regularize the user's attendance using available short leaves.
- **Manual Entry** - To regularize a record by manually adding or editing the available punches. Select the record from the grid. Enter the target work hours to be achieved in order to mark the user present. Click on Apply. The punches are adjusted automatically according to target work hours and attendance status gets updated.

If shift hours for full day is 8:00 hrs, then you must enter target work hours as 08:00 to make user full day present.

Manage Attendance

Date: 01/10/2016 to 07/10/2016

User: ID: Name: View

User ID	User Name	01-Oct Sat	02-Oct Sun	03-Oct Mon	04-Oct Tue	05-Oct Wed	06-Oct Thu	07-Oct Fri
5	Chirag	PR	PR	WO	WO	PR	PR	AB
3	Milam	PR	PR	WO	WO	PR	PR	PR
4	Shalini	PR	PR	WO	WO	PR	PR	PR

06/10/2016 - No Punches Available

5 - Chirag

NS PR SL

Attendance Details

Work Hours Break Hours

Actual Punches

Date: 06/10/2016 Time: HH:MM Sp. Function: Select In Reason: Select

Date: 06/10/2016 Time: HH:MM Sp. Function: Select Out Reason: Select

Suggested Changes

Regularizing With: Manual Entry Target Work Hours: 0

For half day to be present, minimum 2 hrs are required. So enter Target hours as 02:00 hrs. Then Click **Apply Changes**. This will make the user present on first half as shown below.

06/10/2016 - AB:Early-OUT

5 - Chirag

NS PR SL

Attendance Details

Work Hours: 02:00 Break Hours

Actual Punches

Date: 06/10/2016 Time: 21:00 Sp. Function: Select In Reason: Select

Date: 06/10/2016 Time: 23:00 Sp. Function: Select Out Reason: Select

Suggested Changes

Regularizing With: Manual Entry Target Work Hours: 02:00

### To apply latest change to multiple date

There is a provision to apply latest change to multiple date records. This will be useful in cases where similar change is to be done for various days.

Example: Shift is changed for one user on 1st oct.

Then **Apply Similar Change** symbol  appears as shown below.



Manage Attendance Saved Successfully

Date: 01/10/2016 to 12/10/2016  
 User: ID / Name  
 View

User ID	User Name	01-Oct Sat	02-Oct Sun	03-Oct Mon	04-Oct Tue	05-Oct Wed	06-Oct Thu	07-Oct Fri
5	Chirag	PR   AB	WO   WO	PR   PR	PR   PR	AB   PR	PR   SL	AB   AB
3	Nilam	PR   PR	WO   WO	PR   PR	PR   PR	PR   PR	PR   PR	PR   PR
4	Shalini	PR   PR	WO   WO	PR   PR	PR   PR	PR   PR	WO   WO	AB   AB

Apply Similar Change: Shift Chan

01/10/2016 - Present

5 - Chirag  
 NS PR AB

Attendance Details  
 Work Hours: 12:50  
 Break Hours: 12:50

Actual Punches

Date: 01/10/2016 Time: 06:40  
 Sp. Function: Select In Reason: Select

Date: 01/10/2016 Time: 21:30  
 Sp. Function: Select Out Reason: Select

Suggested Changes  
 Regularizing With: Short Leave  
 Available Short Leave: 3

Click on this symbol and select the records in the grid for which the same change is to be applied. The selected records will be marked by yellow color as shown below.

Manage Attendance 6 record(s) selected

Date: 01/10/2016 to 12/10/2016  
 User: ID / Name  
 View

User ID	User Name	01-Oct Sat	02-Oct Sun	03-Oct Mon	04-Oct Tue	05-Oct Wed	06-Oct Thu	07-Oct Fri
5	Chirag	PR   AB	WO   WO	PR   PR	PR   PR	AB   PR	PR   SL	AB   AB
3	Nilam	PR   PR	WO   WO	PR   PR	PR   PR	PR   PR	PR   PR	PR   PR
4	Shalini	PR   PR	WO   WO	PR   PR	PR   PR	PR   PR	WO   WO	AB   AB

01/10/2016 - Present

5 - Chirag  
 NS PR AB


Attendance Details  
 Work Hours: 12:50  
 Break Hours: 12:50

Actual Punches

Date: 01/10/2016 Time: 06:40  
 Sp. Function: Select In Reason: Select

Date: 01/10/2016 Time: 21:30  
 Sp. Function: Select Out Reason: Select

Suggested Changes  
 Regularizing With: Short Leave  
 Available Short Leave: 3

After selecting the records, click Apply  button to apply the shift change to the selected records.

# Shift-Wise Management

The **Shift-Wise Management** functionality allows the administrator to view and manage the shift-based attendance and reporting status of employees for a chosen date. To know more about shift-based attendance, refer to the **Shift and Schedule** module.

To access this functionality, click **Time & Attendance > Utilities > Shift-Wise Management**

The **Shift-Wise Management** page will open as shown:

Shift ID ▲	Name	Assigned	Scheduled	On Leave/Tour	On Week-Off	On Holiday	Reported	Not Yet Reported
		5	4	1	0	0	1	3
FB	Field break	1	1	0	0	0	0	1
GS	General Shift	16	13	1	2	0	3	10
NE	newshift	1	1	0	0	0	0	1
NS	Night Shift	1	1	0	0	0	0	1

**Attendance Date:** Select a date from the date selection picklist for which you want to view the shift-wise details.

**Filter Users:** Select an individual user or multiple users associated with a specific enterprise group from the Filter Users drop down list.

**Group/User:** Specify an enterprise group or user using the given picklist.

Once the above fields are specified, click the **View** button.

The shift-based details for the specified date and users will be displayed as follows:

Shift ID ▲	Name	Assigned	Scheduled	On Leave/Tour	On Week-Off	On Holiday	Reported	Not Yet Reported
		5	4	1	0	0	1	3
FB	Field break	1	1	0	0	0	0	1
GS	General Shift	16	13	1	2	0	3	10
NE	newshift	1	1	0	0	0	0	1
NS	Night Shift	1	1	0	0	0	0	1

The above list displays the following columns:

- **Shift ID:** This column displays the IDs of all the shifts for the specified date.
- **Name:** This column displays the names of the shifts.
- **Assigned:** This column displays the number of users who are assigned the selected shift for the specific date.

- **Scheduled:** This column displays the number of users scheduled for the respective shifts for the specific date.
- **On Leave/Tour:** This column displays the number of users on a shift who are on leave/tour.
- **On Week-Off:** This column displays the number of users on a shift who are on week-off.
- **On Holiday:** This column displays the number of users on a shift who are on holiday.
- **Reported:** This column displays the total number of users on the shift who have reported on the selected date.
- **Not Yet Reported:** This column displays the total number of users on the shift who have not yet reported on the selected date.

To view a detailed list of users whose numbers are represented on the columns, click the respective number link. This will open a pop up window with the list of users.

The admin can use this pop up window to update the shift and day status of the users by selecting the user from the list and selecting the Shift/Day from the drop down list.

Not Yet Reported (3)

User: ID, Name

Attendance Date: Date

Shift/Day: Select, Normal

Attendance Status:

Work Hours: HHMM

Extra Work Hours: HHMM

Net-Work Hours: HHMM

Total Overtime: HHMM

Update

Search

User ID	Name	Shift	First Punch	Last Punch	First Half	Second Half
1320	SHRUTI SAGAR PATKI					
NSuser	Night Shift user					
user1	user1					

Close

Click the **Update** button to save the changes in shift.

# Change Policy

The **Change Policy** function is used to change the current effective *Time and Attendance* policy for a user or multiple users to another policy configured in the system. Such changes can be made for the following *Time and Attendance* policies:

- Absentee Policy
- Overtime Policy
- Late-IN Policy
- Early-OUT Policy
- C-OFF Policy



*An Attendance Policy cannot be changed using this feature. To change the Attendance Policy for a user, go to Users> User Configuration> T&A> Policy.*

*You can change the policies upto maximum 99 times.*

To change the Policy, click **Time & Attendance > Utilities > Change Policy**

The **Change Policy** page opens as follows:

The screenshot shows the 'Change Policy' web application interface. On the left, there are two tabs: 'Single User' (selected) and 'Multiple User'. The main area is titled 'User Attendance Details' and contains a table with the following data:

Policy Type	Policy Name
Attendance Policy	Attendance Policy-1
Absentee Policy	Absentee Policy-1
Overtime Policy	Overtime Policy-1
Late-IN Policy	Late IN Policy-2
Early-OUT Policy	Early Out Policy-2
C-OFF Policy	COFF Policy-1

Below the table, there are several input fields and a button:

- User:** A dropdown menu with '07' selected.
- Change Policy:** A dropdown menu with 'Select' selected.
- Date:** Two date selection buttons.
- New Policy:** Two input fields for 'ID' and 'Name'.
- Remark:** A text input field.
- Apply:** A button to submit the changes.

At the bottom, there is a section titled 'User Attendance Change Records' with a dropdown arrow.

The Change Policy function can be performed for single users as well as multiple users at a time.

## Single User

To change the policy for a single user, select the **Single User** tab.

**User:** Select the user from the user selection picklist whose policy is to be changed.

The **User Attendance Details** section displays the current policies assigned to the selected user.

**Change Policy:** Select the policy type which is to be changed.

**Date:** Select the Start and End dates from the date selection button for which the policy change would apply.

**New Policy:** Select a new policy from the picklist to replace the old policy.  
For eg: Late- IN Policy is to be changed from Late-IN Policy-2 to Late-IN Policy-1.

**Remark:** A remark related to the new policy change can be entered in the Remark field.

User Attendance Details

Attendance Policy: Attendance Policy-1  
 Absentee Policy: Absentee Policy-1  
 Overtime Policy: OverTime Policy-1  
 Late-IN Policy: Late In Policy-2  
 Early-OUT Policy: Early Out Policy-2  
 C-OFF Policy: COFF Policy-1

Change Policy\*: Late-IN  
 Date\*: 01/03/2017 to 31/03/2017  
 New Policy\*: 1, Late In Policy-1  
 Remark: Late-IN-1 to be given from 1st March

Apply

User Attendance Change Records

Click the **Apply** button to apply the policy change. The changed policy will be reflected in the User Attendance Details section only when the Date range includes the current date.

Else; New Policy will be reflected in the **User Attendance Change Records** section as shown.

User ID	Change Policy	From Date	To Date	New Policy
07	Late-IN	01/01/2009	31/12/2099	Late In Policy-2
07	Late-IN	01/03/2017	31/03/2017	Late In Policy-1

## Multiple Users

To change policy for multiple users at a time, select the **Multiple User** tab.

Change Policy

Single User  
Multiple User

Change Policy\*: Absentee  
 Date\*: 01/03/2017 to 31/03/2017  
 New Policy\*: 2, Absentee Policy-2  
 Remark: Absentee Policy change

Select Users: User Wise  
 User\*: ID, Name

Apply

**Change Policy:** Select the policy type which is to be changed for multiple users.

**Date:** Select the Start and End dates from the date selection button for which the policy change would apply.

**New Policy:** Select a new policy from the picklist to replace the old policy.

**Remark:** A remark related to the new policy change can be entered in the Remark field.

**Select Users:** Once Change Policy has been configured, select the users for whom the policy change is to be applied using the filter options of Userwise, Groupwise or All.:

- Userwise - To select random users from a user picklist.
- Groupwise - To select a group of users from the Select Group dropdown list.
- All - To select all users active on the system.

Once the users are specified, click the **Apply** button to apply the changed policy.

# User-Wise Attendance Restriction

This option enables the application user to assign a User-wise Restriction on selected devices for Attendance Process. The attendance restriction can be assigned to a *single user* or *multiple users*.

To access this functionality, click **Time & Attendance > Utilities > User-Wise Attendance Restriction**.

## Single User Restriction

The screenshot shows the 'User-Wise Attendance Restriction' window in 'Single User' mode. The 'User' field is set to '3' and 'Isha'. Below this, the 'Assigned Devices' table is displayed:

Device Name	Type	Restrict Attendance
Door v2	Door V3	<input type="checkbox"/>
NGT Ground Floor	NGT Direct Door	<input checked="" type="checkbox"/>
Panel Lite V2-Device-9	Panel Lite V2	<input type="checkbox"/>
RnD Panel lite V2	Panel Lite V2	<input type="checkbox"/>
Vega Direct Door	Vega Controller	<input type="checkbox"/>

An 'Apply' button is located at the bottom right of the window.

**User:** Select a user from the User picklist for whom attendance is to be restricted. On selection of user, a list of the **Assigned Devices** is displayed.

Select the appropriate checkboxes under the **Restrict Attendance** column to restrict the user's attendance for the corresponding device as shown in the above figure.

So when the user punches on these devices, the attendance will not be calculated. The user will be allowed access through these devices.

Click the **Apply** button to apply the changes.

## Multiple User Restriction

The screenshot shows the 'User-Wise Attendance Restriction' window in 'Multiple User' mode. The 'Device Filter' is set to 'Randomly'. The 'Device' section has fields for 'ID' and 'Name'. The 'Select Users' section has a dropdown set to 'User Wise' and fields for 'User ID' and 'Name'. An 'Apply' button is located at the bottom right of the window.

**Device Filter:** Select the desired options— **All**, **Device Group** or **Randomly**.

- If you select **All**, then All devices will be selected and will appear in the grid.

Select Devices

Device Filter

AB

Device

Name

Select	Device Name	Type	Allow Attendance	Restrict Attendance
<input type="checkbox"/>	argofacedummy	ARGO FACE	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	ARIC200	ARIC DC 200	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	argofacedummy	ARGO FACE	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	argofacedummy3	ARGO FACE	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	argofacedummy4	ARGO FACE	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Argofacedummy5	ARGO FACE	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Argofacedummy6	ARGO FACE	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	CC2	Panel200	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	dummyargoface	ARGO FACE	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	FACTORY ACCOUNT	Door V3	<input type="checkbox"/>	<input type="checkbox"/>

- Select the check box of the desired device for which you wish to restrict attendance. By default, the **Allow Attendance** check box is selected, if you wish to restrict attendance then select the corresponding **Restrict Attendance** check box.
- If you select **Device Group**, click **Device Group** picklist. The **Picklist For Device Group** pop-up appears.

Picklist For Device Group

Search

DGID ▲	Name
1	ACTA Devices
2	RnD1Visitor
3	Device Group 3
4	Device Group 4
5	Device Group 5
6	Device Group 6
7	Device Group 7
8	Device Group 8
9	Device Group 9
10	Device Group 10

1 - 10 of 13 records

< > 1 2 > >>

Cancel

- Select the desired Device Group. You can select one device group only. Devices belonging to the selected Device Group appear in the grid.



- Select the check box of the desired device for which you wish to restrict attendance. By default, the **Allow Attendance** check box is selected, if you wish to restrict attendance then select the corresponding **Restrict Attendance** check box.

**Select Devices**

Device Filter: Device Group

Device Group: 1 First Floor

Search

Select	Device Name	Type	Allow Attendance	Restrict Attendance
<input checked="" type="checkbox"/>	ARC DC 200-253	ARC DC 200	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	ARGO FACE-78	ARGO FACE	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	ARGO FACE-Device-2	ARGO FACE	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	ARGO-190	ARGO	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	ARGO-Device-10	ARGO	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	ARGO-Device-10.82	ARGO	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Panel200-222	Panel200	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Panel200-Device-171	Panel200	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Panel200-Device-249	Panel200	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Panel200-Device-77	Panel200	<input type="checkbox"/>	<input type="checkbox"/>

- If you select **Randomly**, click the **Device** picklist. The **Picklist For Panel and Direct Doors** pop-up appears.

**Picklist For Panel and Direct Doors**

Total Selected: 0 Records

Search

Show Selected

☐ Select All

<input type="checkbox"/>	MID ▲	Name	Type	Status
<input type="checkbox"/>	9	Panel	Panel200	Enable
<input type="checkbox"/>	10	panel 2	Panel200	Enable
<input type="checkbox"/>	11	cc c c	Panel200	Enable
<input type="checkbox"/>	12	Panel200-Device-12	Panel200	Enable
<input type="checkbox"/>	13	Panel	Panel	Enable
<input type="checkbox"/>	14	PanelLite	Panel Lite	Enable
<input type="checkbox"/>	50	RnD1 3rd Floor VEGA	Vega Controller	Enable
<input type="checkbox"/>	52	Factory Vega Production-2	Vega Controller	Enable
<input type="checkbox"/>	57	RnD1 GF TRIPOD LEFT OUT	PVR Door	Enable
<input type="checkbox"/>	59	RnD1 BOOM BARRIER IN	Vega Controller	Enable

1 - 10 of 66 records

<< < 1 2 3 ... 7 > >>

OK Cancel

You can either select particular devices or can select all the devices at once.

To select particular devices, select the check boxes of the desired devices.

The screenshot shows a window titled "Picklist For Panel and Direct Doors". At the top, a green bar indicates "Total Selected: 3 Records". Below this is a search bar and a "Show Selected" link. A "Select All" checkbox is unchecked. The main table has columns: MID, Name, Type, and Status. Three rows are selected (checked): MID 9 (Panel), MID 10 (Panel 2), and MID 11 (CC2). The bottom of the window shows "1 - 10 of 68 records" and pagination controls with "1" highlighted. "OK" and "Cancel" buttons are at the bottom.

<input type="checkbox"/>	MID ▲	Name	Type	Status
<input checked="" type="checkbox"/>	9	Panel	Panel200	Enable
<input checked="" type="checkbox"/>	10	Panel 2	Panel200	Enable
<input checked="" type="checkbox"/>	11	CC2	Panel200	Enable
<input type="checkbox"/>	12	Panel200-Device-12	Panel200	Enable
<input type="checkbox"/>	13	Panel	Panel	Enable
<input type="checkbox"/>	14	PanelLite	Panel Lite	Enable
<input type="checkbox"/>	15	Panel200-Device-15	Panel200	Enable
<input type="checkbox"/>	16	Panel200	Panel200	Enable
<input type="checkbox"/>	50	RnD1 3rd Floor VEGA	Vega Controller	Enable
<input type="checkbox"/>	52	Factory Vega Production-2	Vega Controller	Enable

OR

To select all the devices, select the **Select All** check box. The devices on all the pages will be selected.

The screenshot shows the same window as before, but the "Select All" checkbox is now checked. The green bar at the top now indicates "Total Selected: 68 Records". In the table, all rows have their selection checkboxes checked. The bottom of the window shows "1 - 10 of 68 records" and the same pagination controls. "OK" and "Cancel" buttons are at the bottom.

<input checked="" type="checkbox"/>	MID ▲	Name	Type	Status
<input checked="" type="checkbox"/>	9	Panel	Panel200	Enable
<input checked="" type="checkbox"/>	10	Panel 2	Panel200	Enable
<input checked="" type="checkbox"/>	11	CC2	Panel200	Enable
<input checked="" type="checkbox"/>	12	Panel200-Device-12	Panel200	Enable
<input checked="" type="checkbox"/>	13	Panel	Panel	Enable
<input checked="" type="checkbox"/>	14	PanelLite	Panel Lite	Enable
<input checked="" type="checkbox"/>	15	Panel200-Device-15	Panel200	Enable
<input checked="" type="checkbox"/>	16	Panel200	Panel200	Enable
<input checked="" type="checkbox"/>	50	RnD1 3rd Floor VEGA	Vega Controller	Enable
<input checked="" type="checkbox"/>	52	Factory Vega Production-2	Vega Controller	Enable

Click **OK**.

All the selected devices appear in the grid.

**Select Devices**

Device Filter: Randomly

Device: ID  Name

Search

Select	Device Name	Type	Allow Attendance	Restrict Attendance
<input type="checkbox"/>	CC2	Panel200	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Panel	Panel200	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Panel 2	Panel200	<input type="checkbox"/>	<input type="checkbox"/>

Select the check box of the desired device for which you wish to restrict attendance. By default, the **Allow Attendance** check box is selected, if you wish to restrict attendance then select the corresponding **Restrict Attendance** check box.

**Select Devices**

Device Filter: Randomly

Device: ID  Name

Search

Select	Device Name	Type	Allow Attendance	Restrict Attendance
<input checked="" type="checkbox"/>	cc c c	Panel200	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Factory Vega Production-2	Vega Controller	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Panel	Panel200	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Panel	Panel	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	panel 2	Panel200	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Panel200-Device-12	Panel200	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	PanelLite	Panel Lite	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	RnD1 3rd Floor VEGA	Vega Controller	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	RnD1 BOOM BARRIER IN	Vega Controller	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	RnD1 GF TRIPOD LEFT OUT	PVR Door	<input type="checkbox"/>	<input type="checkbox"/>

**Select Users:** Select the desired option — **All, User Wise, Group Wise**.

If you select **All**, then All users will be selected.

If you select **User Wise**, click the **User** picklist. The **Picklist For All Users** pop-up appears.

Picklist For All Users

Total Selected: 0 Records

Search  Show Selected

<input type="checkbox"/>	User ID ▲	Name
<input type="checkbox"/>	1	SALIM ANSARI
<input type="checkbox"/>	10	RAJENDRA GOSWAMI
<input type="checkbox"/>	1001	ANKITKUMAR SOHLIYA
<input type="checkbox"/>	1002	MEGHA H SHUKLA
<input type="checkbox"/>	1003	UMESH M TALANPURI
<input type="checkbox"/>	1004	DARSHAK B PATEL
<input type="checkbox"/>	1007	DHAVAL I PATEL
<input type="checkbox"/>	1008	MAYANK K KORAT
<input type="checkbox"/>	1009	DIPTI K RATHWA
<input type="checkbox"/>	1010	RAHUL S SHAH

1 - 10 of 1986 records

1 2 3 ... 199 > >>

OK Cancel

Select the check boxes of the desired user. Click **OK**.

The selected users appears in the grid.

Search

User ID ▲	Name
1	SALIM ANSARI
10	RAJENDRA GOSWAMI
1001	ANKITKUMAR SOHLIYA
1002	MEGHA H SHUKLA

Apply

You can also delete the desired User. Click **Delete**  of the respective user.

If you select **Group Wise**, select the desired enterprise group from the **Select Group** drop-down list — Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1/2/3.

For each enterprise group — Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1/2/3, click the corresponding picklist to select the desired option/s.

Search

ID	Name	Group ▲
1	MATRIX COMSEC PVT. LTD.	Organization
2	SAMARTH	Organization
3	AVDHOT	Organization
4	ELSENGARD	Organization

Apply

Click **Apply** to save the changes.

# Advance Overtime Application

---

Advance Overtime Application is a formal mode of requesting overtime approval before an employee has put in extra working hours as overtime. It enables an organization to keep a track of all the requested, approved/rejected /pending overtime applications.

The Overtime applications can be made by:

- System Account User
- On Behalf System Account User
- Using the ESS Self Service Module

COSEC Web enables all *System Account users* with appropriate page rights to make overtime applications using the *Time and Attendance* module. All applications made by the System Account user are *pre-approved* by default.

COSEC Web also enables all On Behalf System Account User with appropriate page rights to make overtime applications using the *Time and Attendance* module. All applications made by the On Behalf System Account User are *pre-approved* by default. For creating and assigning the roles and rights to the On Behalf System Account User. Refer to [“On Behalf System Account User”](#). To receive a notification alert once the final verdict for such application is provided by the RIC, make sure you have configured the desired Mobile Number/Email ID in [“Optional”](#) as well as configure the Advance Overtime Approval/Rejection Alert parameters. For details refer to [“Configuring Alert Messages”](#).

For overtime applications applied in advance using the *Employee Self Service* module, the advance overtime application approvals/rejections have to be done by the respective supervisors of the reporting group by logging into their ESS login. However, such applications can also be approved by the System Account user from the Time and Attendance module of the COSEC Web Application.



*For SA users, make sure you have enabled Advance Overtime Application Rights from Admin> System Accounts> Role and Rights Configuration.*

*For ESS users, make sure you have enabled Advance Overtime Application ESS Rights from Users> Utilities> ESS Role Rights.*



*ESS users can apply for overtime application in advance only using the ESS module and such advance overtime applications require approval either from the Reporting Group In-Charge or the COSEC Web System Account user. Advance Overtime Application directly approved by the System Administrator do not require any further approval from respective supervisors.*

*The Advance Overtime Application applied from Time and Attendance module get approved automatically.*

Advance Overtime Application for an employee can be applied by the System Account user from **Time & Attendance> Utilities> Advance Overtime Application**.

The page appears as shown below:

To generate a new Advance Overtime Application, click on the **Add** button and configure the following parameters.

**User:** Select a user from the picklist for whom this overtime application is being generated.

**Application Date:** This field displays the current date (system generated) on which the application is being generated.

**Attendance Date:** Enter the desired date for which this Overtime Application is being generated. The SA will be allowed to select past dates (only for Night Shift Cases and provided the system has not generated OT hours automatically), current dates (before assigned shift hours) as well as future dates for overtime application.

**OT Hours:** Enter the total duration for which the User wants to work overtime in the format of hours and minutes.

**Advance Overtime Application**

User \* 1 Athira

Application Date 08/01/2021

Attendance Date \* 23/01/2021

OT Hours \* 09:00

**Reason And Contact Info**

Reason \* Overtime

Address A-19 Shivashish Society

Contact Number 9658741230

Submit Cancel

### Reason And Contact Info

**Reason:** Enter the reason for overtime.

**Address:** Enter an address of the User.

**Contact Number:** Enter the contact number of the User.

Once all the details are filled, Click on the **Submit** button.

The application gets pre-approved after submitting and following parameters will be displayed.

**Advance Overtime Application** ✓ OT Application has been submitted successfully

User \* 1 Athira

Application Date 08/01/2021

Attendance Date \* 23/01/2021

OT Hours \* 09:00

Approved OT Hours 09:00

**Reason And Contact Info**

Reason \* Overtime

Address A-19 Shivashish Society

Contact Number 9658741230

Application Status Approved (08/01/2021 11:57)

Submit Cancel

OT Date	Applied OT Hours	Approved OT Hours	Application Date	Status
23/01/2021	09:00	09:00	08/01/2021	✓
20/01/2021	02:00		07/01/2021	✗
13/01/2021	05:00		06/01/2021	✗
12/01/2021	05:00	05:00	07/01/2021	✓
09/01/2021	04:00		07/01/2021	✗
08/01/2021	03:00		06/01/2021	✗
07/01/2021	04:00	04:00	06/01/2021	✓

The grid on the right side of this page displays the details of all the applied Applications of the particular user like **OT Date, Applied OT Hours, Approved OT Hours, Application Date** and the **Status** of the Applications.

Jan 2021

Mar 2021

1 Pending

2 Approved

2 Rejected

Application Details

OT Date ▲	Applied OT Hours	Approved OT Hours	Application Date	Status
13/01/2021	05:00		06/01/2021	⊗
12/01/2021	05:00		07/01/2021	⌚
08/01/2021	03:00		06/01/2021	⊗
07/01/2021	04:00	04:00	06/01/2021	✓
05/01/2021	03:00	03:00	05/01/2021	✓

Rejected

Pending

Approved

Rejected

Pending









Approved

You can even filter the Applications based on **All**, **Pending**, **Approved** and **Rejected** by clicking on the **Filter** ▼ button.



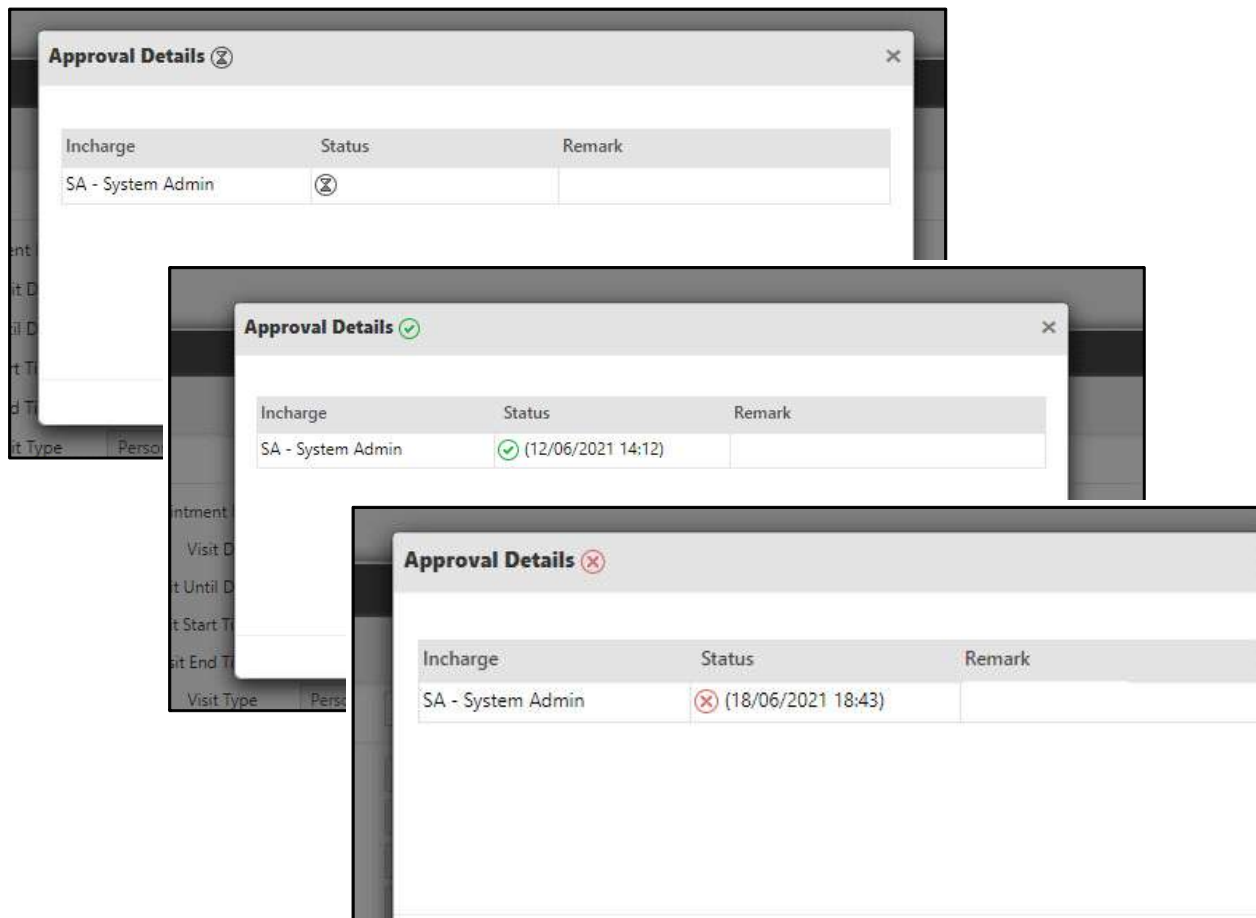
*System Administrator can delete pending/approved/rejected application.*

Click **Approval Details** ≡ icon from the grid available on the left side of the page to view the Approval Details of the already applied application.

Jun 2021		Aug 2021			
0 Pending		1 Approved	1 Rejected		
Application Details					
					
OT Date ▲	Applied OT Hours	Approved OT Hours	Application Date	Status	Approval Details
25/06/2021	02:00	02:00	23/06/2021		
24/06/2021	05:00		23/06/2021		



**Approval Details** window appears as shown below:



It displays the status of the user's application under **Approval Details**, that is, whether it is — pending, approved or rejected.

The application's status is displayed in the **Status** column as Pending , Approved or Rejected .

**Remark** displays the comments provided by the Admin/ RIC/ System.

System can auto approve / reject an application if the Reporting In-charge or SA fails to authorize it as per the Approval Policy assigned to the Reporting Groups. To know more about the Approval Policy, refer "[Approval Policy](#)".

# Authorization or Approval

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Authorization refers to the act of sanctioning or approving an action, task, manual data entry or event performed on the COSEC Web Application. Authorization for any activity on the COSEC Web Application can be performed by a System Account user with appropriate page rights.

This functionality is useful when the HR administrator in an organization needs to supervise employee attendance and authorize certain data before it is officially recorded for an employee. The Time and Attendance module enables the administrator to perform the following authorizations/approvals for a user:

- “Short Leave/Official In-Out Approval”
- “Overtime/C-OFF Approval”
- “Daily Attendance Approval”
- “Attendance Correction Approval”
- “Event Authorization”
- “Advance Overtime Approval”



*The system requires some of the above authorizations to be enabled during the configuration of the corresponding T&A policy. Entries or applications will be forwarded for authorization/approval only if authorization/approval functionality has been enabled for them.*

# Short Leave/Official In-Out Approval

This option enables the HR user to authorize all Short Leave/Official IN-OUT requests from ESS users who have punched IN late or punched OUT early for a particular day as per the scheduled shift timings. The ESS users can request the Late-IN or Early-OUT events to be authorized as either a Short Leave, if allowed by HR policy, or as official entry or exit events.

The authorization is dependent on the number of Reporting In-charge in the Reporting Group, the Authorization Mode as well as the Approval Policy assigned by the system administrator. For details refer to [“Reporting In-Charge”](#), [“Approval Policy”](#) and [“Configuring Users”](#).

To do this, click **Time & Attendance > Authorization/Approval > Short Leave/Official IN-OUT**.

The **Short Leave/Official IN-OUT Authorization** page opens as follows:

You can either:

- view all the pending applications for Short Leave/Official IN-OUT Authorization
- set the filters — Date, Filter Users — to view the desired applications

## All Pending Applications

To view only Pending Applications,

- **Show All Pending Applications:** Select this option to enable the pending application filter.
- Click the **Pending** collapsible panel. All the applications in pending state appear.

To approve the application, select the **Approve** check box of the desired entry.

To reject the application, select the **Reject** check box of the desired entry.

To know more, refer to [“Pending Authorization”](#).



*The population on this page depends on the server's database. It might take time to load all pending applications.*

## Applications according to Set Filters

To Set the Filters,

- **Date:** Select this option to enable the date filter. Select the start and end date as the duration for which the application status of the Short Leave/Official IN-OUT Authorization is to be viewed.
- **Filter Users:** You can filter records according to the desired Enterprise Group, All or for an Individual.

Select **All**, to view authorization status of the applications of all the active users on the system.

Select **Individual**, to view authorization status of the applications of a single user. Click the picklist to select the desired User ID/Name.

Select the desired Enterprise Group — Organization, Branch, Department, Section, Category, Grade, Designation, Custom Group1/2/3 and then click the picklist to select the desired group's ID/Name, to view authorization status of these applications.

Click **View**. The Pending, Approved and Rejected collapsible panels appear.

## Pending Authorization

Click the **Pending** collapsible panel.

The **Pending** section lists all employees for whom Short Leave/Official IN-OUT requests are pending for authorization.



The screenshot shows a window titled "Pending (1)" with a search bar and a table of pending applications. The table has columns for User ID, Name, Date, 1st Half, 2nd Half, Special Function, Start, End, Applied Duration, Posted Duration, Work Hours, Approve, Reject, Remark, and Details. A single row is visible for user MV1 on 10/08/2022, with a status of Short Leave and a duration of 09:00 to 10:00.

User ID	Name	Date	1st Half	2nd Half	Special Function	Start	End	Applied Duration	Posted Duration	Work Hours	Approve	Reject	Remark	Details
MV1	MV1	10/08/2022	AB	PR	Short Leave	09:00	10:00	01:00	01:00	07:00	<input type="checkbox"/>	<input type="checkbox"/>		

When any application is in the Pending state it can be authorized by the Admin or RIC.

- To approve/reject applications selectively, click the respective application check box against the user.
- To approve/reject all the applications simultaneously, click the Approve /Reject checkbox in the header column.

Once the Admin approves/ rejects the application, the record will be moved from the **Pending** section to the **Approved/ Rejected** section respectively.

The default **Remark** for the Approved and Rejected application will appear in the respective fields. You can enter any customized Remark while authorizing the application.

Click the **Details**  icon to view the attendance details of the corresponding user.

**All Attendance Punches** window appears as shown below:

**All Attendance Punches**

User: MV1

Attendance Date: 10/08/2022

Shift/Day: GS Normal

Attendance Status: AB PR

Work Hours: 07:00

Extra Work Hours:

Net-Work Hours:

Authorized Overtime:

Reason: 62 chars

Search


Date	Time	IO Type	Device Name	Special Function	Access	Source/Location	Job Details	View Image
14/03/2022	14:17	In	ARGO FACE-Device-2		Allowed	Device		
14/03/2022	14:23	In	ARGO FACE-Device-2		Allowed	Device		
14/03/2022	14:34	In	ARGO FACE-Device-2		Allowed	Device		
14/03/2022	14:34	In	ARGO FACE-Device-2		Allowed	Device		
14/03/2022	15:03	In	ARGO FACE-Device-2		Allowed	Device		
14/03/2022	15:12	In	ARGO FACE-Device-2		Allowed	Device		
14/03/2022	15:22	In	ARGO FACE-Device-2		Allowed	Device		
14/03/2022	15:22	In	ARGO FACE-Device-2		Allowed	Device		
14/03/2022	15:26	In		Regular - IN	Allowed	ESS		

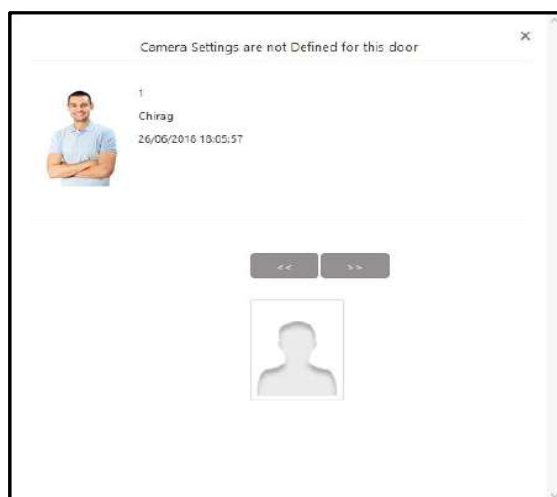
**All Attendance Punches** window displays the user's attendance and overtime details.

Click the  button to view source location co-ordinate details for an entry or exit event of the user.



*If Map is not loaded; check the network connection or check the value of Google API Key from Admin Module > System Configuration > Global Policy > Basic tab.*

If there is a Built-In Camera to capture the image of the user while punching on the door; you can view that image by clicking on the **View Image**  icon.



*If the event is generated by API then there will not be any image popup window on clicking View Image icon.*

**All Attendance Punches** window also displays the status of the user's application under **Approval Details**. The application's status is displayed in the **Status** column.

System can auto approve / reject an application if the Reporting In-charge or SA fails to authorize it as per the Approval Policy assigned to the Reporting Groups. To know more about the Approval Policy, refer [“Approval Policy”](#).

**Remark** displays the comments provided by the Admin/ RIC/ System.

Click **Save** to save the authorization.



*The pending applications can not be authorized if the attendance period is closed while doing monthly attendance process and “Attendance Correction in Closed Period” check-box is disabled from Time and Attendance> Policies> Attendance Policy> General> Event Authorization.*

*Even though; the period is closed but if “Attendance Correction in Closed Period” checkbox in Policy is enabled then authorization can be made.*

## Approved Short Leave/Official IN-OUT

Click the **Approved** collapsible panel.

This section lists all short leave/official IN-OUT requests that have been approved. The following screen is an example of an **Approved** list for Official IN-OUT requests for a specific date range:

Approved (8)														
Search														
User ID	Name	Date	1st Half	2nd Half	Special Function	Start	End	Applied Duration	Posted Duration	Work Hours	Approve	Reject	Remark	Details
5	dhruvi	03/06/2019	PR	PR	Official	09:00	11:00	01:00	02:00	12:00	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Approved Official	
12	Dinesh	02/06/2019	WO	WO	Short Leave	09:00	10:00	01:00	01:00	10:00	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Approved Short Le	
12	Dinesh	03/06/2019	WO	WO	Short Leave	09:00	11:00	01:00	00:00	04:36	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Approved Short Le	

To change the authorization verdict of any application, select **Reject** checkbox against the corresponding user. Once you reject an approved application, the record will be moved to the **Rejected** section.

Click the **Details** icon to view the attendance details of the corresponding user.

**All Attendance Punches** window appears as shown below:

All Attendance Punches

User

MV1

MV1

Attendance Date

10/08/2022

Shift/Day

G5

Normal

Attendance Status

AB

PR

Work Hours

07:00

Extra Work Hours

Net-Work Hours

Authorized Overtime

Reason

62 chars

Search


Date	Time	IO Type	Device Name	Special Function	Access	Source/Location	Job Details		View Image
14/03/2022	14:17	In	ARGO FACE-Device-2		Allowed	Device			
14/03/2022	14:23	In	ARGO FACE-Device-2		Allowed	Device			
14/03/2022	14:34	In	ARGO FACE-Device-2		Allowed	Device			
14/03/2022	14:34	In	ARGO FACE-Device-2		Allowed	Device			
14/03/2022	15:03	In	ARGO FACE-Device-2		Allowed	Device			
14/03/2022	15:12	In	ARGO FACE-Device-2		Allowed	Device			
14/03/2022	15:22	In	ARGO FACE-Device-2		Allowed	Device			
14/03/2022	15:22	In	ARGO FACE-Device-2		Allowed	Device			
14/03/2022	15:26	In		Regular - IN	Allowed	ESS			
14/03/2022	15:28	In	ARGO FACE-Device-2		Denied	Device			
14/03/2022	15:28	In	ARGO FACE-Device-2		Allowed	Device	J1 - Job1		
14/03/2022	15:48	In	ARGO FACE-Device-2		Allowed	Device	J1 - Job1		
14/03/2022	15:50	In	ARGO FACE-Device-2		Allowed	Device	J1 - Job1		
14/03/2022	15:54	In	ARGO FACE-Device-2		Allowed	Device	J1 - Job1		
14/03/2022	16:05	In	ARGO FACE-Device-2		Allowed	Device	J2 - Job2		
14/03/2022	16:10	In	ARGO FACE-Device-2		Allowed	Device	J1 - Job1		
14/03/2022	16:10	In	ARGO FACE-Device-2		Denied	Device			

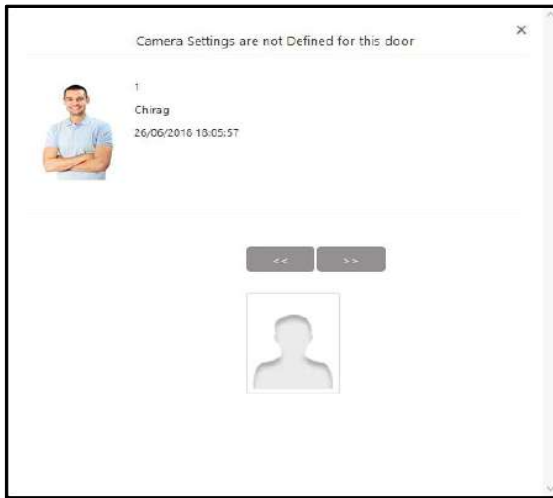
**All Attendance Punches** window displays the user's attendance and overtime details.

Click the  button to view source location co-ordinate details for an entry or exit event of the user.



*If Map is not loaded; check the network connection or check the value of Google API Key from Admin Module > System Configuration > Global Policy > Basic tab.*

If there is a Built-In Camera to capture the image of the user while punching on the door; you can view that image by clicking on the **View Image**  icon.



*If the event is generated by API then there will not be any image popup window on clicking View Image icon.*

**All Attendance Punches** window also displays the status of the user's application under **Approval Details**. The application's status is displayed in the **Status** column.

System can auto approve / reject an application if the Reporting In-charge or SA fails to authorize it as per the Approval Policy assigned to the Reporting Groups. To know more about the Approval Policy, refer ["Approval Policy"](#).

**Remark** displays the comments provided by the Admin / RIC / System.

Click **Save** to save the authorization.



## Rejected Short Leave/Official IN-OUT

Click the **Rejected** collapsible panel.

This section lists all short leave/official IN-OUT requests that have been rejected. The following screen is an example of **Rejected** list for Official IN-OUT requests for a specific date range:



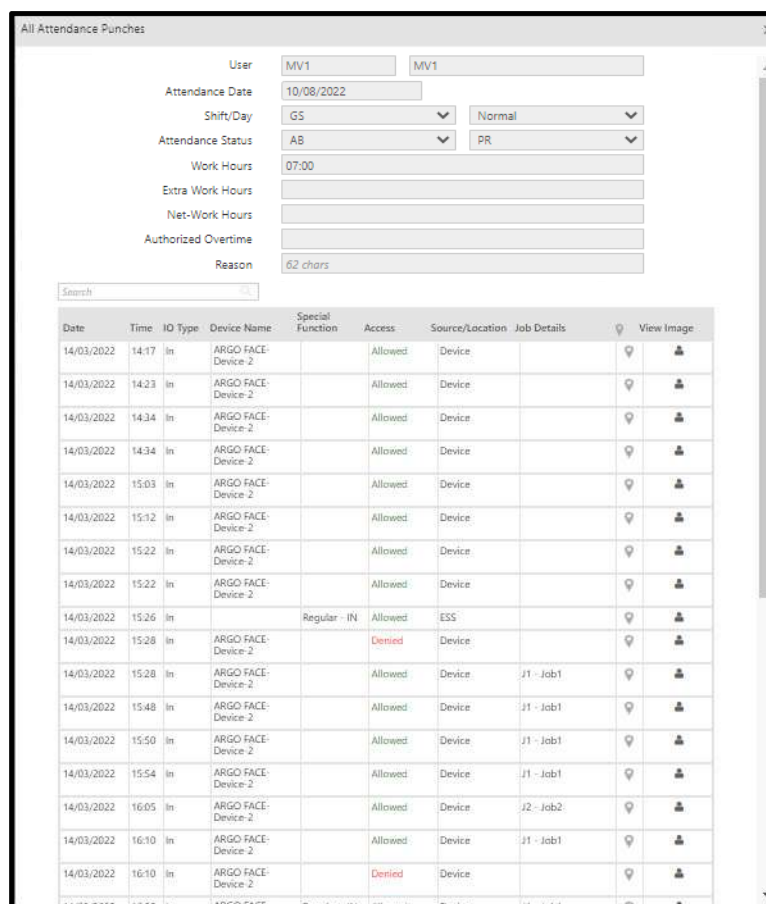
The screenshot shows a web interface titled "Rejected (0)". Below the title is a search bar. A table lists rejected requests with columns: User ID, Name, Date, In-Hold, 2nd Half, Special Function, Shift, End, Applied Duration, Posted Duration, Work Hours, Approve, Reject, Remark, and Details. The first row shows a rejected request for User ID "US", Name "User5", Date "11/04/2021", In-Hold "08", 2nd Half "08", Special Function "Official", Shift "09:00", End "11:14", Applied Duration "02:10", Posted Duration "02:10", Work Hours "00:00". The Approve checkbox is unchecked, and the Reject checkbox is checked. The Remark field contains "Rejected Official11".

User ID	Name	Date	In-Hold	2nd Half	Special Function	Shift	End	Applied Duration	Posted Duration	Work Hours	Approve	Reject	Remark	Details
US	User5	11/04/2021	08	08	Official	09:00	11:14	02:10	02:10	00:00	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Rejected Official11	



































To change the authorization verdict of any application, select **Approve** checkbox against the corresponding user. Once you approve a rejected application, the record will be moved to the **Approved** section.

Click the **Details**  icon to view the attendance details of the corresponding user.

**All Attendance Punches** window appears as shown below:



The screenshot shows the "All Attendance Punches" window. It has a search bar at the top. Below it are filters for User (MV1), Attendance Date (10/08/2022), Shift/Day (GS), Normal (Normal), Attendance Status (AB), PR (PR), Work Hours (07:00), Extra Work Hours, Net-Work Hours, Authorized Overtime, and Reason (62 chars). Below the filters is a table with columns: Date, Time, IO Type, Device Name, Special Function, Access, Source/Location, Job Details, and View Image. The table lists attendance punches for 14/03/2022. Most punches are "Allowed" and "Device". One punch at 15:26 is "Regular - IN" and "Allowed" with "ESS" as the source. Two punches at 15:28 and 16:10 are "Denied" and "Device".


Date	Time	IO Type	Device Name	Special Function	Access	Source/Location	Job Details	View Image
14/03/2022	14:17	In	ARGO FACE-Device 2		Allowed	Device		 
14/03/2022	14:23	In	ARGO FACE-Device 2		Allowed	Device		 
14/03/2022	14:34	In	ARGO FACE-Device 2		Allowed	Device		 
14/03/2022	14:34	In	ARGO FACE-Device 2		Allowed	Device		 
14/03/2022	15:03	In	ARGO FACE-Device 2		Allowed	Device		 
14/03/2022	15:12	In	ARGO FACE-Device 2		Allowed	Device		 
14/03/2022	15:22	In	ARGO FACE-Device 2		Allowed	Device		 
14/03/2022	15:22	In	ARGO FACE-Device 2		Allowed	Device		 
14/03/2022	15:26	In		Regular - IN	Allowed	ESS		 
14/03/2022	15:28	In	ARGO FACE-Device 2		Denied	Device		 
14/03/2022	15:28	In	ARGO FACE-Device 2		Allowed	Device	J1 - Job1	 
14/03/2022	15:48	In	ARGO FACE-Device 2		Allowed	Device	J1 - Job1	 
14/03/2022	15:50	In	ARGO FACE-Device 2		Allowed	Device	J1 - Job1	 
14/03/2022	15:54	In	ARGO FACE-Device 2		Allowed	Device	J1 - Job1	 
14/03/2022	16:05	In	ARGO FACE-Device 2		Allowed	Device	J2 - Job2	 
14/03/2022	16:10	In	ARGO FACE-Device 2		Allowed	Device	J1 - Job1	 
14/03/2022	16:10	In	ARGO FACE-Device 2		Denied	Device		 

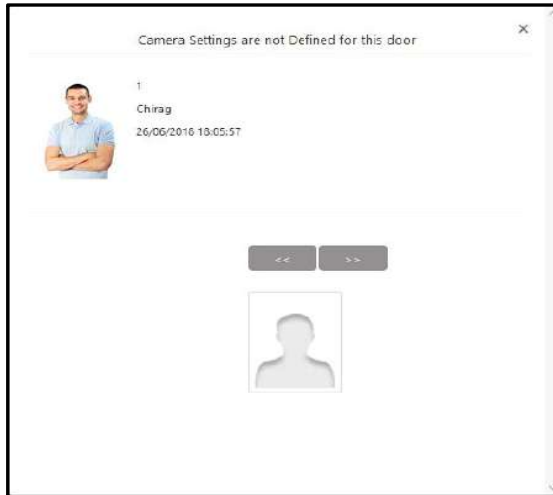
**All Attendance Punches** window displays the user's attendance and overtime details.

Click the  button to view source location co-ordinate details for an entry or exit event of the user.



*If Map is not loaded; check the network connection of your PC or check the value of Google API Key from Admin Module > System Configuration > Global Policy > Basic tab.*

If there is a Built-In Camera to capture the image of the user while punching on the door; you can view that image by clicking on the **View Image**  icon.



*If the event is generated by API then there will not be any image popup window on clicking View Image icon.*

**All Attendance Punches** window also displays the status of the user's application under **Approval Details**. The application's status is displayed in the **Status** column.

System can auto approve / reject an application if the Reporting In-charge or SA fails to authorize it as per the Approval Policy assigned to the Reporting Groups. To know more about the Approval Policy, refer ["Approval Policy"](#).

**Remarks** displays the comments provided by the Admin / RIC / System.

Click **Save** button to save the changes.



*System Administrator can delete pending/approved/rejected application.*

# Overtime/C-OFF Approval

This option enables the HR user to authorize the conversion of an employee's extra work hours into Overtime or C-OFF hours. Extra hours authorized using this option can only be considered for overtime payment or C-OFF hours compensation.

The authorization is dependent on the number of Reporting In-charge in the Reporting Group, the Authorization Mode as well as the Approval Policy assigned by the system administrator. For details refer to "[Reporting In-Charge](#)", "[Approval Policy](#)" and "[Configuring Users](#)".



To enable Overtime/C-OFF Authorization, make sure that the "Auto Authorize" option is disabled during both Overtime and C-OFF Policy configuration.

To authorize OT/C-OFF for a user, click **Time & Attendance > Authorization/Approval > Overtime/C-OFF**.

The **Overtime/C-OFF Authorization** page opens as follows:

You can either:

- view all the pending applications for Overtime/C-Off Authorization
- set the filters — Date, Filter Users, Authorization For — to view the desired applications

## All Pending Applications

To view only Pending Applications,

- **Show All Pending Applications:** Select this option to enable the pending application filter.
- Click the **Pending** collapsible panel. All the applications in pending state appear.

To know more, refer to "[Pending Overtime/C-OFF](#)".



The population on this page depends on the server's database. It might take time to load all pending applications.

## Applications according to Set Filters

- **Date/Attendance Period:** Select this option to enable the date filter.

If you select the Period as Daily, select the start and end dates by clicking the respective date selection buttons.

If you select the Period as Monthly, select the month and year for monthly period. This defines the period for which authorization status is to be viewed for extra work hours.

- **Filter Users:** You can filter records according to the desired Enterprise Group, All or for an Individual.

Select **All**, to view authorization status of the applications of all the active users on the system.

Select **Individual**, to view authorization status of the applications of a single user. Click the picklist to select the desired User ID/Name.

Select the desired Enterprise Group — Organization, Branch, Department, Section, Category, Grade, Designation, Custom Group1/2/3 and then click the picklist to select the desired group's ID/Name, to view authorization status of these applications.

- **Authorization For:** Select the option as Single Record to authorize single/ individual transaction. Select the option as Multiple Records to authorize multiple transaction records.

### Daily Period- Single Record

User ID	Name	Date	Shift	OT Type	OT Hours	Details
DN	Dinesh	2017/08/25	G5	OT1	00:20	
DN	Dinesh	2017/08/25	G5	OT5	08:30	
DN	Dinesh	2017/08/26	G5	OT1	01:00	
DN	Dinesh	2017/08/26	G5	OT5	08:30	

### Daily Period- Multiple Record

User ID	Name	Date	Shift	OT Type	OT Hours	Details
DN	Dinesh	2017/08/25	G5	OT1	00:20	
DN	Dinesh	2017/08/25	G5	OT5	08:30	
DN	Dinesh	2017/08/26	G5	OT1	01:00	
DN	Dinesh	2017/08/26	G5	OT5	08:30	

### Monthly Period- Single Record

User ID	Name	OT Type	OT Hours	Auth as OT	Auth as C-OFF	Remarks	Authorization Sequence	Details
DN	Dinesh	OT1	03:20	01:00	01:00			
DN	Dinesh	OT3	06:15	03:10	02:34			
DN	Dinesh	OT5	42:30	16:30	17:00			

## Multiple Period- Multiple Record

The screenshot shows the 'Authorization For' dropdown set to 'Multiple Records'. Below it is a 'View' button. A search bar is present. The main table lists pending records for user 'DN' (Dinesh) with columns: User ID, Name, OT Type, OT Hours, Auth as OT, Auth as C-OFF, Remarks, and Details. The table contains three rows of pending records. At the bottom is a 'Define and Authorize' button.

User ID	Name	OT Type	OT Hours	Auth as OT	Auth as C-OFF	Remarks	Details
DN	Dinesh	OT1	03:20	01:00	01:00		
DN	Dinesh	OT3	08:15	03:10	02:34		
DN	Dinesh	OT5	42:30	16:30	17:00		

Click the **View** button to view the pending and authorized application with their details.

## Pending Overtime/C-OFF

Click the **Pending** collapsible panel.

The **Pending** section lists all users whose extra work hours are pending to be authorized as OT/C-OFF by an HR administrator or Reporting In-charge.

The following example displays a pending authorization requests generated for the user.

## Single Record Authorization

The screenshot shows the 'Authorization For' dropdown set to 'Single Record'. Below it is a 'View' button. A search bar is present. The main table lists pending records for user 'DN' (Dinesh) with columns: User ID, Name, Date, Shift, OT Type, OT Hours, Auth as OT, Auth as C-OFF, Remarks, and Details. The table contains five rows of pending records. The second row is highlighted, showing 'Authorized Overtime/C-OFF' in the Remarks column. At the bottom is a 'Define and Authorize' button.

User ID	Name	Date	Shift	OT Type	OT Hours	Auth as OT	Auth as C-OFF	Remarks	Details
DN	Dinesh	2017/08/07	GS	OT1	01:00				
DN	Dinesh	2017/08/07	GS	OT3	02:00	HHH : MM	HHH : MM	Authorized Overtime/C-OFF	
DN	Dinesh	2017/08/07	GS	OT5	08:30				
DN	Dinesh	2017/08/08	GS	OT3	02:00				
DN	Dinesh	2017/08/08	GS	OT5	08:30				

Select a record of a user from the Pending list which is to be authorized as shown above.

You can authorize the requested hours as **Overtime hours**, **C-OFF hours** or both as required. Enter the number of hours to be authorized as shown below. Here 30 minutes is authorized for OT and 1 hour is authorized for C-OFF.

The screenshot shows the 'Authorization For' dropdown set to 'Single Record'. Below it is a 'View' button. A search bar is present. The main table lists pending records for user 'DN' (Dinesh) with columns: User ID, Name, Date, Shift, OT Type, OT Hours, Auth as OT, Auth as C-OFF, Remarks, and Details. The table contains five rows of pending records. The second row is highlighted, showing 'Authorized Overtime/C-OFF' in the Remarks column. Arrows point to the input fields for 'Auth as OT' (00 : 30) and 'Auth as C-OFF' (1 : 00). At the bottom is a 'Define and Authorize' button.

User ID	Name	Date	Shift	OT Type	OT Hours	Auth as OT	Auth as C-OFF	Remarks	Details
DN	Dinesh	2017/08/07	GS	OT1	01:00				
DN	Dinesh	2017/08/07	GS	OT3	02:00	00 : 30	1 : 00	Authorized Overtime/C-OFF	
DN	Dinesh	2017/08/07	GS	OT5	08:30				
DN	Dinesh	2017/08/08	GS	OT3	02:00				
DN	Dinesh	2017/08/08	GS	OT5	08:30				

You must add a **Remark** while authorization.

Then click **Save** to save the authorization.



The OT/C-OFF Eligibility is configured from User Configuration> T&A> Attendance. The C-OFF hours can be authorized in multiple of specified value in C-OFF Policy.

If the user is eligible for OT and C-OFF, authorization can be done for both.

Once you approve, the record will be moved from the **Pending** section to the **Authorized** section.

The authorized overtime hours will be displayed in the grid as shown below.

User ID	Name	Date	Shift	OT Type	OT Hours	Auth as OT	Auth OT Date	Auth as C-OFF	Auth C-OFF Date	Auth By	Remarks	Details
DN	Dinesh	2017/08/07	GS	OT3	02:00	00:30	2017/09/01	01:00	2017/09/01	SA		

Click the **Details** icon corresponding to the user, to view the detailed attendance record as well as the Advance Overtime Application and its status.

The **All Attendance Punches** window appears as shown below.

User: U2 Attendance Date: 19/04/2022 Shift/Day: GS Normal Attendance Status: PR PR Work Hours: 08:00 Extra Work Hours: Net-Work Hours:

**Advance Overtime Application**

Date	Time	IO Type	Device Name	Special Function	Access	Source/Location	Job Details	View Image
19/04/2022	11:52	In	ARGO-Device-2		Allowed	Device		
19/04/2022	11:52	In	ARGO-Device-2		Allowed	Device		
19/04/2022	11:55	In	ARGO-Device-2		Allowed	Device	Default Job	
19/04/2022	11:55	In	ARGO-Device-2		Allowed	Device	J1 - Job1	
19/04/2022	11:55	In	ARGO-Device-2		Allowed	Device	J1 - Job1	
20/04/2022	10:22	In	ARGO-Device-2		Allowed	Device	J1 - Job1	
20/04/2022	10:22	In	ARGO-Device-2		Allowed	Device	J2 - Job2	
20/04/2022	10:22	In	ARGO-Device-2		Allowed	Device	J1 - Job1	
20/04/2022	10:22	In	ARGO-Device-2		Allowed	Device	J2 - Job2	

**Approval Details**

Incharge	Status	Remark


Close

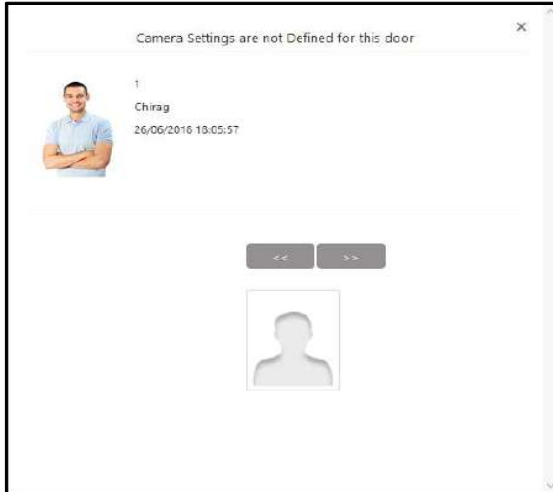
**All Attendance Punches** window displays the user's attendance and overtime details.

Click the button to view source location co-ordinate details for an entry or exit event of the user.



If Map is not loaded; check the network connection of your PC or check the value of Google API Key from Admin Module > System Configuration > Global Policy > Basic tab.

If there is a Built-In Camera to capture the image of the user while punching on the door; you can view that image by clicking on the **View Image**  icon.



If the event is generated by API then there will not be any image popup window on clicking View Image icon.

**All Attendance Punches** window also displays the status of the user's application under **Approval Details**. The application's status is displayed in the **Status** column.

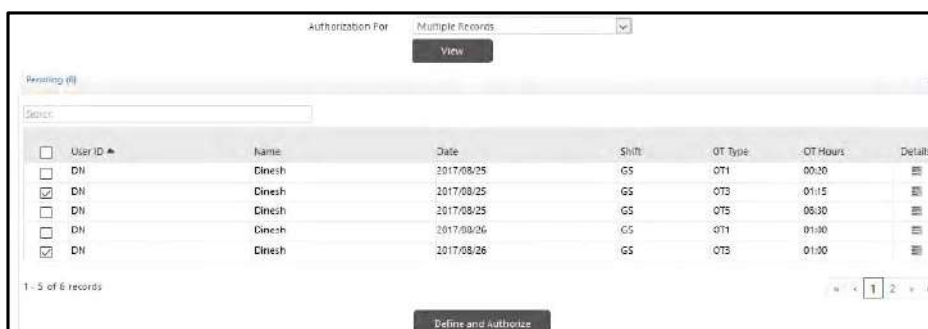
System can auto approve / reject an application if the Reporting In-charge or SA fails to authorize it as per the Approval Policy assigned to the Reporting Groups. To know more about the Approval Policy, refer [“Approval Policy”](#).

**Remark** displays the comments provided by the Admin/ RIC/ System.

Click **Save** to save the authorization.

## Multiple Record Authorization

If you want to authorize multiple records at a time then select Multiple Records in “Authorization For” and click View. The page appears as shown below.



Now select the checkboxes for the overtime record to be authorized. For example: Here OT3 on 25th and 26th August is to be authorized for 1 hour.

Click **Define and Authorize** button. The **Configure Authorization Parameters** window appears. You can authorize OT for multiple records in following ways:

- **Authorize:** You can select the option as Available OT or Defined OT hours for OT Type-Wise or Record Wise option.
- Select the option as **Available OT** to authorize the respective available overtime hours for the selected records.

The screenshot shows the 'Configure Authorization Parameters' window. The 'Authorize' dropdown is set to 'Available OT'. The 'Authorization Mode' is 'OT Type-Wise'. The 'Authorize in Terms of' dropdown is set to 'Percentage'. Below this, there are two columns of input fields: 'Define Hours for OT(%)' and 'Define Hours for C-OFF(%)'. The rows are labeled OT1 through OT5. The values entered are: OT1 (50.00, 50.00), OT2 (60, 40.00), OT3 (30, 70.00), OT4 (100.00, 0.00), and OT5 (100.00, 0.00). There are also fields for 'Authorize Hours for Each Record(As Overtime)' and 'Authorize Hours for Each Record(As C-OFF)', both set to 0.00. A 'Remarks' field contains the text 'Authorized Overtime/C-OFF'. An 'Authorize' button is at the bottom.

The screenshot shows the 'Authorized' window with a table of authorized records. The table has columns: User ID, Name, Date, Shift, OT Type, OT Hours, Auth as OT, Auth OT Date, Auth as C-OFF, Auth C-OFF Date, Auth By, Remarks, and Details. Two records are shown: one for DN Dinesh on 2017/08/25 for OT3 with 01:15 OT hours, and another for DN Dinesh on 2017/08/26 for OT3 with 01:00 OT hours. The 'Auth as OT' column shows 00:22 and 00:18 respectively, and the 'Auth C-OFF Date' column shows 2017/09/18 00:52 and 2017/09/18 00:42 respectively.

User ID	Name	Date	Shift	OT Type	OT Hours	Auth as OT	Auth OT Date	Auth as C-OFF	Auth C-OFF Date	Auth By	Remarks	Details
<input type="checkbox"/> DN	Dinesh	2017/08/25	GS	OT3	01:15	00:22	2017/09/18	00:52	2017/09/18	SA		
<input type="checkbox"/> DN	Dinesh	2017/08/26	GS	OT3	01:00	00:18	2017/09/18	00:42	2017/09/18	SA		

OT3 on 25th = 30%of OT=30% of 1:15 hrs= 22 minutes; C-OFF= 70% of 1.15 hrs = 52 minutes

OT3 on 26th = 30%of OT=30% of 1:00 hrs= 18 minutes; C-OFF= 70% of 1.00 hrs = 42 minutes

- Select the option as **Defined OT hours** to define a value of hours to be authorized for selected records.

The screenshot shows the 'Configure Authorization Parameters' window. The 'Authorize' dropdown is set to 'Defined OT Hours'. The 'Authorization Mode' is 'Record-Wise'. The 'Authorize in Terms of' dropdown is set to 'Hours'. Below this, there are two columns of input fields: 'Define Hours for OT' and 'Define Hours for C-OFF'. The rows are labeled OT1 through OT5. The values entered are: OT1 (001, 00), OT2 (001, 00), OT3 (001, 00), OT4 (001, 00), and OT5 (001, 00). There are also fields for 'Authorize Hours for Each Record(As Overtime)' and 'Authorize Hours for Each Record(As C-OFF)', both set to 001 : 00. A 'Remarks' field contains the text '1 hour to be authorized as OT'. An 'Authorize' button is at the bottom.



**Authorization Mode:** Select the mode as **OT-Type Wise** to authorize hours separately for each OT or **Record-Wise** to authorize hours for the selected records.

#### **Available OT**

In the option “**OT Type-Wise**” you can authorize hours based on the OT type (OT1, OT2,...OT5) for the selected records.

- **Authorize in Terms of:** Select the option as **Hours** or **Percentage** of OT/C-OFF based on which number of hours or percentage of hours is to be authorized as Overtime or C-OFF.
- **Hours:** Enter the number of hours to be assigned as overtime for OT1, OT2...OT5. The remaining hours from the available overtime will be assigned to the C-OFF hours.
- **Percentage:** Enter the percentage value to calculate OT1, OT2...OT5 as percentage of available overtime hours. Based on entered OT percentage, C-OFF percentage will appear. For example: If OT1 is set to 40% of OT then C-OFF will be calculated as 60% of OT.

In the option “Record-Wise” you can authorize hours for OT and C-OFF for each records.

- **Authorize in Terms of:** Select the option as **Hours** or **Percentage** of OT/C-OFF based on which number of hours or percentage of hours is to be authorized as Overtime or C-OFF.
- **Hours:** When Hours of OT or Hours of C-OFF is selected then enter the number of hours in the field **Authorize Hours for Each Record (As Overtime)** or **Authorize Hours for Each Record (As C-OFF)** depending on the selection. For example: If available OT hrs is 2 hrs and Authorize hours for each record (As Overtime) is entered as 1:00 hr then remaining 1 hr is given to C-OFF.
- **Percentage:** When Percentage of OT or Percentage of C-OFF is selected then enter the percentage in the field Authorize Hours for Each Record (As Overtime) or Authorize Hours for Each Record (As C-OFF) depending on the selection. For example: If Authorize hours for each record (As Overtime) is entered as 40% then remaining 60% is given to C-OFF.

#### **Defined OT Hours**

In the option “**OT Type-Wise**” you can authorize hours based on the OT type (OT1, OT2,...OT5) for the selected records.

- **Authorize in Terms of:** Select the option as **Hours** or **Percentage** based on which number of hours or percentage of hours is to be authorized as Overtime or C-OFF.
- **Hours:** Enter the number of hours to be assigned as overtime and or C-OFF for OT1, OT2...OT5.
- **Percentage:** Enter the percentage value for overtime and C-OFF to calculate OT1, OT2...OT5.

**Configure Authorization Parameters**

Authorize: Defined OT Hours

Authorization Mode: OT Type-Wise

Authorize in Terms of: Hours

OT Type	Define Hours for OT	Define Hours for C-OFF
OT1	001 : 00	001 : 00
OT2	002 : 00	000 : 30
OT3	001 : 00	000 : 30
OT4	HHH : MM	HHH : MM
OT5	HHH : MM	HHH : MM

Authorize Hours for Each Record(As Overtime): HHH : MM

Authorize Hours for Each Record(As C-OFF): HHH : MM

Remarks:

Authorize

**Configure Authorization Parameters**

Authorize: Defined OT Hours

Authorization Mode: OT Type-Wise

Authorize in Terms of: Percentage

OT Type	Define Hours for OT(%)	Define Hours for C-OFF(%)
OT1	40 %	50 %
OT2	20 %	20 %
OT3	50 %	40 %
OT4	60 %	40 %
OT5	10 %	10 %

Authorize Hours for Each Record(As Overtime): %

Authorize Hours for Each Record(As C-OFF): %

Remarks:

Authorize

In the option “**Record-Wise**” you can authorize hours for OT and C-OFF for each records.

- **Authorize in Terms of:** Select the option as **Hours** or **Percentage** based on which number of hours or percentage of hours is to be authorized as Overtime or C-OFF.
  - **Hours:** When Hours is selected then enter the number of hours in the field **Authorize Hours for Each Record (As Overtime)** and or **Authorize Hours for Each Record (As C-OFF)**.
  - **Percentage:** Enter the percentage value in the field **Authorize Hours for Each Record (As Overtime)** and or **Authorize Hours for Each Record (As C-OFF)**.

## Authorizing Monthly Records

Authorization For: Multiple Records

View

Pending (3)

Search:

	UserID	Name	OT Type	OT Hours	Auth as OT	Auth as C-OFF	Remarks	Details
<input checked="" type="checkbox"/>	DN	Dinesh	OT1	03:20	01:00	01:00		
<input checked="" type="checkbox"/>	DN	Dinesh	OT3	06:15	03:10	02:34		
<input checked="" type="checkbox"/>	DN	Dinesh	OT5	42:30	16:30	17:00		

Define and Authorize

After selecting the records, click on **Define and Authorize**. The **Configure Authorization Parameters** page appears as shown below.

Configure the below parameters as described before.

You can select the Authorization Sequence from the options of **OT then C-OFF** and **C-OFF then OT**.

Configure Authorization Parameters

Authorize: Available OT

Authorization Mode: OT Type-Wise

Authorize in Terms of: Percentage ☒ OT ☐

OT Type	Define Hours for OT(%)	Define Hours for C-OFF(%)
OT1	40 %	60.00 %
OT2	70 %	30.00 %
OT3	60 %	40.00 %
OT4	50 %	50.00 %
OT5	100.00 %	0.00 %

Authorize Hours for Each Record(As Overtime):

Authorize Hours for Each Record(As C-OFF):

Remarks: Authorize OT then C-OFF

Authorization Sequence: OT then C-OFF

Authorize

Configure Authorization Parameters

Authorize: Available OT

Authorization Mode: Record-Wise

Authorize in Terms of: Hours ☐ OT ☐

OT Type	Define Hours for OT	Define Hours for C-OFF
OT1		
OT2		
OT3		
OT4		
OT5		

Authorize Hours for Each Record(As Overtime): 0003 : 00

Authorize Hours for Each Record(As C-OFF): Remaining OT Hours

Remarks:

Authorization Sequence: OT then C-OFF

Authorize

In above example 3 hr is to be given as OT for each record then remaining hours will be given to C-OFF.

Pending (0)

Authorized (3)

Search

<input type="checkbox"/>	User ID ▲	Name	OT Type	OT Hours	Auth as OT	Auth as C-OFF	Remarks	Details
<input type="checkbox"/>	DN	Dinesh	OT1	03:20	03:00	00:20		
<input type="checkbox"/>	DN	Dinesh	OT3	08:15	03:00	05:15		
<input type="checkbox"/>	DN	Dinesh	OT5	42:30	03:00	39:30		

Define and Authorize

The authorized records will be shown in Authorized section.

## Authorized Overtime/C-OFF




Click the **Authorized** collapsible panel.

This section lists all the OT/C-OFF Authorizations for the selected user or user groups for the specified time period.

Authorized (1)

Search

User ID ▲	Name	Date	Shift	OT Type	OT Hours	Auth as OT	Auth OT Date	Auth as C-OFF	Auth C-OFF Date	Auth By	Remarks	Details
U1	User1	14/06/2021	GS	OT1	03:00	03:00	17/06/2021	00:00	17/06/2021	SA	Authorized Overtime/C-OFF	<div><div></div><div></div></div>

Click on **Edit**  to edit the Authorized OT, C-off Hours and the Remarks. Then click **OK**  to save or **Cancel**  to discard the changes.

Click the Details  icon to view the attendance details of the corresponding user.

**All Attendance Punches** window appears as shown below:

Approved OT Hours

Approved OT Hours

Approved By





















Status


Remarks


Rejected

Rejected Overtime

Search

Date	Time	IO Type	Device Name	Special Function	Access	Source/Location		View Image
11/06/2021	05:00	In	ARGO-Device-1		Allowed	Device - *****SSSSSS		
11/06/2021	05:00	In	ARGO-Device-1		Allowed	Device - ****		
11/06/2021	05:00	In	ARGO-Device-1		Allowed	Device - L1		
11/06/2021	05:00	In	ARGO-Device-1		Allowed	Device - L1		
11/06/2021	05:00	In	ARGO-Device-1		Allowed	Device - *****SSSSSS		
11/06/2021	05:00	In	ARGO-Device-1		Allowed	Device - ble_name		
11/06/2021	06:00	In	ARGO-Device-1		Allowed	Device - ble_name		
11/06/2021	11:31	In		Regular - IN	Allowed	ESS		
11/06/2021	11:44	In		Regular - IN	Allowed	ESS		
11/06/2021	11:45	In	ARGO-Device-1		Allowed	Device		

Approval Details 

Incharge	Status	Remark
SA - System Admin	 (16/06/2021 15:25)	Authorized Overtime/C-OFF


Close

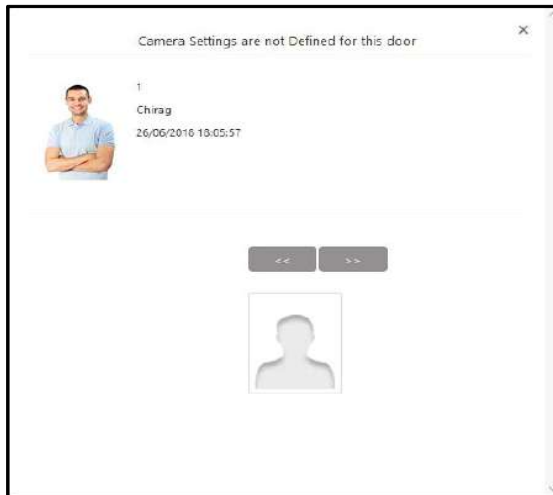
**All Attendance Punches** window displays the user's attendance and overtime details.

Click the  button to view source location co-ordinate details for an entry or exit event of the user.



*If Map is not loaded; check the network connection of your PC or check the value of Google API Key from Admin Module > System Configuration > Global Policy > Basic tab.*

If there is a Built-in camera to capture the image of the user while punching on the door; you can view that image by clicking on the **View Image**  icon.



*If the event is generated by API then there will not be any image popup window on clicking View Image icon.*

**All Attendance Punches** window also displays the status of the user's application under **Approval Details**. The application's status is displayed in the **Status** column.

System can auto approve / reject an application if the Reporting In-charge or SA fails to authorize it as per the Approval Policy assigned to the Reporting Groups. To know more about the Approval Policy, refer ["Approval Policy"](#).

**Remark** displays the comments provided by the Admin / RIC / System.

Click **Save** to save the authorization.

# Daily Attendance Approval

The HR administrator may want to review daily IN and OUT punch records for all users before approving these as the official attendance for the day. This may be especially useful in monitoring irregularity in the attendance patterns of employees and in keeping a check on suspected abuse of privileges such as punching on behalf of colleagues or unauthorized visitors.

Authorization for Daily Attendance can be enabled during the configuration of an Attendance Policy from **Time & Attendance > Policies > Attendance Policy > General**. Once enabled, every attendance event from the configured users will pass to the respective reporting in-charges and the COSEC Web system administrator for approval before the user is marked “present”.

The authorization is dependent on the number of Reporting In-charge in the Reporting Group, the Authorization Mode as well as the Approval Policy assigned by the system administrator. For details refer to [“Reporting In-Charge”](#), [“Approval Policy”](#) and [“Configuring Users”](#).

To view and authorize daily attendance, click **Time & Attendance > Authorization/Approval > Daily Attendance**.

The **Attendance Authorization** page opens as follows:

You can either:

- view all the pending applications for Attendance Authorization
- set the filters — Date, Filter Users — to view the desired applications

## All Pending Applications

To view only Pending Applications,

- **Show All Pending Applications:** Select this option to enable the pending application filter.
- Click the **Pending** collapsible panel. All the applications in pending state appear.

To approve the application, select the **Authorize** check box of the desired entry.

To know more, refer to [“Pending Authorization”](#).



*The population on this page depends on the server's database. It might take time to load all pending applications.*

## Applications according to Set Filters

To Set the Filters,

- **Date:** Select this option to enable the date filter. Select the start and end date as the duration for which the applications for Attendance Authorization are to be viewed.
- **Filter Users:** You can filter records according to the desired Enterprise Group, All or for an Individual.

Select **All**, to view authorization status of the applications of all the active users on the system.

Select **Individual**, to view authorization status of the applications of a single user. Click the picklist to select the desired User ID/Name.

Select the desired Enterprise Group — Organization, Branch, Department, Section, Category, Grade, Designation, Custom Group 1/2/3 and then click the picklist to select the desired group's ID/Name, to view authorization status of these applications.

Click the **View** button to view the pending and authorized attendance records of the specified users and their details.

## Pending Authorization

Click the **Pending** collapsible panel.

The **Pending** section lists daily attendance records of users that are yet to be sanctioned by the system administrator. All the records in this section are marked "AB" (absent) because they are unauthorized.

User ID	Name	Date	Shift	1st Half	2nd Half	Gross Work	Extra Work	Net Work	Total OT	First IN	Last OUT	Authorize	Remark	Details
AIFS	AIFS	02/08/2022	GS	AB	AB	08:00				09:30	18:00	<input type="checkbox"/>	Revoked	
AIFS	AIFS	03/08/2022	IN	AB						11:20		<input type="checkbox"/>		
KJ	Khushal	01/08/2022	GS	AB	AB	08:00				09:00	18:00	<input type="checkbox"/>		
KJ	Khushal	02/08/2022	GS	UP	UP					15:18		<input type="checkbox"/>		
RIC1	RIC1	03/08/2022	GS	PL	PL					12:20		<input type="checkbox"/>		

When any application is in the Pending state it can be authorized by the Admin or RIC.

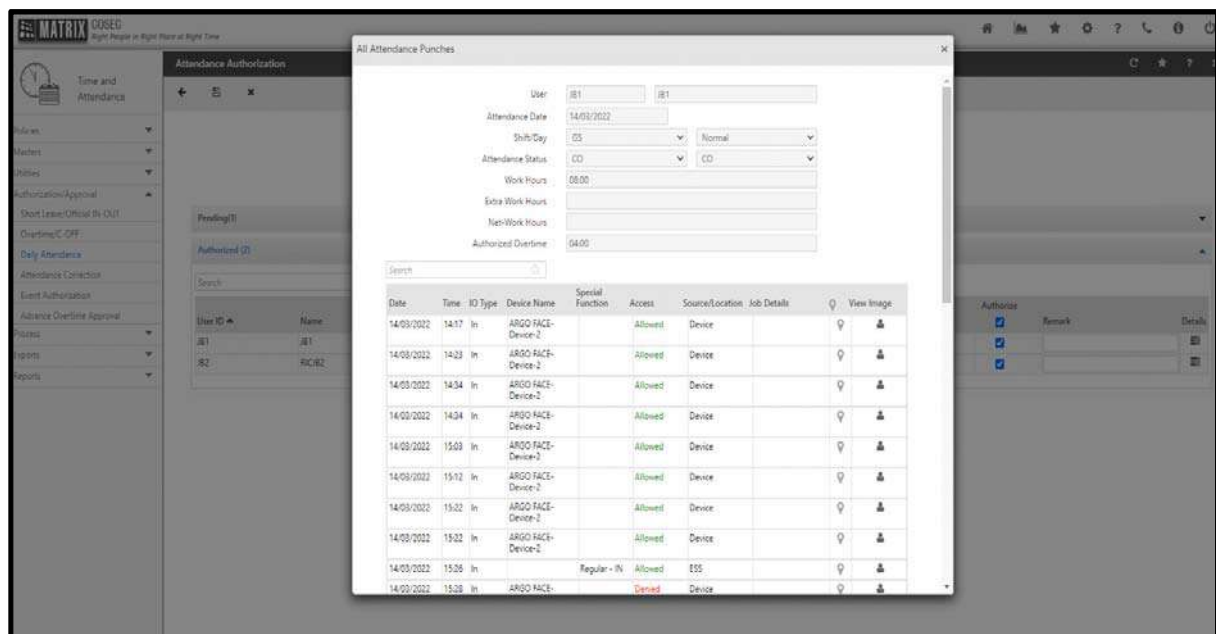
- To authorize the applications selectively, click the respective **Authorize** check box against the user.
- To authorize all the applications simultaneously, click the **Authorize** checkbox in the header column.

Once the Admin authorizes the application, the record will be moved from the **Pending** section to the **Authorized** section.

The default **Remark** for the Authorized application will appear in the respective fields. You can enter your Remark while authorizing the application.

Click the **Details**  icon to view the attendance details of the corresponding user.

**All Attendance Punches** window appears as shown below:



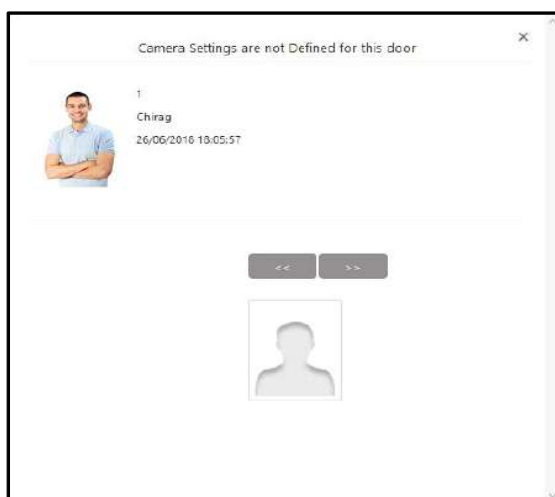
**All Attendance Punches** window displays the user's attendance and overtime details.

Click the button to view source location co-ordinate details for an entry or exit event of the user.



*If Map is not loaded; check the network connection of your PC or check the value of Google API Key from Admin Module > System Configuration > Global Policy > Basic tab.*

If there is a Built-In Camera to capture the image of the user while punching on the door; you can view that image by clicking on the **View Image** icon.



*If the event is generated by API then there will not be any image popup window on clicking View Image icon.*

**All Attendance Punches** window also displays the status of the user's application under **Approval Details**. The application's status is displayed in the **Status** column.



System can auto approve / reject an application if the Reporting In-charge or SA fails to authorize it as per the Approval Policy assigned to the Reporting Groups. To know more about the Approval Policy, refer [“Approval Policy”](#).

**Remarks** displays the comments provided by the Admin/ RIC/ System.

Click **Save** to save the authorization.

## Authorized Attendance

Click the **Authorized** collapsible panel.

This section lists all the daily attendance records that have been authorized. All the authorized records are now marked as “PR” (present) in the following example:

Pending (5)													
Authorized (1)													
Search													
User ID ▲	Name	Date	Shift	1st Half	2nd Half	Gross Work	Extra Work	Net Work	Total OT	First IN	Last OUT	Authorize	Details
1587	Aditi Gupta	01/12/2017	G2	PR	PR	10:00	01:00			09:00	19:00	<input checked="" type="checkbox"/>	Authorized Daily Attendance



*The attendance status (“AB”, “PR” etc.) after attendance is authorized, will depend on criteria such as shift timings, work hours etc. for the respective employee. For e.g. if punches do not match with assigned shift timings, user will be marked “AB”.*

To revoke authorization, clear the **Authorize** checkbox against a user. Then this record will be moved from the **Authorized** section to the **Pending** section again.

Click the **Details** icon to view the attendance details of the corresponding user.

**All Attendance Punches** window appears as shown below:

All Attendance Punches

User: JB2 RICJB2

Attendance Date: 14/03/2022

Shift/Day: Normal

Attendance Status: IN

Work Hours:

Extra Work Hours:

Net-Work Hours:

Authorized Overtime:

Search:

Date	Time	IO Type	Device Name	Special Function	Access	Source/Location	Job Details	View Image
14/03/2022	14:09	In	ARGO FACE-Device-2		Allowed	Device		

**Approval Details** ✓


Incharge	Status	Remark
SA - System Admin	✓ (14/03/2022 00:00)	

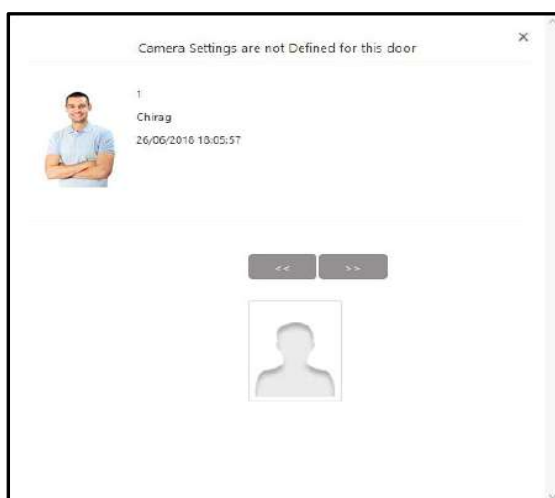
**All Attendance Punches** window displays the user's attendance and overtime details.

Click the  button to view source location co-ordinate details for an entry or exit event of the user.



*If Map is not loaded; check the network connection of your PC or check the value of Google API Key from Admin Module > System Configuration > Global Policy > Basic tab.*

If there is a Built-In Camera to capture the image of the user while punching on the door; you can view that image by clicking on the **View Image**  icon.





*If the event is generated by API then there will not be any image popup window on clicking View Image icon.*

**All Attendance Punches** window also displays the status of the user's application under **Approval Details**. The application's status is displayed in the **Status** column.

System can auto approve / reject an application if the Reporting In-charge or SA fails to authorize it as per the Approval Policy assigned to the Reporting Groups. To know more about the Approval Policy, refer ["Approval Policy"](#).

**Remark** displays the comments provided by the Admin / RIC / System.

Click **Save** to save the authorization.

# Attendance Correction Approval

Attendance Correction may be required by an employee in several instances. It may be required to correct a missed or forgotten punch during the course of a working day or to request modification for an entry or exit event posted for a particular day's attendance data. COSEC allows employees to log in to the ESS module and apply for attendance data corrections.

These attendance correction applications however, are required to be authorized by the COSEC Web system administrator (likely an HR personnel) using the *Time and Attendance* module.

The authorization is dependent on the number of Reporting In-charge in the Reporting Group, the Authorization Mode as well as the Approval Policy assigned by the system administrator. For details refer to [“Reporting In-Charge”](#), [“Approval Policy”](#) and [“Configuring Users”](#).



*Attendance correction performed by a System Account user will always be pre-approved. Attendance Correction applications can also be approved by respective Reporting Group In-charges from the ESS application.*

To authorize attendance correction applications, click **Time & Attendance > Authorization/Approval > Attendance Correction**.

The **Attendance Correction Authorization** page will appear as follows:

You can either:

- view all the pending applications for Attendance Correction Authorization
- set the filters — Date, Filter Users — to view the desired applications

## All Pending Applications

To view only Pending Applications,

- **Show All Pending Applications:** Select this option to enable the pending application filter.
- Click the **Pending** collapsible panel. All the applications in pending state appear.

To approve the application, select the **Approve** check box of the desired entry.

To reject the application, select the **Reject** check box of the desired entry.

To know more refer to [“Pending Applications”](#).



*The population on this page depends on the server's database. It might take time to load all pending applications.*

## Applications according to Set Filters

To Set the Filters,

- **Date:** Select this option to enable the date filter. Select the start and end dates by clicking the respective date selection buttons. This defines the period for which Attendance Correction Applications are to be viewed. The end date is by default set to the current date and authorization is not allowed for any later date.
- **Filter Users:** You can filter records according to the desired Enterprise Group, All or for an Individual.

Select **All**, to view authorization status of the applications of all the active users on the system.

Select **Individual**, to view authorization status of the applications of a single user. Click the picklist to select the desired User ID/Name.

Select the desired Enterprise Group — Organization, Branch, Department, Section, Category, Grade, Designation, Custom Group1/2/3 and then click the picklist to select the desired group's ID/Name, to view authorization status of these applications.

Click the **View** button to view all pending, approved and rejected attendance correction applications and their details.

## Pending Applications

Click the **Pending** collapsible panel.

The **Pending** section lists all the attendance correction applications from users waiting to be sanctioned by the system administrator/RIC as shown.



User ID	Name	Application Date	Attendance Date	Shift	WO/PH	1st Punch	2nd Punch	3rd Punch	4th Punch	Approve	Reject	Remark	Details
AIS	AIS	04/08/2022	03/08/2022	GS		11:30	19:00			<input type="checkbox"/>	<input type="checkbox"/>	Approved Attendance Correction	
AnyOneUser	AnyOneUser	04/08/2022	04/08/2022	GS		09:30	20:00			<input type="checkbox"/>	<input type="checkbox"/>	Approved Attendance Correction	

When any application is in the Pending state it can be authorized by the Admin or RIC.

- To approve/reject applications selectively, click the respective application check box against the user.
- To approve/reject all the applications simultaneously, click the Approve/Reject checkbox in the header column.

Once the Admin approves/ rejects the application, the record will be moved from the **Pending** section to the **Approved/ Rejected** section respectively.

The default **Remark** for the Approved and Rejected application will appear in the respective fields. You can enter your Remark while authorizing the application.

Click the **Details**  icon to view the attendance details of the corresponding user.

**All Attendance Punches** window appears as shown below:

All Attendance Punches

User: U4 User4

Attendance Date: 07/06/2021

Shift/Day: GS Normal

Attendance Status: AB AB

Attendance Values: Applied

Reason: Personal

Search

Date	Time	Device Name	Access
07/06/2021	09:00		
07/06/2021	12:00		

**Break**

Search

Break	Date	Time	Special Function
Start			
End			

**Approval Details**

Incharge	Status	Remark
ric2 - RIC2	⊗	
ric1 - RIC1	⊗	

The **Attendance Values** has the following options:

All Attendance Punches

User: 1551SU Shalini User

Attendance Date: 2017/02/06

Shift/Day: GS Normal

Attendance Status: AB AB

Attendance Values: Applied

Reason: On Application

Remark: Applied

Search

Date	Time	Device Name	Access
2017/02/06	09:00		
2017/02/06	17:00		

- **On Application:** Displays punch details at the time of application.
- **Applied:** Displays applied punch values.
- **Current:** Displays current punch values for the selected date.

As per the option selected in **Attendance Values** the details will be displayed below.

**All Attendance Punches** window displays the user's attendance and break details. It also displays the status of user's attendance correction application under **Approval Details**. The application's status is displayed in the **Status** column.

System can auto approve / reject an application if the Reporting In-charge or SA fails to authorize it as per the Approval Policy assigned to the Reporting Groups. To know more about the Approval Policy, refer "[Approval Policy](#)".

**Remarks** displays the comments provided by the Admin/ RIC/ System.

Click **Save** to save the authorization.






## Approved Applications

Click the **Approved** collapsible panel.

The **Approved** section displays all the attendance correction applications that have been approved by the reporting group in-charge or the system administrator. The following screen displays the **Approved** section.

Pending (7)

Approved (20)

User ID ▲	Name	Application Date	Attendance Date	Shift	WC/PH	1st Punch	2nd Punch	3rd Punch	4th Punch	Approve	Reject	Remark	Details
adminalert	adminalert	03/11/2017	05/09/2017	GS		09:00	18:30			<input checked="" type="checkbox"/>	<input type="checkbox"/>	approveee	
adminalert	adminalert	03/11/2017	05/10/2017	GS		09:00	18:30			<input checked="" type="checkbox"/>	<input type="checkbox"/>	approve	
NpunchAS	Npunchforauto shift	17/11/2017	15/11/2017	NS		21:00	05:00			<input checked="" type="checkbox"/>	<input type="checkbox"/>		
NpunchAS	Npunchforauto shift	17/11/2017	15/11/2017	GS		21:00	05:00			<input checked="" type="checkbox"/>	<input type="checkbox"/>		
NpunchAS	Npunchforauto shift	17/11/2017	02/10/2017	ES		05:00	21:00			<input checked="" type="checkbox"/>	<input type="checkbox"/>		

1 - 5 of 20 records

⏪

1

2

3

4

⏩

Rejected (10)

Click the **Details**  icon to view the attendance details of the corresponding user.

**All Attendance Punches** window appears as shown below:

All Attendance Punches

User: U4 User4

Attendance Date: 07/06/2021

Shift/Day: GS Normal

Attendance Status: AB AB

Attendance Values: On Application

Reason: Personal

Search

Date	Time	Device Name	Access
No Data			

Break

Search

Break	Date	Time	Special Function
Start			
End			

Approval Details

Incharge	Status	Remark
RI2 - Riia2	✓ (14/06/2021 16:18)	Approved Attendance RG2

The **Attendance Values** has the following options:

All Attendance Punches

User: 1551SU Shalini User

Attendance Date: 2017/02/06

Shift/Day: GS Normal

Attendance Status: AB AB

Attendance Values: Applied

Reason: On Application

Remark: Applied

Search

Date	Time	Device Name	Access
2017/02/06	09:00		
2017/02/06	17:00		

- **On Application:** Displays punch details at the time of application.
- **Applied:** Displays applied punch values.
- **Current:** Displays current punch values for the selected date.

As per the option selected in **Attendance Values** the details will be displayed below.



**All Attendance Punches** window displays the user's attendance and overtime details. It also displays the status of user's application under **Approval Details**. The application's status is displayed in the **Status** column.

System can auto approve / reject an application if the Reporting In-charge or SA fails to authorize it as per the Approval Policy assigned to the Reporting Groups. To know more about the Approval Policy, refer "[Approval Policy](#)".

Remarks displays the comments provided by the Admin / RIC / System.

Click **Save** to save the authorization.

## Rejected Applications

Click the **Rejected** collapsible panel.

This section lists all attendance correction requests that have been rejected. The following screen is an example of an **Rejected** list of attendance correction requests for a specific date range:

Rejected (4)													
Search													
User ID ▲	Name	Application Date	Attendance Date	Shift	WD/PH	1st Punch	2nd Punch	3rd Punch	4th Punch	Approve	Reject	Remark	Details
KJ	Khushal	01/08/2022	01/08/2022	GS		09:00	21:00			<input type="checkbox"/>	<input type="checkbox"/>	Rejected Attendance Correction	
KJ	Khushal	01/08/2022	01/08/2022	GS		09:00	19:00			<input type="checkbox"/>	<input type="checkbox"/>	Rejected Attendance Correction	
KJ	Khushal	03/08/2022	01/08/2022	GS		09:00	14:00			<input type="checkbox"/>	<input type="checkbox"/>	Rejected Attendance Correction	
KJ	Khushal	01/08/2022	01/08/2022	GS		09:00	18:00			<input type="checkbox"/>	<input type="checkbox"/>	Rejected Attendance Correction	

Click the **Details**  icon to view the attendance details of the corresponding user.

All Attendance Punches window appears as shown below:

The screenshot shows the 'All Attendance Punches' window. It includes search filters for User (U4), Attendance Date (17/06/2021), Shift/Day (GS), Normal, Attendance Status, Attendance Values (On Application), and Reason (Personal). Below the filters is a search bar and a table with columns: Date, Time, Device Name, and Access. The table displays 'No Data'. There is also a 'Break' section with a search bar and a table with columns: Break, Date, Time, and Special Function. The 'Approval Details' section shows a table with columns: Incharge, Status, and Remark. The status is marked as rejected with a red 'X' icon.

Date	Time	Device Name	Access
No Data			

Break	Date	Time	Special Function
Start			
End			

Incharge	Status	Remark
SA - System Admin	(X) (17/06/2021 15:12)	Rejected Attendance Correction

The **Attendance Values** has the following options:

The screenshot shows the 'All Attendance Punches' window with the 'Attendance Values' dropdown menu open. The dropdown menu has three options: 'Applied', 'On Application', and 'Current'. The 'Applied' option is selected and highlighted in blue. The search filters are set to User (1551SU), Attendance Date (2017/02/06), Shift/Day (GS), Normal, Attendance Status (AB), and Reason (Applied). The table below shows two rows of data for the selected date.

Date	Time	Device Name	Access
2017/02/06	09:00		
2017/02/06	17:00		

- **On Application** - Displays punch details at the time of application.
- **Applied** - Displays applied punch values.
- **Current** - Displays current punch values for the selected date.

As per the option selected in **Attendance Values** the details will be displayed below.

**All Attendance Punches** window displays the user's attendance and break details. It also displays the status of user's attendance correction application under **Approval Details**. The application's status is displayed in the **Status** column.

System can auto approve / reject an application if the Reporting In-charge or SA fails to authorize it as per the Approval Policy assigned to the Reporting Groups. To know more about the Approval Policy, refer ["Approval Policy"](#).

**Remarks** displays the comments provided by the Admin / RIC / System.

Click **Save** button to save the changes.

# Event Authorization

The Event Authorization plays very important role in terms of attendance of employee. It specifies prior authorization required for the events that should be considered for Attendance. It allows reporting In-charge or System Administrator to validate these events.



*The events will occur only when Authorization Required is enabled from **Time & Attendance > Policies > Attendance Policy > General Parameters > Event Authorization**.*

*Also, the events will depend on the parameters selected from Event Source list-box. Only the selected Event sources will be displayed here.*

The System Administrator can Authorize the events from this page in absence of reporting in-charge.

The authorization is dependent on the number of Reporting In-charge in the Reporting Group, the Authorization Mode as well as the Approval Policy assigned by the system administrator. For details refer to [“Reporting In-Charge”](#), [“Approval Policy”](#) and [“Configuring Users”](#).

To authorize Events, click **Time & Attendance > Authorization/Approval > Event Authorization**.

The **Event Authorization** page will appear as follows:

You can either:

- view all the pending applications for Event Authorization
- set the filters — Date, Filter Users — to view the desired applications

## All Pending Applications

To view only Pending Applications,

- **Show All Pending Applications:** Select this option to enable the pending application filter.
- Click the **Pending** collapsible panel. All the applications in pending state appear.

To approve the application, select the **Authorize** check box of the desired entry.

To know more refer to [“Pending Events”](#).



*The population on this page depends on the server's database. It might take time to load all pending applications.*

## Applications according to Set Filters

To Set the Filters,

- **Date:** Select this option to enable the date filter. Select the start and end dates by clicking the respective date selection buttons. This defines the period for which User Events are to be viewed. The end date is by default set to the current date and authorization is not allowed for any later date.
- **Filter Users:** You can filter records according to the desired Enterprise Group, All or for an Individual.

Select **All**, to view authorization status of the applications of all the active users on the system.

Select **Individual**, to view authorization status of the applications of a single user. Click the picklist to select the desired User ID/Name.

Select the desired Enterprise Group — Organization, Branch, Department, Section, Category, Grade, Designation, Custom Group1/2/3 and then click the picklist to select the desired group's ID/Name, to view authorization status of these applications.

Click the **View** button to view all pending and authorized events and their details.

## Pending Events

Click the **Pending** collapsible panel.

The **Pending** section lists all the events from users waiting to be sanctioned by the system administrator as shown:



User ID	Name	Date-Time	I/O	Access	Source	Authorize	Remark	View Image	Details
U1	USER	05/08/2022 09:38	Entry	Allowed	App	<input type="checkbox"/>			
U1	USER	04/08/2022 18:05	Entry	Allowed	App	<input type="checkbox"/>			

- **Access:** Specifies whether the access is allowed/denied to the user.
- **Source:** Displays the sources from where the punch is marked i.e. ESS, Device, Mobile Application, etc.


Select the **Authorize** checkbox against an event to authorize it. The administrator can also select all the applications to authorize at the same time and give the verdict by checking the common Authorized checkbox on the header column.

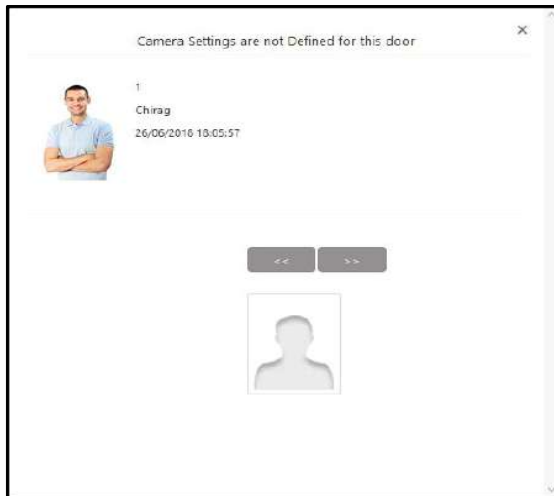
The default **Remark** for the Authorized event application will appear in the respective fields. You can enter your Remark while authorizing the application.

Click the  button to view source location co-ordinate details for an entry or exit event of the user.




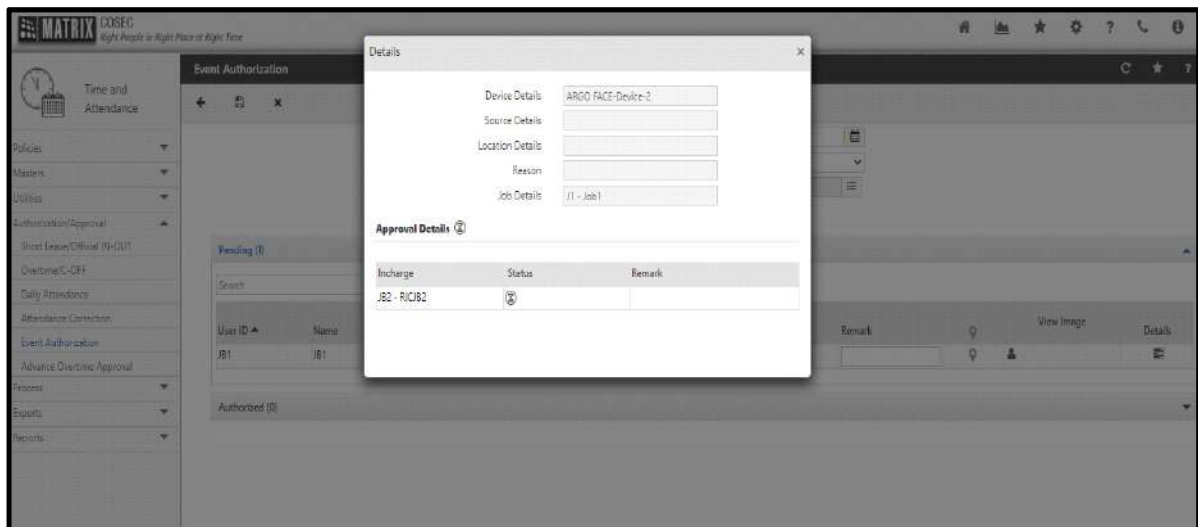
*If Map is not loaded; check the network connection or check the value of Google API Key from Admin Module > System Configuration > Global Policy > Basic tab.*

If there is a Built-In Camera to capture the image of the user while punching on the door; you can view that image by clicking on the **View Image**  icon.



*If the event is generated by API then there will not be any image popup window on clicking View Image icon.*

The Reason for punching from unassigned location (when punch is made from Application) can be viewed from **Details** . Click on **Details** and the below window appears:



You can view details like — Device Details, Source Details, Location Details, Reason.

It also displays the status of user's event authorization request under **Approval Details**. The application's status is displayed in the **Status** column.

System can auto approve / reject an application if the Reporting In-charge or SA fails to authorize it as per the Approval Policy assigned to the Reporting Groups. To know more about the Approval Policy, refer [“Approval Policy”](#).

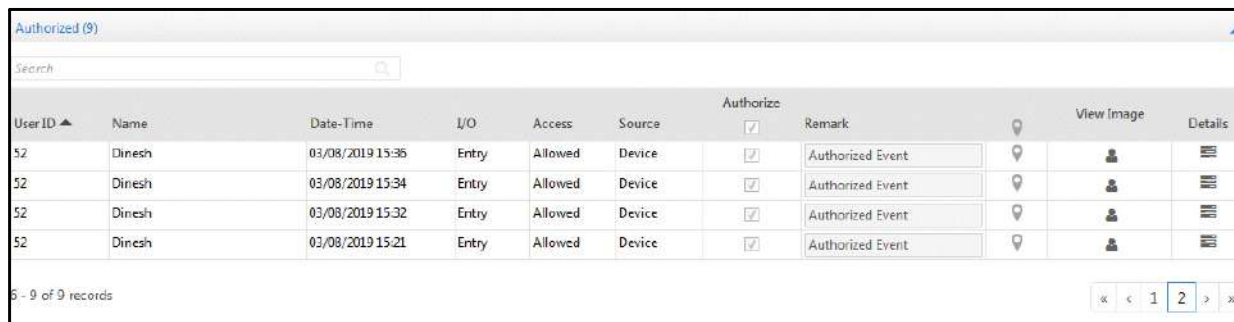
**Remarks** displays the comments provided by the Admin/ RIC/ System.

Click **Save** to save the authorization.

## Authorized Events

Click the **Authorized** collapsible panel.

The **Authorized** section displays all the events that have been authorized by the reporting group in-charge or the system administrator. The following screen displays the **Authorized** section.



User ID ▲	Name	Date-Time	I/O	Access	Source	Authorize	Remark	View Image	Details
52	Dinesh	03/08/2019 15:35	Entry	Allowed	Device	<input checked="" type="checkbox"/>	Authorized Event		
52	Dinesh	03/08/2019 15:34	Entry	Allowed	Device	<input checked="" type="checkbox"/>	Authorized Event		
52	Dinesh	03/08/2019 15:32	Entry	Allowed	Device	<input checked="" type="checkbox"/>	Authorized Event		
52	Dinesh	03/08/2019 15:21	Entry	Allowed	Device	<input checked="" type="checkbox"/>	Authorized Event		


6 - 9 of 9 records

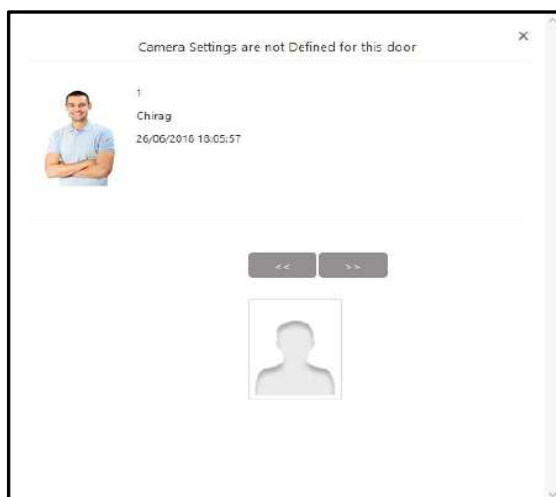
Here, Authorized events can be viewed only.

Click the  button to view source location co-ordinate details for an entry or exit event of the user.




*If Map is not loaded; check the network connection or check the value of Google API Key from Admin Module > System Configuration > Global Policy > Basic tab.*

If there is a Built-In Camera to capture the image of the user while punching on the door; you can view that image by clicking on the **View Image**  icon.



*If the event is generated by API then there will not be any image popup window on clicking View Image icon.*

Click on **Details**  and the below window appears.

Details

Device Details: ARGO FACE-Device-2

Source Details:

Location Details:

Reason:

Job Details: J1 - Job1

**Approval Details** ⓘ

Incharge	Status	Remark
JB2 - RICJB2	⊗	

You can view details like — Device Details, Source Details, Location Details, Reason.

It also displays the status of user's event authorization request under **Approval Details**. The application's status is displayed in the **Status** column.

System can auto approve / reject an application if the Reporting In-charge or SA fails to authorize it as per the Approval Policy assigned to the Reporting Groups. To know more about the Approval Policy, refer "[Approval Policy](#)".

**Remarks** displays the comments provided by the Admin/ RIC/ System.

Click **Save** to save the authorization.



# Advance Overtime Approval

The Advance Overtime Approval is providing prior approval for the Advance Overtime Applications of the users. This page will be displayed for System Administrator.



*Approval of Advance Overtime Application performed by a System Account user will always be pre-approved.*

*Advance Overtime Applications can also be approved by respective Reporting Group In-charges from the ESS application.*

The authorization is dependent on the number of Reporting In-charge in the Reporting Group, the Authorization Mode as well as the Approval Policy assigned by the system administrator. For details refer to [“Reporting In-Charge”](#), [“Approval Policy”](#) and [“Configuring Users”](#).

To approve the applications,

click **Time & Attendance > Authorization/Approval > Advance Overtime Approval**.

The **Advance Overtime Approval** page will appear as follows:

The screenshot shows the 'Advance Overtime Approval' web application. At the top, there's a title bar with 'Advance Overtime Approval' and navigation icons. Below the title bar, there's a section for filtering applications. It includes a radio button for 'Show All Pending Applications' (which is selected), a date range selector for 'Overtime Date' with 'From Date' and 'To Date' fields, a 'Filter Users' dropdown menu set to 'All', and a 'Group/User' section with 'ID' and 'Name' input fields and a 'View' button. Below the filters, there's a 'Pending (1)' section with a search bar. Underneath the search bar is a table with the following columns: 'User', 'Name', 'OT Date', 'OT Hours', 'Application Date', 'Approved Hours', 'Approve' (with a checkbox), 'Reject' (with a checkbox), 'Remark', and 'Details'. The table contains one entry for user '1' with name 'Athira', OT Date '15/01/2021', OT Hours '05:00', Application Date '08/01/2021', and Approved Hours '05:00'. The 'Approve' and 'Reject' checkboxes are currently unchecked.

You can either:

- view all the pending applications for Advance Overtime Approval
- set the filters — Overtime Date, Filter Users — to view the desired applications

## All Pending Applications

To view only Pending Applications,

- **Show All Pending Applications:** Select this option to enable the pending application filter.
- Click the **Pending** collapsible panel. All the applications in pending state appear.

To approve the application, select the **Approve** check box of the desired entry.

To reject the application, select the **Reject** check box of the desired entry.

To know more refer to "[Pending Overtime/C-OFF](#)".

## Applications according to Set Filters

To Set the Filters,

- **Overtime Date:** Set the start and end dates by clicking the respective date selection buttons. This defines the applications to be displayed within the set dates.
- **Filter Users:** You can filter records according to the desired Enterprise Group, All or for an Individual.

Select **All**, to view authorization status of the applications of all the active users on the system.

Select **Individual**, to view authorization status of the applications of a single user. Click the picklist to select the desired User ID/Name.

Select the desired Enterprise Group — Organization, Branch, Department, Section, Category, Grade, Designation, Custom Group 1,/2/3 and then click the picklist to select the desired group's ID/Name, to view authorization status of these applications.

Click the **View** button to view all pending, authorized and rejected application and their details.

## Pending Applications

Click the **Pending** collapsible panel. The **Pending** section lists all the applications of the users awaiting approval by the System Administrator/RIC as shown below.

Show All Pending Applications ☒

Overtime Date ☐ From Date  To Date

Filter Users: All

Group/User: ID  Name

View

Pending (1)

Search

User	Name	OT Date	OT Hours	Application Date	Approved Hours	Approve	Reject	Remark	Details
1	Ashira	12/01/2021	05:00	07/01/2021	05:00	<input type="checkbox"/>	<input type="checkbox"/>		

When any application is in the Pending state it can be authorized by the Admin or RIC.

- To approve/reject applications selectively, click the respective application check box
- To approve/reject all the applications simultaneously, click the Approve /Reject checkbox in the header column.

Once the Admin approves/ rejects the application, the record will be moved from the **Pending** section to the **Approved/ Rejected** section respectively.

The default **Remark** for the Approved and Rejected application will appear in the respective fields. You can enter your Remark while authorizing the application.

To view the details of a particular application, click on the **Details** . The **Advance Overtime Application Detail** window appears as shown below:

Advance Overtime Application Detail

User U1 User1

**Application Details**

Application Date 17/06/2021

OT Date 18/06/2021

OT Hours 05:00

Reason Overtime

Address

Contact Number

**Approval Details** ⓘ

Incharge	Status	Remark
SA - System Admin	ⓘ	

**Advance Overtime Application Detail** window displays the user's advance overtime application.

This window also displays the status of the user's application under **Approval Details**. The application's status is displayed in the **Status** column.

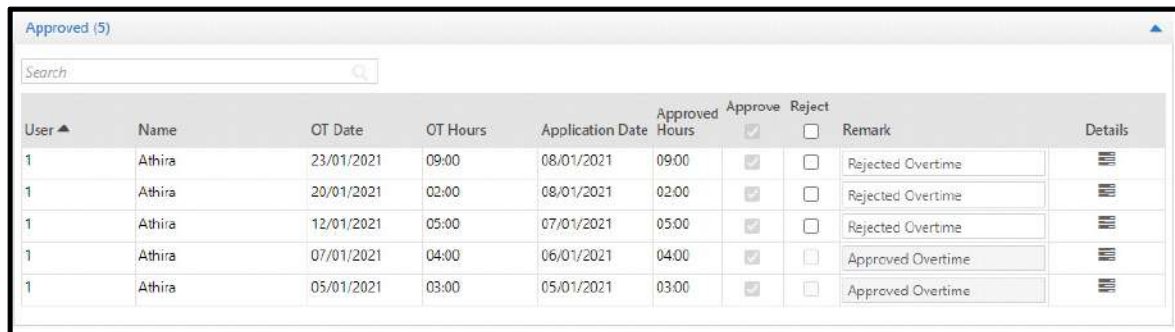
System can auto approve / reject an application if the Reporting In-charge or SA fails to authorize it as per the Approval Policy assigned to the Reporting Groups. To know more about the Approval Policy, refer "[Approval Policy](#)".

**Remarks** displays the comments provided by the Admin/ RIC/ System.

Click **Save** to save the authorization.

## Approved Applications

Click the **Approved** collapsible panel. The **Approved** section lists all the applications of the users that have been approved by the Reporting Group In-Charge/System Administrator as shown below.



The screenshot shows a window titled "Approved (5)" with a search bar and a table of approved overtime applications. The table has columns for User, Name, OT Date, OT Hours, Application Date, Approved Hours, Approve, Reject, Remark, and Details. There are five rows of data, all for user "Athira".

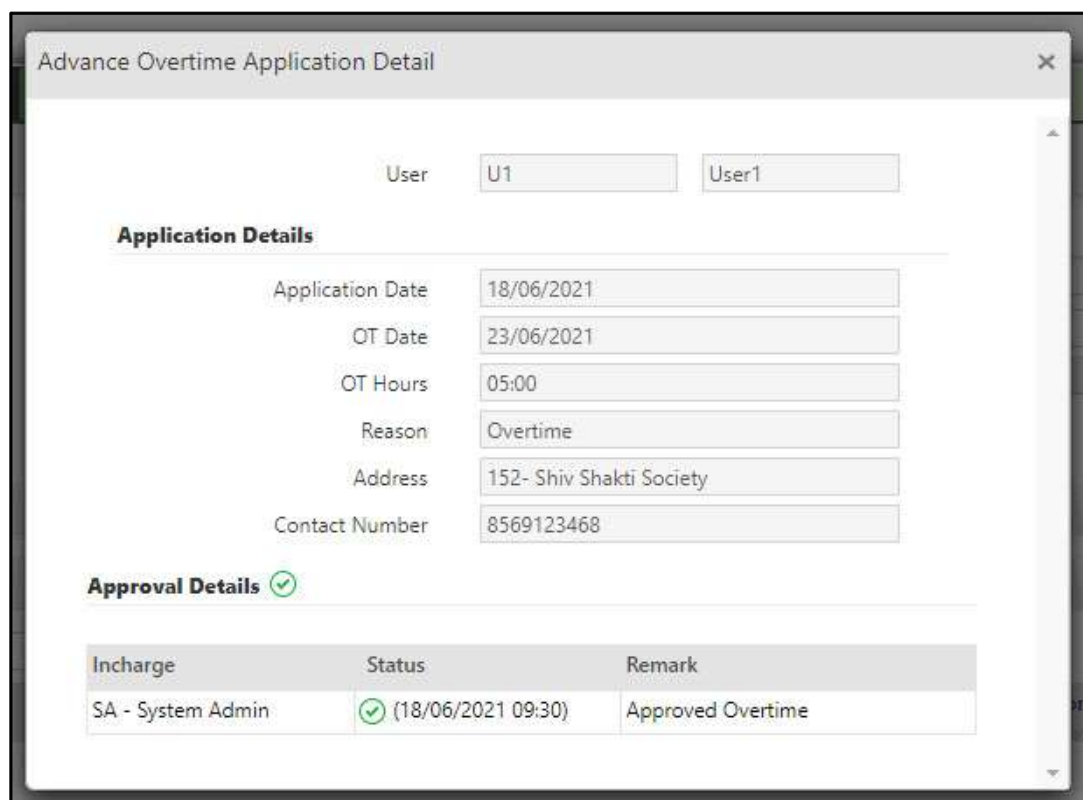
User	Name	OT Date	OT Hours	Application Date	Approved Hours	Approve	Reject	Remark	Details
1	Athira	23/01/2021	09:00	08/01/2021	09:00	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Rejected Overtime	
1	Athira	20/01/2021	02:00	08/01/2021	02:00	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Rejected Overtime	
1	Athira	12/01/2021	05:00	07/01/2021	05:00	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Rejected Overtime	
1	Athira	07/01/2021	04:00	06/01/2021	04:00	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Approved Overtime	
1	Athira	05/01/2021	03:00	05/01/2021	03:00	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Approved Overtime	

The Approved applications of present as well as of future dates can be rejected by the RIC, if required. To do so, select the **Reject** checkbox of the respective application.

The Approved applications of the past dates can only be viewed.

Click the **Details** icon to view the attendance details of the corresponding user.

**Advance Overtime Application Detail** window appears as shown below:



The screenshot shows the "Advance Overtime Application Detail" window. It displays the user "U1" (User1) and their application details. The application details include Application Date (18/06/2021), OT Date (23/06/2021), OT Hours (05:00), Reason (Overtime), Address (152- Shiv Shakti Society), and Contact Number (8569123468). The approval details show the application is approved by "SA - System Admin" on "18/06/2021 09:30" with the remark "Approved Overtime".

Incharge	Status	Remark
SA - System Admin	(18/06/2021 09:30)	Approved Overtime

**Advance Overtime Application Detail** window displays the user's advance overtime application details. It also displays the status of user's application under **Approval Details**. The application's status is displayed in the **Status** column.

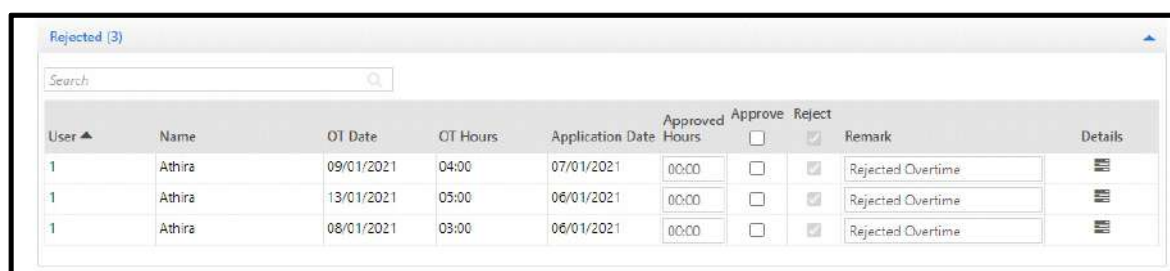
System can auto approve / reject an application if the Reporting In-charge or SA fails to authorize it as per the Approval Policy assigned to the Reporting Groups. To know more about the Approval Policy, refer [“Approval Policy”](#).

**Remark** displays the comments provided by the Admin / RIC / System.

Click **Save** to save the authorization.

## Rejected Applications

Click the **Rejected** collapsible panel. The **Rejected** section lists all the applications of the users that have been rejected by the Reporting Group In-Charge or the System Administrator as shown below.



User	Name	OT Date	OT Hours	Application Date	Approved Hours	Approve	Reject	Remark	Details
1	Athira	09/01/2021	04:00	07/01/2021	00:00	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Rejected Overtime	
1	Athira	13/01/2021	05:00	06/01/2021	00:00	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Rejected Overtime	
1	Athira	08/01/2021	03:00	06/01/2021	00:00	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Rejected Overtime	

The Rejected applications of present as well as future dates can be approved by the Reporting Group In-Charge/ System Administrator, if required. To do so, select the **Approved** checkbox of the respective application and specify the **Approved Hours**.

The Rejected applications of the past dates can only be viewed.

Click the **Details** icon to view the attendance details of the corresponding user.

**Advance Overtime Application Detail** window appears as shown below:

Advance Overtime Application Detail

User

U1

User1

Application Details

Application Date

18/06/2021

OT Date

23/06/2021

OT Hours

05:00

Reason

Overtime

Address

152- Shiv Shakti Society

Contact Number

8569123468

Approval Details

Incharge	Status	Remark
SA - System Admin	⊗ (18/06/2021 09:38)	Rejected Overtime

**Advance Overtime Application Detail** window displays the user's advance overtime application details. It also displays the status of user's application under **Approval Details**. The application's status is displayed in the **Status** column.

System can auto approve / reject an application if the Reporting In-charge or SA fails to authorize it as per the Approval Policy assigned to the Reporting Groups. To know more about the Approval Policy, refer ["Approval Policy"](#).

**Remark** displays the comments provided by the Admin / RIC / System.

Click **Save** button to save the changes.



*System Administrator can delete pending/approved/rejected application.*

# Processing Attendance

This option enables an HR user to manually run certain processes required for generation of shifts, daily attendance and month-end attendance data. Attendance data for users is generated as per their entry/exit punches and scheduled entry/exit time. This is achieved by assigning the shifts to the users for each day of the attendance period. Shift schedule generation does the process of assigning shift for each day of the month as per the schedule group allotted to user.

To Process Daily Attendance [See “Processing Daily Attendance” on page 2061.](#)

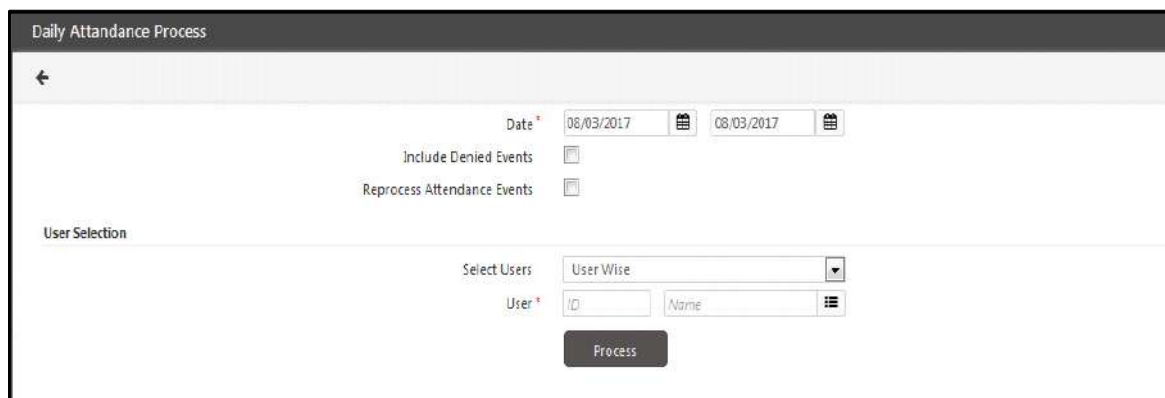
To Process Monthly Attendance [See “Processing Monthly Attendance” on page 2062.](#)

## Processing Daily Attendance

This process will enable the HR user to calculate the times related to attendance marking as per scheduled shift and then mark the attendance for a day. This is on regularized, authorized and summarized based on the Attendance Policy which generate the attendance summary data which can be used as input for salary calculation by any other application after importing the data in required format. Based on the attendance marking events of the day the system calculates the working hours, overtime hours and late-in/early-out hours for the day.

To run the Attendance process, click **Time & Attendance > Process > Daily Attendance**.

The **Daily Attendance Process** page appears as shown:



The following options appear on the **Daily Attendance Process** page for configuration:

- **Date:** Specify the Start and End dates to define the period for which daily attendance is to be processed.
- **Include Denied Events:** Select this checkbox to enable denied user events to be considered for daily attendance processing.
- **Reprocess Attendance Events:** Select this checkbox to reprocess all attendance events based on the new policy settings:

When Time & Attendance policy or shift of user for previous day is changed then it is required to Reprocess Attendance events to correct the attendance calculation.

Example: If user is assigned GS from 1st to 10th of a month. And user is coming in NS from 4th to 7th of month. When you are running the Daily Attendance process on 10th; then it is must to Reprocess Attendance Events to calculate the punches as per the assigned shift.

For the events that requires authorization, Only the authorized events will be considered when **Process** is clicked. Hence, the User Denied Events are not considered for Authorization.



*Indiscriminate use of the **Reprocess Attendance Events** option is not recommended as it will revert all changes made using the **Manual Correction** option.*



*For Site based and Location based Auto Tour feature; when the Tour application is automatically applied/generated; then it cannot be revert back even after reprocessing events. The user has to manually delete/apply for cancellation if needed.*

- **Select Users:** Specify the group of users whose daily attendance data is to be processed in this section. To specify users, select one of the following options in the User Filter dropdown list:
  - **User Wise:** Enables administrator to randomly select users from the user Picklist window.
  - **Group Wise:** Enables the administrator to select all users belonging to a particular group.
  - **All:** Enables administrator to select all active users in the database.

Click the **Process** button to start processing daily attendance data.

## Processing Monthly Attendance

This process will enable the HR user to generate a summary of the attendance period as per the defined attendance policy. In addition, previous adjustment data will be generated for allowed previous closed attendance period. Once this is done, the system allows the HR user to close the current attendance period.

To start the process, click **Time & Attendance > Process > Monthly Attendance**.

The **Monthly Attendance Process** page appears as shown:

The following options appear on the **Monthly Attendance Process** page:

- **Attendance Period:** Select the month and the year for which the process is to be run.



- **Send Alert to Users:** Select this checkbox if an alert message is to be sent to the assigned users at the end of the process.
- **Close Attendance Period:** Select this checkbox to close the chosen attendance period after the process is run. This will ensure that no data can be changed or processed for this period any further.

Suppose the Attendance period for June 2018 is closed and there are pending Award/Penalty authorization applications of June so

- those applications will not be allowed to authorize if Attendance Correction in Attendance Policy is disabled.
- those applications will be allowed to authorize if Attendance Correction in Attendance Policy is enabled for the valid period of adjustment.



*Close Attendance Period check-box will not appear if “Adjustment Generated for Closed Period” in Attendance Policy is enabled.*

- **Select Users:** Specify the group of users whose monthly attendance data is to be processed in this section. To specify users, select one of the following options in the **User Filter** dropdown list:
  - **User Wise:** Enables administrator to randomly select users from the user Picklist window.
  - **Group Wise:** Enables the administrator to select all users belonging to a particular group.
  - **All:** Enables administrator to select all active users in the database.

Click the **Process** button to start processing monthly attendance data.



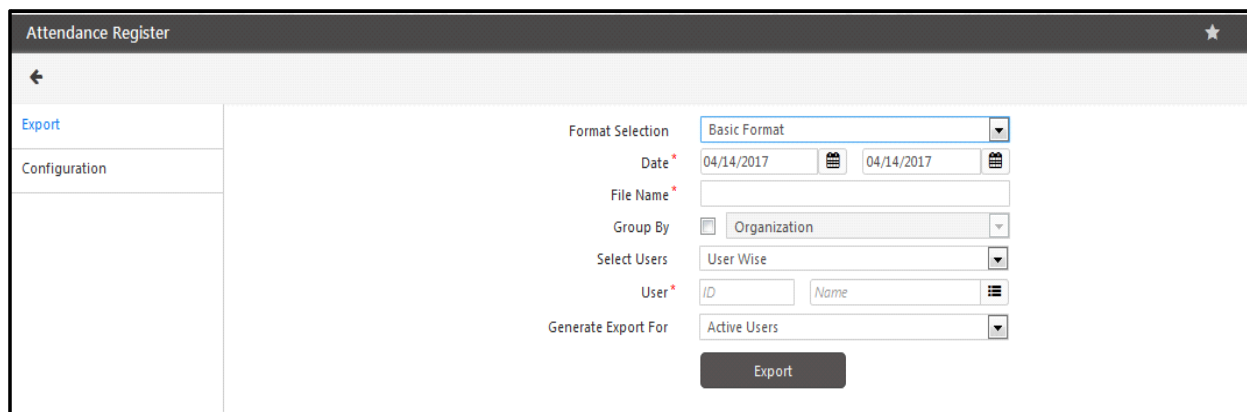
*Monthly Attendance Process can be run for one month in future for custom attendance period. But if process is attempted for an entirely future attendance period w.r.t. current date; then it will not be processed.*

# Attendance Register Export

The COSEC system has the functionality to export attendance register data for a particular period in Excel format. The administrator needs to configure output code for each combination of the attendance status based on the site requirements.

To access this functionality, click **Time & Attendance > Exports > Attendance Register**.

The **Attendance Register** page opens as follows:



The screenshot shows the 'Attendance Register' page with a sidebar on the left containing 'Export' and 'Configuration' links. The main area contains the following fields:

- Format Selection:** A dropdown menu set to 'Basic Format'.
- Date:** Two date pickers showing '04/14/2017'.
- File Name:** A text input field.
- Group By:** A checkbox labeled 'Organization' and a dropdown menu.
- Select Users:** A dropdown menu set to 'User Wise'.
- User:** Two input fields labeled 'ID' and 'Name'.
- Generate Export For:** A dropdown menu set to 'Active Users'.
- Export:** A button at the bottom right.

## Export



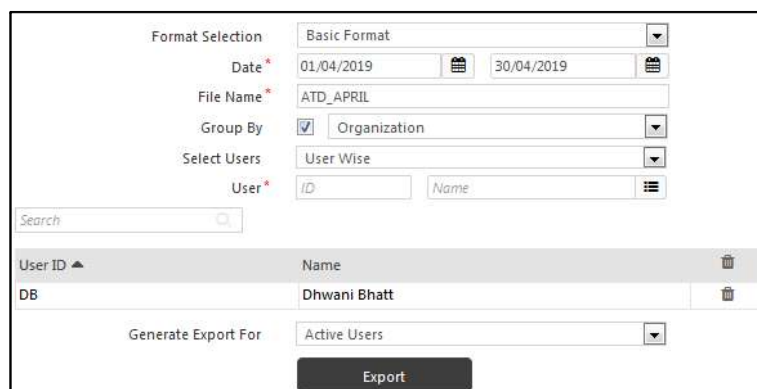
Before Exporting you must do **“Configuration”** for the Export parameters.

**Format Selection:** Select the Format from the options of **Basic Format** and **Form 25**.

### Basic Format

**Date:** If Basic Format is selected then select a date range for data export using the date selection buttons.

**Filename:** Enter an appropriate Filename for the file to be exported as shown.



This screenshot shows the same configuration page as above, but with sample data entered:

- Format Selection:** Basic Format
- Date:** 01/04/2019 to 30/04/2019
- File Name:** ATD\_APRIL
- Group By:** ☒ Organization
- Select Users:** User Wise
- User:** ID and Name fields are empty.
- Generate Export For:** Active Users
- Export:** Button at the bottom.

Below the configuration fields, there is a search bar and a table with the following data:

User ID	Name
DB	Dhwani Bhatt

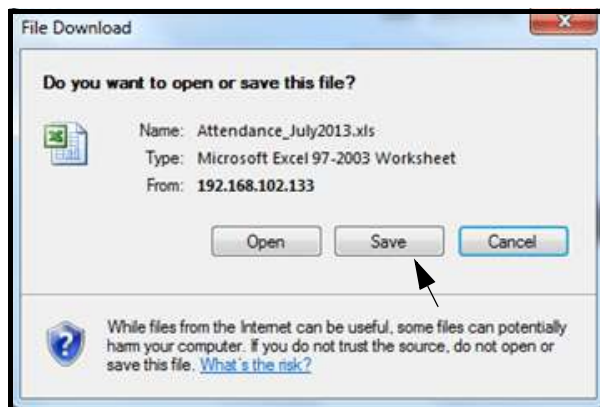
**Group By:** Select the check box and select the Enterprise group from the drop down list.

**Select Users:** Select the user based on one of the following filters from the drop down list:

- **User Wise** - To select users randomly by clicking the User picklist.
- **Group Wise**- To select all users associated with a particular enterprise group using the **Select Group** dropdown list.
- **ALL** - To select all users active in the system.

**Generate Export For:** You can Generate Export For All Users, Active Users or Inactive users.

Click the **Export** button. You can open or save the exported file at a desired location.



Save the file at a desired location. The following figure illustrates an attendance register exported as an Excel file for the month of July, 2013:

SrNo	User ID	Name	Designation Name	01Jul Mon	02Jul Tue	03Jul Wed	04Jul Thu	05Jul Fri	06Jul Sat	07Jul Sun	08Jul Mon	09Jul Tue	10Jul Wed	11Jul Thu	12Jul Fri	13Jul Sat	14Jul Sun	15Jul Mon	16Jul Tue
1	11	SALIM ANSARI	Engineer	W	P	P	P	P	W	P	P	P	P	P	P	P	W	P	P
2	10	RAJENDRA GOSWAMI	Team Leader	W	P	P	P	P	W	P	P	P	P	CL	P	P	W	P	P
3	1001	ANIKITKUMAR SOHLYA	Engineer	P	P	P	P	P	W	P	P	P	P	P	P	P	W	P	P
4	1002	MEGHA H SHUKLA	Engineer	P	P	P	P	P	W	P	P	P	P	P	P	P	W	CL	P
5	1003	UMESH M TALAHURI	Team Leader	P	P	P	P	P	W	P	P	P	P	P	P	P	W	W	P
6	1004	DARSHAK B PATEL	Engineer	P	P	P	P	P	W	P	P	P	P	P	P	P	W	W	????
7	1007	DHAVAL I PATEL	Engineer	P	P	P	P	P	W	P	P	P	P	P	P	P	W	W	P
8	1008	MAYANK K KORAT	Engineer	P	P	P	P	P	W	P	P	P	P	P	P	P	WP	W	P
9	1009	DIPTI K RATHWA	Team Leader	????	P	P	P	CL	CL	W	CL	CL	CL	CL	CL	W	W	CL	P
10	1010	RAHUL S SHAH	Engineer	P	P	P	P	P	W	P	P	P	P	P	P	P	W	W	P
11	1011	PARIKA S PANDEY	Engineer	P	P	P	P	OD	P	W	P	P	P	P	P	P	W	W	P

## Form 25

**Month-Year:** If Form 25 is selected then select the month and year for which the data is to be exported.

**Custom Attendance Period:** Check the box to enable the custom attendance period and select the **month start date- end date** for which the data is to be exported. The month end date is automatically generated as per start date selection.

**Attendance Register**

Export

Configuration

Format Selection: Form 25

Month-Year: April 2017

Custom Attendance Period: ☐

Month Start-End Date: 2 1

File Name: Attendance\_april

Select Users: User Wise

User: ID Name

Search

User ID	Name	
07	Aditi	
101	Khushbu	
1567	Sheetal	
2	Chirag	

Generate Export For: Active Users

Export

**File Name:** Enter an appropriate Filename for the file to be exported.

**Select Users:** Select the user based on the filters of User Wise, Group Wise or All.

**Generate Export for:** You can Generate Export For All Users, Active Users or Inactive users.

Click the **Export** button. You can open or save the exported file at a desired location.



*Before exporting data run the monthly attendance process for the users.*

The Form 25 will be generated in excel format as shown below:

Attendance\_april [Read-Only] [Compatibility Mode] - Microsoft Excel

FileHomeInsertPage LayoutFormulasDataReviewView

</



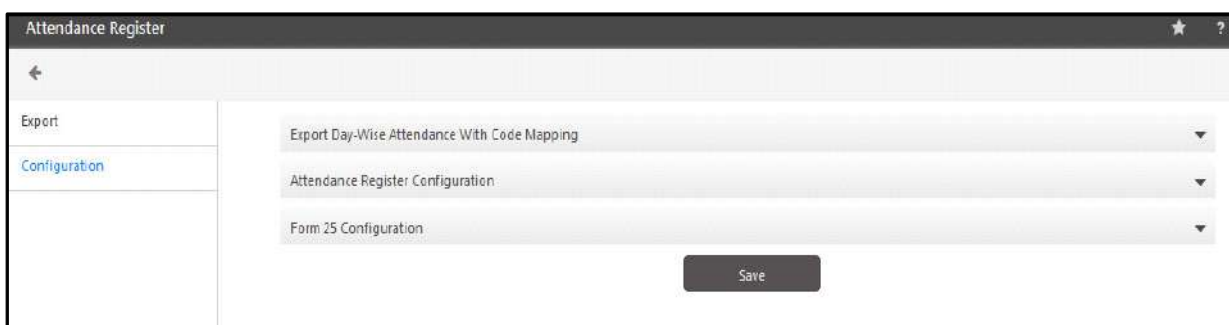
*In case if user applied leave for some future date and was made inactive before that date, then too its reflection in any field after it is made inactive will not be shown anywhere.*

*In "Basic Format" if proper data is required then "Daily Process" must be called.*

## Configuration

Attendance Register Export can be configured to determine which data appears in the exported file and how.

To do this, click **Time & Attendance > Exports > Attendance Register > Configuration**.



There are three collapsible panels:

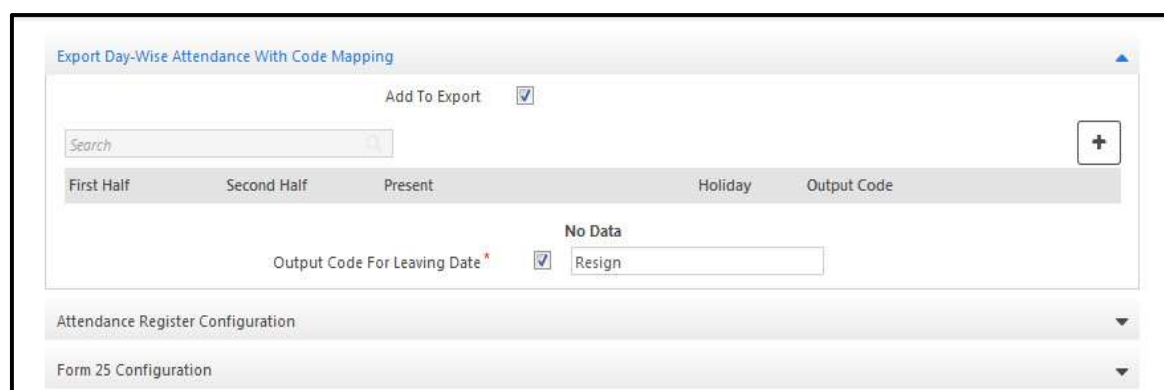
- Export Day-wise Attendance With Code Mapping
- Attendance Register Configuration
- Form 25 Configuration

### Export Day-Wise Attendance With Code Mapping

Click the **Export Day-wise Attendance With Code Mapping** collapsible panel.

Select the **Add to Export** check box to include day-wise attendance with the configured code in the exported file.

This section enables the administrator to map different combinations of attendance statuses for a day to a user defined output code.



Click **Add**  to configure the Output Code for different combinations of First Half and Second Half status.

- Select the desired option from the **First Half** and **Second Half** drop-down lists.
- Select the desired option from the **Present** drop-down list.
- Select the check box in **Holiday** if required.
- Enter the desired code in **Output Code**.

Export Day-Wise Attendance With Code Mapping

Add To Export ☒

Search

First Half ▲	Second Half	Present	Holiday	Output Code	
AB	PR	-	No	PH2	
AB	AB	-	No	A	
PR	AB	-	No	PH1	
PR	PR	-	No	P	
WO	WO	Full Day	No	WF	

1 - 5 of 6 records

Output Code For Leaving Date ☒

« < 1 2 > »

In the above example, the output code for a combination of a “Present” status in the first half, and “Absent” status in the second half for a user is defined as “PH1”. User can also set separate codes for full day present and half day present on a Week Off/Public Holiday, as shown above.

An output code can also be defined against a user’s Leaving Date i.e. the last day of the user in the organization (e.g. “Resign”).

Click to save or click to discard. The added entry appears in the grid.

You can Edit or Delete the desired entry. To edit, click or to delete click of the respective entry.

**Output Code For Leaving Date:** Select the check box to enable and configure the code.

Click **Save**.

## Attendance Register Configuration

Click the **Attendance Register Configuration** collapsible panel.

**Select Fields to Export:** You can select the desired fields or can select all the fields at once.

The screenshot shows the 'Attendance Register Configuration' window. The 'Select Fields To Export' section has a search bar, a 'Select All' checkbox, and a list of fields with checkboxes. The 'Export Per Leave Summary' section has a search bar, an 'Add To Export' checkbox, and a table with columns: Leave ID, Leave Name, and Output Code.

Leave ID	Leave Name	Output Code
CO	C-off	CO
LW	Leave Without Pay	UL
ML	MATERNITY LEAVE	ML
PL	PAID LEAVE	PL

- To select particular fields, select the check boxes for the desired fields to include them during export from the COSEC database.
- OR**
- To select all the fields, select the **Select All** check box to include all the fields during export from the COSEC database. The fields on all the pages will be selected.

**Include Summary in Export:** Select this check box to provide the sum total of the values of specific fields in export.

The following fields can be included in the summation.

- 1.<Daily> Work Hours
- 2.<Daily> Loss Hours
- 3.<Daily> Extra Work Hours
- 4.<Shift-Wise> Attendance
- 5.Shift-Allowance Presence
- 6.Present
- 7.Absent
- 8.Leaves
- 9.Holiday-Present
- 10.PH-HD/FD-Present
- 11.Work-Hours-On-Holiday
- 12.Week-Off-Present
- 13.WO-HD/FD-Present
- 14.Work-Hours-On Week-Off
- 15.Generated Overtime

16.Total Authorized Overtime  
17.Authorized OT1  
18.Authorized OT2  
19.Authorized OT3  
20.Authorized OT4  
21.Authorized OT5  
22.Gross-Work Hours  
23.Total Planned-Hours  
24.Net-Work-Hours  
25.Extra-Work-Hours  
26.Total-Late-In  
27.Total-Early-Out  
28.Total-Loss-Hours  
29.Total-Paid-Leaves  
30.Total-Unpaid-Leaves  
31.Total-Lay-Off  
32.Total-C-Off  
33.Total-Tour  
34.Week <no>-Work Hours  
35.Payable Days  
36.Total Days  
37. Short Leave  
38. Official Hour

### Export Per Leave Summary


**Add to Export:** Select the **Add to Export** check box to include the leave summary in exported file.

This section enables the user to define codes for various leave types in the exported file. Eg: The output code for Paid leave is set as "PL1".

Click **Add**  .

- Click the **Leave ID** picklist. The **Picklist For Leave Masters** pop-up appears.Select the desired option.
- Click the **Leave Name** picklist. The **Picklist For Leave Masters** pop-up appears.Select the desired option.
- Enter the desired **Output Code**.

Click  to save or click  to discard. The added entry appears in the grid.

To delete click  of the respective entry.

Click **Save**.

## Form 25 Configuration

Form 25 format displays the attendance details of employees. These may differ from organization to organization. You can configure them as per your requirement.

Enter a custom **Header Message** that will appear on Form 25.



Form 25 Configuration

Header Message

Add To Worked Days ☐ Week-Off ☐ PH

Apply Strict Code Mapping ☒ ⓘ

Save

Select the **Week-Off** and/or **PH** checkboxes to include week-offs and/or public holidays in working days for the selected month.

Select **Apply Strict Code Mapping** check box to apply Code Mapping on all the attendance data which are to be exported. You can configure code mapping from **Export Day-Wise Attendance with Code Mapping**.

To know more about **Export Day-Wise Attendance with Code Mapping**, refer [“Export Day-Wise Attendance With Code Mapping”](#).

Example: Export data on 21/05/2021

Case 1: If Apply Strict Code Mapping = Disabled

*Export Day-Wise Attendance with Code Mapping*

First IN	Second IN	Output Code
IN	AB	AB

In this case, the code mapping is applicable till the date 20/05/2021 while exporting the data.

Case 2: If Apply Strict Code Mapping = Enabled

*Export Day-Wise Attendance with Code Mapping*

First IN	Second IN	Output Code
IN	AB	AB

In this case, the code mapping is applicable till the date 21/05/2021 while exporting the data.

Click **Save** to save these configurations for the next export.

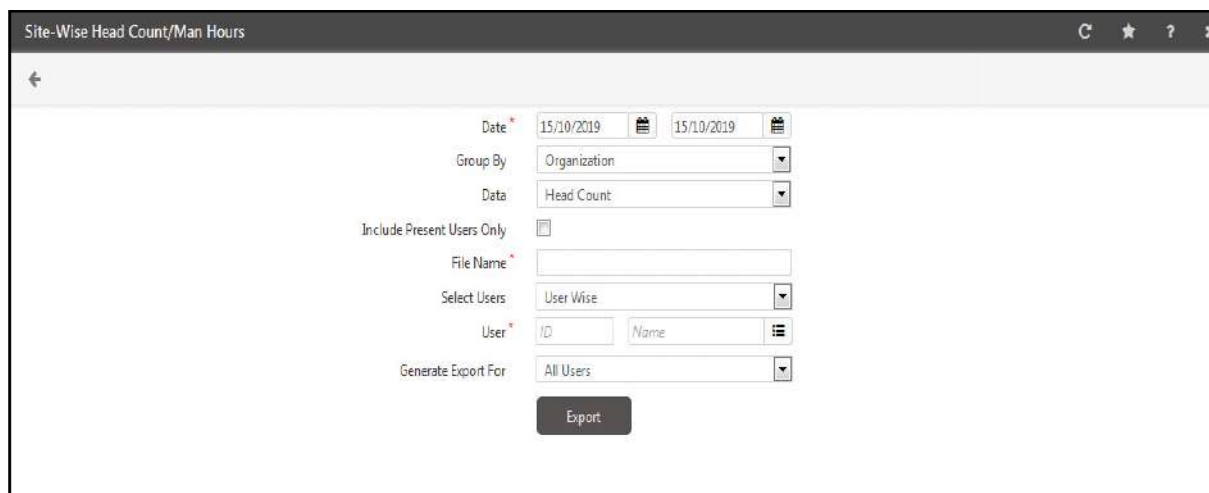
The Exported file is shown in [“Export”](#) section.

# Site-Wise Head Count/Man Hours Export

The COSEC Time and Attendance module enables the export of data in Excel format based on both the total head count of personnel as well as the total man-hours count for all sites associated with a particular enterprise group (such as *Organization, Branch* etc).

To access this functionality, click **Time & Attendance > Exports > Site-Wise Headcount/Man Hours**.

The **Site-Wise Headcount/Man Hours** page opens as follows:



The screenshot shows the 'Site-Wise Head Count/Man Hours' export form. It includes the following fields and controls:

- Date**: Two date pickers showing '15/10/2019'.
- Group By**: A dropdown menu set to 'Organization'.
- Data**: A dropdown menu set to 'Head Count'.
- Include Present Users Only**: An unchecked checkbox.
- File Name**: A text input field.
- Select Users**: A dropdown menu set to 'User Wise'.
- User**: Two input fields for 'ID' and 'Name'.
- Generate Export For**: A dropdown menu set to 'All Users'.
- Export**: A button at the bottom.

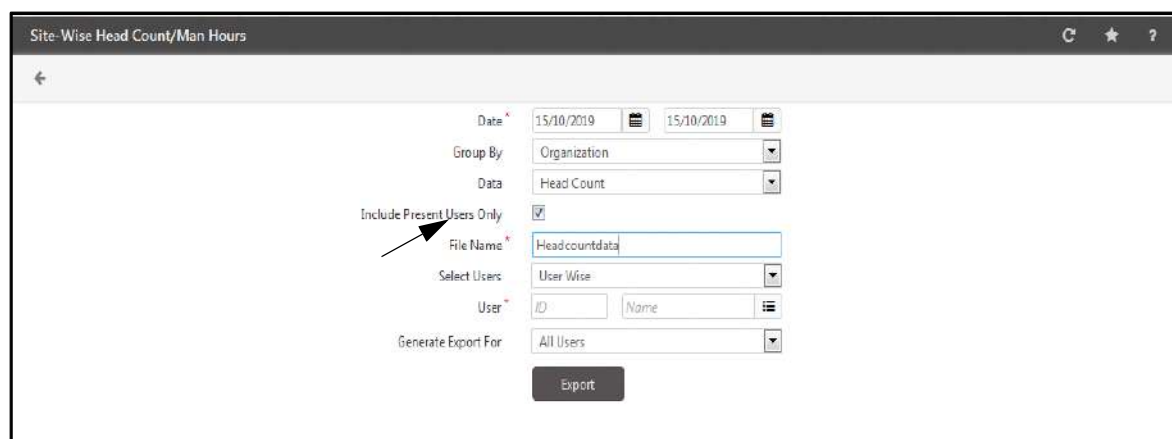
**Date**: Select a date range for data export by selecting the date selection buttons.

**Group By**: Select the desired option — Organization, Branch, Department, Section, Category, Grade, Designation, Custom Group1/2/3.

**Data**: Select the desired option— **Head Count**, **Man-hours** or **Work Hours** based on which the Site Wise data is to be exported.

**Include Present Users Only**: Enable this check box to ensure that the headcount is increased only if a user is present for a full day for an attendance date within the specified date range.

**File Name**: Enter an appropriate Filename for the file to be exported.



This screenshot is similar to the previous one but includes annotations:

- An arrow points to the **Include Present Users Only** checkbox, which is now checked.
- The **File Name** input field contains the text 'Headcountdata'.

If you select **Work Hours**, click on **Select Sites**.

**Selected Sites:** Select the desired option— **All** or **Randomly**.

If **All** is selected, then all sites will be selected.

If you select **Randomly**, click **Sites** picklist. The **Picklist For Site** pop-up appears.

The 'Picklist For Site' dialog box is shown with a green header bar indicating 'Total Selected: 0 Records'. Below the header is a search bar and a 'Show Selected' link. A 'Select All' checkbox is present. The main area contains a table with 10 rows, each with a checkbox, a 'Site ID' column, and a 'Name' column. The sites listed are Factory, HO, RnD1, RnD2, Site 5, Site 6, Site 7, Site 8, Site 9, and Site 10. At the bottom, there is a pagination bar showing '1 - 10 of 11 records' and a set of navigation buttons. The 'OK' and 'Cancel' buttons are at the bottom right.

<input type="checkbox"/>	Site ID ▲	Name
<input type="checkbox"/>	1	Factory
<input type="checkbox"/>	2	HO
<input type="checkbox"/>	3	RnD1
<input type="checkbox"/>	4	RnD2
<input type="checkbox"/>	5	Site 5
<input type="checkbox"/>	6	Site 6
<input type="checkbox"/>	7	Site 7
<input type="checkbox"/>	8	Site 8
<input type="checkbox"/>	9	Site 9
<input type="checkbox"/>	10	Site 10

You can either select particular sites or all the sites at once.

To select particular sites, select the check boxes of the desired sites.

The 'Picklist For Site' dialog box is shown with a green header bar indicating 'Total Selected: 2 Records'. Below the header is a search bar and a 'Show Selected' link. A 'Select All' checkbox is present. The main area contains a table with 10 rows, each with a checkbox, a 'Site ID' column, and a 'Name' column. The sites listed are Factory, HO, RnD1, RnD2, Site 5, Site 6, Site 7, Site 8, Site 9, and Site 10. The checkboxes for 'Factory' and 'HO' are checked. At the bottom, there is a pagination bar showing '1 - 10 of 11 records' and a set of navigation buttons. The 'OK' and 'Cancel' buttons are at the bottom right.

<input type="checkbox"/>	Site ID ▲	Name
<input checked="" type="checkbox"/>	1	Factory
<input checked="" type="checkbox"/>	2	HO
<input type="checkbox"/>	3	RnD1
<input type="checkbox"/>	4	RnD2
<input type="checkbox"/>	5	Site 5
<input type="checkbox"/>	6	Site 6
<input type="checkbox"/>	7	Site 7
<input type="checkbox"/>	8	Site 8
<input type="checkbox"/>	9	Site 9
<input type="checkbox"/>	10	Site 10

OR

To select all the sites select the **Select All** check box. The sites on all the pages will be selected.

Picklist For Site

Total Selected: 11 Records

Search

Show Selected

☒ Select All

<input checked="" type="checkbox"/>	Site ID ▲	Name
<input checked="" type="checkbox"/>	1	Factory
<input checked="" type="checkbox"/>	2	HO
<input checked="" type="checkbox"/>	3	RnD1
<input checked="" type="checkbox"/>	4	RnD2
<input checked="" type="checkbox"/>	5	Site 5
<input checked="" type="checkbox"/>	6	Site 6
<input checked="" type="checkbox"/>	7	Site 7
<input checked="" type="checkbox"/>	8	Site 8
<input checked="" type="checkbox"/>	9	Site 9
<input checked="" type="checkbox"/>	10	Site 10

1 - 10 of 11 records

<<

<

1

2

>

>>

OK

Cancel

Click **OK**

The selected sites appears in the grid.

Selected Sites

Randomly

Site

ID

Name

ID ▲	Name	
1	Factory	
2	HO	
3	RnD1	
4	RnD2	

You can also delete the desired sites, click **Delete** icon of the respective sites.

**Select Users:** Select the desired option—**User-Wise**, **Group-Wise**, or **All**.

If you select **User Wise**,

Click on **User** picklist. The Picklist For All User pop-up appears.

Picklist For All Users

Total Selected: 0 Records

Search  Show Selected

<input type="checkbox"/>	User ID ▲	Name
<input type="checkbox"/>	1	SALIM ANSARI
<input type="checkbox"/>	10	RAJENDRA GOSWAMI
<input type="checkbox"/>	1001	ANKITKUMAR SOHLIYA
<input type="checkbox"/>	1002	MEGHA H SHUKLA
<input type="checkbox"/>	1003	UMESH M TALANPURI
<input type="checkbox"/>	1004	DARSHAK B PATEL
<input type="checkbox"/>	1007	DHAVAL I PATEL
<input type="checkbox"/>	1008	MAYANK K KORAT
<input type="checkbox"/>	1009	DIPTI K RATHWA
<input type="checkbox"/>	1010	RAHUL S SHAH

1 - 10 of 1986 records

OK Cancel

Select the desired check boxes from the list. Click **OK**

The selected users appears in the grid.

Select Users

User Wise

User  ID  Name

Search

User ID ▲	Name	
1	SALIM ANSARI	
10	RAJENDRA GOSWAMI	
1001	ANKITKUMAR SOHLIYA	

Apply

- You can also delete the desired users. To do so, click **Delete** of the respective user.


If you select Group-Wise option,

Select the desired enterprise group from the **Select Group** drop-down list — Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1/2/3.

For each enterprise group — Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1/2/3, click the corresponding picklist to select the desired option/s.

The selected group appears in the grid.

Search			
ID	Name	Group	
1	MATRIX COMSEC PVT. LTD.	Organization	
2	SAMARTH	Organization	
3	AVDHOT	Organization	
4	ELSENGARD	Organization	
Apply			

You can also delete particular group. To do so, click **Delete**  of the respective group.

If you select **All** option, then all the users will be selected.

**Generate Export for:** Select the desired options—**All Users**, **Active User** or **Inactive User**.

Click **Export**.

Site-Wise Head Count/Man Hours

Date: 15/10/2019 15/10/2019  
Group By: Organization  
Data: Head Count  
Include Present Users Only: ☒  
File Name: Headcountdata  
Select Users: User Wise  
User: ID Name

Search

User ID	Name	
1	Vagnesh	
123	Suresh	
13	Sujal	
15	Rushi	
2	Vesha	

1 - 5 of 7 records

Generate Export For: Active Users

Export

You can open or save the file in a suitable location. The following figure illustrates a sample Excel file with the site-wise head count for Organization.

Site-Organization Wise Head Count Summary From 05/01/2017 To 05/01/2017			
Sr No	Site Name	Organization-1[1]	Matrix[2]
1	HO Site	0	2
2	Matrix- RnD	0	2

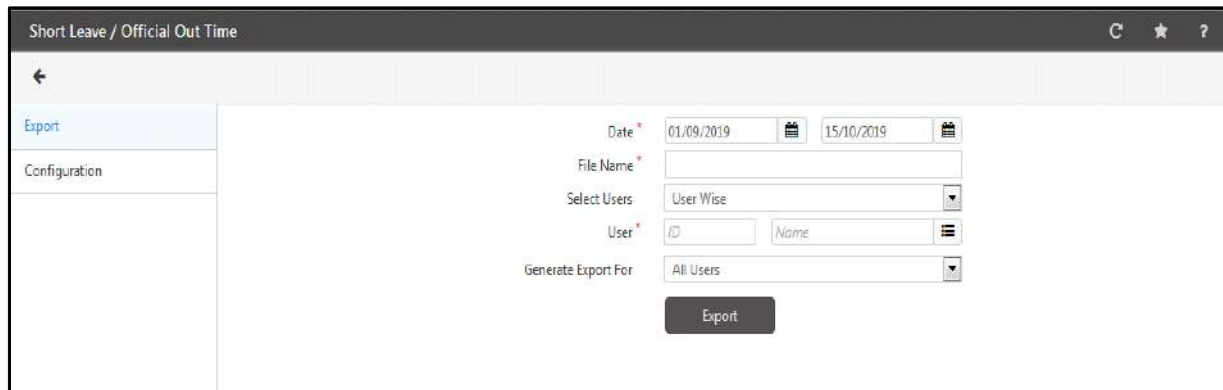
The data based on Man hours is shown as below.

Site-Organization Wise Man Hours Summary From 05/01/2017 To 05/01/2017			
Sr No	Site Name	Organization-1[1]	Matrix[2]
1	HO Site	00:00	18:00
2	Matrix- RnD	00:00	09:02

# Short Leave/Official Out Time Export

This functionality enables you to export specific data related to Short Leave/Official IN-OUT marking of users such as total duration of short leaves (authorized/unauthorized), total duration of Official Out Time (authorized/unauthorized), reason-wise hours authorized as short leave or official marking etc. The data can be exported in Excel format.

To access this functionality, click **Time & Attendance > Exports > Short Leave/Official Out Time**.

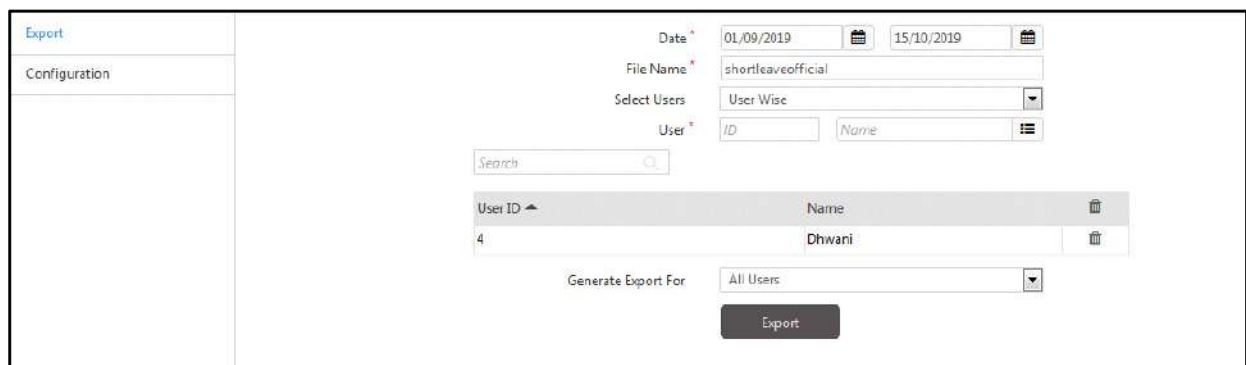


## Export



Before Exporting you must do *“Configuration”* for the Export parameters.

- You can select the **Date** range to export the Short leave, Official out time for the desired duration of the month.
- Specify the alphanumeric **File Name** with upto 20 character as the name of the file to be exported.
- **Select Users:** You can select the users based on filter options of User Wise, Group Wise (Enterprise groups) or All users (active/inactive/ all).
- **Generate Export for:** Select the users as **All**, **Active** or **Inactive** for which Short leave, Official out time is to be exported.



Finally Click on Export button to Export the Short leave, Official out time for the selected user.



Short Leave / Official Out Time From 04/01/2017 To 04/30/2017											
A	B	C	D	E	F	G	H	I	J	K	
Short Leave / Official Out Time From 04/01/2017 To 04/30/2017											
User ID	Name	Total-Late-IN-Hours	Total-Early-OUT-Hours	OUT Meeting with Client Hours	OUT Health not fine Hours	IN Presentation Hours	Total-Out-Time	Total-Authorized-Short-Leave-Hours	Total-Unauthorized-Short-Leave-Hours	Total-Authorized-Official-IN/OUT-Hours	
1567	Sheetal	00:12		08:00	00:30	00:30	09:00	00:30		08:30	

## Configuration

The **Short Leave/Official Out Time** export can be configured to determine which data is to be exported in the exported file.

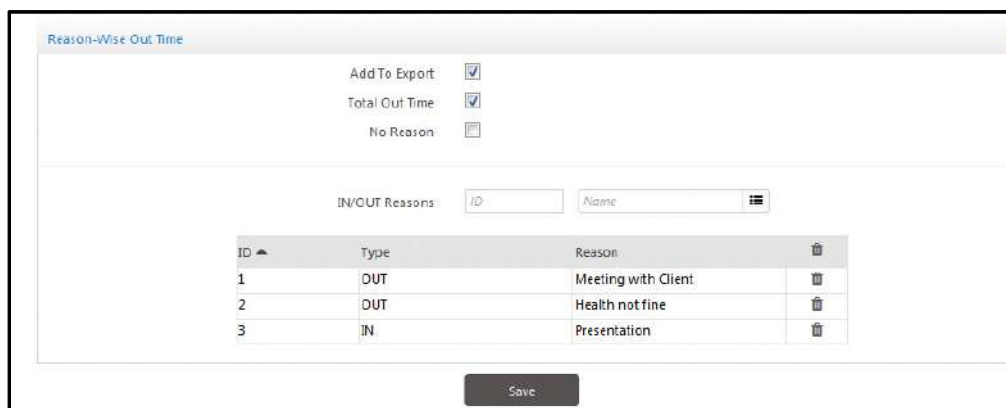
**Select Fields to Export:** You can select particular fields or can select all the fields at once.

- To select particular fields, select the check boxes for the desired fields to include them during the export of Short Leave/Official Out time.
- OR**
- To select all the fields, select the **Select All** check box to include them during the export of Short Leave/Official Out time. The fields on all the pages will be selected.

## Reason-Wise Out Time

Click the **Reason-Wise Out Time** collapsible panel.

You can select the IN/OUT reasons for which the IN/OUT timings are to be exported.



Reason-Wise Out Time

Add To Export ☒

Total Out Time ☒

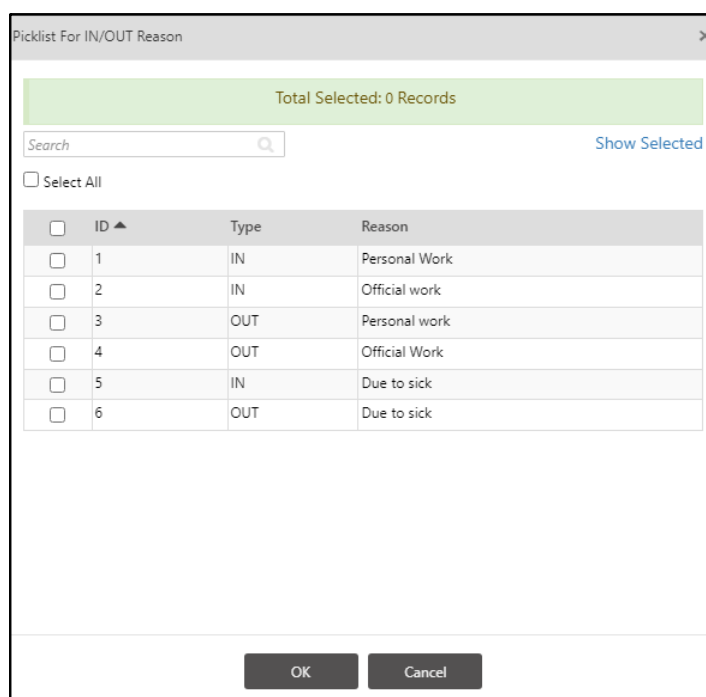
No Reason ☐

IN/OUT Reasons: ID  Name

ID	Type	Reason	
1	OUT	Meeting with Client	
2	OUT	Health not fine	
3	IN	Presentation	

Save

- Select the **Add to Export** check box to add the authorized personal or official out time corresponding to the selected IN/OUT Reasons. To configure In/OUT reasons click T&A> Masters > In/Out Reasons.
- Select the **Total Out Time** and **No Reason** check boxes to add these fields to the export.
- Click the **IN/OUT Reasons** picklist. The **Picklist For IN/OUT Reason** appears.



Picklist For IN/OUT Reason

Total Selected: 0 Records

Search

[Show Selected](#)


☐ Select All

<input type="checkbox"/>	ID	Type	Reason
<input type="checkbox"/>	1	IN	Personal Work
<input type="checkbox"/>	2	IN	Official work
<input type="checkbox"/>	3	OUT	Personal work
<input type="checkbox"/>	4	OUT	Official Work
<input type="checkbox"/>	5	IN	Due to sick
<input type="checkbox"/>	6	OUT	Due to sick

OK Cancel

You can select particular reason or can select all the reasons at once.

- To select particular reason, select the check boxes of the desired reasons.
- OR**
- To select all the reasons, select the Select All check box.
- Click **OK**.The selected reasons appear in the grid.

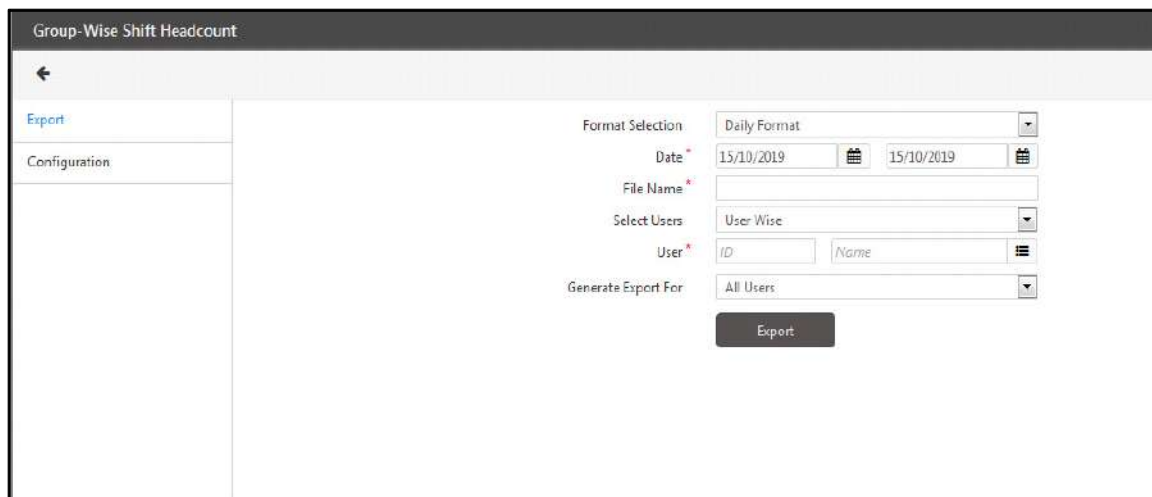
You can delete the desired reason.To do so, click **Delete**  of the respective reason.

- Click **Save** to save these configurations for the next export. The Exported file is shown in **"Export"** section.

# Group-Wise Shift Head Count Export

This feature enables the export of data in Excel format for the overall count of users belonging to different enterprise groups (branches, departments, grades etc. say, in a manufacturing facility), reporting across different shifts (say, day and night shifts). The data can be exported in daily and monthly formats once the enterprise groups, shift groups and shift codes have been configured using the Configuration tab.

To access this functionality, click **Time & Attendance > Exports > Group-Wise Shift Headcount**.



## Export



Before Exporting you must do **“Configuration”** for the Export parameters.

**Format Selection:** Select the export format as **Daily Format** or **Monthly Format**.

**Date:** Select a date range for data export by selecting the date selection buttons.

**File Name:** Enter an appropriate Filename for the file to be exported.

**Select Users:** Select one of the following filters from the drop down list:

- **Use Wise** - To select users randomly by clicking the **Select User** button.
- **Select Group** - To select all users associated with a particular enterprise group using the **Select Group** dropdown list.
- **ALL** - To select all users active on the system.

**Generate Export for:** Select the users as **All**, **Active** or **Inactive** for which Group-wise shift headcount is to be exported.

Click on **Export** and save the file at the required location.

## Configuration

The Group-Wise Shift Headcount Export can be configured to view the shift wise head count in the exported file.

### Enterprise Group Configuration

Click the **Enterprise Group Configuration** collapsible panel and configure the following:

- For each **Group-1**, **Group-2** and **Group-3** select the desired enterprise group from the drop-down, for which shift-based headcount data is to be exported. As per the
- **Filter By:** Select the desired option from the dropdown list — Group-1, Group-2 or Group-3.
- **Select Organization/Branch/Department/Designation/Section/Grade/Custom Group1/Custom Group2/Custom Group3/Category:** This option is displayed according to the option selected in Filter By above. For Example: If in Filter By: Group-1 is selected and in Group-1: Category is selected. Then we need to select the desired Category here.

Select the desired option — All, Selected.

- If you select **Selected**, you can select particular categories or can select all the categories at once.
  - To select particular categories, select the check boxes of the desired categories.**OR**
  - To select all the categories, select the Select All check box. The categories on all the pages will be selected.

### Shift Configuration

Click the **Shift Configuration** collapsible panel and configure the following:

## Select Shifts For Export

- Select **Group-1 Shifts**: Click the **Select Group-1 Shift** picklist. The **Picklist For Shift Master** pop-up appears.

Picklist For Shift Masters

Total Selected: 0 Records

Search  Show Selected

☐ Select All

<input type="checkbox"/>	SFTID ▼	SFTName	SFTSTTime	SFTEDTime	BRKSTTime	BRKEDTime
<input type="checkbox"/>	US	USA 14:30-00:00	14:30	00:00	17:00	17:30
<input type="checkbox"/>	U2	US 17:30-02:30	17:30	02:30	22:00	22:30
<input type="checkbox"/>	U1	USA 1820-0300	18:20	03:00		
<input type="checkbox"/>	TS	1100 to 1930	11:00	19:30		
<input type="checkbox"/>	SU	Support US	20:00	05:00		
<input type="checkbox"/>	SS	Saturday 0900-1330	09:00	13:30		
<input type="checkbox"/>	SN	Support Night	23:30	09:00	03:00	03:30
<input type="checkbox"/>	SF	Saturday First	14:10	18:30		
<input type="checkbox"/>	SE	Support Evening	18:00	03:30	20:30	21:00
<input type="checkbox"/>	SS	Guard 2300 to 0700	23:00	07:00		

1 - 10 of 60 records

OK Cancel

You can either select particular shifts or can select all the shifts at once.

To select particular shifts, select the check boxes of the desired shifts.

Picklist For Shift Masters

Total Selected: 2 Records

Search  Show Selected

☐ Select All

<input type="checkbox"/>	SFTID ▼	SFTName	SFTSTTime	SFTEDTime	BRKSTTime	BRKEDTime
<input checked="" type="checkbox"/>	US	USA 14:30-00:00	14:30	00:00	17:00	17:30
<input checked="" type="checkbox"/>	U2	US 17:30-02:30	17:30	02:30	22:00	22:30
<input type="checkbox"/>	U1	USA 1820-0300	18:20	03:00		
<input type="checkbox"/>	TS	1100 to 1930	11:00	19:30		
<input type="checkbox"/>	SU	Support US	20:00	05:00		
<input type="checkbox"/>	SS	Saturday 0900-1330	09:00	13:30		
<input type="checkbox"/>	SN	Support Night	23:30	09:00	03:00	03:30
<input type="checkbox"/>	SF	Saturday First	14:10	18:30		
<input type="checkbox"/>	SE	Support Evening	18:00	03:30	20:30	21:00
<input type="checkbox"/>	SS	Guard 2300 to 0700	23:00	07:00		

1 - 10 of 60 records

OK Cancel

OR

To select all the shifts at once, select the **Select All** check box. The shifts on all the pages will be selected.

Picklist For Shift Masters

Total Selected: 60 Records

Search  Show Selected

☒ Select All

<input checked="" type="checkbox"/>	SFTID	SFTName	SFTSTTime	SFTEDTime	BRKSTTime	BRKEDTime
<input checked="" type="checkbox"/>	US	USA 14:30-00:00	14:30	00:00	17:00	17:30
<input checked="" type="checkbox"/>	U2	US 17:30-02:30	17:30	02:30	22:00	22:30
<input checked="" type="checkbox"/>	U1	USA 1820-0300	18:20	03:00		
<input checked="" type="checkbox"/>	TS	1100 to 1930	11:00	19:30		
<input checked="" type="checkbox"/>	SU	Support US	20:00	05:00		
<input checked="" type="checkbox"/>	SS	Saturday 0900-1330	09:00	13:30		
<input checked="" type="checkbox"/>	SN	Support Night	23:30	09:00	03:00	03:30
<input checked="" type="checkbox"/>	SF	Saturday First	14:10	18:30		
<input checked="" type="checkbox"/>	SE	Support Evening	18:00	03:30	20:30	21:00
<input checked="" type="checkbox"/>	SS	Guard 2300 to 0700	23:00	07:00		

1 - 10 of 60 records

OK Cancel

Click **OK**.

All the selected shifts appear in the grid.

Select Group-1 Shifts

ID  Name

ID	Name	
10	GENERAL 9:30 TO 7:00	
11	General Shift	
21	Fac Gen Shift 2	
22	Fac Saturday Shift	
23	Fac General Shift	

1 - 5 of 7 records

You can also delete the desired shifts. To do so, click **Delete** of the respective shifts.

Similarly, configure **Select Group-2 Shifts**. Click **Save**.

### Shift Groups Code For Export

- **Group-1 Code:** Configure the code for Group-1 Shift.
- **Group-2 Code:** Configure the code for Group-2 Shift.

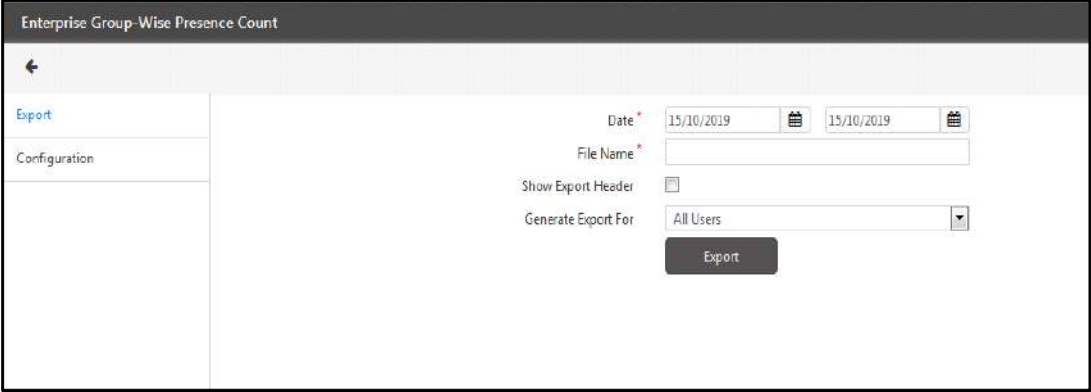
Click the **Save** button to save these configurations for the next export. The exported file will display the parameters as configured.

Group-Wise Shift Headcount From 01/05/2017 To 03/05/2017										
Branch	Department	Organization-1			Matrix			Total Reported Users For Organization		
		Day	Night	Total	Day	Night	Total	Day	Night	Total
Branch-1	Department-1	3	0	3	0	0	0	3	0	3
	Total Reported Users	3	0	3	0	0	0	3	0	3
RnD	Department-1	0	3	3	0	0	0	0	3	3
	Total Reported Users	0	3	3	0	0	0	0	3	3
Total Reported Users For Branch		3	3	6	0	0	0	3	3	6

# Enterprise Group-Wise Presence Count Export

This feature enables the export of data for the count of presence in selected enterprise groups or shifts out of all the assigned users. Data can be exported in the Excel format once the relevant enterprise groups/shifts have been selected using the *Configuration* tab.

To access this functionality, click **Time & Attendance > Exports > Enterprise Group-Wise Presence Count**.



The screenshot shows the 'Enterprise Group-Wise Presence Count' window. On the left, there is a sidebar with two tabs: 'Export' (highlighted in blue) and 'Configuration'. The main area contains the following fields and controls:

- Date \***: Two date pickers, both set to '15/10/2019'.
- File Name \***: A text input field.
- Show Export Header**: A checkbox, currently unchecked.
- Generate Export For**: A dropdown menu set to 'All Users'.
- Export**: A dark button at the bottom right.

## Export



*Before Exporting you must do "Configuration" for the Export parameters.*

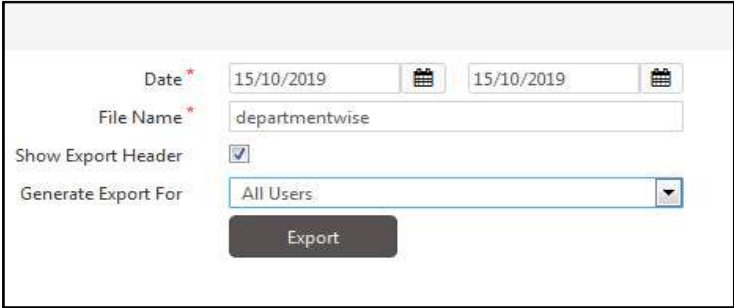
**Date:** Select a date range using the date selection buttons for the data to be exported.

**File Name:** Enter the alphanumeric **File Name** with upto 20 character as the name of the file to be exported.

**Show Export Header:** Check the box to add the header in exported Excel file.

**Generate Export for:** Select the users as **All**, **Active** or **Inactive** for which Enterprise Group-Wise Presence Count is to be exported.

Click on **Export** and save the file at the required location.



This is a detailed view of the configuration form. The fields are filled as follows:

- Date \***: '15/10/2019' (selected twice).
- File Name \***: 'departmentwise'.
- Show Export Header**: Checked (checkbox with a blue checkmark).
- Generate Export For**: 'All Users' (selected in the dropdown).
- Export**: The dark button is visible at the bottom.

Sr. No.	Department	Assigned Users of	1-Branch-1	2-Branch-2	3-RnD	4-HO	Total PR Users
1	05/01/2017						
2	Certification	2	0	0	2	0	2
3	Training	2	0	0	0	1	1
4	Total	4	0	0	2	1	3

## Configuration

The Enterprise Group-Wise Presence Count Export can be configured to determine which data is to be exported in the exported file.

Enterprise Group-Wise Presence Count

Export

Configuration

Group-1: Organization

Group-2: Branch

Filter By: Group-1

Select Organization: Selected

Search: [ ]

☐ Select All

ID	Name	<input type="checkbox"/>
1	MATRIX COMSEC PVT. LTD.	<input type="checkbox"/>
2	SAMARTH	<input type="checkbox"/>
3	AVDHOT	<input type="checkbox"/>
4	ELSENGARD	<input type="checkbox"/>
5	TECH SERVICES	<input type="checkbox"/>

1 - 5 of 13 records

Save

**Group1/2:** Select the desired option in **Group-1** and **Group-2** based on which presence count data of users is to be sent. The same value can be selected for both Group-1 and Group-2 as well.

**Filter By:** Select the desired option — Group1/2.

**Select Organization/Branch/Department/Designation/Section/Grade/Custom Group1/Custom Group2/Custom Group3/Category/Shift:** This option is displayed as per the Filter By option selected. For example if Filter By: Group-1 is selected and Group-1: Organization is selected, then here Select Organization appears.

Select the desired option — All, Selected.

- If you select **Selected**, you can select particular organization or can select all the organization at once.

- To select particular organization, select the check boxes of the desired organization.

**OR**



- To select all the organization, select the Select All check box. The organizations on all the pages will be selected.

Click **Save** to save these configurations for the next export.

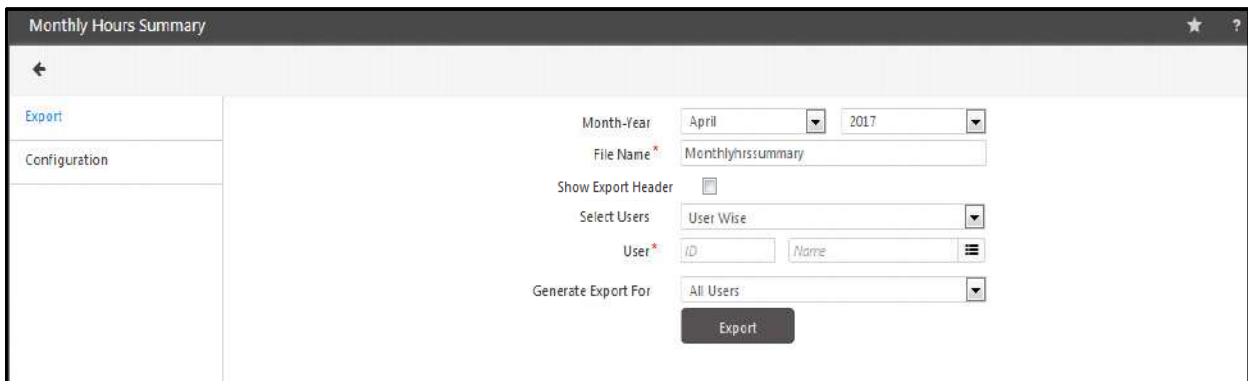
The Exported file is shown in [“Export”](#) section.

# Monthly Hours Summary Export

This export displays authorized overtime components as configured, net-work hours, work hours, shift duration, loss hours, altogether, along with, configurable Attendance Status combinations.

To access this functionality, click **Time & Attendance > Exports > Monthly Hours Summary**.

The Export page has two tabs: Export and Configuration.



## Export



Before Exporting you must do **“Configuration”** for the Export parameters.

- You can select **Month** and **Year** to export the summary for the desired month of year.
- Specify the alphanumeric **File Name** with upto 20 character as the name of the file to be exported.
- **Show Export Header:** Check the box to add the header in exported Excel file.
- **Select Users:** You can select the users based on filter options of User Wise, Group Wise(Enterprise groups) or All users( active/inactive/ all).
- **Generate Export for:** Select the users as All, Active or Inactive for which Monthly Hours Summary is to be exported.

Finally Click on Export button to Export the monthly hours summary for the selected user.

## Configuration



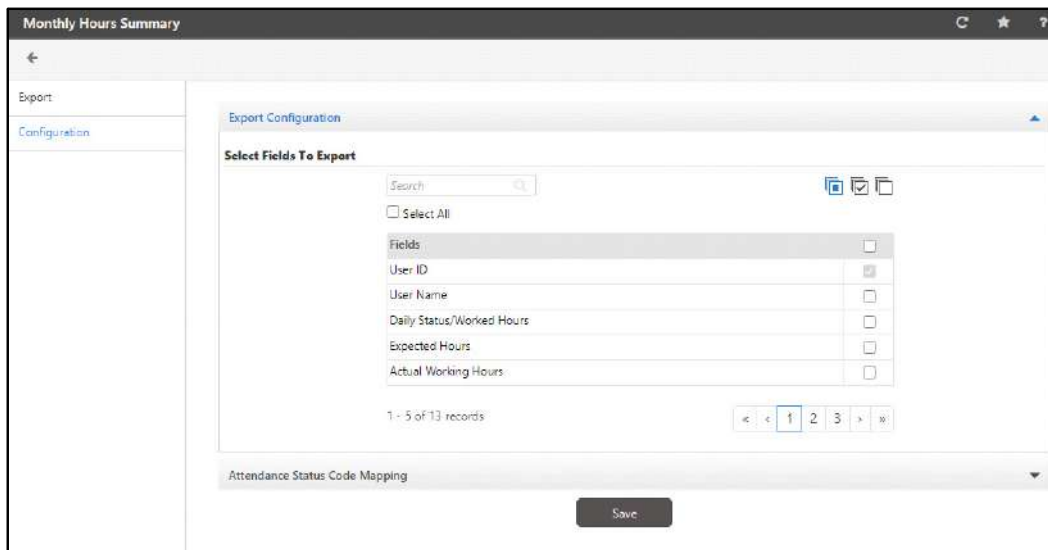
There are two collapsible panels:

- Export Configuration
- Attendance Status Code Mapping

## Export Configuration

Click the **Export Configuration** collapsible panel and configure the following:

**Select Fields To Export:** You can select particular fields or all the fields at once to be exported in the monthly hours summary export file.




To select particular fields, select the check boxes of the desired fields.

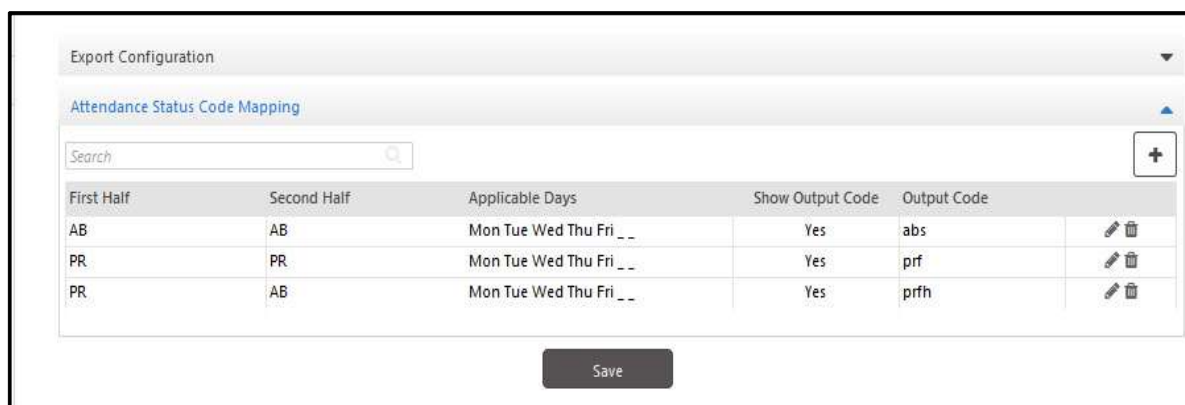
**OR**







To select all the fields at once, select the **Select All** check box. The fields on all the pages will be selected.

## Attendance Status Code Mapping

Click the **Attendance Status Code Mapping** collapsible panel.

Click Add  to configure the output code for various combinations of attendance.



First Half	Second Half	Applicable Days	Show Output Code	Output Code	
AB	AB	Mon Tue Wed Thu Fri _ _	Yes	abs	 
PR	PR	Mon Tue Wed Thu Fri _ _	Yes	prf	 
PR	AB	Mon Tue Wed Thu Fri _ _	Yes	prfh	 

**First Half/Second Half Attendance Status:** Select the desired option as the **First Half** and **Second Half** status from the drop-down list.

**Applicable Days:** Click to select the desired applicable days for which attendance status will be mapped with the output code.

**Show Output Code If Work Not Done:** Select the check box to enable, if you wish an Output Code to be displayed, when no work is done on any day, that is if hours for that day are found as 00:00. This output code will be displayed in the exported file.

**Output Code:** Specify the code to be displayed and mapped with the selected attendance status. For example: for attendance status AB AB in both halves, Output Code displayed will be abs.

Click **Save** to save the configuration.

The Export file in Excel will be generated as shown below:

A	B	C	D	E	F	G	H	I	J	K	L	M	N
User ID	Name	01/04/2017	02/04/2017	03/04/2017	04/04/2017	05/04/2017	06/04/2017	07/04/2017	08/04/2017	09/04/2017	10/04/2017	11/04/2017	12/04/2017
07	Aditi	9.00		9.00	0.55	9.00	0.05	prf			3.36	0.12	prf
1	Shalini												
101	Khushbu	abs		abs	abs	abs	abs	abs	abs		abs	abs	abs
1567	Sheetal	8.00		7.45	7.00	8.00	7.00	8.00	7.43		6.00	abs	abs
1678	Supriya										abs	abs	abs
1782	Nidhi	abs		abs	8.00	4.30	abs	abs	abs		abs	abs	abs
2	Chirag	abs						abs	abs		abs	abs	abs
3	Isha	abs		abs	abs	abs	abs	abs	abs		abs	abs	abs
4	Sweta												

# Site Wise Monthly Summary Export

This export displays site wise records for user's attendance summary. It is a monthly level export. It is supposed to have individual records for site-wise work done on consecutive date range of selected month.

To access this functionality, click **Time & Attendance > Exports > Site-Wise Monthly Summary**.

The Export page has two tabs: Export and Configuration.

## Export



Before Exporting you must do **"Configuration"** for the Export parameters.

- You can select **Month** and **Year** to export the summary for the desired month of year.
- Specify the alphanumeric **File Name** with upto 20 character as the name of the file to be exported.
- Show Export Header:** Check the box to add the header in exported Excel file.
- Select Users:** You can select the users based on filter options of User Wise, Group Wise (Enterprise groups) or All users (active/inactive/ all).
- Generate Export for:** Select the users as All, Active or Inactive for which Site wise Monthly Summary is to be exported.

Finally Click on **Export** button to Export the Site wise monthly summary for the selected user.

The Export file in Excel will be generated as shown below:

UserR ID	UserR Name	Range Start	Range End	Site ID	Site	Total	Present	Absents	Week	Holiday	Leaves	Tours	C.OFF	All	bn	Non Working Days	AB/Lea	AB/Lea	No Of AB/leave	
2192	chirag	01/12/2016	15/12/2016	1	Site-1	15	0	11.0	2	0	1.0	0	1.0	30.0	15		2	01/12/20	03/12/20	3.0
2192	chirag	01/12/2016	15/12/2016	1	Site-1	15	0	11.0	2	0	1.0	0	1.0	30.0	15		2	05/12/20	06/12/20	2.0
2192	chirag	01/12/2016	15/12/2016	1	Site-1	15	0	11.0	2	0	1.0	0	1.0	30.0	15		2	08/12/20	10/12/20	3.0
2192	chirag	01/12/2016	15/12/2016	1	Site-1	15	0	11.0	2	0	1.0	0	1.0	30.0	15		2	12/12/20	12/12/20	1.0
2192	chirag	01/12/2016	15/12/2016	1	Site-1	15	0	11.0	2	0	1.0	0	1.0	30.0	15		2	14/12/20	16/12/20	2.0
2192	chirag	16/12/2016	23/12/2016	2	Site-2	8	1.0	3.5	0	0	1.0	0	0	13.5	9.0		0	17/12/20	18/12/20	2.0
2192	chirag	16/12/2016	23/12/2016	2	Site-2	8	1.0	3.5	0	0	1.0	0	0	13.5	9.0		0	22/12/20	22/12/20	1.0
2192	chirag	16/12/2016	23/12/2016	2	Site-2	8	1.0	3.5	0	0	1.0	0	0	13.5	9.0		0	23/12/20	24/12/20	0.5
2192	chirag	24/12/2016	31/12/2016	1	Site-1	8	0	0	0	0	0	0	0	8	8		0			

## Configuration

Select Fields To Export	
Fields	<input type="checkbox"/>
User ID	<input checked="" type="checkbox"/>
User Name	<input checked="" type="checkbox"/>
Organization Code	<input type="checkbox"/>
Organization Name	<input type="checkbox"/>
Branch Code	<input type="checkbox"/>

Custom Export Field Configuration

Export New Entries For Occurrences

Absent ☒ ⓘ

Leave/Tour/C-OFF ☒ ⓘ

Save

Select the fields to be exported in the Site wise monthly summary export file.

### Custom Export Field Configuration

You can configure customized formula based field to export sheet. It can be created using Field and Operator from the Field Value list.

**Field Name:** Enter a name for the column to be generated in export sheet.

Example:

Select a field say “Presents” and click >. The field “Presents” will move to right side.

Then select operator “+” and click >. The field “+” will move to right side.

Similarly move the “Week Offs” and “Holidays”.

Field Name: PR-WO-PH

Field Value

Total Days  
Presents  
Absents  
Week OTTs  
Holidays  
Leaves  
Tours  
COFF

Presents  
+  
Week Offs  
+  
Holidays

Add Cancel

Click **Add** button. The custom field will be shown in the grid.

Field Name	Field Value
PR-WO-PH	Presents+Week Offs+Holidays

**Export New Entries For Occurrences**

Absent ☒ ⓘ

Leave/Tour/C-OFF ☒ ⓘ

Save

### Export New Entries for Occurrences

**Absent-** Enabling this check box will create new record in export sheet for every Absent range. It will export absent date range and number of days.

**Leave/Tour/C-OFF-** Enabling this check box will create new record in export sheet for every Leave/Tour/C-OFF range. It will export Leave/Tour/C-OFF Code, Date Range, Reason and No. of Days.

### Example:

The export configuration is shown below.

Field Name:

Field Value:

- Total Days
- Presents
- Absents
- Week Offs
- Holidays
- Leaves
- Tours
- COFF

Add Cancel

Field Name	Field Value
All	Total Days+Presents+Absents+Week Offs+Holidays+Leaves+Tours+COFF
bn	Total Days+Presents+Holidays-Tours
Non Working Days	Week Offs+Holidays

**Export New Entries For Occurrences**

Absent ☒ ⓘ

Site Wise Monthly Summary

←

Export

Configuration

Month-Year

December

2016

Filename

NonWorkingdays

File Format

Excel

UserR Filter

Randomly

UserR

ID

Name

2192

chirag

Generate Export For

Active UserRs

Export

The exported file is shown below.

UserR ID	UserR Name	Range Start	Range End	Site ID	Site	Total	Present	Absents	Week	Holiday	Leaves	Tours	C-OFF	All	bn	Non Working Days	AB/Lea	AB/Lea	No Of AB/Leave
2192	chirag	01/12/2016	15/12/2016	1	Site-1	15	0	11.0	2	0	1.0	0	1.0	30.0	15	2	01/12/20	03/12/20	3.0
2192	chirag	01/12/2016	15/12/2016	1	Site-1	15	0	11.0	2	0	1.0	0	1.0	30.0	15	2	05/12/20	06/12/20	2.0
2192	chirag	01/12/2016	15/12/2016	1	Site-1	15	0	11.0	2	0	1.0	0	1.0	30.0	15	2	08/12/20	10/12/20	3.0
2192	chirag	01/12/2016	15/12/2016	1	Site-1	15	0	11.0	2	0	1.0	0	1.0	30.0	15	2	12/12/20	12/12/20	1.0
2192	chirag	01/12/2016	15/12/2016	1	Site-1	15	0	11.0	2	0	1.0	0	1.0	30.0	15	2	14/12/20	16/12/20	2.0
2192	chirag	16/12/2016	23/12/2016	2	Site-2	8	1.0	3.5	0	0	1.0	0	0	13.5	9.0	0	17/12/20	18/12/20	2.0
2192	chirag	16/12/2016	23/12/2016	2	Site-2	8	1.0	3.5	0	0	1.0	0	0	13.5	9.0	0	22/12/20	22/12/20	1.0
2192	chirag	16/12/2016	23/12/2016	2	Site-2	8	1.0	3.5	0	0	1.0	0	0	13.5	9.0	0	23/12/20	24/12/20	0.5
2192	chirag	24/12/2016	31/12/2016	1	Site-1	8	0	0	0	0	0	0	0	8	8	0			

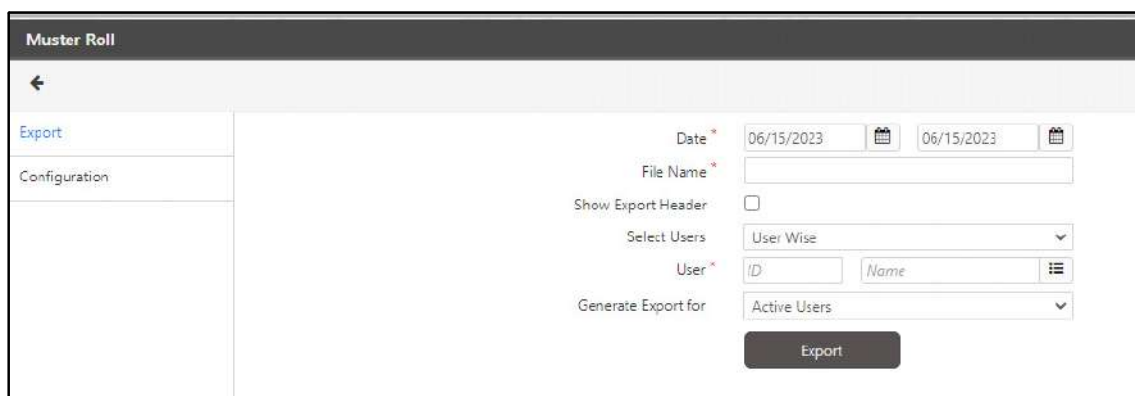


# Muster Roll Export

This export generates information of employees' details such as their attendance status, leaves, week-offs pertaining to the shifts assigned to them.

To access this functionality, click **Time & Attendance > Exports > Muster Roll**.

The Export page has two tabs: Export and Configuration.



## Export



Before Exporting you must do **“Configuration”** for the Export parameters.

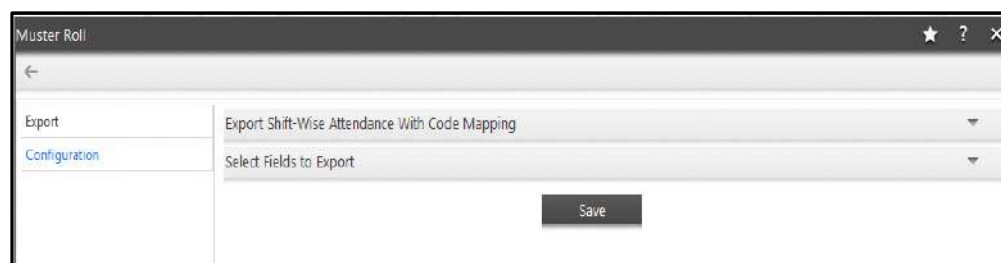
- You can select **From** and **To** date for which the export is to be done.
- Specify the alphanumeric **File Name** with as the name of the file to be exported.
- **Show Export Header:** Check the box to add the header in exported Excel file.
- **Users:** You can select the users Randomly, by selected group (Enterprise groups) or all users (active/ inactive/ all).
- **Generate Export for:** Select the users as All, Active or Inactive for which Muster Export is to be exported.

Finally Click on **Export** button to Export the monthly hours summary for the selected user.

## Configuration

There are two collapsible panels:

- Export Shift-Wise Attendance With Code Mapping
- Select Fields to Export



Click the **Export Shift-Wise Attendance With Code Mapping** collapsible panel and configure the following:

Export Shift-Wise Attendance With Code Mapping

Add To Export ☒

Search

Shift	First Half	Second Half	Present	Holiday	Output Code1	Output Code2
All	Select	Select	Full Day	<input type="checkbox"/>	10 chars	10 chars

Add

Select Fields to Export

Save

**Add to Export:** Select this check box to enable. Only when enabled the mapped output codes will be visible in export.

For the mapping,

Click **Add** .

Muster Roll

Export

Configuration

Export Shift-Wise Attendance with Code Mapping

Add To Export ☐

Search

Shift	First Half	Second Half	Present	Holiday	Output Code1	Output Code2
No Data						

Select Fields to Export

Save

**Shift:** Select the desired option — All or Randomly.

- If you select **Randomly**, click the picklist. The **Picklist For Shift Masters** pop-up appears. You can select particular shifts or can select all the shift at once.

Picklist For Shift Masters

Total Selected: 0 Records

Search  Show Selected

☐ Select All

<input type="checkbox"/>	SFTID ▲	SFTName	SFTSTTime	SFTEDTime	BRKSTTime	BRKEDTime
<input type="checkbox"/>	10	GENERAL 9 30 TO 7 00	09:30	19:00	13:30	14:20
<input type="checkbox"/>	11	General Shift	08:00	17:00	13:00	13:50
<input type="checkbox"/>	21	Fac Gen Shift 2	07:30	16:00	12:00	12:30
<input type="checkbox"/>	22	Fac Saturday Shift	08:30	17:00	12:30	13:00
<input type="checkbox"/>	23	Fac General Shift	08:30	17:00	12:30	13:00
<input type="checkbox"/>	A1	Asia 0830-1800	08:30	18:00	13:00	13:30
<input type="checkbox"/>	AF	Africa (10.00-19.30)	10:00	19:30	13:00	13:30
<input type="checkbox"/>	AK	Akshay	09:00	18:00		
<input type="checkbox"/>	AN	AfterNoon	15:00	23:00	17:00	18:00
<input type="checkbox"/>	AS	Asia (08.00-17.30)	08:00	17:30	13:00	13:30

1 - 10 of 60 records

« < 1 2 3 ... 6 > »

OK Cancel

- To select particular shifts, select the check boxes of the desired shifts.

**OR**

- To select all the shifts, select the Select All check box.

**First Half/Second Half Attendance Status:** Select the desired option for the First Half and Second Half from the drop-down list.



**Present:** The Present field will be enabled only If Attendance status selected is WO-Week-Off or PH-Holiday in both drop-downs. When Present check box is enabled, you can select full day or half day to mark present on week off day.

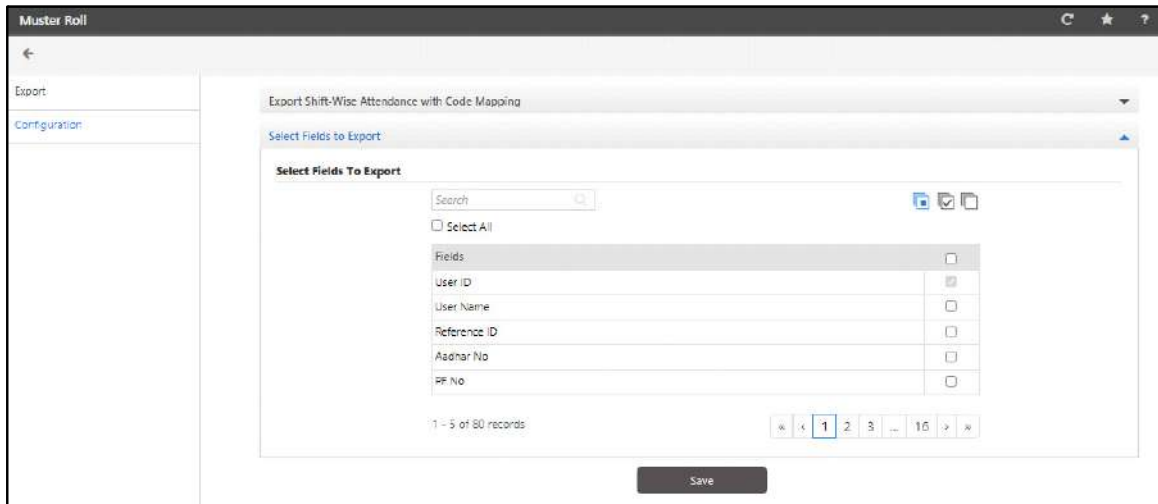
**Holiday:** The Holiday field will be enabled only If Attendance status selected is WO-Week-Off in both drop-downs.

**Output Code 1/2:** Specify the desired code of your choice to map with the Shifts and First Half and Second Half Attendance Status.

For example: For attendance status AB AB in both halves, output code will be displayed as ABS.

Click to save or click to discard. The added entry appears in the grid. Click **Save** to save the configuration.

Click the **Select Fields to Export** collapsible panel.



Select the fields to be exported in the Muster Roll export file. You can select particular fields or can select all the fields at once.

To select particular fields, select the check boxes of the desired fields

**OR**

To select all the fields, select the Select All check box. The fields on all the pages will be selected.

You can select Present, Absent, leaves, Week-offs etc. The field names Field1, Field 2, Field 3 and Field 4 are customizable according to the names defined in Admin > Global Policy > User > Custom Fields.

**Hours Utilization:** This field displays the utilization of Hours in the form of Percentage in exported sheet.

- Hours Utilization = (Gross Work Hours/ Total Planned Hours) \*100  
If Total Planned Hours = 0 then, value of Hours Utilization =0

**Exceeding Planned Hours:** This field displays the value of Hours worked more than planned hours in exported sheet

- If Gross Work Hours > Total Planned Hours, then Exceeding Planned Hours= Gross Work Hours -Total Planned Hours
- If Gross Work Hours < Total Planned Hours, then the value of Exceeding Planned Hours= 0.

Click **Save** to save the configuration.

Then Export the file from “Export” The Export file in Excel will be generated as shown below:

Sr No.	User ID	Name	Organization Name	Reporting-Incharge2		01Dec Thu	02Dec Fri	03Dec Sat	04Dec Sun	05Dec Mon	06Dec Tue
1	GSNS	GSNS User1	Organization 2		Shift	GS	GS	GS	NS	NS	NS
					First Half	PRF	PRF	PRF	PRF	????	INF
					Second Half	PRS	ABS	ABS	ABS	????	UPS
					First Punch	09:00	09:00	15:00	07:00	23:00	07:00
					Last Punch	18:00	14:00	19:00	23:00		
					Work Hours	09:00	05:00	04:00	16:00	00:00	00:00
					Loss Hours	00:00	03:00	04:00	00:00	00:00	04:00
					Extra Work Hours	01:00	01:00	01:00	16:00	00:00	16:00
2	GSShift1	GS Shift Use 1	Organization-1	Test2	Shift	GS	GS	GS	GS	GS	GS
				Test2	First Half	PRF	WOF	WOF	ABF	ABF	PRF
				Test2	Second Half	PRS	WOS	WOS	ABS	ABS	PRS
				Test2	First Punch	09:00					09:00
				Test2	Last Punch	18:00					18:00
				Test2	Work Hours	09:00	00:00	00:00	00:00	00:00	09:00
				Test2	Loss Hours	00:00	00:00	00:00	08:00	08:00	00:00
				Test2	Extra Work Hours	01:00	00:00	00:00	00:00	00:00	01:00
3	NSShift1	NightShift user 1	Organization-1	Test2	Shift	NS	NS	NS	NS	NS	NS
				Test2	First Half	PRF	PRF	PLF	WOFF	PRF	COF
				Test2	Second Half	PRS	PRS	ABS	WOFS	PRS	ABS
				Test2	First Punch	23:00	21:00		21:00	21:00	
				Test2	Last Punch	07:00	10:00		08:00	08:00	
				Test2	Work Hours	08:00	13:00	00:00	11:00	11:00	00:00
				Test2	Loss Hours	00:00	00:00	04:00	00:00	00:00	04:00
				Test2	Extra Work Hours	00:00	05:00	00:00	03:00	03:00	00:00

# Time and Attendance Reports

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These reports can be obtained using the **Reports** section under the **Time and Attendance** add-on module. The **Time and Attendance** Reports can be categorized as follows:

- “Time Management”
- “Absenteeism”
- “Overtime”
- “Exceptions”
- “Monthly Reports”
- “Registers”
- “Yearly Reports”
- “User Defined Reports”
- “Statutory Reports”
- “Charts”



*Before generating Reports, make sure to run the Daily Attendance Process and Monthly Attendance Process to get the proper data in reports*

*Certain Time and Attendance Reports such as Attendance Summary, Attendance Register, Muster Roll etc. provide an **Include Archived Data** check box on the report generation page.*

The screenshot shows a web-based form for report generation. It features two date pickers, both set to 17/06/2014. Below the date pickers is a checkbox labeled 'Include Archived Data' which is checked. To the right of the checkbox is a yellow warning icon and the text 'This will take a long time.'

*Select this check box to enable archived data (if any) to be included at the time of report generation. Retrieving data from archives may take a significantly long time.*

## Time Management

The Time Management Reports are an assortment of detailed and focused reports on the time activities of the users on a site. These include the following reports:

### Late-IN

This report provides a group-wise listing of users with details of Late In events during the specified time period.

Set the report filters as per your requirement.

The screenshot shows the 'Late-IN' report generation window. At the top, there's a date range selector with '06/21/2023' and '06/21/2023'. Below this is the 'Optional Parameters' section, which contains several dropdown menus and input fields: 'Group By' (Organization), 'Group By' (Organization), 'Duration (>)' (0), 'Count (>)' (0), and 'Organization Name in Header As Per' (User Selection). Below the 'Optional Parameters' section is the 'User Selection' section, which includes 'Select Users' (User Wise), 'User' (ID), 'Name', and 'Generate Report For' (All Users). A 'Generate Report' button is located at the bottom of the window.

- **Date:** Select the to and from date for which the report is to be generated.

### Optional Parameters

You can filter the records by applying two types of Group filters, for example if you select the first group as Branch then with the Branch you can select the other group as Department.

- **Group By:** Select the desired first enterprise group from the drop-down list — Organization, Branch, Department, Section, Category, Grade, Designation, Custom Group1/2/3.
- **Group By:** Select the desired second enterprise group from the drop-down list — Organization, Branch, Department, Section, Category, Grade, Designation, Custom Group1/2/3.
- **Duration:** Configure the duration of late-in according to which you wish to filter the records.
- **Count:** Configure the number of late-in according to which you wish to filter the records.
- **Organization Name in Header As Per:** Select the desired option — User Selection or Customized Selection.

If you select **Customized Selection**, click on **Customize Report Header**.

You can select the desired option from the drop-down list or can also add a new header according to your choice.

### User Selection

- **Select Users:** Select the desired option — **User-Wise**, **Group Wise**, or **All**.

- If you select **User Wise**, click the **User** picklist. The **Picklist for All Users** pop-up appears.

Picklist For All Users

Total Selected: 0 Records

Search  Show Selected

<input type="checkbox"/>	User ID	Name
<input type="checkbox"/>	1	SALIM ANSARI
<input type="checkbox"/>	10	RAJENDRA GOSWAMI
<input type="checkbox"/>	1001	ANKITKUMAR SOHLIYA
<input type="checkbox"/>	1002	MEGHA H SHUKLA
<input type="checkbox"/>	1003	UMESH M TALANPURI
<input type="checkbox"/>	1004	DARSHAK B PATEL
<input type="checkbox"/>	1007	DHAVAL I PATEL
<input type="checkbox"/>	1008	MAYANK K KORAT
<input type="checkbox"/>	1009	DIPTI K RATHWA
<input type="checkbox"/>	1010	RAHUL S SHAH

1 - 10 of 2476 records

OK Cancel


- Select check boxes of the desired users. Click **OK**.
- The selected Users appear in the grid.

Search

User ID	Name	
1	SALIM ANSARI	<input type="checkbox"/>
10	RAJENDRA GOSWAMI	<input type="checkbox"/>
1001	ANKITKUMAR SOHLIYA	<input type="checkbox"/>
1002	MEGHA H SHUKLA	<input type="checkbox"/>

Generate Report For: All Users

Generate Report

- You can also delete the desired User. To do so, click **Delete**  of the respective user.
- If you select **Group Wise** option, select the desired enterprise group from the drop-down list—Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1/2/3.

For each enterprise group — Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1/2/3, click the corresponding picklist to select the desired option/s.


The selected Groups appear in the grid.

Search

ID	Name	Group	
1	MATRIX COMSEC PVT. LTD.	Organization	<input type="checkbox"/>
2	SAMARTH	Organization	<input type="checkbox"/>
3	AVDHOOT	Organization	<input type="checkbox"/>
4	ELSENGARD	Organization	<input type="checkbox"/>

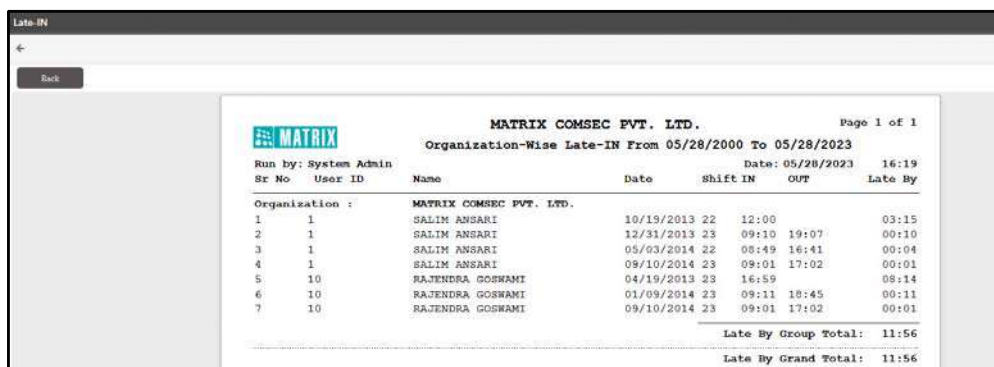
Generate Report



You can also delete particular group. To do so, click **Delete**  of the respective group.

- If you select **All**, then all users will be selected.
- **Generate Report For:** Select the desired option from the drop-down list— **All Users, Active Users or Inactive Users**.
- Click **Generate Report**.

## Sample Report



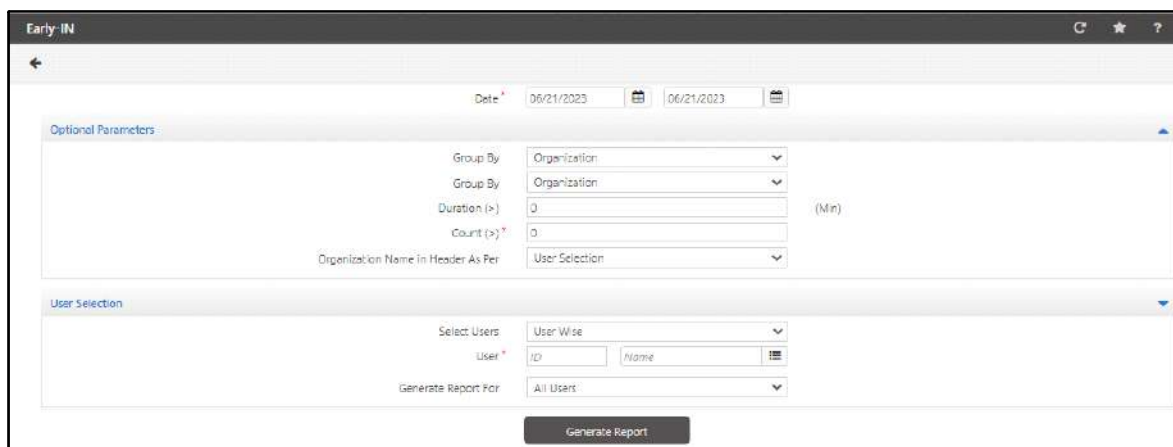
The screenshot shows a web application window titled 'Late-IN'. It contains a table with the following data:

Sr No	User ID	Name	Date	Shift IN	OUT	Late By
Organization : MATRIX COMSEC PVT. LTD.						
1	1	SALIM ANSARI	10/19/2013 22	12:00		03:15
2	1	SALIM ANSARI	12/31/2013 23	09:10	19:07	00:10
3	1	SALIM ANSARI	05/03/2014 22	08:49	16:41	00:04
4	1	SALIM ANSARI	09/10/2014 23	09:01	17:02	00:01
5	10	RAJENDRA GOSWAMI	04/19/2013 23	16:59		08:14
6	10	RAJENDRA GOSWAMI	01/09/2014 23	09:11	18:45	00:11
7	10	RAJENDRA GOSWAMI	09/10/2014 23	09:01	17:02	00:01
Late By Group Total:						11:56
Late By Grand Total:						11:56

## Early-IN

This report provides a group-wise listing of users with details of Early In events during the specified time period.

Set the report filter parameters as per your requirement.



The screenshot shows the 'Early-IN' configuration window. It includes the following fields and options:

- Date:** Two date pickers set to 06/21/2023.
- Optional Parameters:**
  - Group By:** Two dropdown menus, both set to 'Organization'.
  - Duration (>):** A text input field set to 0.
  - Count (>):** A text input field set to 0.
  - Organization Name in Header As Per:** A dropdown menu set to 'User Selection'.
- User Selection:**
  - Select Users:** A dropdown menu set to 'User Wise'.
  - User:** Two input fields for 'ID' and 'Name'.
  - Generate Report For:** A dropdown menu set to 'All Users'.
- Generate Report:** A button at the bottom.

- **Date:** Select the to and from date for which the report is to be generated.

## Optional Parameters

You can filter the records by applying two types of Group filters, for example if you select the first group as Branch then within the Branch you can select the other group as Department.

- **Group By:** Select the desired first enterprise group from the drop-down list — Organization, Branch, Department, Section, Category, Grade, Designation, Custom Group1/2/3.

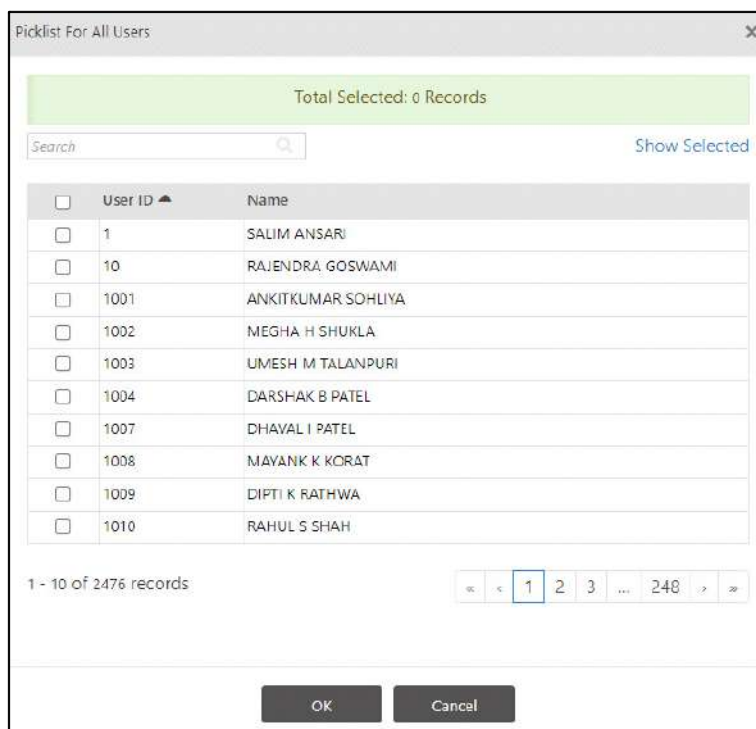
- **Group By:** Select the desired second enterprise group from the drop-down list — Organization, Branch, Department, Section, Category, Grade, Designation, Custom Group1/2/3.
- **Duration (>):** Configure the duration of early-in according to which you wish to filter the records.
- **Count (>):** Configure the number of early-in according to which you wish to filter the records.
- **Organization Name in Header As Per:** Select the desired option — User Selection or Customized Selection.

If you select **Customized Selection**, click on **Customize Report Header**.

You can select the desired option from the drop-down list or can also add a new header according to your choice.

### User Selection

- **Select Users:** Select the desired option — **User-Wise**, **Group Wise**, or **All**.
- If you select **User Wise**, click the **User** picklist. The **Picklist for All Users** pop-up appears.



Picklist For All Users

Total Selected: 0 Records

Search  Show Selected

<input type="checkbox"/>	User ID	Name
<input type="checkbox"/>	1	SALIM ANSARI
<input type="checkbox"/>	10	RAJENDRA GOSWAMI
<input type="checkbox"/>	1001	ANKITKUMAR SOHLIYA
<input type="checkbox"/>	1002	MEGHA H SHUKLA
<input type="checkbox"/>	1003	UMESH M TALANPURI
<input type="checkbox"/>	1004	DARSHAK B PATEL
<input type="checkbox"/>	1007	DHAVAL I PATEL
<input type="checkbox"/>	1008	MAYANK K KORAT
<input type="checkbox"/>	1009	DIPTI K RATHWA
<input type="checkbox"/>	1010	RAHUL S SHAH

1 - 10 of 2476 records

1 2 3 ... 248

OK Cancel

- Select check boxes of the desired users. Click **OK**.

- The selected Users appear in the grid.

User ID	Name	
1	SALIM ANSARI	
10	RAJENDRA GOSWAMI	
1001	ANKITKUMAR SOHLIYA	
1002	MEGHA H SHUKLA	

Generate Report For: All Users

**Generate Report**

- You can also delete the desired User. To do so, click **Delete** of the respective user.
- If you select **Group Wise** option, select the desired enterprise group from the drop-down list— Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1/2/3.
- For each enterprise group — Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1/2/3, click the corresponding picklist to select the desired option/s.
- The selected Groups appear in the grid.

ID	Name	Group	
1	MATRIX COMSEC PVT. LTD.	Organization	
2	SAMARTH	Organization	
3	AVDHQOT	Organization	
4	ELSENGARD	Organization	

**Generate Report**

- You can also delete particular group. To do so, click **Delete** of the respective group.
- If you select **All**, then all users will be selected.
- **Generate Report For:** Select the desired option from the drop-down list— **All Users, Active Users** or **Inactive Users**.
- Click **Generate Report**.

**Example:** If Duration is > 10 mins; then event with Early IN of more than 10 mins will be displayed. If Count > 1; then event of user with more than 1 Early IN will be displayed.

## Sample Report

Early-IN							
Back							
MATRIX COMSEC PVT. LTD. Page 1 of 7							
Organization-Wise Early-IN From 05/28/2019 To 05/28/2023							
Run by: System Admin Date: 05/28/2023 16:35							
Sr No	User ID	Name	Date	Shift	IN	OUT	Early-IN
Organization : MATRIX COMSEC PVT. LTD.							
1	1	SALIM ANSARI	05/28/2019	23	08:16	17:04	00:14
2	1	SALIM ANSARI	05/29/2019	23	08:18	17:02	00:12
3	1	SALIM ANSARI	05/30/2019	23	08:19	17:00	00:11
4	1	SALIM ANSARI	05/31/2019	23	08:18	17:03	00:12
5	1	SALIM ANSARI	06/01/2019	22	08:18	16:03	00:12
6	1	SALIM ANSARI	06/02/2019	23	08:21	17:03	00:09
7	1	SALIM ANSARI	06/04/2019	23	08:19	17:04	00:11
8	1	SALIM ANSARI	06/07/2019	23	08:19	17:03	00:11
9	1	SALIM ANSARI	06/08/2019	22	08:17	16:04	00:13
10	1	SALIM ANSARI	06/13/2019	23	08:18	17:02	00:12
11	1	SALIM ANSARI	06/14/2019	23	08:19	17:05	00:11
12	1	SALIM ANSARI	06/15/2019	22	08:22	16:04	00:08
13	1	SALIM ANSARI	06/18/2019	23	08:17	17:08	00:13
14	1	SALIM ANSARI	06/19/2019	23	08:18	17:05	00:12
15	1	SALIM ANSARI	06/20/2019	23	08:17	17:04	00:13
16	1	SALIM ANSARI	06/21/2019	23	08:19	17:04	00:11
17	1	SALIM ANSARI	06/24/2019	23	08:19	17:03	00:11
18	1	SALIM ANSARI	06/25/2019	23	08:23	17:03	00:07
19	1	SALIM ANSARI	06/26/2019	23	08:19	17:03	00:11
20	1	SALIM ANSARI	06/27/2019	23	08:20	17:03	00:10
21	1	SALIM ANSARI	06/28/2019	23	08:24	19:02	00:06
22	1	SALIM ANSARI	06/29/2019	22	08:25	16:04	00:05
23	1	SALIM ANSARI	07/01/2019	23	08:20	17:04	00:10
24	1	SALIM ANSARI	07/02/2019	23	08:18	17:02	00:12
25	1	SALIM ANSARI	07/03/2019	23	08:17	17:04	00:13
26	1	SALIM ANSARI	07/06/2019	22	08:23	16:07	00:07
27	1	SALIM ANSARI	07/08/2019	23	08:19	17:03	00:11
28	1	SALIM ANSARI	07/09/2019	23	08:18	17:03	00:12
29	1	SALIM ANSARI	07/10/2019	23	08:19	17:03	00:11
30	1	SALIM ANSARI	07/11/2019	23	08:17	16:51	00:13

## Early-OUT

This report provides a group-wise listing of employees with details of Early Out events during the specified time period.

Set the report filters as per requirement.

Early-OUT

←

Date 06/21/2023 06/21/2023

Optional Parameters

Group By Organization

Group By Organization

Duration (≥) 0 (Min)

Count (≥) 0

Organization Name in Header As Per User Selection

User Selection

Select Users User Wise

User ID Name

Generate Report For All Users

Generate Report

- **Date:** Select the to and from date for which the report is to be generated.

### Optional Parameters

You can filter the records by applying two types of Group filters, for example if you select the first group as Branch then within the Branch you can select the other group as Department.

- **Group By:** Select the desired enterprise group from the drop-down list — Organization, Branch, Department, Section, Category, Grade, Designation, Custom Group1/2/3.

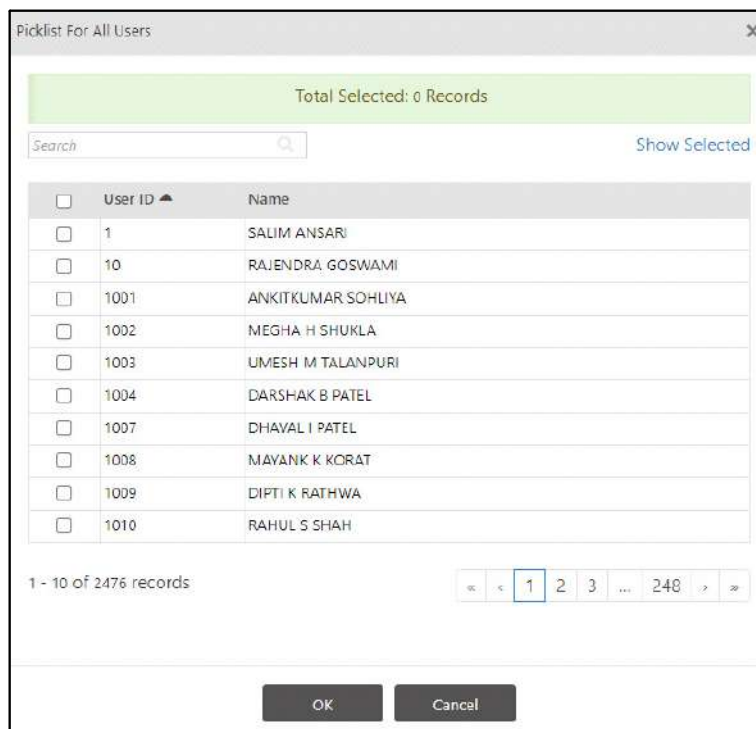
- **Group By:** Select the desired first enterprise group from the drop-down list — Organization, Branch, Department, Section, Category, Grade, Designation, Custom Group1/2/3.
- **Duration (>):** Configure the duration of early-out according to which you wish to filter the records.
- **Count (>):** Configure the number of early-out according to which you wish to filter the records.
- **Organization Name in Header As Per:** Select the desired option — **User Selection** or **Customized Selection**.

If you select **Customized Selection**, click on **Customize Report Header**.

You can select the desired option from the drop-down list or can also add a new header according to your choice.

### User Selection

- **Select Users:** Select the desired option — **User-Wise**, **Group Wise**, or **All**.
- If you select **User Wise**, click the **User** picklist. The **Picklist for All Users** pop-up appears.



Picklist For All Users

Total Selected: 0 Records

Search  Show Selected

<input type="checkbox"/>	User ID	Name
<input type="checkbox"/>	1	SALIM ANSARI
<input type="checkbox"/>	10	RAJENDRA GOSWAMI
<input type="checkbox"/>	1001	ANKITKUMAR SOHLIYA
<input type="checkbox"/>	1002	MEGHA H SHUKLA
<input type="checkbox"/>	1003	UMESH M TALANPURI
<input type="checkbox"/>	1004	DARSHAK B PATEL
<input type="checkbox"/>	1007	DHAVAL I PATEL
<input type="checkbox"/>	1008	MAYANK K KORAT
<input type="checkbox"/>	1009	DIPTI K RATHWA
<input type="checkbox"/>	1010	RAHUL S SHAH

1 - 10 of 2476 records


1 2 3 ... 248

OK Cancel


- Select check boxes of the desired users. Click **OK**.

- The selected Users appear in the grid.

Search		
User ID	Name	
1	SALIM ANSARI	
10	RAJENDRA GOSWAMI	
1001	ANIKTUMAR SOHLIYA	
1002	MEGHA H SHUKLA	
Generate Report For		All Users
Generate Report		

- You can also delete the desired User. To do so, click **Delete**  of the respective user.
- If you select **Group Wise** option, select the desired enterprise group from the drop-down list— Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1/2/3.
- For each enterprise group — Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1/2/3, click the corresponding picklist to select the desired option/s.
- The selected Groups appear in the grid.

Search		
ID	Name	Group
1	MATRIX COMSEC PVT. LTD.	Organization
2	SAMARTH	Organization
3	AVDHOOT	Organization
4	ELSENGARD	Organization
Generate Report For		
Generate Report		

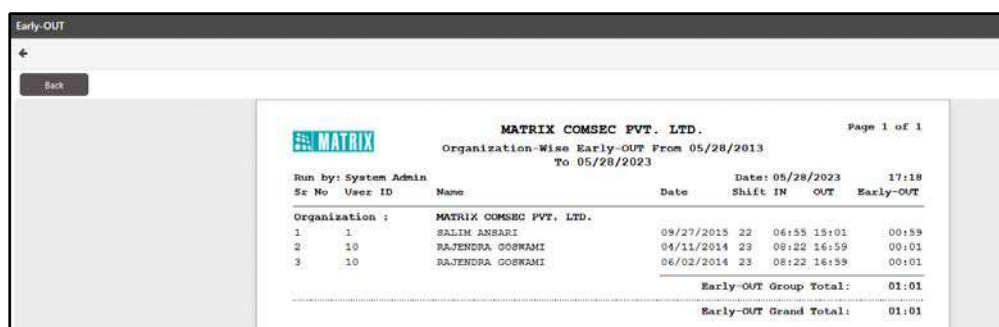
- You can also delete particular group. To do so, click **Delete**  of the respective group.
- If you select **All**, then all users will be selected.
- **Generate Report For:** Select the desired option from the drop-down list— **All Users, Active Users** or **Inactive Users**.
- Click **Generate Report**.

**Example:** Grace Period for Early Out is defined as 5 mins in Shift Configuration. And maximum Early Out allowed is defined as 15 mins in Early OUT policy. So user can go out 20 minutes early than shift end.

If user punches out at 17:55 or afterwards; then that record will not be displayed in Early Out Report. Similarly if user punches before 17:40 then it is more than Early Out allowed so that record will not be displayed here.

Early Out duration is calculated as 17:55 - 17:46 = 00:09.

## Sample Report



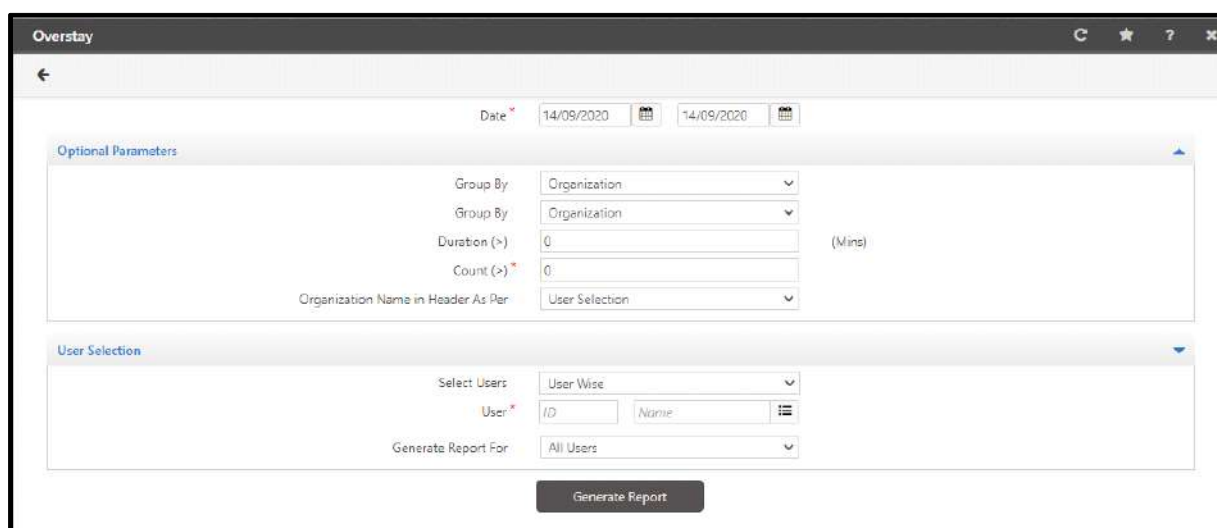
Sr No	User ID	Name	Date	Shift IN	OUT	Early-OUT
1	1	SALIM ANSARI	09/27/2013	22	06:55 15:01	00:59
2	10	RAJENDRA GOSWAMI	04/11/2014	23	08:22 16:59	00:01
3	10	RAJENDRA GOSWAMI	06/02/2014	23	08:22 16:59	00:01
Early-OUT Group Total:						01:01
Early-OUT Grand Total:						01:01

## Overstay

This report provides a group-wise list of users with details of Overstay during the specified time period.

For example, the Shift is from 09:00 to 18:00 hours so the duration after 18:00 hours for which user has worked is counted in Overstay hours.

Set the report filters as per requirement.



Date: 14/09/2020

Optional Parameters

Group By: Organization

Group By: Organization

Duration (>): 0 (Mins)

Count (>): 0

Organization Name in Header As Per: User Selection

User Selection

Select Users: User Wise

User: ID Name

Generate Report For: All Users

Generate Report

- **Date:** Select the to and from date for which the report is to be generated.

### Optional Parameters

You can filter the records by applying two types of Group filters, for example if you select the first group as Branch then within the Branch you can select the other group as Department.

- **Group By:** Select the desired enterprise group from the drop-down list — Organization, Branch, Department, Section, Category, Grade, Designation, Custom Group1/2/3.
- **Group By:** Select the desired enterprise group from the drop-down list — Organization, Branch, Department, Section, Category, Grade, Designation, Custom Group1/2/3.
- **Duration (>):** Configure the duration of overstay according to which you wish to filter the records.
- **Count (>):** Configure the number of overstay according to which you wish to filter the records.

- **Organization Name in Header As Per:** Select the desired option — User Selection or Customized Selection.

If you select **Customized Selection**, click on **Customize Report Header**.

You can select the desired option from the drop-down list or can also add a new header according to your choice.

## User Selection

- **Select Users:** Select the desired option — **User-Wise**, **Group Wise**, or **All**.
- If you select **User Wise**, click the **User** picklist. The **Picklist for All Users** pop-up appears.

Picklist For All Users

Total Selected: 0 Records

Search  Show Selected

<input type="checkbox"/>	User ID	Name
<input type="checkbox"/>	1	SALIM ANSARI
<input type="checkbox"/>	10	RAJENDRA GOSWAMI
<input type="checkbox"/>	1001	ANKITKUMAR SOHLIYA
<input type="checkbox"/>	1002	MEGHA H SHUKLA
<input type="checkbox"/>	1003	UMESH M TALANPURI
<input type="checkbox"/>	1004	DARSHAK B PATEL
<input type="checkbox"/>	1007	DHAVAL I PATEL
<input type="checkbox"/>	1008	MAYANK K KORAT
<input type="checkbox"/>	1009	DIPTI K RATHWA
<input type="checkbox"/>	1010	RAHUL S SHAH

1 - 10 of 2476 records

1 2 3 ... 248

OK Cancel

- Select check boxes of the desired users. Click **OK**.
- The selected Users appear in the grid.

Search

User ID	Name	
1	SALIM ANSARI	
10	RAJENDRA GOSWAMI	
1001	ANKITKUMAR SOHLIYA	
1002	MEGHA H SHUKLA	

Generate Report For: All Users

Generate Report

- You can also delete the desired User. To do so, click **Delete** of the respective user.
- If you select **Group Wise** option, select the desired enterprise group from the drop-down list— Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1/2/3.



- For each enterprise group — Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1/2/3, click the corresponding picklist to select the desired option/s.
- The selected Groups appear in the grid.

Search <input type="text"/>			
ID	Name	Group	
1	MATRIX COMSEC PVT. LTD.	Organization	
2	SAMARTH	Organization	
3	AVDHOOT	Organization	
4	ELSENGARD	Organization	
<a href="#">Generate Report</a>			

- You can also delete particular group. To do so, click **Delete** of the respective group.
- If you select **All**, then all user will be selected.
- **Generate Report For:** Select the desired option from the drop-down list— **All Users, Active Users or Inactive Users**.
- Click **Generate Report**.

## Sample Report

Overstay									
<a href="#">Back</a>									
<div> <div> <b>MATRIX COMSEC PVT. LTD.</b> Page 1 of 36 </div> </div>									
Organization-Wise Overstay From 05/28/2013 To 05/28/2013									
Run by: System Admin									
Sr No	User ID	Name	Date	Shift	IN	OUT	Overstay		
Organization : MATRIX COMSEC PVT. LTD.									
1	1	SALIM ANSARI	05/29/2013	23	08:24	17:02	00:02		
2	1	SALIM ANSARI	05/30/2013	23	08:25	18:05	01:05		
3	1	SALIM ANSARI	05/31/2013	23	08:25	21:49	04:49		
4	1	SALIM ANSARI	06/03/2013	23	08:27	17:01	00:01		
5	1	SALIM ANSARI	06/04/2013	23	08:28	17:04	00:04		
6	1	SALIM ANSARI	06/05/2013	23	08:25	17:04	00:04		
7	1	SALIM ANSARI	06/07/2013	23	08:28	17:04	00:04		
8	1	SALIM ANSARI	06/08/2013	22	08:24	16:07	00:07		
9	1	SALIM ANSARI	06/10/2013	23	08:28	17:01	00:01		
10	1	SALIM ANSARI	06/11/2013	23	08:25	17:04	00:04		
11	1	SALIM ANSARI	06/12/2013	23	08:27	17:04	00:04		
12	1	SALIM ANSARI	06/13/2013	23	08:26	17:02	00:02		
13	1	SALIM ANSARI	06/14/2013	23	08:27	17:01	00:01		
14	1	SALIM ANSARI	06/15/2013	22	08:25	16:02	00:02		
15	1	SALIM ANSARI	06/18/2013	23	08:31	17:01	00:01		
16	1	SALIM ANSARI	06/19/2013	23	08:27	17:03	00:03		
17	1	SALIM ANSARI	06/20/2013	23	08:28	17:02	00:02		
18	1	SALIM ANSARI	06/22/2013	22	08:27	17:01	01:01		
19	1	SALIM ANSARI	06/24/2013	23	08:27	17:02	00:02		
20	1	SALIM ANSARI	06/25/2013	23	08:27	18:01	01:01		
21	1	SALIM ANSARI	06/26/2013	23	08:27	18:06	01:06		
22	1	SALIM ANSARI	06/27/2013	23	08:26	18:29	01:29		
23	1	SALIM ANSARI	06/28/2013	23	08:25	17:01	00:01		
24	1	SALIM ANSARI	06/29/2013	22	08:24	18:02	02:02		
25	1	SALIM ANSARI	06/30/2013	22	08:26	18:57	02:57		
26	1	SALIM ANSARI	07/02/2013	23	08:29	17:02	00:02		
27	1	SALIM ANSARI	07/04/2013	23	08:29	17:03	00:03		
28	1	SALIM ANSARI	07/05/2013	23	08:27	17:02	00:02		
29	1	SALIM ANSARI	07/06/2013	22	08:31	16:03	00:03		
30	1	SALIM ANSARI	07/08/2013	23	08:33	17:04	00:04		

## Attendance

This report provides attendance data for a specific period and for specified users. You can select from one of the four available templates to view the data in the required format.

Set the report filters as per requirement.

The screenshot shows the 'Attendance' report generation window. At the top, there's a date range selector with '06/21/2023' and '06/21/2023'. Below this is the 'Optional Parameters' section. It contains several dropdown menus: 'Format Selection' (with options Format 1, Format 2, Format 3, Format 4), 'Group By' (with options Organization, Branch, Department, Section, Category, Grade, Designation, Custom Group1/2/3), 'New Page For Each Group' (with options Disabled, For User/Date, For Enterprise Group), and 'Organization Name in Header As Per' (with options User Selection, Customized Selection). There is also a checkbox for 'Group Needed in Report'. Below the 'Optional Parameters' is the 'User Selection' section. It includes a 'Select Users' dropdown (with options User Wise, Group Wise, All Users), a table with columns 'User\*', 'ID', and 'Name', and a 'Generate Report For' dropdown (with options All Users, User Wise, Group Wise). A 'Generate Report' button is located at the bottom center.

- **Date:** Select the to and from date for which the report is to be generated.

### Optional Parameters

- **Format Selection:** Select the desired format — Format 1, Format 2, Format 3 or Format 4.

You can filter the records by applying three types of Group filters, for example if you select the first group as Branch then within the Branch you can select the other group as Department and filter it by Date/user.

- **Group By:** Select the desired enterprise group from the drop-down list — Organization, Branch, Department, Section, Category, Grade, Designation, Custom Group1/2/3.
- **Group Needed in Report:** Select the check box, to display the name for that particular group in the generated report.
- **Group By:** Select the desired enterprise group from the drop-down list — Organization, Branch, Department, Section, Category, Grade, Designation, Custom Group1/2/3.
- **Group By:** Select the desired option from the drop-down list—**User** or **Date**
- **New Page For Each Group:** If you wish to view records of each user/date on a new page, select the desired option from the drop-down list— **Disabled, For User/Date or For Enterprise Group**.
- **Show Less Details:** If you select **Format 1**, then select the **Show Less Details** check box if required.
- **Organization Name in Header As Per:** Select the desired option — User Selection or Customized Selection.

If you select **Customized Selection**, click on **Customize Report Header**.

You can select the desired option from the drop-down list or can also add a new header according to your choice.

### User Selection

- **Select Users:** Select the desired option —**User-Wise, Group Wise, or All**.

- If you select **User Wise**, click the **User** picklist. The **Picklist for All Users** pop-up appears.

Picklist For All Users

Total Selected: 0 Records

Search  Show Selected

<input type="checkbox"/>	User ID ▲	Name
<input checked="" type="checkbox"/>	1	SALIM ANSARI
<input checked="" type="checkbox"/>	10	RAJENDRA GOSWAMI
<input checked="" type="checkbox"/>	1001	ANKITKUMAR SOHLIYA
<input checked="" type="checkbox"/>	1002	MEGHA H SHUKLA
<input type="checkbox"/>	1003	UMESH M TALANPURI
<input type="checkbox"/>	1004	DARSHAK B PATEL
<input type="checkbox"/>	1007	DHAVAL I PATEL
<input type="checkbox"/>	1008	MAYANK K KORAT
<input type="checkbox"/>	1009	DIPTI K RATHWA
<input type="checkbox"/>	1010	RAHUL S SHAH

1 - 10 of 2476 records

1 2 3 ... 248 29

OK Cancel

- Select check boxes of the desired users. Click **OK**.
- The selected Users appear in the grid.

Search

User ID ▲	Name	
1	SALIM ANSARI	
10	RAJENDRA GOSWAMI	
1001	ANKITKUMAR SOHLIYA	
1002	MEGHA H SHUKLA	

Generate Report For: All Users

Generate Report

- You can also delete the desired User. To do so, click **Delete** of the respective user.
- If you select **Group Wise** option, select the desired enterprise group from the drop-down list—Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1/2/3.
- For each enterprise group — Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1/2/3, click the corresponding picklist to select the desired option/s.

- The selected Groups appear in the grid.

Search <input type="text"/>			
ID	Name	Group	
1	MATRIX COMSEC PVT. LTD.	Organization	
2	SAMARTH	Organization	
3	AVDHOOT	Organization	
4	ELSENGARD	Organization	
<div>Generate Report</div>			

- You can also delete particular group. To do so, click **Delete** of the respective group.
- If you select **All**, then all users will be selected.
- **Generate Report For:** Select the desired option from the drop-down list— **All Users, Active Users** or **Inactive Users**.
- Click **Generate Report**.

#### Sample Report - Format 1

Run By:		System Admin	MATRIX COMSEC PVT. LTD.															Page 1 of 116	
User ID		Shift	IN- SPTD	OUT- SPTD	IN- SPTD	OUT- SPTD	1st Half	2nd Half	Late -15	Early -15	Hourly Paid Leave	Hourly Unpaid Leave	Over Time	Auth OT	Auth C-OT	Work Hrs	Star Entry	Date:	Time
01/01/2013 (Tuesday)																			
1		SALIM AHMAD	20																
01/02/2013 (Wednesday)																			
1		SALIM AHMAD	20	08:26	17:01												08:05	Tue	
01/03/2013 (Thursday)																			
1		SALIM AHMAD	20	08:27	08:56	10:04	12:22										07:56		
01/04/2013 (Friday)																			
1		SALIM AHMAD	20	08:26	10:08	10:49	12:09										08:08		
01/05/2013 (Saturday)																			
1		SALIM AHMAD	20	08:26	14:00												07:06	Tue	
01/06/2013 (Sunday)																			
1		SALIM AHMAD	20																
01/07/2013 (Monday)																			
1		SALIM AHMAD	20	08:26	14:07	10:22	17:01										08:21		
01/08/2013 (Tuesday)																			
1		SALIM AHMAD	20	08:26	17:02	10:15											08:06	Tue	
01/09/2013 (Wednesday)																			
1		SALIM AHMAD	20	08:26	10:01	10:15	12:11										07:07		
01/10/2013 (Thursday)																			
1		SALIM AHMAD	20	08:27	10:10	12:02	17:02										08:07		
01/11/2013 (Friday)																			
1		SALIM AHMAD	20	08:26	10:04	10:22	17:06										08:17		
01/12/2013 (Saturday)																			

## Attendance Summary

This report provides a group-wise attendance summary for a selected period. You can also view the details of Attendance for particular date, by clicking on the desired Date. The report for the selected Date will be displayed.

Set the report filters as per requirement.

The screenshot shows the 'Attendance Summary' report generation window. At the top, there's a title bar with 'Attendance Summary' and navigation icons. Below it, a date range is set from '06/21/2023' to '06/21/2023'. The 'Optional Parameters' section includes a 'Group By' dropdown set to 'Organization', a 'Format Selection' dropdown set to 'Format 1', a 'Show Less Details' checkbox, and a 'Organization Name in Header As Per' dropdown set to 'User Selection'. The 'User Selection' section includes a 'Select Users' dropdown set to 'Group Wise', a 'Select Group' dropdown set to 'Organization', an 'Organization' section with 'ID' and 'Name' picklists, and a 'Generate Report For' dropdown set to 'All Users'. A 'Generate Report' button is located at the bottom center.

- **Date:** Select the to and from date for which the report is to be generated.

### Optional Parameters

- **Group By:** Select the desired enterprise group from the drop-down list — Organization, Branch, Department, Section, Category, Grade, Designation, Custom Group1/2/3.
- **Format Selection:** Select the desired option from the drop-down list— **Format 1** or **Format 2**.
- **Show Less Details:** If you select **Format 1**, then select the **Show Less Details** check box if required.
- **Organization Name in Header As Per:** Select the desired option — User Selection or Customized Selection.

If you select **Customized Selection**, click on **Customize Report Header**.


You can select the desired option from the drop-down list or can also add a new header according to your choice.

### User Selection

- **Select Users:** Select the desired option —**Group Wise**, or **All**.
- If you select **Group Wise** option, select the desired enterprise group from the drop-down list— Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1/2/3.
- For each enterprise group — Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1/2/3, click the corresponding picklist to select the desired option/s.

- The selected Groups appear in the grid.

Search			
ID	Name	Group	
1	MATRIX COMSEC PVT. LTD.	Organization	
2	SAMARTH	Organization	
3	AVDHOT	Organization	
4	ELSENGARD	Organization	
Generate Report			

- You can also delete particular group. To do so, click **Delete**  of the respective group.
- If you select **All**, then all users will be selected.
- **Generate Report For:** Select the desired option from the drop-down list— **All Users, Active Users** or **Inactive Users**.
- Click **Generate Report**.

## Sample Report

### Format 1

Attendance Summary												
Back												
1 of 1												
100%												
SARATHI												
Organization-Wise Attendance Summary From 02/01/2023 To 06/21/2023												
Run by: System Admin												
Pr No.	Date	Scheduled	PR	AB	MD	PR	IV	PR	AB	MD	PR	IV
SARATHI												
1	05/01/2023	291.0	0.0	291.0	0.0	0.0	0.0	0.00	100.00	0.00	0.00	0.0
2	05/02/2023	291.0	0.0	291.0	0.0	0.0	0.0	0.00	100.00	0.00	0.00	0.0
3	05/03/2023	291.0	0.0	291.0	0.0	0.0	0.0	0.00	100.00	0.00	0.00	0.0
4	05/04/2023	291.0	0.0	291.0	0.0	0.0	0.0	0.00	100.00	0.00	0.00	0.0
5	05/05/2023	291.0	0.0	291.0	0.0	0.0	0.0	0.00	100.00	0.00	0.00	0.0
6	05/06/2023	291.0	0.0	291.0	0.0	0.0	0.0	0.00	100.00	0.00	0.00	0.0
7	05/07/2023	291.0	0.0	291.0	0.0	0.0	0.0	0.00	100.00	0.00	0.00	0.0
8	05/08/2023	291.0	0.0	291.0	0.0	0.0	0.0	0.00	100.00	0.00	0.00	0.0
9	05/09/2023	291.0	0.0	291.0	0.0	0.0	0.0	0.00	100.00	0.00	0.00	0.0
10	05/10/2023	291.0	0.0	291.0	0.0	0.0	0.0	0.00	100.00	0.00	0.00	0.0
11	05/11/2023	291.0	0.0	291.0	0.0	0.0	0.0	0.00	100.00	0.00	0.00	0.0
12	05/12/2023	291.0	0.0	291.0	0.0	0.0	0.0	0.00	100.00	0.00	0.00	0.0
13	05/13/2023	291.0	0.0	291.0	0.0	0.0	0.0	0.00	100.00	0.00	0.00	0.0
14	05/14/2023	291.0	0.0	291.0	0.0	0.0	0.0	0.00	100.00	0.00	0.00	0.0
15	05/15/2023	291.0	0.0	291.0	0.0	0.0	0.0	0.00	100.00	0.00	0.00	0.0
16	05/16/2023	291.0	0.0	291.0	0.0	0.0	0.0	0.00	100.00	0.00	0.00	0.0
17	05/17/2023	291.0	0.0	291.0	0.0	0.0	0.0	0.00	100.00	0.00	0.00	0.0
18	05/18/2023	291.0	0.0	291.0	0.0	0.0	0.0	0.00	100.00	0.00	0.00	0.0
19	05/19/2023	291.0	0.0	291.0	0.0	0.0	0.0	0.00	100.00	0.00	0.00	0.0
20	05/20/2023	291.0	0.0	291.0	0.0	0.0	0.0	0.00	100.00	0.00	0.00	0.0
21	05/21/2023	291.0	0.0	291.0	0.0	0.0	0.0	0.00	100.00	0.00	0.00	0.0
22	05/22/2023	291.0	0.0	291.0	0.0	0.0	0.0	0.00	100.00	0.00	0.00	0.0
23	05/23/2023	291.0	0.0	291.0	0.0	0.0	0.0	0.00	100.00	0.00	0.00	0.0
24	05/24/2023	291.0	0.0	291.0	0.0	0.0	0.0	0.00	100.00	0.00	0.00	0.0

Click on the desired date to view the details.

Attendance Summary

Back

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100%

← Back To Main Report

Run By: System Admin Date: 06/21/2023 20:51

Se No	User ID	Name	1st Mail	2nd Mail
05/01/2023	SAMARTH			
1	2002	DINESH PRAJAPATI		
2	2003	Dinesh J Vankar		
3	2007	Vishnu Vasava		
4	2008	Ashish Vasav		
5	2009	Jatesh Gadehi		
6	2014	SANJAY K BODANA		
7	2015	Jagdish Padhiyar		
8	2016	Virendra Chauhan		
9	2019	Ronak Patel		
10	2021	Amit Chimanbhai Solanki		
11	2023	Krushil Patel		
12	2025	Chirag Valand		
13	2026	Ravi Panchal		
14	2027	HARSHAD TALVI		
15	2029	Ugmesh Patel		
16	2030	Rajjan Vasava		
17	2021	Janak Kshit		
18	2032	Sachin Patel		
19	2033	HEMANT PANCHOLI		
20	2034	Sachin Patel		
21	2035	Yogesh Vasava		
22	2037	Kalpesh Rathwa		
23	2038	SAGAR N BHOOTEKAR		
24	2029	KARAN K PATEL		
--	----	--		

Format 2

Attendance Summary

Back

1 of 6

100%

Matrix

SAMARTH

Organization-Wise Attendance Summary From 02/01/2023 To 06/21/2023

Run By: System Admin Date: 06/21/2023 20:53

User ID	Name	PR Days	AB Shrt Days	LV Count	PL Count	PH Count	WD Count	Total Days
SAMARTH								
2002	DINESH PRAJAPATI	0.0	0.0	0.0	0	0	0	141
2003	Dinesh J Vankar	0.0	0.0	0.0	0	0	0	141
2007	Vishnu Vasava	0.0	0.0	0.0	0	0	0	141
2008	Ashish Vasav	0.0	0.0	0.0	0	0	0	141
2009	Jatesh Gadehi	0.0	0.0	0.0	0	0	0	141
2014	SANJAY K BODANA	0.0	0.0	0.0	0	0	0	141
2015	Jagdish Padhiyar	0.0	0.0	0.0	0	0	0	141
2016	Virendra Chauhan	0.0	0.0	0.0	0	0	0	141
2019	Ronak Patel	0.0	0.0	0.0	0	0	0	141
2021	Amit Chimanbhai Solanki	0.0	0.0	0.0	0	0	0	141
2023	Krushil Patel	0.0	0.0	0.0	0	0	0	141
2025	Chirag Valand	0.0	0.0	0.0	0	0	0	141
2026	Ravi Panchal	0.0	0.0	0.0	0	0	0	141
2027	HARSHAD TALVI	0.0	0.0	0.0	0	0	0	141
2029	Ugmesh Patel	0.0	0.0	0.0	0	0	0	141
2030	Rajjan Vasava	0.0	0.0	0.0	0	0	0	141
2021	Janak Kshit	0.0	0.0	0.0	0	0	0	141
2032	Sachin Patel	0.0	0.0	0.0	0	0	0	141
2033	HEMANT PANCHOLI	0.0	0.0	0.0	0	0	0	141
2034	Sachin Patel	0.0	0.0	0.0	0	0	0	141
2035	Yogesh Vasava	0.0	0.0	0.0	0	0	0	141
2037	Kalpesh Rathwa	0.0	0.0	0.0	0	0	0	141
2038	SAGAR N BHOOTEKAR	0.0	0.0	0.0	0	0	0	141
2029	KARAN K PATEL	0.0	0.0	0.0	0	0	0	141

## Late Arrival Memo

This report provides details of individual or multiple Late Arrival Memos of the selected/all users for the specific duration.

Set the report filters as per requirement.

The screenshot shows the 'Late Arrival Memo' report generation interface. At the top, there is a date range selector with '14/09/2020' as both the start and end dates. Below this, the 'Optional Parameters' section includes a checkbox for 'New Page For Each Group' (unchecked) and a dropdown for 'Organization Name in Header As Per' set to 'User Selection'. The 'User Selection' section contains a 'Select Users' dropdown set to 'User Wise', a 'User' field with 'ID' and 'Name' sub-fields, and a 'Generate Report For' dropdown set to 'All Users'. A 'Generate Report' button is located at the bottom center.

- **Date:** Select the to and from date for which the report is to be generated.

### Optional Parameters

- **New Page For Each Group:** Select the check box to display a new page for each group in the generated report.
- **Organization Name In Header As Per:** Select the desired option — User Selection or Customized Selection.

If you select **Customized Selection**, click **Customize Report Header**.

You can select the desired option from the drop-down list or can also add a new header according to your choice.

### User Selection

- **Select Users:** Select the desired option —User-Wise, Group Wise, or All.



- If you select **User Wise**, click the **User** picklist. The **Picklist for All Users** pop-up appears.

Picklist For All Users

Total Selected: 0 Records

Search

Show Selected

<input type="checkbox"/>	User ID	Name
<input checked="" type="checkbox"/>	1	SALIM ANSARI
<input checked="" type="checkbox"/>	10	RAJENDRA GOSWAMI
<input checked="" type="checkbox"/>	1001	ANKITKUMAR SOHLIYA
<input checked="" type="checkbox"/>	1002	MEGHA H SHUKLA
<input type="checkbox"/>	1003	UMESH M TALANPURI
<input type="checkbox"/>	1004	DARSHAK B PATEL
<input type="checkbox"/>	1007	DHAVAL I PATEL
<input type="checkbox"/>	1008	MAYANK K KORAT
<input type="checkbox"/>	1009	DIPTI K RATHWA
<input type="checkbox"/>	1010	RAHUL S SHAH

1 - 10 of 2476 records

1 2 3 ... 248

OK Cancel

- Select check boxes of the desired users. Click **OK**.
- The selected Users appear in the grid.

Search

User ID	Name	
1	SALIM ANSARI	
10	RAJENDRA GOSWAMI	
1001	ANKITKUMAR SOHLIYA	
1002	MEGHA H SHUKLA	

Generate Report For: All Users

Generate Report

- You can also delete the desired User. To do so, click **Delete** of the respective user.
- If you select **Group Wise** option, select the desired enterprise group from the drop-down list—Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1/2/3.
- For each enterprise group — Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1/2/3, click the corresponding picklist to select the desired option/s.

- The selected Groups appear in the grid.

Search <input type="text"/>			
ID	Name	Group	
1	MATRIX COMSEC PVT. LTD.	Organization	
2	SAMARTH	Organization	
3	AVDHOOT	Organization	
4	ELSENGARD	Organization	
<button>Generate Report</button>			

- You can also delete particular group. To do so, click **Delete** of the respective group.
- If you select **All**, then all users will be selected.
- **Generate Report For:** Select the desired option from the drop-down list— **All Users, Active Users or Inactive Users**.
- Click **Generate Report**.

#### Sample Report

Late Arrival Memo					
<div> <div> <b>MATRIX COMSEC PVT. LTD.</b>  Late Arrival Memo From 05/28/2013 To 05/28/2023 </div> </div>					
Run by:	System Admin	Date:		05/28/2023 18:59	
User:	1 SALIM ANSARI	Branch	FACTORY		
Department:	MANUFACTURING	Designation	Designation 1		
Sr No	Date	Shift	IN	Late-IN	
1	10/19/2013	22	12:00	03:15	
2	12/31/2013	23	09:10	00:10	
3	05/03/2014	22	08:49	00:04	
4	09/10/2014	23	09:01	00:01	
				<b>Total:</b>	<b>03:30</b>
You have been marked late on above dates between 05/28/2013 and 05/28/2023					
Total		4	day(s)	03:30	Hrs

## Grace Time Usage

This report provides group-wise details of grace time usage for a specified time period for all or selected users.

For example, the Grace period for Late-IN is set as 10 mins and Grace period for Early-Out is set as 5 mins in Shift configuration. So if the user avails this grace period; then the record is displayed in report.

The shift is **09:00** to **18:00** hours. If user punches IN at **09:10** then Grace IN is **00:10** and user punches out at **17:56** then Grace OUT is **00:04**. Hence total grace time used is **00:14** and this will be displayed in the report.

Set the report filters as per requirement

Grace Time Usage

Date: 03/09/2018 18/09/2018

Optional Parameters

Group By: Organization

Grace Type: ☒ IN Grace ☒ OUT Grace

User Selection

Select Users: All

Generate Report For: All Users

Generate Report

- **Date:** Select the to and from date for which the report is to be generated.

### Optional Parameters

- **Group By:** Select the desired enterprise group from the drop-down list — Organization, Branch, Department, Section, Category, Grade, Designation, Custom Group1/2/3.
- **Grace Type:** Select the desired check boxes — Grace In, Grace Out — or both.
- **Organization Name in Header As Per:** Select the desired option — User Selection or Customized Selection.

If you select **Customized Selection**, click **Customize Report Header**.

You can select the desired option from the drop-down list or can also add a new header according to your choice.

### User Selection

- **Select Users:** Select the desired option — **User-Wise**, **Group Wise**, or **All**.

- If you select **User Wise**, click the **User** picklist. The **Picklist for All Users** pop-up appears.

Picklist For All Users

Total Selected: 0 Records

Search  Show Selected

<input type="checkbox"/>	User ID ▲	Name
<input type="checkbox"/>	1	SALIM ANSARI
<input type="checkbox"/>	10	RAJENDRA GOSWAMI
<input type="checkbox"/>	1001	ANKITKUMAR SOHLIYA
<input type="checkbox"/>	1002	MEGHA H SHUKLA
<input type="checkbox"/>	1003	UMESH M TALANPURI
<input type="checkbox"/>	1004	DARSHAK B PATEL
<input type="checkbox"/>	1007	DHAVAL I PATEL
<input type="checkbox"/>	1008	MAYANK K KORAT
<input type="checkbox"/>	1009	DIPTI K RATHWA
<input type="checkbox"/>	1010	RAHUL S SHAH

1 - 10 of 2476 records

OK Cancel

- Select check boxes of the desired users. Click **OK**.
- The selected Users appear in the grid.

Search

User ID ▲	Name	
1	SALIM ANSARI	
10	RAJENDRA GOSWAMI	
1001	ANKITKUMAR SOHLIYA	
1002	MEGHA H SHUKLA	

Generate Report For: All Users

Generate Report

- You can also delete the desired User. To do so, click **Delete** of the respective user.
- If you select **Group Wise** option, select the desired enterprise group from the drop-down list—Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1/2/3.
- For each enterprise group — Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1/2/3, click the corresponding picklist to select the desired option/s.

- The selected Groups appear in the grid.

Search <input type="text"/>			
ID	Name	Group	
1	MATRIX COMSEC PVT. LTD.	Organization	
2	SAMARTH	Organization	
3	AVDHOOT	Organization	
4	ELSENGARD	Organization	
<div>Generate Report</div>			

- You can also delete particular group. To do so, click **Delete** of the respective group.
- If you select **All**, then all users will be selected.
- Generate Report For:** Select the desired option from the drop-down list— **All Users**, **Active Users** or **Inactive Users**.
- Click **Generate Report**.

## Sample Report

Grace Time Usage									
<div> <div>Back</div> <div> <div>MATRIX</div> <div>MATRIX COMSEC PVT. LTD.</div> <div>Organization-Wise Grace Time Usage From 05/28/2000 To 05/28/2023</div> <div>Date: 05/28/2023 20:58</div> </div> <div>Page 1 of 1</div> </div>									
Run By: System Admin	Sr No	User ID	Name	Department	Designation	Grace Usage Count	Grace IN	Grace OUT	Grace Total Time
MATRIX COMSEC PVT. LTD.									
1	1		SALIM ANSARI	MANUFACTURING	Designation 1	42	02:42	00:00	02:42
2	10		RAJENDRA GOSWAMI	MANUFACTURING	Designation 1	25	02:27	00:00	02:27

## N-Punch Work Hours

This report provides user-wise details of net work-time for a specified period.

Set the report filters as per requirement

Date <input type="text" value="05/23/2023"/>		<input type="text" value="05/23/2023"/>	
Optional Parameters			
Group By		User Then Date	
Organization Name in Header As Ref		User Selection	
User Selection			
Select Users		User Wise	
User <input type="text"/>		Name <input type="text"/>	
Generate Report For		All Users	
<div>Generate Report</div>			

- Date:** Select the to and from date for which the report is to be generated.

## Optional Parameters

- Group By:** Select the desired option from the drop-down list— **User Then Date** or **Date Then User**.

- **Organization Name In Header:** Select the desired option — User Selection or Customized Selection.

If you select **Customized Selection**, click **Customize Report Header**.

You can select the desired option from the drop-down list or can also add a new header according to your choice.

## User Selection

- **Select Users:** Select the desired option —**User-Wise**, **Group Wise**, or **All**.
- If you select **User Wise**, click the **User** picklist. The **Picklist for All Users** pop-up appears.

Picklist For All Users

Total Selected: 0 Records

Search  Show Selected

<input type="checkbox"/>	User ID ▲	Name
<input type="checkbox"/>	1	SALIM ANSARI
<input type="checkbox"/>	10	RAJENDRA GOSWAMI
<input type="checkbox"/>	1001	ANKITKUMAR SOHLIYA
<input type="checkbox"/>	1002	MEGHA H SHUKLA
<input type="checkbox"/>	1003	UMESH M TALANPURI
<input type="checkbox"/>	1004	DARSHAK B PATEL
<input type="checkbox"/>	1007	DHAVAL I PATEL
<input type="checkbox"/>	1008	MAYANK K KORAT
<input type="checkbox"/>	1009	DIPTI K RATHWA
<input type="checkbox"/>	1010	RAHUL S SHAH

1 - 10 of 2476 records

OK Cancel

- Select check boxes of the desired users. Click **OK**.
- The selected Users appear in the grid.

Search

User ID ▲	Name	
1	SALIM ANSARI	
10	RAJENDRA GOSWAMI	
1001	ANKITKUMAR SOHLIYA	
1002	MEGHA H SHUKLA	


Generate Report For: All Users

Generate Report


- You can also delete the desired User. To do so, click **Delete** of the respective user.
- If you select **Group Wise** option, select the desired enterprise group from the drop-down list—Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1/2/3.

- For each enterprise group — Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1/2/3, click the corresponding picklist to select the desired option/s.
- The selected Groups appear in the grid.

Search			
ID	Name	Group	
1	MATRIX COMSEC PVT. LTD.	Organization	
2	SAMARTH	Organization	
3	AVDHOT	Organization	
4	ELSENGARD	Organization	
Generate Report			

- You can also delete particular group. To do so, click **Delete**  of the respective group.
- If you select **All**, then all users will be selected.
- **Generate Report For:** Select the desired option from the drop-down list— **All Users, Active Users** or **Inactive Users**.
- Click **Generate Report**.

#### Sample Report

N-Punch Work Hours												
←												
Back												
<div>  <div> <b>MATRIX COMSEC PVT. LTD.</b>  N-Punch Work Hours From 05/28/2019 To 05/28/2023 </div> <div> Page 19 of 19  Date: 05/28/2023 21:07 </div> </div>												
Run by: System Admin												
Sr No	Date	Shift	First IN	Last OUT	1st Half	2nd Half	Gross Work Hrs	OUT Time	N-Punch Work Hrs	O/P Code For Status	Man Entry	Reason
10 - RAJENDRA GOSWAMI												
199	12/12/2019	23			AB	AB	00:00	00:00	00:00	A	NO	
200	12/13/2019	23			AB	AB	00:00	00:00	00:00	A	NO	
201	12/14/2019	23			AB	AB	00:00	00:00	00:00	A	NO	
202	12/15/2019	23			WO	WO	00:00	00:00	00:00	WO	NO	
203	12/16/2019	23			AB	AB	00:00	00:00	00:00	A	NO	
204	12/17/2019	23			AB	AB	00:00	00:00	00:00	A	NO	
205	12/18/2019	23			AB	AB	00:00	00:00	00:00	A	NO	
206	12/19/2019	23			AB	AB	00:00	00:00	00:00	A	NO	
207	12/20/2019	23			AB	AB	00:00	00:00	00:00	A	NO	
208	12/21/2019	23			AB	AB	00:00	00:00	00:00	A	NO	
209	12/22/2019	23			WO	WO	00:00	00:00	00:00	WO	NO	
210	12/23/2019	23			AB	AB	00:00	00:00	00:00	A	NO	
211	12/24/2019	23			AB	AB	00:00	00:00	00:00	A	NO	
212	12/25/2019	23			AB	AB	00:00	00:00	00:00	A	NO	
213	12/26/2019	23			AB	AB	00:00	00:00	00:00	A	NO	
214	12/27/2019	23			AB	AB	00:00	00:00	00:00	A	NO	
215	12/28/2019	23					00:00	00:00	00:00	????	NO	
216	12/29/2019	23					00:00	00:00	00:00	????	NO	
217	12/30/2019	23			AB	AB	00:00	00:00	00:00	A	NO	
218	12/31/2019	23					00:00	00:00	00:00	????	NO	

## Daily Work Hours

This report provides user-wise details of daily work hours for a selected period.

Set the report filters as per requirement.

The screenshot shows the 'Daily Work Hours' report configuration window. At the top, there are date pickers for 'Date' (05/22/2023) and 'To' (06/21/2023). Below this is a 'Work Hours Based Calculation' checkbox. The 'Optional Parameters' section contains several settings: 'Group By' with dropdowns for 'Organization' and 'User'; a 'Group Needed In Report' checkbox; 'New Page For Each Date/User' checkbox; 'Include In Lost Hours' with checkboxes for 'Late-IN' and 'Early-OUT'; 'Add Custom Footer' checkbox; a 'Remark' text field; and 'Organization Name In Header As Per' with a 'User Selection' dropdown. The 'User Selection' section at the bottom includes 'Select Users' (User Wise), 'User' (ID and Name fields), and 'Generate Report For' (All Users). A 'Generate Report' button is at the bottom right.

- **Date:** Select the to and from date for which the report is to be generated.
- **Work Hour Based Calculation:** Select the check box to generated report based on work hour calculation.

### Optional Parameters

- **Group By:** Select the desired enterprise group from the drop-down list — Organization, Branch, Department, Section, Category, Grade, Designation, Custom Group1/2/3.
- **Group Needed in Report:** Enable the check box, to display the name for that particular group in the generated report.
- **Group By:** Select the desired option from the drop-down list— **User** or **Date**.
- **New Page For Each Date/User:** Select the check box if you want the report on a new page for each Date/ User.
- **Include in Lost Hour:** Select the Late-IN /Early-OUT check box, if you wish to include the same in Lost Hours.
- **Add Custom Footer:** Select the check box to add custom footer messages and configure the desired footer message.
- **Organization Name in Header As Per:** Select the desired option — User Selection or Customized Selection.

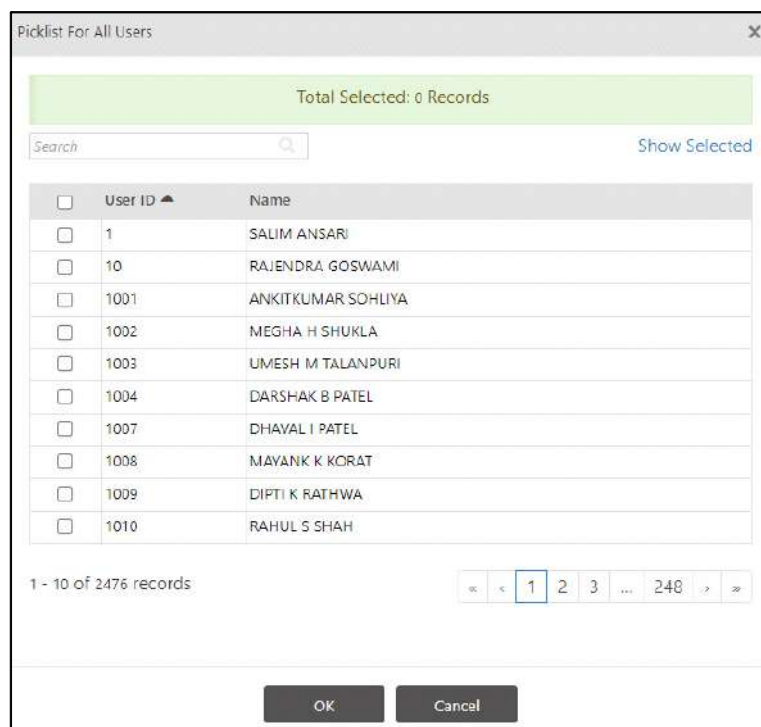
If you select **Customized Selection**, click on **Customize Report Header**.



You can select the desired option from the drop-down list or can also add a new header according to your choice.

## User Selection

- **Select Users:** Select the desired option —**User-Wise, Group Wise, or All.**
- If you select **User Wise**, click the **User** picklist. The **Picklist for All Users** pop-up appears.



Picklist For All Users

Total Selected: 0 Records

Search  Show Selected

<input type="checkbox"/>	User ID	Name
<input type="checkbox"/>	1	SALIM ANSARI
<input type="checkbox"/>	10	RAJENDRA GOSWAMI
<input type="checkbox"/>	1001	ANKITKUMAR SOHLIYA
<input type="checkbox"/>	1002	MEGHA H SHUKLA
<input type="checkbox"/>	1003	UMESH M TALANPURI
<input type="checkbox"/>	1004	DARSHAK B PATEL
<input type="checkbox"/>	1007	DHAYAL I PATEL
<input type="checkbox"/>	1008	MAYANK K KORAT
<input type="checkbox"/>	1009	DIPTI K RATHWA
<input type="checkbox"/>	1010	RAHUL S SHAH

1 - 10 of 2476 records

1 2 3 ... 248

OK Cancel

- Select check boxes of the desired users. Click **OK**.
- The selected Users appear in the grid.




Search

User ID	Name	
1	SALIM ANSARI	
10	RAJENDRA GOSWAMI	
1001	ANKITKUMAR SOHLIYA	
1002	MEGHA H SHUKLA	

Generate Report For: All Users

Generate Report

- You can also delete the desired User. To do so, click **Delete**  of the respective user.
- If you select **Group Wise** option, select the desired enterprise group from the drop-down list—Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1/2/3.
- For each enterprise group — Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1/2/3, click the corresponding picklist to select the desired option/s.



## Absent Adjustments

Set the report filters as per requirement.

The screenshot shows the 'Absent Adjustments' window with the following configuration:

- For Month-Year:** June, 2023
- Optional Parameters:** Organization Name in Header As Per: User Selection
- User Selection:**
  - Select Users: User Wise
  - User: ID (input field), Name (input field)
  - Generate Report For: All Users
- Generate Report** button

- **For Month-Year:** Select the month year to specify the time period for which the data is to be generated.

### Optional Parameters

- **Organization Name in Header As Per:** Select the desired option — User Selection or Customized Selection.

If you select **Customized Selection**, click on **Customize Report Header**.

You can select the desired option from the drop-down list or can also add a new header according to your choice.

### User Selection

- **Select Users:** Select the desired option — **User Wise**, **Group Wise**, or **All**.
- If you select **User Wise**, click the **User** picklist. The **Picklist For All Users** pop-up appears.

The screenshot shows the 'Picklist For All Users' pop-up window with the following details:

- Total Selected:** 0 Records
- Search** input field and **Show Selected** button
- User List Table:**

<input type="checkbox"/>	User ID	Name
<input type="checkbox"/>	1	SALIM ANSARI
<input type="checkbox"/>	10	RAJENDRA GOSWAMI
<input type="checkbox"/>	1001	ANKITKUMAR SOHLIYA
<input type="checkbox"/>	1002	MEGHA H SHUKLA
<input type="checkbox"/>	1003	UMESH M TALANPURI
<input type="checkbox"/>	1004	DARSHAK B PATEL
<input type="checkbox"/>	1007	DHAVAL I PATEL
<input type="checkbox"/>	1008	MAYANK K KORAT
<input type="checkbox"/>	1009	DIPTI K RATHWA
<input type="checkbox"/>	1010	RAHUL S SHAH

1 - 10 of 2476 records

Navigation: < 1 2 3 ... 248 >

**OK** **Cancel**

- Select check boxes of the desired users. Click **OK**.
- The selected Users appear in the grid.

User ID	Name	
1	SALIM ANSARI	
10	RAJENDRA GOSWAMI	
1001	ANKITKUMAR SOHLIYA	
1002	MEGHA H SHUKLA	

Generate Report For: All Users

**Generate Report**

- You can also delete the desired User. To do so, click **Delete** of the respective user.
- If you select **Group Wise** option, select the desired enterprise group from the drop-down list— Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1/2/3.
- For each enterprise group — Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1/2/3, click the corresponding picklist to select the desired option/s.
- The selected Groups appear in the grid.

ID	Name	Group	
1	MATRIX COMSEC PVT. LTD.	Organization	
2	SAMARTH	Organization	
3	AWDHCOT	Organization	
4	ELSENGARD	Organization	

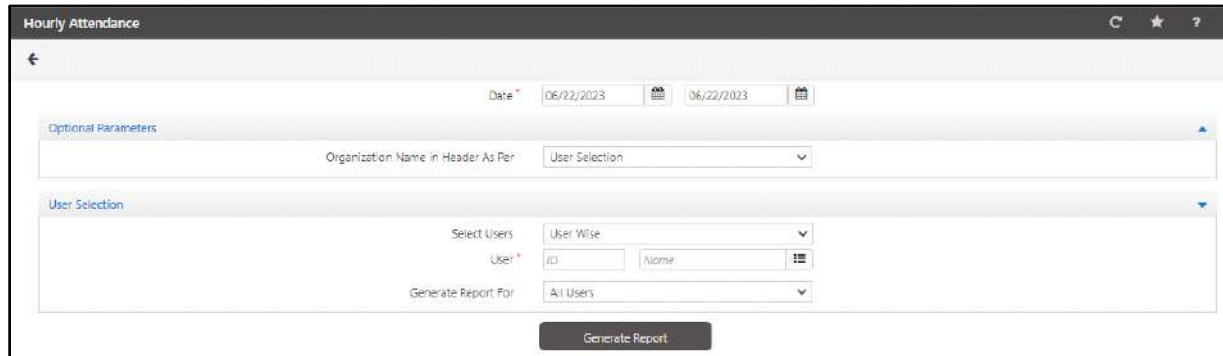
**Generate Report**

- You can also delete particular group. To do so, click **Delete** of the respective group.
- If you select **All**, then all users will be selected.
- **Generate Report For:** Select the desired option from the drop-down list— **All Users, Active Users** or **Inactive Users**.
- Click **Generate Report**.

## Hourly Attendance

This report provides a list of day-based hourly attendance for selected users over a specified date range.

Set the report filters as per requirement.

The screenshot shows a web application window titled "Hourly Attendance". At the top, there are date pickers for "Date" with values "06/22/2023" and "06/22/2023". Below this is a section titled "Optional Parameters" which contains a dropdown menu labeled "Organization Name in Header As Per" with the value "User Selection". Underneath is a section titled "User Selection" which includes a "Select Users" dropdown menu set to "User Wise", a "User" field with sub-fields for "ID" and "Name", and a "Generate Report For" dropdown menu set to "All Users". At the bottom of the form is a "Generate Report" button.

- **Date:** Select the to and from date for which the report is to be generated.

### Optional Parameters

- **Organization Name in Header As Per:** Select the desired option — User Selection or Customized Selection.

If you select **Customized Selection**, click on **Customize Report Header**.

You can select the desired option from the drop-down list or can also add a new header according to your choice.

### User Selection

- **Select Users:** Select the desired option —User-Wise, Group Wise, or All.

- If you select **User Wise**, click the **User** picklist. The **Picklist for All Users** pop-up appears.

Picklist For All Users

Total Selected: 0 Records

Search

Show Selected

<input type="checkbox"/>	User ID ▲	Name
<input type="checkbox"/>	1	SALIM ANSARI
<input type="checkbox"/>	10	RAJENDRA GOSWAMI
<input type="checkbox"/>	1001	ANKITKUMAR SOHLIYA
<input type="checkbox"/>	1002	MEGHA H SHUKLA
<input type="checkbox"/>	1003	UMESH M TALANPURI
<input type="checkbox"/>	1004	DARSHAK B PATEL
<input type="checkbox"/>	1007	DHAVAL I PATEL
<input type="checkbox"/>	1008	MAYANK K KORAT
<input type="checkbox"/>	1009	DIPTI K RATHWA
<input type="checkbox"/>	1010	RAHUL S SHAH

1 - 10 of 2476 records

1 2 3 ... 248 > >>

OK Cancel

- Select check boxes of the desired users. Click **OK**.
- The selected Users appear in the grid.

Search

User ID ▲	Name	
1	SALIM ANSARI	
10	RAJENDRA GOSWAMI	
1001	ANKITKUMAR SOHLIYA	
1002	MEGHA H SHUKLA	

Generate Report For: All Users

Generate Report

- You can also delete the desired User. To do so, click **Delete** of the respective user.
- If you select **Group Wise** option, select the desired enterprise group from the drop-down list— Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1/2/3.
- For each enterprise group — Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1/2/3, click the corresponding picklist to select the desired option/s.



## Work Hours Summary

This report provides a list of day-wise work hours summary for selected users for a specified date range.

Set the report filters as per requirement.

The screenshot shows a web application window titled "Work Hours Summary". At the top, there is a "Date" field with a date range from "05/23/2023" to "06/22/2023". Below this is a section titled "Optional Parameters" which contains a dropdown menu labeled "Organization Name in Header As Per" with "User Selection" selected. Underneath is a section titled "User Selection" which includes a "Select Users" dropdown menu with "User Wise" selected. Below this is a "User" field with "ID" and "Name" options, and a "Generate Report For" dropdown menu with "All Users" selected. At the bottom of the form is a "Generate Report" button.

- **Date:** Select the to and from date for which the report is to be generated.

### Optional Parameters

- **Organization Name in Header As Per:** Select the desired option — User Selection or Customized Selection.

If you select **Customized Selection**, click **Customize Report Header**.

You can select the desired option from the drop-down list or can also add a new header according to your choice.

### User Selection

- **Select Users:** Select the desired option —User-Wise, Group Wise, or All.



- If you select **User Wise**, click the **User** picklist. The **Picklist for All Users** pop-up appears.

Picklist For All Users

Total Selected: 0 Records

Search  Show Selected

<input type="checkbox"/>	User ID	Name
<input type="checkbox"/>	1	SALIM ANSARI
<input type="checkbox"/>	10	RAJENDRA GOSWAMI
<input type="checkbox"/>	1001	ANKITKUMAR SOHLIYA
<input type="checkbox"/>	1002	MEGHA H SHUKLA
<input type="checkbox"/>	1003	UMESH M TALANPURI
<input type="checkbox"/>	1004	DARSHAK B PATEL
<input type="checkbox"/>	1007	DHAYAL I PATEL
<input type="checkbox"/>	1008	MAYANK K KORAT
<input type="checkbox"/>	1009	DIPTI K RATHWA
<input type="checkbox"/>	1010	RAHUL S SHAH

1 - 10 of 2476 records

1 2 3 ... 248

OK Cancel

- Select check boxes of the desired users. Click **OK**.
- The selected Users appear in the grid.

Search

User ID	Name	
1	SALIM ANSARI	
10	RAJENDRA GOSWAMI	
1001	ANKITKUMAR SOHLIYA	
1002	MEGHA H SHUKLA	


Generate Report For: All Users

Generate Report

- You can also delete the desired User. To do so, click **Delete** of the respective user.
- If you select **Group Wise** option, select the desired enterprise group from the drop-down list— Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1/2/3.
- For each enterprise group — Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1/2/3, click the corresponding picklist to select the desired option/s.

- The selected Groups appear in the grid.

<input type="text" value="Search"/>			
ID	Name	Group 	
1	MATRIX COMSEC PVT. LTD.	Organization	
2	SAMARTH	Organization	
3	AVDHOOT	Organization	
4	ELSENGARD	Organization	

- You can also delete particular group. To do so, click **Delete**  of the respective group.
- If you select **All**, then all users will be selected.
- **Generate Report For:** Select the desired option from the drop-down list— **All Users**, **Active Users** or **Inactive Users**.
- Click **Generate Report**.

## Sample Report

**Work Hours Summary**

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<b>MATRIX COMSEC PVT. LTD.</b>										Page 1 of 58
<b>Work Hours Summary From 02/01/2000 To 06/22/2023</b>										
Run by:	System Admin			Date:	06/22/2023		15:44			
Date	First IN	Last OUT	Gross Hours	Extra Hours	Net-Work Hours	Total Overtime	Less Hours			
<b>1 - SALIM ANSARI</b>										
01/01/2013			00:00	00:00	00:00	00:00				
01/02/2013	08:26	17:01	08:05	00:05	00:00	00:00				
01/03/2013	08:27	17:01	07:56	00:04	00:00	00:00				
01/04/2013	08:31	17:00	08:05	00:00	00:00	00:00				
01/05/2013	08:25	16:00	07:05	00:05	00:00	00:00				
01/06/2013			00:00	00:00	00:00	00:00				
01/07/2013	08:25	17:01	08:21	00:06	00:00	00:00				
01/08/2013	08:26	17:02	08:06	00:06	00:00	00:00				
01/09/2013	08:26	17:00	07:57	00:04	00:00	00:00				
01/10/2013	08:27	17:02	08:07	00:05	00:00	00:00				
01/11/2013	08:25	17:00	08:17	00:05	00:00	00:00				
01/12/2013	08:23	15:17	07:07	00:07	00:00	00:00				
01/13/2013			00:00	00:00	00:00	00:00				
01/14/2013			00:00	00:00	00:00	00:00				
01/15/2013			00:00	00:00	00:00	00:00				

## Daily Details

This report provides group-wise daily time and attendance details for a specified date-range and in a specified format.

Set the report filters as per requirement.

The screenshot shows the 'Daily Details' report configuration window. At the top, there's a date range selector with '05/22/2023' and '05/22/2023'. Below it, the 'Optional Parameters' section contains several settings: 'Group By' is set to 'Organization', 'Group by' is set to 'User', 'Format Selection' is set to 'All Punches', 'New Page For Each Date/User' is checked, and 'Organization Name in Header As Per' is set to 'User Selection'. The 'User Selection' section below has 'Select Users' set to 'User Wise', a table for 'User\*' with columns 'ID' and 'Name', and a 'Generate Report For' dropdown set to 'All Users'. A 'Generate Report' button is located at the bottom center.

- **Date:** Select the to and from date for which the report is to be generated.

### Optional Parameters

- **Group By:** Select the desired enterprise group from the drop-down list — Organization, Branch, Department, Section, Category, Grade, Designation, Custom Group1/2/3.
- **Group By:** Select the desired option from the drop-down list—**User** or **Date**.
- **Format Selection:** Select the desired option from the drop-down list— **All Punches, All Punch and Status, First-Last Punch, First-Last Punch with Status, Working Hour Details**.
- **New Page For Each Date/User:** Enable the check to display a new page for each Date/User in the generated report.
- **Organization Name in Header As Per:** Select the desired option — User Selection or Customized Selection.

If you select **Customized Selection**, click **Customize Report Header**.

You can select the desired option from the drop-down list or can also add a new header according to your choice.

### User Selection

- **Select Users:** Select the desired option —**User Wise, Group Wise, or All**.

- If you select **User Wise**, click the **User** picklist. The **Picklist for All Users** pop-up appears.

Picklist For All Users

Total Selected: 0 Records

Search  Show Selected

<input type="checkbox"/>	User ID ▲	Name
<input type="checkbox"/>	1	SALIM ANSARI
<input type="checkbox"/>	10	RAJENDRA GOSWAMI
<input type="checkbox"/>	1001	ANKITKUMAR SOHLIYA
<input type="checkbox"/>	1002	MEGHA H SHUKLA
<input type="checkbox"/>	1003	UMESH M TALANPURI
<input type="checkbox"/>	1004	DARSHAK B PATEL
<input type="checkbox"/>	1007	DHAVAL I PATEL
<input type="checkbox"/>	1008	MAYANK K KORAT
<input type="checkbox"/>	1009	DIPTI K RATHWA
<input type="checkbox"/>	1010	RAHUL S SHAH

1 - 10 of 2476 records

1 2 3 ... 248 249

OK Cancel

- Select check boxes of the desired users. Click **OK**.
- The selected Users appear in the grid.

Search

User ID ▲	Name	
1	SALIM ANSARI	
10	RAJENDRA GOSWAMI	
1001	ANKITKUMAR SOHLIYA	
1002	MEGHA H SHUKLA	

Generate Report For: All Users

Generate Report

- You can also delete the desired User. To do so, click **Delete** of the respective user.
- If you select **Group Wise** option, select the desired enterprise group from the drop-down list—Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1/2/3.
- For each enterprise group — Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1/2/3, click the corresponding picklist to select the desired option/s.

- The selected Groups appear in the grid.

Search <input type="text"/>			
ID	Name	Group	
1	MATRIX COMSEC PVT. LTD.	Organization	
2	SAMARTH	Organization	
3	AVDHOOT	Organization	
4	ELSENGARD	Organization	
<button>Generate Report</button>			


- You can also delete particular group. To do so, click **Delete** of the respective group.
- If you select **All**, then all users will be selected.
- Generate Report For:** Select the desired option from the drop-down list— **All Users, Active Users** or **Inactive Users**.
- Click **Generate Report**.

### Sample Report

Daily Details

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MATRIX

MATRIX COMSEC PVT. LTD.

Organization-Wise Daily Details From 06/22/2000 To 06/22/2015

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Run by: System Admin

Date: 06/22/2023 16:53

Date	Day	Shift	Day Status	IN/OUT Punch												Late-IN	Early-OUT	Cross Hours	Within Shift	Loss Hours
				1 IN	2 OUT	3 IN	4 OUT	5 IN	6 OUT	7 IN	8 OUT	9 IN	10 OUT	11 IN	12 OUT					
MATRIX COMSEC PVT. LTD.																				
User: 1042 RICHIA MENTA																				
01/01/2013	Tue	GS	N	09:22	19:45										00:00	00:00	09:26	08:15	00:42	
01/02/2013	Wed	GS	N	09:25	19:45										00:00	00:00	09:30	08:15	00:45	
01/03/2013	Thu	GS	N	09:20	19:29										00:00	00:00	09:29	08:20	00:40	
01/04/2013	Fri	GS	N	09:29	20:04										00:00	00:00	09:45	08:11	00:49	
01/05/2013	Sat	GS	N	09:28	19:59										00:00	00:00	09:32	08:12	00:45	
01/06/2013	Sun	GS	WO												00:00	00:00	00:00	00:00		
01/07/2013	Mon	GS	N	09:25	19:29										00:00	00:00	09:21	08:12	00:45	
01/08/2013	Tue	GS	N	09:29											00:00	00:00	00:00	00:00	09:00	
01/09/2013	Wed	GS	N	09:30	19:45										00:00	00:00	09:25	08:10	00:50	
01/10/2013	Thu	GS	N	09:29	20:00										00:00	00:00	10:11	08:11	00:49	
01/11/2013	Fri	GS	N	09:21	18:57										00:00	00:00	09:46	08:19	00:41	
01/12/2013	Sat	GS	N	09:31	19:59										00:00	00:00	09:39	08:40	00:20	
01/13/2013	Sun	GS	WO												00:00	00:00	00:00	00:00		
01/14/2013	Mon	GS	PS												00:00	00:00	00:00	00:00		
01/15/2013	Tue	GS	WO/PS												00:00	00:00	00:00	00:00		
01/16/2013	Wed	GS	N												00:00	00:00	00:00	00:00	09:00	
01/17/2013	Thu	GS	N	10:25	19:30										00:00	00:00	09:40	08:40	00:20	
01/18/2013	Fri	GS	N	09:24	20:07										00:00	00:00	09:39	08:16	00:44	
01/19/2013	Sat	GS	N	09:20	19:29										00:00	00:00	09:24	08:10	00:45	
01/20/2013	Sun	GS	WO												00:00	00:00	00:00	00:00		
01/21/2013	Mon	GS	N	09:23	19:24										00:00	00:00	09:21	08:17	00:43	
01/22/2013	Tue	GS	N	09:24	19:49										00:00	00:00	09:35	08:16	00:44	
01/23/2013	Wed	GS	N	09:27	19:49										00:00	00:00	09:22	08:13	00:47	
01/24/2013	Thu	GS	N	09:44	19:24										00:14	00:00	08:50	07:56	01:04	
01/25/2013	Fri	GS	N	09:31	19:19										00:01	00:00	08:58	08:09	00:51	
01/26/2013	Sat	GS	WO												00:00	00:00	00:00	00:00		

For example:

- Loss Hours = Shift hours - Actual working hours in shift  
= 08:00 - 07:45 = 00:15 hours
- When there is no punch on a day; then Loss hours = Shift hours= 8 hours
- On Week Off, there is no loss work hours.

## Daily Summary

This report provides group-wise daily attendance analysis/summary report for a specified date range and in a specified format.

When there is no punch on a day; then Loss hours = Shift hours = 8 hours

On Week Off, there is no loss work hours.

DADB															Page 1 of 1			
Organization-Wise Daily Summary From 01/01/2017 To 07/01/2017															Date: 27/07/2022 11:14			
Run By:	System Admin	Shift	Day Status	First IN	Last OUT	Early -IN	Late -IN	Early -OUT	Late -OUT	Hourly Paid Leave	Hourly Unpaid Leave	Gross Hours	Net-Work Hours	Within Shift	Break Hours	Loss Hours Adj. Hours	OT Hours	Auth. OT
01/01/2017 (Sunday)																		
DADB	initial	initial	OS	N		08:00	08:00	08:00	08:00			08:00	08:00	08:00	08:00	08:00		
ORG2	initial	initial	OS	N		08:00	08:00	08:00	08:00			08:00	08:00	08:00	08:00	08:00		
02/01/2017 (Monday)																		
DADB	initial	initial	OS	N		08:00	08:00	08:00	08:00			08:00	08:00	08:00	08:00	08:00		
ORG2	initial	initial	OS	N		08:00	08:00	08:00	08:00			08:00	08:00	08:00	08:00	08:00		
03/01/2017 (Tuesday)																		
DADB	initial	initial	OS	N		08:00	08:00	08:00	08:00			08:00	08:00	08:00	08:00	08:00		
ORG2	initial	initial	OS	N		08:00	08:00	08:00	08:00			08:00	08:00	08:00	08:00	08:00		
04/01/2017 (Wednesday)																		
DADB	initial	initial	OS	N		08:00	08:00	08:00	08:00			08:00	08:00	08:00	08:00	08:00		

- **Date:** Select the to and from date for which the report is to be generated.

### Optional Parameters

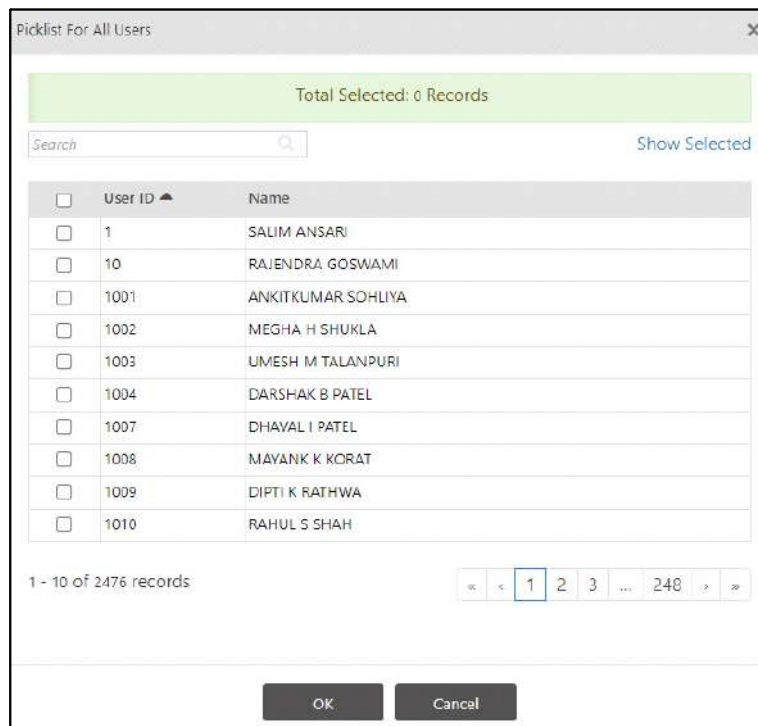
- **Group By:** Select the desired enterprise group from the drop-down list — Organization, Branch, Department, Section, Category, Grade, Designation, Custom Group1/2/3.
- **Format Selection:** Select the desired option from the drop-down list— **Daily Summary, Daily Summary with Status, Daily Analysis or Daily Analysis with Status.**
- **Organization Name in Header As Per:** Select the desired option — User Selection or Customized Selection.

If you select Customized Selection, click on Customize Report Header.

You can select the desired option from the drop-down list or can also add header according to your choice.

## User Selection

- **Select Users:** Select the desired option —**User-Wise**, **Group Wise**, or **All**.
- If you select **User Wise**, click the **User** picklist. The **Picklist for All Users** pop-up appears.



Picklist For All Users

Total Selected: 0 Records

Search  Show Selected

<input type="checkbox"/>	User ID	Name
<input type="checkbox"/>	1	SALIM ANSARI
<input type="checkbox"/>	10	RAJENDRA GOSWAMI
<input type="checkbox"/>	1001	ANKITKUMAR SOHLIYA
<input type="checkbox"/>	1002	MEGHA H SHUKLA
<input type="checkbox"/>	1003	UMESH M TALANPURI
<input type="checkbox"/>	1004	DARSHAK B PATEL
<input type="checkbox"/>	1007	DHAYAL I PATEL
<input type="checkbox"/>	1008	MAYANK K KORAT
<input type="checkbox"/>	1009	DIPTI K RATHWA
<input type="checkbox"/>	1010	RAHUL S SHAH

1 - 10 of 2476 records

1 2 3 ... 248

OK Cancel

- Select check boxes of the desired users. Click **OK**.
- The selected Users appear in the grid.




Search

User ID	Name	
1	SALIM ANSARI	
10	RAJENDRA GOSWAMI	
1001	ANKITKUMAR SOHLIYA	
1002	MEGHA H SHUKLA	

Generate Report For: All Users

Generate Report

- You can also delete the desired User. To do so, click **Delete**  of the respective user.
- If you select **Group Wise** option, select the desired enterprise group from the drop-down list—Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1/2/3.
- For each enterprise group — Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1/2/3, click the corresponding picklist to select the desired option/s.

- The selected Group appear in the grid.

Search <input type="text"/>			
ID	Name	Group	
1	MATRIX COMSEC PVT. LTD.	Organization	
2	SAMARTH	Organization	
3	AVDHOOT	Organization	
4	ELSENGARD	Organization	
<button>Generate Report</button>			

- You can also delete particular group. To do so, click **Delete** of the respective group.
- If you select **All**, then all user will be selected.
- Generate Report For:** Select the desired option from the drop-down list— **All Users, Active Users** or **Inactive Users**.
- Click **Generate Report**.

## Sample Report

Daily Summary																	
←																	
1 of 13302																	
<div> <b>MATRIX COMSEC PVT. LTD.</b>            Organization-Wise Daily Summary From 01/01/2000 To 01/01/2021         </div>																	
Run By:	System Admin	Shift	Day	First IN	Last OFF	Early -IN	Late -IN	Early -OUT	Late-OUT	Hourly Paid	Hourly Unpaid	Ones	Net-Work	Minute	Streak	Loss	Date:
Row ID	Name		Station							Leave	Leave	Hours	Hours	Sec	Hours	Hours	06/22
01/01/2013 (Tuesday)																	
1	MATRIX COMSEC PVT. LTD.	22	MD			00:00	00:00	00:00	00:00			00:00	00:00	00:00	00:00		
10	SALVENDI GOWDAM	22	MD			00:00	00:00	00:00	00:00			00:00	00:00	00:00	00:00		
1001	ANANTHARAO SURESH	00	IF	00:20	20:00	00:00	00:00	00:00	01:30			00:40	00:00	00:10	00:00	00:40	
1002	DEEPA S SURESH	00	IF	00:21	19:50	00:00	00:00	00:00	01:25			00:40	00:00	00:10	00:00	00:40	
1003	UNESA M TALLAPATI	00	IF	00:16	19:00	00:00	00:00	00:00	00:30			00:30	00:00	00:00	00:00	00:30	
1004	SANDEEP S PATEL	00	IF	00:37	18:40	00:00	00:00	00:00	00:10			00:00	00:00	00:00	00:00	00:00	
1007	CHITRAL S PATEL	00	IF	00:20	20:10	00:00	00:00	00:00	01:40			01:00	00:00	00:00	00:00	00:00	
1008	MEHMET K KOKAT	00	IF	00:33	18:37	00:00	00:00	00:00	01:07			00:20	00:00	00:17	00:00	00:40	
1009	DEEPTI K SATHYA	00	IF	00:21	19:10	00:00	00:00	00:00	00:45			00:00	00:00	00:10	00:00	00:40	
1010	RAHUL S SETHI	00	IF	00:20	19:40	00:00	00:00	00:00	01:10			00:00	00:00	00:10	00:00	00:40	
1011	RAHUL S SETHI	00	IF	00:19	18:30	00:00	00:00	00:00	00:21			00:00	00:00	00:00	00:00	00:00	
1012	PARASRAT DAS	00	IF	00:27	20:10	00:00	00:00	00:00	01:40			01:00	00:00	00:10	00:00	00:40	
1013	SURESH A GANAPATHY	00	IF	00:19	18:50	00:00	00:00	00:00	00:00			00:00	00:00	00:00	00:00	00:00	
1016	RAJAT A	00	IF			00:00	00:00	00:00	00:00			00:00	00:00	00:00	00:00	00:00	
1020	VINAYAK M PRASAD	00	IF	10:20	19:07	00:00	00:00	00:00	00:27			00:17	00:00	00:40	00:00	00:00	
1022	RAJESH K CHANDRA	00	IF	00:34	18:10	00:00	00:00	00:00	00:00			00:10	00:00	00:10	00:00	00:00	
1030	DEEPA KALIAH	00	IF	00:37	21:40	00:00	00:00	00:00	00:20			00:10	00:00	00:10	00:00	00:00	
1039	ANANTHARAO SURESH	00	IF	00:20	19:10	00:00	00:00	00:00	00:40			00:00	00:00	00:10	00:00	00:40	
104	ANANTHARAO SURESH	00	IF	00:11	19:00	00:00	00:00	00:00	01:20			00:00	00:00	00:10	00:00	00:00	
1041	ANANTHARAO SURESH	00	IF			00:00	00:00	00:00	00:00			00:00	00:00	00:00	00:00	00:00	
1042	ANANTHARAO SURESH	00	IF	00:20	19:40	00:00	00:00	00:00	01:10			00:00	00:00	00:10	00:00	00:40	
1043	ANANTHARAO SURESH	00	IF	00:30	18:10	00:00	00:00	00:00	00:00			00:00	00:00	00:00	00:00	00:00	
1044	ANANTHARAO SURESH	00	IF			00:00	00:00	00:00	00:00			00:00	00:00	00:00	00:00	00:00	
1045	ANANTHARAO SURESH	00	IF	00:24	17:40	00:00	00:00	00:00	00:00			00:00	00:00	00:00	00:00	00:00	
105	ANANTHARAO SURESH	00	IF			00:00	00:00	00:00	00:00			00:00	00:00	00:00	00:00	00:00	
1060	ANANTHARAO SURESH	00	IF			00:00	00:00	00:00	00:00			00:00	00:00	00:00	00:00	00:00	
1061	ANANTHARAO SURESH	00	IF	00:20	20:00	00:00	00:00	00:00	01:20			00:00	00:00	00:10	00:00	00:40	
1062	ANANTHARAO SURESH	00	IF			00:00	00:00	00:00	00:00			00:00	00:00	00:00	00:00	00:00	

## Daily Work Details

This report provides daily work details of selected users for selected period.

Set the report filters as per requirement.



The screenshot shows a web-based interface for generating a 'Daily Work Details' report. At the top, there's a date range selector with '06/22/2023' and '06/22/2023'. Below this is the 'Optional Parameters' section, which includes a 'Group By' dropdown set to 'Organization', a 'New Page For Each User' checkbox that is checked, an 'Add Custom Footer' checkbox that is unchecked, a 'Remark' text field, and an 'Organization Name in Header As Per' dropdown set to 'User Selection'. The 'User Selection' section below has a 'Select Users' dropdown set to 'User Wise', two input fields for 'User' (ID and Name), and a 'Generate Report For' dropdown set to 'All Users'. A 'Generate Report' button is located at the bottom center.

- **Date:** Select the to and from date for which the report is to be generated.

### Optional Parameters

- **Group By:** Select the desired enterprise group from the drop-down list — Organization, Branch, Department, Section, Category, Grade, Designation, Custom Group1/2/3.
- **New Page For Each User:** Enable the check to display a new page for each Date/User in the generated report.
- **Add Custom Footer:** Select the check box to add a Custom Footer. And configure the desired footer.
- **Organization Name in Header As Per:** Select the desired option — User Selection or Customized Selection.

If you select **Customized Selection**, click **Customize Report Header**.

You can select the desired option from the drop-down list or can also add a new header according to your choice.

### User Selection

- **Select Users:** Select the desired option — **User-Wise**, **Group Wise**, or **All**.

- If you select **User Wise**, click the **User** picklist. The **Picklist for All Users** pop-up appears.

Picklist For All Users

Total Selected: 0 Records

Search  Show Selected

<input type="checkbox"/>	User ID ▲	Name
<input type="checkbox"/>	1	SALIM ANSARI
<input type="checkbox"/>	10	RAJENDRA GOSWAMI
<input type="checkbox"/>	1001	ANKITKUMAR SOHLIYA
<input type="checkbox"/>	1002	MEGHA H SHUKLA
<input type="checkbox"/>	1003	UMESH M TALANPURI
<input type="checkbox"/>	1004	DARSHAK B PATEL
<input type="checkbox"/>	1007	DHAVAL I PATEL
<input type="checkbox"/>	1008	MAYANK K KORAT
<input type="checkbox"/>	1009	DIPTI K RATHWA
<input type="checkbox"/>	1010	RAHUL S SHAH

1 - 10 of 2476 records

1 2 3 ... 248

OK Cancel

- Select check boxes of the desired users. Click **OK**.
- The selected Users appear in the grid.

Search

User ID ▲	Name	
1	SALIM ANSARI	
10	RAJENDRA GOSWAMI	
1001	ANKITKUMAR SOHLIYA	
1002	MEGHA H SHUKLA	

Generate Report For: All Users

Generate Report

- You can also delete the desired User. To do so, click **Delete** of the respective user.
- If you select **Group Wise** option, select the desired enterprise group from the drop-down list—Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1/2/3.
- For each enterprise group — Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1/2/3, click the corresponding picklist to select the desired option/s.

- The selected Groups appear in the grid.

Search <input type="text"/>			
ID	Name	Group	
1	MATRIX COMSEC PVT. LTD.	Organization	
2	SAMARTH	Organization	
3	AVDHOT	Organization	
4	ELSENGARD	Organization	
<button>Generate Report</button>			

- You can also delete particular group. To do so, click **Delete** of the respective group.
- If you select **All**, then all users will be selected.
- **Generate Report For:** Select the desired option from the drop-down list— **All Users**, **Active Users** or **Inactive Users**.
- Click **Generate Report**.

## Sample Report

Daily Work Details													
<div>Back</div> <div> <div>1 of 2</div> <div> </div> </div>													
<div> <div>MATRIX COMSEC PVT. LTD.</div> <div>Organization-Wise Daily Work Details Report From 01/01/2000 To 01/01/2003</div> <div>Page 1 of 2</div> </div>													
Sl. No.	Emp. Name	1 SH	2 SH	3 SH	4 SH	5 SH	6 SH	7 SH	8 SH	9 SH	10 SH	11 SH	12 SH
1	SALIM ANSARI												
01/01/2000	Saturday	20:00											
Summary:		Total Days: 1	FR Days: 0	Total Expected Hours: 00:00									
10	SALIM ANSARI												
01/01/2000	Saturday	20:00											
Summary:		Total Days: 1	FR Days: 0	Total Expected Hours: 00:00									
15	SALIM ANSARI												
01/01/2000	Saturday	20:00											
Summary:		Total Days: 1	FR Days: 0	Total Expected Hours: 00:00									
16	SALIM ANSARI												
01/01/2000	Saturday	20:00											
Summary:		Total Days: 1	FR Days: 0	Total Expected Hours: 00:00									
17	SALIM ANSARI												
01/01/2000	Saturday	20:00											
Summary:		Total Days: 1	FR Days: 0	Total Expected Hours: 00:00									

## Break Deviation

When break deviation is allowed for a shift, i.e. for shifts with fixed but flexible break duration, a report can be generated to view the difference between the defined break duration and the actual break taken by employees. This difference is defined as break deviation.

Set the report filters as per requirement.

The screenshot shows a web application window titled "Break Deviation". At the top, there is a date range selector with "Date" and two date inputs: "06/22/2023" and "06/22/2023". Below this is a section titled "Optional Parameters" which contains four fields: "Deviation More Than" (set to "15/Min"), "Deviation Less Than" (set to "15/Min"), "Group By" (set to "Organization"), and "Organization Name in Header As Per" (set to "User Selection"). Below the "Optional Parameters" section is a "User Selection" section. It contains a "Select Users" dropdown menu (set to "User Wise"), a "User #" field with a search icon, and a "Generate Report For" dropdown menu (set to "All Users"). At the bottom of the "User Selection" section is a "Generate Report" button.

- **Date:** Select the to and from date for which the report is to be generated. Select the to and from date for which the report is to be generated.

### Optional Parameters

- **Deviation More Than:** You can filter the Break Deviation by configuring more than five minutes;
- **Deviation Less Than:** You can filter the Break Deviation by configuring less than twenty minutes.
- **Group By:** Select the desired enterprise group from the drop-down list — Organization, Branch, Department, Section, Category, Grade, Designation, Custom Group1/2/3.
- **Organization Name in Header As Per:** Select the desired option — User Selection or Customized Selection.

If you select **Customized Selection**, click **Customize Report Header**.

You can select the desired option from the drop-down list or can also add a new header according to your choice.

### User Selection

- **Select Users:** Select the desired option — **User Wise**, **Group Wise**, or **All**.

- If you select **User Wise**, click the **User** picklist. The **Picklist for All Users** pop-up appears.

Picklist For All Users

Total Selected: 0 Records

Search  Show Selected

<input type="checkbox"/>	User ID ▲	Name
<input type="checkbox"/>	1	SALIM ANSARI
<input type="checkbox"/>	10	RAJENDRA GOSWAMI
<input type="checkbox"/>	1001	ANKITKUMAR SOHLIYA
<input type="checkbox"/>	1002	MEGHA H SHUKLA
<input type="checkbox"/>	1003	UMESH M TALANPURI
<input type="checkbox"/>	1004	DARSHAK B PATEL
<input type="checkbox"/>	1007	DHAVAL I PATEL
<input type="checkbox"/>	1008	MAYANK K KORAT
<input type="checkbox"/>	1009	DIPTI K RATHWA
<input type="checkbox"/>	1010	RAHUL S SHAH

1 - 10 of 2476 records

OK Cancel

- Select check boxes of the desired users. Click **OK**.
- The selected Users appear in the grid.

Search

User ID ▲	Name	
1	SALIM ANSARI	
10	RAJENDRA GOSWAMI	
1001	ANKITKUMAR SOHLIYA	
1002	MEGHA H SHUKLA	

Generate Report For: All Users

Generate Report

- You can also delete the desired User. To do so, click **Delete** of the respective user.
- If you select **Group Wise** option, select the desired enterprise group from the drop-down list— Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1/2/3.
- For each enterprise group — Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1/2/3, click the corresponding picklist to select the desired option/s.

- The selected Groups appear in the grid.

Search <input type="text"/>		
ID	Name	Group
1	MATRIX COMSEC PVT. LTD.	Organization
2	SAMARTH	Organization
3	AVDHOOT	Organization
4	ELSENGARD	Organization
<a href="#">Generate Report</a>		

- You can also delete particular group. To do so, click **Delete** of the respective group.
- If you select **All**, then all users will be selected.
- Generate Report For:** Select the desired option from the drop-down list— **All Users, Active Users or Inactive Users**.
- Click **Generate Report**.

## Sample Report

Break Deviation									
<div> <a href="#">Back</a> </div>									
<div> <b>MATRIX COMSEC PVT. LTD.</b> <span>Page 12 of 12</span> </div>									
Organization-Wise Break Deviation From 05/28/2019 To 05/28/2023									
Run By: System Admin									
Sr No	User ID	Name	Date	Break Start	Break End	Assigned Shift	Defined Duration	Actual Duration	Deviation
MATRIX COMSEC PVT. LTD.									
397	1	SALIM AHMARI	03/27/2023			23	00:30	00:00	
398	1	SALIM AHMARI	03/28/2023			23	00:30	00:00	
399	1	SALIM AHMARI	03/29/2023			23	00:30	00:00	
400	1	SALIM AHMARI	03/30/2023			23	00:30	00:00	
401	1	SALIM AHMARI	03/31/2023			23	00:30	00:00	
402	1	SALIM AHMARI	04/01/2023			23	00:30	00:00	
403	1	SALIM AHMARI	04/02/2023			23	00:30	00:00	
404	1	SALIM AHMARI	04/03/2023			23	00:30	00:00	
405	1	SALIM AHMARI	04/04/2023			23	00:30	00:00	
406	1	SALIM AHMARI	04/05/2023			23	00:30	00:00	
407	1	SALIM AHMARI	04/06/2023			23	00:30	00:00	
408	1	SALIM AHMARI	04/07/2023			23	00:30	00:00	
409	1	SALIM AHMARI	04/08/2023			23	00:30	00:00	
410	1	SALIM AHMARI	04/09/2023			23	00:30	00:00	
411	1	SALIM AHMARI	04/10/2023			23	00:30	00:00	
412	1	SALIM AHMARI	04/11/2023			23	00:30	00:00	
413	1	SALIM AHMARI	04/12/2023			23	00:30	00:00	
414	1	SALIM AHMARI	04/13/2023			23	00:30	00:00	
415	1	SALIM AHMARI	04/14/2023			23	00:30	00:00	
416	1	SALIM AHMARI	04/15/2023			23	00:30	00:00	
417	1	SALIM AHMARI	04/16/2023			23	00:30	00:00	
418	1	SALIM AHMARI	04/17/2023			23	00:30	00:00	
419	1	SALIM AHMARI	04/18/2023			23	00:30	00:00	
420	1	SALIM AHMARI	04/19/2023			23	00:30	00:00	
421	1	SALIM AHMARI	04/20/2023			23	00:30	00:00	
422	1	SALIM AHMARI	04/21/2023			23	00:30	00:00	
423	1	SALIM AHMARI	04/22/2023			23	00:30	00:00	
424	1	SALIM AHMARI	04/23/2023			23	00:30	00:00	
425	1	SALIM AHMARI	04/24/2023			23	00:30	00:00	
426	1	SALIM AHMARI	04/25/2023			23	00:30	00:00	
427	1	SALIM AHMARI	04/26/2023			23	00:30	00:00	
428	1	SALIM AHMARI	04/27/2023			23	00:30	00:00	
429	1	SALIM AHMARI	04/28/2023			23	00:30	00:00	

## Shift-Wise Count Summary

This report provides user summary for all shifts configured on COSEC. Shift Summary fields to be viewed are user selectable.

Set the report filters as per requirement.

The screenshot shows a web application window titled "Shift-Wise Count Summary". At the top, there is a "Date" field set to "06/22/2023". Below this is a section titled "Optional Parameters". Inside this section, there is a "Shift Summary Fields" area with a list of checkboxes: "Assigned", "Scheduled", "On Leave/Tour", "On Week-Off", and "On Holiday", all of which are checked. To the right of these checkboxes is a "User Selection" dropdown menu. Below the "Shift Summary Fields" is a label "Organization Name in Header As Per" followed by a dropdown menu currently showing "User Selection". Below the "Optional Parameters" section is a "User Selection" section. It contains a "Select Users" label, a "User Wise" dropdown menu, and two input fields labeled "User" and "Name". Below these is a "Generate Report For" dropdown menu set to "All Users". At the bottom center of the form is a "Generate Report" button.

- **Date:** Select the date for which the report is to be generated.

### Optional Parameters

- **Shift Summary Shield:** Select the check boxes for desired options for which Shift Summary Report is to be generated.
- **Organization Name in Header As Per:** Select the desired option — User Selection or Customized Selection.

If you select **Customized Selection**, click **Customize Report Header**.

You can select the desired option from the drop-down list or can also add a new header according to your choice.

### User Selection

- **Select Users:** Select the desired option —User Wise, Group Wise, or All.

- If you select **User Wise**, click the **User** picklist. The **Picklist for All Users** pop-up appears.

Picklist For All Users

Total Selected: 0 Records

Search

Show Selected

<input type="checkbox"/>	User ID ▲	Name
<input type="checkbox"/>	1	SALIM ANSARI
<input type="checkbox"/>	10	RAJENDRA GOSWAMI
<input type="checkbox"/>	1001	ANKITKUMAR SOHLIYA
<input type="checkbox"/>	1002	MEGHA H SHUKLA
<input type="checkbox"/>	1003	UMESH M TALANPURI
<input type="checkbox"/>	1004	DARSHAK B PATEL
<input type="checkbox"/>	1007	DHAVAL I PATEL
<input type="checkbox"/>	1008	MAYANK K KORAT
<input type="checkbox"/>	1009	DIPTI K RATHWA
<input type="checkbox"/>	1010	RAHUL S SHAH

1 - 10 of 2476 records

1 2 3 ... 248

OK Cancel

- Select check boxes of the desired users. Click **OK**.
- The selected Users appear in the grid.

Search

User ID ▲	Name	
1	SALIM ANSARI	
10	RAJENDRA GOSWAMI	
1001	ANKITKUMAR SOHLIYA	
1002	MEGHA H SHUKLA	

Generate Report For: All Users


Generate Report

- You can also delete the desired User. To do so, click **Delete** of the respective user.
- If you select **Group Wise** option, select the desired enterprise group from the drop-down list—Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1/2/3.
- For each enterprise group — Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1/2/3, click the corresponding picklist to select the desired option/s.




- The selected Groups appear in the grid.

Search			
ID	Name	Group	
1	MATRIX COMSEC PVT. LTD.	Organization	
2	SAMARTH	Organization	
3	AVDHOT	Organization	
4	ELSENGARD	Organization	
Generate Report			

- You can also delete particular group. To do so, click **Delete**  of the respective group.
- If you select **All**, then all users will be selected.
- **Generate Report For:** Select the desired option from the drop-down list— **All Users, Active Users or Inactive Users.**
- Click **Generate Report.**

## Sample Report

Shift-Wise Count Summary									
<div> <div>  </div> <div> <b>MATRIX COMSEC PVT. LTD.</b>  Shift-Wise Count Summary For 05/29/2019 </div> <div> Page 1 of 1 </div> </div>									
Run by: System Admin		Date: 05/29/2019		18:05					
Shift ID	Name	Assigned	Scheduled	On Leave/Tour	On Week-Off	On Holiday	Reported	Not Yet Reported	
23	Fac General Shift	2	2	0	0	0	2	0	
<b>Assigned</b>									
User ID	Name	Shift	First Punch	Last Punch	First Half	Second Half			
1	SALIM ANSARI	23	08:18	17:02	PR	PR			
10	RAJENDRA GOSWAMI	23	08:17	17:00	PR	PR			
<b>Scheduled</b>									
User ID	Name	Shift	First Punch	Last Punch	First Half	Second Half			
1	SALIM ANSARI	23	08:18	17:02	PR	PR			
10	RAJENDRA GOSWAMI	23	08:17	17:00	PR	PR			
<b>Reported</b>									
User ID	Name	Shift	First Punch	Last Punch	First Half	Second Half			
1	SALIM ANSARI	23	08:18	17:02	PR	PR			
10	RAJENDRA GOSWAMI	23	08:17	17:00	PR	PR			

## First IN-Last OUT Punch Details

This report provides a group wise list of the users with details of the First IN and Last OUT Punch during the specified time period.

Set the report filters as per requirement.

Date: 07/22/2023		08/22/2023	
Optional Parameters			
Organization Name in Header As Per:		User Selection	
User Selection			
Select Users:		User Wise	
User:	ID:	Name:	
Generate Report For:		All Users	
Generate Report			

- **Date:** Select the to and from date for which the report is to be generated.

## Optional Parameters

- **Organization Name in Header As Per:** Select the desired option — User Selection or Customized Selection.

If you select **Customized Selection**, click **Customize Report Header**.

You can select the desired option from the drop-down list or can also add a new header according to your choice.

## User Selection

- **Select Users:** Select the desired option — **User-Wise**, **Group Wise**, or **All**.
- If you select **User Wise**, click the **User** picklist. The **Picklist for All Users** pop-up appears.

Picklist For All Users

Total Selected: 0 Records

Search  Show Selected

<input type="checkbox"/>	User ID ▲	Name
<input type="checkbox"/>	1	SALIM ANSARI
<input type="checkbox"/>	10	RAJENDRA GOSWAMI
<input type="checkbox"/>	1001	ANKITKUMAR SOHLIYA
<input type="checkbox"/>	1002	MEGHA H SHUKLA
<input type="checkbox"/>	1003	UMESH M TALANPURI
<input type="checkbox"/>	1004	DARSHAK B PATEL
<input type="checkbox"/>	1007	DHAVAL I PATEL
<input type="checkbox"/>	1008	MAYANK K KORAT
<input type="checkbox"/>	1009	DIPTI K RATHWA
<input type="checkbox"/>	1010	RAHUL S SHAH

1 - 10 of 2476 records

1 2 3 ... 248 249

OK Cancel

- Select check boxes of the desired users. Click **OK**.
- The selected Users appear in the grid.

Search

User ID ▲	Name	
1	SALIM ANSARI	
10	RAJENDRA GOSWAMI	
1001	ANKITKUMAR SOHLIYA	
1002	MEGHA H SHUKLA	

Generate Report For: All Users

Generate Report

- You can also delete the desired User. To do so, click **Delete** of the respective user.

- If you select **Group Wise** option, select the desired enterprise group from the drop-down list— Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1/2/3.
- For each enterprise group — Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1/2/3, click the corresponding picklist to select the desired option/s.
- The selected Group appear in the grid.

Search <input type="text"/>			
ID	Name	Group	
1	MATRIX COMSEC PVT. LTD.	Organization	
2	SAMARTH	Organization	
3	AVDHOOT	Organization	
4	ELSENGARD	Organization	
<button>Generate Report</button>			

- You can also delete particular group. To do so, click **Delete** of the respective group.
- If you select **All**, then all users will be selected.
- **Generate Report For:** Select the desired option from the drop-down list— **All Users, Active Users or Inactive Users.**
- Click **Generate Report.**

## Sample Report

First IN-Last OUT Punch Details									
Back									
1 of 132									
<div> <div>MATRIX</div> <div> <b>MATRIX COMSEC PVT. LTD.</b> </div> <div> <b>First IN-Last OUT Punch Details From 01/01/2001 To 06/22/2023</b> </div> <div> <b>Date: 06/22/2023</b> </div> <div> <b>18:34</b> </div> </div>									
Run by:	System Admin	Date	First IN	Last OUT	IN Device	OUT Device	Total Hours(100)		
User ID	Name								
92	SMITA BARIA	01/01/2013	01/01/2013	01/01/2013			9.77		
92	SMITA BARIA	01/02/2013	08:52:00	18:38:00			9.70		
92	SMITA BARIA	01/03/2013	08:56:00	18:38:00			9.72		
92	SMITA BARIA	01/04/2013	09:12:00	18:55:00			9.80		
92	SMITA BARIA	01/05/2013	01/04/2013	01/04/2013			9.88		
92	SMITA BARIA	01/06/2013	08:57:00	18:51:00			9.72		
92	SMITA BARIA	01/07/2013	01/06/2013	01/06/2013			9.72		
92	SMITA BARIA	01/08/2013	08:55:00	18:48:00			10.25		
92	SMITA BARIA	01/09/2013	01/07/2013	01/07/2013			9.72		
92	SMITA BARIA	01/10/2013	08:58:00	18:41:00			9.93		
92	SMITA BARIA	01/11/2013	01/08/2013	01/08/2013			9.90		
92	SMITA BARIA	01/12/2013	09:00:00	18:43:00					
92	SMITA BARIA	01/13/2013	01/10/2013	01/10/2013					
92	SMITA BARIA	01/14/2013	08:43:00	18:39:00					
92	SMITA BARIA	01/15/2013	01/11/2013	01/11/2013					

## Absenteeism

This section allows the user to generate Absenteeism related attendance reports. The following reports fall under this category:

### Absentee

This report provides a group wise list of the users with details of the Absent days during the specified time period.

Set the report filters as per requirement.

The screenshot shows a web application window titled 'Absentee'. It features a date range selector at the top with 'Date' and two date inputs (06/22/2023 and 06/22/2023). Below this is a section titled 'Optional Parameters' containing three dropdown menus: 'Group By' (set to Organization), 'Group By' (set to Organization), and 'Organization Name in Header As Per' (set to User Selection). Underneath is a 'User Selection' section with a 'Select Users' dropdown (set to User Wise), a 'User' section with 'ID' and 'Name' input fields, and a 'Generate Report For' dropdown (set to All Users). A 'Generate Report' button is located at the bottom center.

- **Date:** Select the to and from date for which the report is to be generated.

### Optional Parameters

You can filter the records by applying two types of Group filters, for example if you select the first group as Branch then within the Branch you can select the other group as Department.

- **Group By:** Select the desired first enterprise group from the drop-down list — Organization, Branch, Department, Section, Category, Grade, Designation, Custom Group1/2/3.
- **Group By:** Select the desired second enterprise group from the drop-down list — Organization, Branch, Department, Section, Category, Grade, Designation, Custom Group1/2/3.
- **Organization Name in Header As Per:** Select the desired option — User Selection or Customized Selection.

If you select **Customized Selection**, click **Customize Report Header**.

You can select the desired option from the drop-down list or can also add a new header according to your choice.

### User Selection

- **Select Users:** Select the desired option — **User-Wise**, **Group Wise**, or **All**.

- If you select **User Wise**, click the **User** picklist. The **Picklist for All Users** pop-up appears.

Picklist For All Users

Total Selected: 0 Records

Search  Show Selected

<input type="checkbox"/>	User ID ▲	Name
<input checked="" type="checkbox"/>	1	SALIM ANSARI
<input checked="" type="checkbox"/>	10	RAJENDRA GOSWAMI
<input checked="" type="checkbox"/>	1001	ANKITKUMAR SOHLIYA
<input checked="" type="checkbox"/>	1002	MEGHA H SHUKLA
<input type="checkbox"/>	1003	UMESH M TALANPURI
<input type="checkbox"/>	1004	DARSHAK B PATEL
<input type="checkbox"/>	1007	DHAVAL I PATEL
<input type="checkbox"/>	1008	MAYANK K KORAT
<input type="checkbox"/>	1009	DIPTI K RATHWA
<input type="checkbox"/>	1010	RAHUL S SHAH

1 - 10 of 2476 records

OK Cancel

- Select check boxes of the desired users. Click **OK**.
- The selected Users appear in the grid.

Search

User ID ▲	Name	
1	SALIM ANSARI	
10	RAJENDRA GOSWAMI	
1001	ANKITKUMAR SOHLIYA	
1002	MEGHA H SHUKLA	


Generate Report For: All Users

Generate Report


- You can also delete the desired User. To do so, click **Delete** of the respective user.
- If you select **Group Wise** option, select the desired enterprise group from the drop-down list—Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1/2/3.
- For each enterprise group — Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1/2/3, click the corresponding picklist to select the desired option/s.

- The selected Groups appear in the grid.

Search			
ID	Name	Group	
1	MATRIX COMSEC PVT. LTD.	Organization	
2	SAMARTH	Organization	
3	AVDHOOT	Organization	
4	ELSENGARD	Organization	
Generate Report			

- You can also delete particular group. To do so, click **Delete**  of the respective group.
- If you select **All**, then all users will be selected.
- Generate Report For:** Select the desired option from the drop-down list— **All Users, Active Users** or **Inactive Users**.
- Click **Generate Report**.

## Sample Report

Absenteeism									
←									
Back									
<div>  <b>MATRIX COMSEC PVT. LTD.</b> <span>Page 1 of 3</span> </div>									
Organization-Wise Absentee From 05/29/2019 To 05/29/2023									
Run by: System Admin									
Sr No	User ID	Name	Date	Shift	1st Half	2nd Half			
Organization : MATRIX COMSEC PVT. LTD.									
1	1	SALIM ANSARI	01/28/2020	23	AB	IN			
2	1	SALIM ANSARI	01/30/2020	23	PR	AB			
3	1	SALIM ANSARI	05/01/2020	23	AB	AB			
4	1	SALIM ANSARI	05/02/2020	23	AB	AB			
5	1	SALIM ANSARI	05/04/2020	23	AB	AB			
6	1	SALIM ANSARI	05/05/2020	23	AB	AB			
7	1	SALIM ANSARI	05/06/2020	23	AB	AB			
8	1	SALIM ANSARI	05/07/2020	23	AB	AB			
9	1	SALIM ANSARI	05/08/2020	23	AB	AB			
10	1	SALIM ANSARI	05/09/2020	23	AB	AB			
11	1	SALIM ANSARI	05/11/2020	23	AB	AB			
12	1	SALIM ANSARI	05/12/2020	23	AB	AB			
13	1	SALIM ANSARI	05/13/2020	23	AB	AB			
14	1	SALIM ANSARI	05/14/2020	23	AB	AB			
15	1	SALIM ANSARI	05/15/2020	23	AB	AB			
16	1	SALIM ANSARI	05/16/2020	23	AB	AB			
17	1	SALIM ANSARI	05/18/2020	23	AB	AB			
18	1	SALIM ANSARI	05/19/2020	23	AB	AB			
19	1	SALIM ANSARI	05/20/2020	23	AB	AB			
20	1	SALIM ANSARI	05/21/2020	23	IN	AB			
21	1	SALIM ANSARI	05/22/2020	23	AB	AB			
22	1	SALIM ANSARI	05/23/2020	23	AB	AB			
23	1	SALIM ANSARI	05/24/2020	23	AB	AB			
24	1	SALIM ANSARI	05/26/2020	23	AB	AB			
25	1	SALIM ANSARI	05/27/2020	23	AB	AB			
26	1	SALIM ANSARI	05/28/2020	23					
27	1	SALIM ANSARI	05/29/2020	23					
28	1	SALIM ANSARI	05/30/2020	23					
29	1	SALIM ANSARI	05/31/2020	23					
30	1	SALIM ANSARI	03/01/2023	23					
31	1	SALIM ANSARI	03/02/2023	23					
32	1	SALIM ANSARI	03/03/2023	23					
33	1	SALIM ANSARI	03/04/2023	23					
34	1	SALIM ANSARI	03/05/2023	23					
35	1	SALIM ANSARI	03/06/2023	23					
36	1	SALIM ANSARI	03/07/2023	23					
37	1	SALIM ANSARI	03/08/2023	23					
38	1	SALIM ANSARI	03/09/2023	23					

## Absenteeism Memo

This report provides details of multiple or individual Absent Memos during the specified time period.

Set the report filters as per requirement.

- **Date:** Select the to and from date for which the report is to be generated.

### Optional Parameters

- **New Page For Each Group:** Select the check to display a new page for each group in the generated report.

### User Selection

- **Select Users:** Select the desired option — **User-Wise**, **Group Wise**, or **All**.
- If you select **User Wise**, click the **User** picklist. The **Picklist for All Users** pop-up appears.

<input type="checkbox"/>	User ID	Name
<input type="checkbox"/>	1	SALIM ANSARI
<input type="checkbox"/>	10	RAJENDRA GOSWAMI
<input type="checkbox"/>	1001	ANKITKUMAR SOHLIYA
<input type="checkbox"/>	1002	MEGHA H SHUKLA
<input type="checkbox"/>	1003	UMESH M TALANPURI
<input type="checkbox"/>	1004	DARSHAK B PATEL
<input type="checkbox"/>	1007	DHAVAL I PATEL
<input type="checkbox"/>	1008	MAYANK K KORAT
<input type="checkbox"/>	1009	DIPTI K RATHWA
<input type="checkbox"/>	1010	RAHUL S SHAH

- Select check boxes of the desired users. Click **OK**.

- The selected Users appear in the grid.

User ID ▲	Name	
1	SALIM ANSARI	
10	RAJENDRA GOSWAMI	
1001	ANKITKUMAR SOHLIYA	
1002	MEGHA H SHUKLA	

Generate Report For: All Users

Generate Report

- You can also delete the desired User. To do so, click **Delete** of the respective user.
- If you select **Group Wise** option, select the desired enterprise group from the drop-down list— Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1/2/3.

For each enterprise group — Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1/2/3, click the corresponding picklist to select the desired option/s.

- The selected Groups appear in the grid.

ID	Name	Group ▲	
1	MATRIX COMSEC PVT. LTD.	Organization	
2	SAMARTH	Organization	
3	AVDHOOT	Organization	
4	ELSENGARD	Organization	

Generate Report

- You can also delete particular group. To do so, click **Delete** of the respective group.
- If you select **All**, then all users will be selected.
- **Generate Report For:** Select the desired option from the drop-down list— **All Users, Active Users** or **Inactive Users**.
- Click **Generate Report**.



## Sample Report

Absenteeism Memo

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MATRIX COMSEC PVT. LTD.

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Absenteeism Memo From 05/29/2019 To 05/29/2020

Run by:	HR	Date: 05/29/2023 20:46		
User	: 1 SALEM ANSARI	Branch : FACTORY		
Department	: MANUFACTURING	Designation : Designation 1		
Sr No	Date	Shift	1st Half	2nd Half
1	01/28/2020	23	AB	LX
2	01/30/2020	23	PR	AB
3	05/01/2020	23	AB	AB
4	05/02/2020	23	AB	AB
5	05/04/2020	23	AB	AB
6	05/05/2020	23	AB	AB
7	05/06/2020	23	AB	AB
8	05/07/2020	23	AB	AB
9	05/08/2020	23	AB	AB
10	05/09/2020	23	AB	AB
11	05/11/2020	23	AB	AB
12	05/12/2020	23	AB	AB
13	05/13/2020	23	AB	AB
14	05/14/2020	23	AB	AB
15	05/15/2020	23	AB	AB
16	05/16/2020	23	AB	AB
17	05/18/2020	23	AB	AB
18	05/19/2020	23	AB	AB
19	05/20/2020	23	AB	AB
20	05/21/2020	23	IN	AB
21	05/22/2020	23	AB	AB
22	05/23/2020	23	AB	AB
23	05/25/2020	23	AB	AB
24	05/26/2020	23	AB	AB
25	05/27/2020	23	AB	AB
26	05/28/2020	23		
27	05/29/2020	23		
You have been marked absent on above dates between 05/29/2019 and 05/29/2020				
total	26	day(s)		

## Continuous Absence/Presence

This report provides the attendance summary of user, if he/she is absent or present continuously for many days/hours.

Set the report filters as per requirement.

Continuous Absence/Presence

Date: 05/22/2023 06/22/2023

Optional Parameters

Report Type: Continuous Absence

Continuous Absent Days: 1

Consider Half Day PR as Full Day PR: ☒

Days to consider as Absent

☐ Days

☒ AB

Always

HHMM

☒ WO

Always

HHMM

☒ PH

Always

HHMM

☒ Leave

Always

HHMM

☒ FB

Always

HHMM

☒ RD

Always

HHMM

☐ IN

Always

HHMM

User Selection

Select Users: Group Wise

Select Group: Organization

Organization: ID Name

Generate Report For: All Users

Generate Report

- **Date:** Select the to and from date for which the report is to be generated.

### Optional Parameters

- **Report Type:** Select the desired type of report — Continuous Absence/Continuous Presence.

If you select **Continuous Absence**, configure the following:

- **Continuous Absent Days:** Enter the minimum number of days for 'Absence' which is required to be counted as 'Continuous Absent Days'. Suppose, 3 days are specified, then the counting will be started and shown into the report only if user is absent for 3 or more days. The absence of less than 3 days will not be considered as Continuous Absent Days.
- **Consider Half Day PR as Full Day PR:** Select this check box to consider a day as full day present even if the user is present for half day.

#### Days to consider as Absent

- **Days:** Select this check box to consider all types of days — AB, Leave, WO, PH, FB, RD, IN or to selected the desired option select the respective check box.

For each type of day enabled, select the desired option:

- **Always:** Select the option to count the entire day as absent.
- **Skip:** Select to Skip the day from counting of continuous absence.
- **Shift Based:** Select to check for assigned work hours of a user. If the work hours for the day are equal or greater than the assigned hours, then count as present else count the day in number of total continuous absent days.
- **Custom Hours:** Select and specify the custom work hours which is required to be completed on the day. If the work hours are equal or greater than the specified hours then, count as present else count the day in number of total continuous absent days. If you select Custom Hours, enter the time in HH:MM format.

If you select **Continuous Presence**, configure the following:

- **Filter Based On:** Select the desired option as — Hours, Days.
- **Continuous Present Days/Hours:** If you select **Days** as the **Filter Based On** option then configure the minimum number of days to be considered for Continuous Present.

If you select **Hours** as the **Filter Based On** option then configure the minimum number of hours to be considered for Continuous Present.

**Consider Half Day PR as Full Day PR:** Select this check box to consider a day as full day present even if the user is present for half day.

#### Days to consider as Present

- **Days:** Select this check box to consider all types of days — AB, Leave, WO, PH, FB, RD, IN or to selected the desired option select the respective check box.



For each type of day enabled, select the desired option:


- **Always:** Select the option to count the entire day as absent.
- **Skip:** Select to Skip the day from counting of continuous absence.

- **Shift Based:** Select to check for assigned work hours of a user. If the work hours for the day are equal or greater than the assigned hours, then count as present else count the day in number of total continuous absent days.
- **Custom Hours:** Select and specify the custom work hours which is required to be completed on the day. If the work hours are equal or greater than the specified hours then, count as present else count the day in number of total continuous absent days. If you select Custom Hours, enter the time in HH:MM format.

## User Selection

- **Select Users:** Select the desired option — **Group Wise, All.**
- If you select **Group Wise** option, select the desired enterprise group from the drop-down list— Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1/2/3.
- For each enterprise group — Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1/2/3, click the corresponding picklist to select the desired option/s.
- The selected Group appear in the grid.

Search <input type="text"/>			
ID	Name	Group 	
1	MATRIX COMSEC PVT. LTD.	Organization	
2	SAMARTH	Organization	
3	AVDHOT	Organization	
4	ELSENGARD	Organization	
<div>Generate Report</div>			

- You can also delete particular group. To do so, click **Delete**  of the respective group.
- If you select **All**, then all user will be selected.
- **Generate Report For:** Select the desired option from the drop-down list— **All Users, Active Users** or **Inactive Users.**
- Click **Generate Report.**

## Sample Report

Continuous Absence/Presence

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Organization-1 Page 1 of 1

Continuous Absence For 1 Or More Days From  
01/01/2000 To 23/06/2023

Run by: System Admin Date: 23/06/2023 15:44

Sr No	User ID	Name	From	To	No. of Days
1	1	1User11	15/06/2023	15/06/2023	1

Continuous Absence/Presence

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1 of 1 100%

Organization-1 Page 1 of 1

Continuous Presence For 1 Or More Days From  
01/01/2000 To 23/06/2023

Run by: System Admin Date: 23/06/2023 15:45

Sr No	User ID	Name	From	To	No. of Days
1	1	1User11	21/06/2023	21/06/2023	1
2	1	1User11	01/06/2023	01/06/2023	1

## Week Off & Holiday

This report provides list of all coinciding Week Offs and holidays during the specified time period.

Set the report filters as per requirement.

Week Off & Holiday

Date: 23/06/2023 23/06/2023

Optional Parameters

Group By: Organization

Organization Name in Header As Per: User Selection

User Selection

Select Users: User Wise

User: ID Name

Generate Report For: All Users

Generate Report

- **Date:** Select the to and from date for which the report is to be generated.

### Optional Parameters

- **Group By:** Select the desired enterprise group from the drop-down list — Organization, Branch, Department, Section, Category, Grade, Designation, Custom Group1/2/3.
- **Organization Name in Header As Per:** Select the desired option — User Selection or Customized Selection.

If you select **Customized Selection**, click **Customize Report Header**.

You can select the desired option from the drop-down list or can also add a new header according to your choice.

### User Selection

- **Select Users:** Select the desired option — **User-Wise, Group Wise, All**.
- If you select **User Wise**, click the **User** picklist. The **Picklist for All Users** pop-up appears.

Picklist For All Users

Total Selected: 0 Records

Search  Show Selected

<input type="checkbox"/>	User ID	Name
<input type="checkbox"/>	1	SALIM ANSARI
<input type="checkbox"/>	10	RAJENDRA GOSWAMI
<input type="checkbox"/>	1001	ANKITKUMAR SOHLIYA
<input type="checkbox"/>	1002	MEGHA H SHUKLA
<input type="checkbox"/>	1003	UMESH M TALANPURI
<input type="checkbox"/>	1004	DARSHAK B PATEL
<input type="checkbox"/>	1007	DHAVAL I PATEL
<input type="checkbox"/>	1008	MAYANK K KORAT
<input type="checkbox"/>	1009	DIPTI K RATHWA
<input type="checkbox"/>	1010	RAHUL S SHAH

1 - 10 of 2476 records

1 2 3 ... 248

OK Cancel

- Select check boxes of the desired users. Click **OK**.

- The selected Users appear in the grid.

User ID	Name	
1	SALIM ANSARI	
10	RAJENDRA GOSWAMI	
1001	ANKITKUMAR SOHLIYA	
1002	MEGHA H SHUKLA	

Generate Report For: All Users

Generate Report

- You can also delete the desired User. To do so, click **Delete** of the respective user.
- If you select **Group Wise** option, select the desired enterprise group from the drop-down list— Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1/2/3.
- For each enterprise group — Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1/2/3, click the corresponding picklist to select the desired option/s.
- The selected Groups appear in the grid.

ID	Name	Group	
1	MATRIX COMSEC PVT. LTD.	Organization	
2	SAMARTH	Organization	
3	AVDHOOT	Organization	
4	ELSENGARD	Organization	

Generate Report

- You can also delete particular group. To do so, click **Delete** of the respective group.
- If you select **All**, then all users will be selected.
- **Generate Report For:** Select the desired option from the drop-down list— **All Users, Active Users** or **Inactive Users**.
- Click **Generate Report**.

## Sample Report

Week-Off & Holiday

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MATRIX COMSEC PVT. LTD. Page 1 of 12

Organization-Wise Week-Off & Holiday From 01/01/2000 To 08/22/2023

Run by: System Admin Date: 08/22/2023 18:06

Sr No	User ID	Name	Date	Day	Holiday
MATRIX COMSEC PVT. LTD.					
1	1003	UMESH M TALANPURI	01/14/2017	SATURDAY	Makar Sankranti
2	1003	UMESH M TALANPURI	10/21/2017	SATURDAY	Diwali (Bhaidduj)
3	1003	UMESH M TALANPURI	01/26/2019	SATURDAY	Republic Day
4	1008	HAYANK K KORAT	01/26/2019	SATURDAY	Republic Day
5	1009	DIPTI K RATHWA	01/26/2019	SATURDAY	Republic Day
6	102	AKSHAY SHETH	01/26/2019	SATURDAY	Republic Day
7	1030	KEYUR BHALODIYA	01/26/2019	SATURDAY	Republic Day
8	1045	SHUSHANGINI VAITURKAR	01/26/2019	SATURDAY	Republic Day
9	105	Setish Reje	01/26/2019	SATURDAY	Republic Day
10	1062	MANIRAN PATEL	01/26/2019	SATURDAY	Republic Day
11	1077	ANIL TRILOK	01/26/2019	SATURDAY	Republic Day
12	1082	MANOJ DETROJA	01/26/2019	SATURDAY	Republic Day
13	1083	JAY K DOSHI	01/26/2019	SATURDAY	Republic Day
14	1085	KEYUR PATEL	01/26/2019	SATURDAY	Republic Day
15	1087	KALPESH DIYORA	01/26/2019	SATURDAY	Republic Day

## User Field Break

This report provides a group wise list of the users with details of the Field Break during the specified month and year.

Set the report filters as per requirement.

User Field Break

For Month-Year: August 2023

Optional Parameters

Group By: None

Organization Name in Header As Per: User Selection

User Selection

Select Users: User Wise

User ID: Name

Generate Report For: All Users

Generate Report

- **For Month-Year:** Select the month year to specify the time period for which the data is to be generated.

### Optional Parameters

- **Group By:** Select the desired enterprise group from the drop-down list — None, Organization, Branch, Department, Section, Category, Grade, Designation, Custom Group1/2/3.
- **Organization Name in Header As Per:** Select the desired option — User Selection or Customized Selection.

If you select **Customized Selection**, click **Customize Report Header**.

You can select the desired option from the drop-down list or can also add a new header according to your choice.

## User Selection

- **Select Users:** Select the desired option —**User-Wise**, **Group Wise**, or **All**.
- If you select **User Wise**, click the **User** picklist. The **Picklist for All Users** pop-up appears.

Picklist For All Users

Total Selected: 0 Records

Search  Show Selected

<input type="checkbox"/>	User ID	Name
<input type="checkbox"/>	1	SALIM ANSARI
<input type="checkbox"/>	10	RAJENDRA GOSWAMI
<input type="checkbox"/>	1001	ANKITKUMAR SOHLIYA
<input type="checkbox"/>	1002	MEGHA H SHUKLA
<input type="checkbox"/>	1003	UMESH M TALANPURI
<input type="checkbox"/>	1004	DARSHAK B PATEL
<input type="checkbox"/>	1007	DHAVAL I PATEL
<input type="checkbox"/>	1008	MAYANK K KORAT
<input type="checkbox"/>	1009	DIPTI K RATHWA
<input type="checkbox"/>	1010	RAHUL S SHAH

1 - 10 of 2476 records

1 2 3 ... 248

OK Cancel

- Select check boxes of the desired users. Click **OK**.
- The selected Users appear in the grid.

Search

User ID	Name	
1	SALIM ANSARI	
10	RAJENDRA GOSWAMI	
1001	ANKITKUMAR SOHLIYA	
1002	MEGHA H SHUKLA	

Generate Report For: All Users

Generate Report

- You can also delete the desired User. To do so, click **Delete** of the respective user.
- If you select **Group Wise** option, select the desired enterprise group from the drop-down list—Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1/2/3.
- For each enterprise group — Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1/2/3, click the corresponding picklist to select the desired option/s.



- The selected Group appear in the grid.

Search <input type="text"/>			
ID	Name	Group	
1	MATRIX COMSEC PVT. LTD.	Organization	
2	SAMARTH	Organization	
3	AVDHOT	Organization	
4	ELSENGARD	Organization	
<div>Generate Report</div>			

- You can also delete particular group. To do so, click **Delete** of the respective group.
- If you select **All**, then all user will be selected.
- **Generate Report For:** Select the desired option from the drop-down list— **All Users, Active Users** or **Inactive Users**.
- Click **Generate Report**.

## Overtime

This section allows the user to generate Overtime related attendance reports. The following reports fall under this category:

### Overtime Report

This report provides a group wise list of the users with details of Overtime during the specified time period.

Set the report filters as per requirement.

Overtime Report

Date <sup>\*</sup>

06/27/2023

06/27/2023

Optional Parameters

Group By

Organization

Duration (>)

0

(Min)

Count (>)

0

Show Less Details

☐

Organization Name in Header As Per

User Selection

User Selection

Select Users

User Wise

User

ID

Name

Generate Report For

All Users

Generate Report

- **Date:** Select the to and from date for which the report is to be generated.

### Optional Parameters

- **Group By:** Select the desired enterprise group from the drop-down list — Organization, Branch, Department, Section, Category, Grade, Designation, Custom Group1/2/3.
- **Duration (>):** Configure the duration of overtime according to which you wish to filter the records.
- **Count (>):** Configure the number of overtime according to which you wish to filter the records.

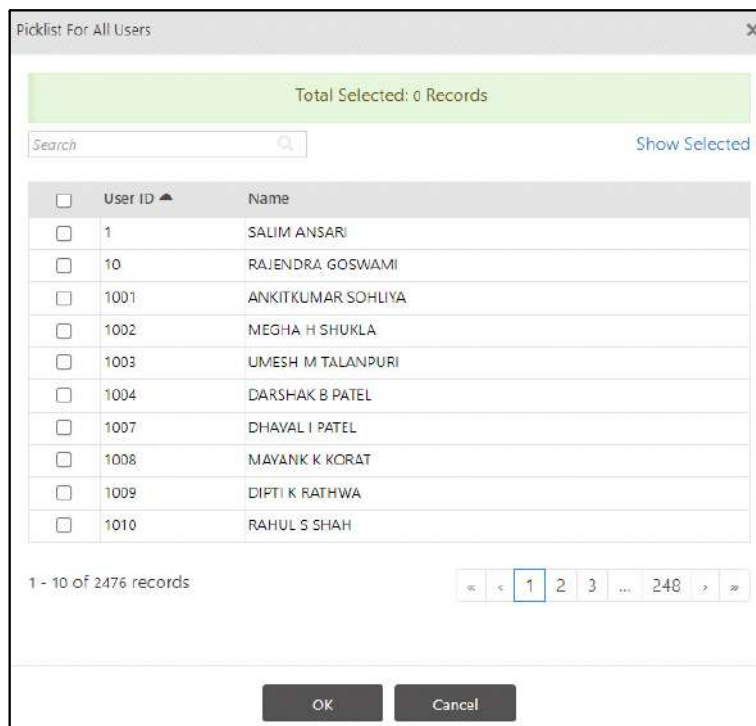
- **Show Less Details:** Select the check box if you wish that additional details like Authorized overtime duration, Credit and Debit details should not be displayed in the report.
- **Organization Name in Header As Per:** Select the desired option — User Selection or Customized Selection.

If you select **Customized Selection**, click **Customize Report Header**.

You can select the desired option from the drop-down list or can also add a new header according to your choice.

## User Selection

- **Select Users:** Select the desired option — **User-Wise**, **Group Wise**, or **All**.
- If you select **User Wise**, click the **User** picklist. The **Picklist for All Users** pop-up appears.



Picklist For All Users

Total Selected: 0 Records

Search  Show Selected

<input type="checkbox"/>	User ID	Name
<input type="checkbox"/>	1	SALIM ANSARI
<input type="checkbox"/>	10	RAJENDRA GOSWAMI
<input type="checkbox"/>	1001	ANKITKUMAR SOHLIYA
<input type="checkbox"/>	1002	MEGHA H SHUKLA
<input type="checkbox"/>	1003	UMESH M TALANPURI
<input type="checkbox"/>	1004	DARSHAK B PATEL
<input type="checkbox"/>	1007	DHAVAL I PATEL
<input type="checkbox"/>	1008	MAYANK K KORAT
<input type="checkbox"/>	1009	DIPTI K RATHWA
<input type="checkbox"/>	1010	RAHUL S SHAH

1 - 10 of 2476 records

1 2 3 ... 248

OK Cancel

- Select check boxes of the desired users. Click **OK**.
- The selected Users appear in the grid.



Search

User ID	Name	
1	SALIM ANSARI	
10	RAJENDRA GOSWAMI	
1001	ANKITKUMAR SOHLIYA	
1002	MEGHA H SHUKLA	


Generate Report For: All Users

Generate Report


- You can also delete the desired User. To do so, click **Delete** of the respective user.

- If you select **Group Wise** option, select the desired enterprise group from the drop-down list— Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1/2/3.
- For each enterprise group — Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1/2/3, click the corresponding picklist to select the desired option/s.
- The selected Groups appear in the grid.

Search			
ID	Name	Group	
1	MATRIX COMSEC PVT. LTD.	Organization	
2	SAMARTH	Organization	
3	AVDHOT	Organization	
4	ELSENGARD	Organization	
Generate Report			

- You can also delete particular group. To do so, click **Delete**  of the respective group.
- If you select **All**, then all users will be selected.
- **Generate Report For:** Select the desired option from the drop-down list— **All Users, Active Users or Inactive Users.**
- Click **Generate Report.**

## Sample Report

Overtime Report																																																																																																																																																																																																																							
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<div>  <b>MATRIX COMSEC PVT. LTD.</b> <span>Page 1 of 99</span> </div> <div> <b>Organization-Wise Overtime Report From 01/01/2000 To 06/27/2023</b> </div> <div> Run by: System Admin  Date: 06/27/2023 17:41 </div> <table> <tr> <th>Sr No</th><th>User ID</th><th>Name</th><th>Date</th><th>Shift</th><th>IN</th><th>OUT</th><th>Overtime Authorized</th><th>Credit</th><th>Debit</th><th>Availed</th><th>Available</th></tr> <tr> <td colspan="12">MATRIX COMSEC PVT. LTD.</td></tr> <tr><td>1</td><td>1</td><td>SALIM ANSARI</td><td>01/19/2013</td><td>22</td><td>08:27</td><td>17:01</td><td>01:01</td><td>00:00</td><td>00:00</td><td>00:00</td><td>00:00</td></tr> <tr><td>2</td><td>1</td><td>SALIM ANSARI</td><td>01/21/2013</td><td>23</td><td>08:23</td><td>19:01</td><td>03:01</td><td>00:00</td><td>00:00</td><td>00:00</td><td>00:00</td></tr> <tr><td>3</td><td>1</td><td>SALIM ANSARI</td><td>01/22/2013</td><td>23</td><td>08:24</td><td>19:02</td><td>02:02</td><td>00:00</td><td>00:00</td><td>00:00</td><td>00:00</td></tr> <tr><td>4</td><td>1</td><td>SALIM ANSARI</td><td>01/24/2013</td><td>23</td><td>08:27</td><td>19:00</td><td>02:00</td><td>00:00</td><td>00:00</td><td>00:00</td><td>00:00</td></tr> <tr><td>5</td><td>1</td><td>SALIM ANSARI</td><td>01/28/2013</td><td>23</td><td>08:25</td><td>19:02</td><td>02:02</td><td>00:00</td><td>00:00</td><td>00:00</td><td>00:00</td></tr> <tr><td>6</td><td>1</td><td>SALIM ANSARI</td><td>01/29/2013</td><td>23</td><td>08:26</td><td>21:33</td><td>04:33</td><td>00:00</td><td>00:00</td><td>00:00</td><td>00:00</td></tr> <tr><td>7</td><td>1</td><td>SALIM ANSARI</td><td>01/30/2013</td><td>23</td><td>08:26</td><td>21:30</td><td>04:30</td><td>00:00</td><td>00:00</td><td>00:00</td><td>00:00</td></tr> <tr><td>8</td><td>1</td><td>SALIM ANSARI</td><td>01/31/2013</td><td>23</td><td>08:31</td><td>22:14</td><td>03:14</td><td>00:00</td><td>00:00</td><td>00:00</td><td>00:00</td></tr> <tr><td>9</td><td>1</td><td>SALIM ANSARI</td><td>02/04/2013</td><td>23</td><td>08:32</td><td>18:03</td><td>01:03</td><td>00:00</td><td>00:00</td><td>00:00</td><td>00:00</td></tr> <tr><td>10</td><td>1</td><td>SALIM ANSARI</td><td>02/08/2013</td><td>22</td><td>08:25</td><td>17:01</td><td>01:01</td><td>00:00</td><td>00:00</td><td>00:00</td><td>00:00</td></tr> <tr><td>11</td><td>1</td><td>SALIM ANSARI</td><td>02/11/2013</td><td>23</td><td>08:28</td><td>18:02</td><td>01:02</td><td>00:00</td><td>00:00</td><td>00:00</td><td>00:00</td></tr> <tr><td>12</td><td>1</td><td>SALIM ANSARI</td><td>02/21/2013</td><td>23</td><td>08:26</td><td>21:30</td><td>04:30</td><td>00:00</td><td>00:00</td><td>00:00</td><td>00:00</td></tr> <tr><td>13</td><td>1</td><td>SALIM ANSARI</td><td>02/22/2013</td><td>23</td><td>08:26</td><td>19:00</td><td>02:00</td><td>00:00</td><td>00:00</td><td>00:00</td><td>00:00</td></tr> <tr><td>14</td><td>1</td><td>SALIM ANSARI</td><td>02/23/2013</td><td>22</td><td>08:26</td><td>21:30</td><td>03:30</td><td>00:00</td><td>00:00</td><td>00:00</td><td>00:00</td></tr> <tr><td>15</td><td>1</td><td>SALIM ANSARI</td><td>02/25/2013</td><td>23</td><td>08:22</td><td>18:58</td><td>01:58</td><td>00:00</td><td>00:00</td><td>00:00</td><td>00:00</td></tr> </table>												Sr No	User ID	Name	Date	Shift	IN	OUT	Overtime Authorized	Credit	Debit	Availed	Available	MATRIX COMSEC PVT. LTD.												1	1	SALIM ANSARI	01/19/2013	22	08:27	17:01	01:01	00:00	00:00	00:00	00:00	2	1	SALIM ANSARI	01/21/2013	23	08:23	19:01	03:01	00:00	00:00	00:00	00:00	3	1	SALIM ANSARI	01/22/2013	23	08:24	19:02	02:02	00:00	00:00	00:00	00:00	4	1	SALIM ANSARI	01/24/2013	23	08:27	19:00	02:00	00:00	00:00	00:00	00:00	5	1	SALIM ANSARI	01/28/2013	23	08:25	19:02	02:02	00:00	00:00	00:00	00:00	6	1	SALIM ANSARI	01/29/2013	23	08:26	21:33	04:33	00:00	00:00	00:00	00:00	7	1	SALIM ANSARI	01/30/2013	23	08:26	21:30	04:30	00:00	00:00	00:00	00:00	8	1	SALIM ANSARI	01/31/2013	23	08:31	22:14	03:14	00:00	00:00	00:00	00:00	9	1	SALIM ANSARI	02/04/2013	23	08:32	18:03	01:03	00:00	00:00	00:00	00:00	10	1	SALIM ANSARI	02/08/2013	22	08:25	17:01	01:01	00:00	00:00	00:00	00:00	11	1	SALIM ANSARI	02/11/2013	23	08:28	18:02	01:02	00:00	00:00	00:00	00:00	12	1	SALIM ANSARI	02/21/2013	23	08:26	21:30	04:30	00:00	00:00	00:00	00:00	13	1	SALIM ANSARI	02/22/2013	23	08:26	19:00	02:00	00:00	00:00	00:00	00:00	14	1	SALIM ANSARI	02/23/2013	22	08:26	21:30	03:30	00:00	00:00	00:00	00:00	15	1	SALIM ANSARI	02/25/2013	23	08:22	18:58	01:58	00:00	00:00	00:00	00:00
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## Overtime Details

This report provides a user wise details of Overtime during the specified time period.

Set the report filters as per requirement.

- **Date:** Select the to and from date for which the report is to be generated.

## Optional Parameters

- **Organization Name in Header As Per:** Select the desired option — User Selection or Customized Selection.

If you select **Customized Selection**, click **Customize Report Header**.

You can select the desired option from the drop-down list or can also add a new header according to your choice.

## User Selection


- **Select Users:** Select the desired option —**User-Wise**, **Group Wise**, or **All**.
- If you select **User Wise**, click the **User** picklist. The **Picklist for All Users** pop-up appears.

<input type="checkbox"/>	User ID	Name
<input type="checkbox"/>	1	SALIM ANSARI
<input type="checkbox"/>	10	RAJENDRA GOSWAMI
<input type="checkbox"/>	1001	ANKITKUMAR SOHLIYA
<input type="checkbox"/>	1002	MEGHA H SHUKLA
<input type="checkbox"/>	1003	UMESH M TALANPURI
<input type="checkbox"/>	1004	DARSHAK B PATEL
<input type="checkbox"/>	1007	DHAVAL I PATEL
<input type="checkbox"/>	1008	MAYANK K KORAT
<input type="checkbox"/>	1009	DIPTI K RATHWA
<input type="checkbox"/>	1010	RAHUL S SHAH


- Select check boxes of the desired users. Click **OK**.

- The selected Users appear in the grid.

Search		
User ID	Name	
1	SALIM ANSARI	
10	RAJENDRA GOSWAMI	
1001	ANKITKUMAR SOHLIYA	
1002	MEGHA H SHUKLA	
Generate Report For		All Users
Generate Report		

- You can also delete the desired User. To do so, click **Delete**  of the respective user.
- If you select **Group Wise** option, select the desired enterprise group from the drop-down list— Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1/2/3.
- For each enterprise group — Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1/2/3, click the corresponding picklist to select the desired option/s.
- The selected Groups appear in the grid.

Search		
ID	Name	Group
1	MATRIX COMSEC PVT. LTD.	Organization
2	SAMARTH	Organization
3	AVDHICOT	Organization
4	ELSENGARD	Organization
Generate Report		

- You can also delete particular group. To do so, click **Delete**  of the respective group.
- If you select **All**, then all users will be selected.
- **Generate Report For:** Select the desired option from the drop-down list— **All Users, Active Users** or **Inactive Users**.
- Click **Generate Report**.

## Sample Report

Run By:	System Admin	Date	Total Wrk Hrs	Extra Wrk Hrs	OT1	Auth OT1	OT2	Auth OT2	OT3	Auth OT3	OT4	Auth OT4	OT5	Auth OT5	Date	Tot Auth OT	Tot Auth C-OFF
1 - SALIM ANSARI		11/11/2013	09:04	00:59	00:04												
		11/25/2013	09:14	01:06	00:14												
		11/26/2013	09:13	01:02	00:12												
		11/27/2013	10:09	02:04	01:09												
		12/11/2013	10:11	02:05	01:11												
		12/13/2013	12:22	04:19	03:22												
		12/16/2013	12:20	04:10	03:20												
		12/20/2013	09:09	01:05	00:09												
		12/24/2013	12:17	04:09	03:17												
		12/25/2013	12:44	04:32	03:44												
		12/26/2013	09:07	01:07	00:07												
		12/27/2013	12:32	04:32	03:32												
		12/28/2013	09:10	02:10	00:10												
		12/30/2013	12:33	04:33	03:33												
		12/31/2013	09:27	02:07	00:27												
		01/02/2014	10:03	02:03	01:03												

## Total Head Count & Overtime

This report provides a group wise list of the users with details of the Total Head Count and Overtime during the specified time period.

Set the report filters as per requirement.

Date: 06/27/2023

Organization Name in Header As Per: User Selection

Select Users: Group Wise

Select Group: Organization

Generate Report For: All Users

Generate Report

- **Date:** Select the to and from date for which the report is to be generated.

### Optional Parameters

- **Organization Name in Header As Per:** Select the desired option — User Selection or Customized Selection.

If you select **Customized Selection**, click **Customize Report Header**.

You can select the desired option from the drop-down list or can also add a new header according to your choice.

### User Selection

- **Select Users:** Select the desired option — **Group Wise**, or **All**.
- If you select **Group Wise** option, select the desired enterprise group from the drop-down list— Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1/2/3.

- For each enterprise group — Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1/2/3, click the corresponding picklist to select the desired option/s.
- The selected Groups appear in the grid.

Search <input type="text"/>			
ID	Name	Group	
1	MATRIX COMSEC PVT. LTD.	Organization	
2	SAMARTH	Organization	
3	AVDHOT	Organization	
4	ELSENGARD	Organization	
Generate Report			

- You can also delete particular group. To do so, click **Delete** of the respective group.
- If you select **All**, then all users will be selected.
- **Generate Report For:** Select the desired option from the drop-down list— **All Users, Active Users or Inactive Users**.
- Click **Generate Report**.

## Sample Report

Total Head Count & Overtime					
Back					
1 of 1					
100%					
<div> <b>MATRIX COMSEC PVT. LTD.</b> Page 1 of 1 </div>					
Branch-Wise Total Head Count & Overtime From 06/27/2023 To 06/27/2023					
Run By: System Admin		Weekly Offs:		Date: 06/27/2023 18:48	
Branch: HEAD OFFICE		Absents: 3.0		Leaves: 0.0	
Department	Shift	Shift Name	Headcount	Overtime	
ID: 1 Name: ACCOUNTS & FINANCE	G1	GENERAL 1000 TO 1930	0	00:00	
	MO	Morning	0	00:00	
		TOTAL	0.0	00:00	

## Users Presence & Overtime

This report provides a user wise list of the users with details of the User Attendance and Overtime during the specified time period.

Set the report filters as per requirement.

The screenshot shows the 'User Presence & Overtime' report configuration window. At the top, there are date pickers for 'Date' set to 09/27/2023. Below this is a section for 'Optional Parameters' containing a dropdown for 'Organization Name in Header As Per' set to 'User Selection'. Another section, 'User Selection', contains a 'Select Users' dropdown set to 'User Wise', and input fields for 'User' (ID and Name). At the bottom, there is a 'Generate Report For' dropdown set to 'All Users' and a 'Generate Report' button.

- **Date:** Select the to and from date for which the report is to be generated.

### Optional Parameters

- **Organization Name in Header As Per:** Select the desired option — User Selection or Customized Selection.

If you select **Customized Selection**, click **Customize Report Header**.

You can select the desired option from the drop-down list or can also add a new header according to your choice.

### User Selection

- **Select Users:** Select the desired option —**User-Wise**, **Group Wise**, or **All**.
- If you select **User Wise**, click the **User** picklist. The **Picklist for All Users** pop-up appears.

The screenshot shows the 'Picklist For All Users' pop-up window. At the top, it says 'Total Selected: 0 Records'. Below this is a search bar and a 'Show Selected' button. The main part of the window is a table with two columns: 'User ID' and 'Name'. The table contains 10 rows of user data. At the bottom, there is a pagination bar showing '1 - 10 of 2476 records' and a page number '1'.

User ID	Name
1	SALIM ANSARI
10	RAJENDRA GOSWAMI
1001	ANKITKUMAR SOHLIYA
1002	MEGHA H SHUKLA
1003	UMESH M TALANPURI
1004	DARSHAK B PATEL
1007	DHAVAL I PATEL
1008	MAYANK K KORAT
1009	DIPTI K RATHWA
1010	RAHUL S SHAH

- Select check boxes of the desired users. Click **OK**.



- The selected Users appear in the grid.

Search <input type="text"/>		
User ID	Name	
1	SALIM ANSARI	
10	RAJENDRA GOSWAMI	
1001	ANKITKUMAR SOHLIYA	
1002	MEGHA H SHUKLA	
Generate Report For <input type="text" value="All Users"/>		
<input type="button" value="Generate Report"/>		

- You can also delete the desired User. To do so, click **Delete** of the respective user.
- If you select **Group Wise** option, select the desired enterprise group from the drop-down list— Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1/2/3.
- For each enterprise group — Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1/2/3, click the corresponding picklist to select the desired option/s.
- The selected Groups appear in the grid.

Search

Q

ID	Name	Group	
1	MATRIX COMSEC PVT. LTD.	Organization	
2	SAMARTH	Organization	
3	AVDHCOT	Organization	
4	ELSENGARD	Organization	

Generate Report

- You can also delete particular group. To do so, click **Delete** of the respective group.
- If you select **All**, then all user will be selected.
- **Generate Report For:** Select the desired option from the drop-down list— **All Users, Active Users** or **Inactive Users**.
- Click **Generate Report**.

## Sample Report

Sr No	User ID	Name	Organization	Branch	Department	Present Days	Overtime
<b>Factory 1</b>							
1	1003	UMESH M TALANPURI	MATRIX COMSEC PVT. LTD.	HEAD OFFICE	ACCOUNTS & FINANCE	1069.5	577:03
2	1003	UMESH M TALANPURI	MATRIX COMSEC PVT. LTD.	HEAD OFFICE	ACCOUNTS & FINANCE	541.5	308:38
3	1003	UMESH M TALANPURI	MATRIX COMSEC PVT. LTD.	HEAD OFFICE	ACCOUNTS & FINANCE	31.5	42:37
4	1003	UMESH M TALANPURI	MATRIX COMSEC PVT. LTD.	HEAD OFFICE	ACCOUNTS & FINANCE	1.0	00:35
<b>Factory 2</b>							
1	1	SALIM ANSARI	MATRIX COMSEC PVT. LTD.	FACTORY	MANUFACTURING	2011.0	1263:17
2	10	RAJENDRA GOSWAMI	MATRIX COMSEC PVT. LTD.	FACTORY	MANUFACTURING	1910.5	954:04
<b>Factory 3</b>							
1	1001	ANKITKUMAR SOHLIYA	MATRIX COMSEC PVT. LTD.	RND I	RND SOFTWARE ENGINEERING	518.5	291:05
2	1002	MEGHA B SHUKLA	MATRIX COMSEC PVT. LTD.	RND I	RND SOFTWARE ENGINEERING	1041.0	829:50
3	1004	DARSHAK B PATEL	MATRIX COMSEC PVT. LTD.	RND I	RND SOFTWARE ENGINEERING	509.0	292:01
4	1007	DHAVAL I PATEL	MATRIX COMSEC PVT. LTD.	RND I	RND SOFTWARE ENGINEERING	475.0	409:28
5	1008	MAYANK K KORAT	MATRIX COMSEC PVT. LTD.	RND I	RND SOFTWARE ENGINEERING	1186.5	1311:27

## Weekly Working Hrs & Overtime

This report provides a group wise list of the users with details of the Weekly Working Hours and Overtime for the selected date.

Set the report filters as per requirement.

- **Date:** Select the date for which the report is to be generated.

### Optional Parameters

- **Organization Name in Header As Per:** Select the desired option — User Selection or Customized Selection.

If you select **Customized Selection**, click **Customize Report Header**.

You can select the desired option from the drop-down list or can also add a new header according to your choice.

### User Selection

- **Select Users:** Select the desired option —User-Wise, Group Wise, or All.

- If you select **User Wise**, click the **User** picklist. The **Picklist for All Users** pop-up appears.

Picklist For All Users

Total Selected: 0 Records

Search  Show Selected

<input type="checkbox"/>	User ID ▲	Name
<input type="checkbox"/>	1	SALIM ANSARI
<input type="checkbox"/>	10	RAJENDRA GOSWAMI
<input type="checkbox"/>	1001	ANKITKUMAR SOHLIYA
<input type="checkbox"/>	1002	MEGHA H SHUKLA
<input type="checkbox"/>	1003	UMESH M TALANPURI
<input type="checkbox"/>	1004	DARSHAK B PATEL
<input type="checkbox"/>	1007	DHAVAL I PATEL
<input type="checkbox"/>	1008	MAYANK K KORAT
<input type="checkbox"/>	1009	DIPTI K RATHWA
<input type="checkbox"/>	1010	RAHUL S SHAH

1 - 10 of 2476 records

1 2 3 ... 248 > >>

OK Cancel

- Select check boxes of the desired users. Click **OK**.
- The selected Users appear in the grid.

Search

User ID ▲	Name	
1	SALIM ANSARI	
10	RAJENDRA GOSWAMI	
1001	ANKITKUMAR SOHLIYA	
1002	MEGHA H SHUKLA	

Generate Report For: All Users

Generate Report

- You can also delete the desired User. To do so, click **Delete** of the respective user.
- If you select **Group Wise** option, select the desired enterprise group from the drop-down list—Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1/2/3.
- For each enterprise group — Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1/2/3, click the corresponding picklist to select the desired option/s.

- The selected Group appears in the grid.

Search <input type="text"/>			
ID	Name	Group	
1	MATRIX COMSEC PVT. LTD.	Organization	
2	SAMARTH	Organization	
3	AVDHOT	Organization	
4	ELSENGARD	Organization	
<button>Generate Report</button>			

- You can also delete particular group. To do so, click **Delete** of the respective group.
- If you select **All**, then all users will be selected.
- Generate Report For:** Select the desired option from the drop-down list— **All Users, Active Users** or **Inactive Users**.
- Click **Generate Report**.

## Sample Report

Weekly Working Hrs & Overtime										
Back										
1 of 1										
<div> <b>MATRIX COMSEC PVT. LTD.</b> <span>Page 1 of 1</span> </div>										
Weekly Working Hours & Overtime From 02/09/2018 To 02/15/2018										
Run by: System Admin										
Date: 06/27/2023 21:08										
Total										
Sr No	User ID	Name	Department	Branch	Daily OT	Weekly OT	OT On	Wk/PH	WkHrs	
1	1	SALIM ANSARI	MANUFACTURING	FACTORY	00:00	00:00	00:00	00:00	40:29	
		09 (FRI)	10 (SAT)	11 (SUN)	12 (MON)	13 (TUE)	14 (WED)	15 (THU)		
		Overtime	-	-	-	-	-	-		
		Auth. OT	-	-	-	-	-	-		
		Work Hrs	08:20	07:16	-	08:19	09:16	08:19		
2	10	RAJENDRA GOSWAMI	MANUFACTURING	FACTORY	00:00	00:00	00:00	00:00	39:59	
		09 (FRI)	10 (SAT)	11 (SUN)	12 (MON)	13 (TUE)	14 (WED)	15 (THU)		
		Overtime	-	-	-	-	-	-		
		Auth. OT	-	-	-	-	-	-		
		Work Hrs	08:14	07:12	-	08:11	09:08	08:14		
3	1003	UMESH M TALAMFURI	ACCOUNTS & FINANCE	HEAD OFFICE	00:00	00:00	00:00	00:00	37:39	
		09 (FRI)	10 (SAT)	11 (SUN)	12 (MON)	13 (TUE)	14 (WED)	15 (THU)		
		Overtime	00:20	-	-	00:24	00:15	-	00:40	
		Auth. OT	-	-	-	-	-	-		
		Work Hrs	09:20	-	-	09:29	09:15	-	09:40	

## Daily Overtime Summary

This report provides a user wise list of details of Daily Overtime during the specified time period.

Set the report filters as per requirement.

- **Date:** Select the to and from date for which the report is to be generated.

### Optional Parameters

- **New Page for Each User:** Select the check box if you wish the report to start from a new page for every user.
- **Include Overtime Components:** Select the check boxes for the desired Overtime Components for which the report is to be generated.
- **Organization Name in Header As Per:** Select the desired option — User Selection or Customized Selection.

If you select **Customized Selection**, click **Customize Report Header**.

You can select the desired option from the drop-down list or can also add a new header according to your choice.

### User Selection

- **Select Users:** Select the desired option —**User-Wise**, **Group Wise**, or **All**.

- If you select **User Wise**, click the **User** picklist. The **Picklist for All Users** pop-up appears.

Picklist For All Users

Total Selected: 0 Records

Search  Show Selected

<input type="checkbox"/>	User ID	Name
<input type="checkbox"/>	1	SALIM ANSARI
<input type="checkbox"/>	10	RAJENDRA GOSWAMI
<input type="checkbox"/>	1001	ANKITKUMAR SOHLIYA
<input type="checkbox"/>	1002	MEGHA H SHUKLA
<input type="checkbox"/>	1003	UMESH M TALANPURI
<input type="checkbox"/>	1004	DARSHAK B PATEL
<input type="checkbox"/>	1007	DHAYAL I PATEL
<input type="checkbox"/>	1008	MAYANK K KORAT
<input type="checkbox"/>	1009	DIPTI K RATHWA
<input type="checkbox"/>	1010	RAHUL S SHAH

1 - 10 of 2476 records

OK Cancel

- Select check boxes of the desired users. Click **OK**.
- The selected Users appear in the grid.

Search

User ID	Name	
1	SALIM ANSARI	
10	RAJENDRA GOSWAMI	
1001	ANKITKUMAR SOHLIYA	
1002	MEGHA H SHUKLA	

Generate Report For: All Users

Generate Report

- You can also delete the desired User. To do so, click **Delete** of the respective user.
- If you select **Group Wise** option, select the desired enterprise group from the drop-down list— Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1/2/3.
- For each enterprise group — Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1/2/3, click the corresponding picklist to select the desired option/s.

- The selected Groups appear in the grid.

Search <input type="text"/>			
ID	Name	Group	
1	MATRIX COMSEC PVT. LTD.	Organization	
2	SAMARTH	Organization	
3	AVDHOOT	Organization	
4	ELSENGARD	Organization	
<button>Generate Report</button>			

- You can also delete particular group. To do so, click **Delete** of the respective group.
- If you select **All**, then all users will be selected.
- **Generate Report For:** Select the desired option from the drop-down list— **All Users, Active Users** or **Inactive Users**.
- Click **Generate Report**.

## Sample Report

Daily Overtime Summary													
Back													
1 of 502													
<div> <b>MATRIX COMSEC PVT. LTD.</b> <span>Page 1 of 502</span> </div> <div> Daily Overtime Summary From 01/01/2000 To 06/27/2023 </div> <div> Run by: System Admin </div> <div> Date: 06/27/2023 22:02 </div>													
Sr No	Date	First IN	Last OUT	Expected Hours	Worked Hours	Under Time	OT1	OT2	OT3	OT4	OT5	Total Hours	
1	SALIM ANSARI												
1	01/01/2013												
2	01/02/2013	08:26:00	17:01:00	8.00	0.00	0.00						8.35	
3	01/03/2013	08:27:00	17:01:00	8.00	0.00	0.00						8.34	
4	01/04/2013	08:31:00	17:00:00	8.00	0.01	0.00						8.29	
5	01/05/2013	08:25:00	16:00:00	8.00	0.00	0.00						7.35	
6	01/06/2013												
7	01/07/2013	08:25:00	17:01:00	8.00	0.00	0.00						8.36	
8	01/08/2013	08:26:00	17:02:00	8.00	0.00	0.00						8.36	
9	01/09/2013	08:26:00	17:00:00	8.00	0.00	0.00						8.34	
10	01/10/2013	08:27:00	17:02:00	8.00	0.00	0.00						8.35	
11	01/11/2013	08:25:00	17:00:00	8.00	0.00	0.00						8.35	
12	01/12/2013	08:25:00	15:17:00	8.00	0.00	0.00						6.54	
13	01/13/2013												
14	01/14/2013												
15	01/15/2013												

## Exceptions

This section allows the user to generate Attendance Exception related attendance reports. The following reports fall under this category:

### Exceptions

This report lists group wise list of the users with details of the Attendance Exceptions along with the work hours during the specified time period.

Set the report filters as per requirement.

- **Date:** Select the to and from date for which the report is to be generated.

### Optional Parameters

You can filter the records by applying two types of Group filters, for example if you select the first group as Branch then within the Branch you can select the other group as Department.

- **Group By:** Select the desired enterprise group from the drop-down list — Organization, Branch, Department, Section, Category, Grade, Designation, Custom Group1/2/3.
- **Group By:** Select the desired enterprise group from the drop-down list — Organization, Branch, Department, Section, Category, Grade, Designation, Custom Group1/2/3.
- **Exception:** Select the desired check boxes for exceptions according to which you wish to filter the records.
- **Work Hours:** Configure the duration of work hours according to which you wish to filter the records.
- **Organization Name in Header As Per:** Select the desired option — User Selection or Customized Selection.

If you select **Customized Selection**, click **Customize Report Header**.

You can select the desired option from the drop-down list or can also add a new header according to your choice.

### User Selection

- **Select Users:** Select the desired option — **User-Wise**, **Group Wise**, or **All**.



- If you select **User Wise**, click the **User** picklist. The **Picklist for All Users** pop-up appears.

Picklist For All Users

Total Selected: 0 Records

Search  Show Selected

<input type="checkbox"/>	User ID	Name
<input type="checkbox"/>	1	SALIM ANSARI
<input type="checkbox"/>	10	RAJENDRA GOSWAMI
<input type="checkbox"/>	1001	ANKITKUMAR SOHLIYA
<input type="checkbox"/>	1002	MEGHA H SHUKLA
<input type="checkbox"/>	1003	UMESH M TALANPURI
<input type="checkbox"/>	1004	DARSHAK B PATEL
<input type="checkbox"/>	1007	DHAVAL I PATEL
<input type="checkbox"/>	1008	MAYANK K KORAT
<input type="checkbox"/>	1009	DIPTI K RATHWA
<input type="checkbox"/>	1010	RAHUL S SHAH

1 - 10 of 2476 records

1 2 3 ... 248

OK Cancel

- Select check boxes of the desired users. Click **OK**.
- The selected Users appear in the grid.

Search

User ID	Name	
1	SALIM ANSARI	
10	RAJENDRA GOSWAMI	
1001	ANKITKUMAR SOHLIYA	
1002	MEGHA H SHUKLA	

Generate Report For: All Users

Generate Report

- You can also delete the desired User. To do so, click **Delete** of the respective user.
- If you select **Group Wise** option, select the desired enterprise group from the drop-down list— Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1/2/3.
- For each enterprise group — Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1/2/3, click the corresponding picklist to select the desired option/s.

- The selected Groups appear in the grid.

Search <input type="text"/>			
ID	Name	Group	
1	MATRIX COMSEC PVT. LTD.	Organization	
2	SAMARTH	Organization	
3	AWDHOT	Organization	
4	ELSENGARD	Organization	
<div>Generate Report</div>			

- You can also delete particular group. To do so, click **Delete** of the respective group.
- If you select **All**, then all users will be selected.
- Generate Report For:** Select the desired option from the drop-down list— **All Users, Active Users** or **Inactive Users**.
- Click **Generate Report**.

## Sample Report

Exceptions													
Back													
<div> <div>1 of 23</div> <div> </div> </div>													
<div> <div>MATRIX COMSEC PVT. LTD.</div> <div>Page 1 of 23</div> </div>													
<div> <div>Run By: System Admin</div> <div>Organization-Wise Exceptions From 01/01/2000 To 06/27/2023</div> <div>Date: 06/27/2023 23:04</div> </div>													
Sr No	User ID	Name	Date	Shift	IN	OUT	IN	OUT	1st Half	2nd Half	Work Hours	Reason	
Organization : MATRIX COMSEC PVT. LTD.													
1	1	SALIM ANSARI	01/01/2000		20:35				IN	AB	00:00	Punches Not In Pair	
2	1	SALIM ANSARI	02/01/2013 23	08:25	10:02	12:05	12:36	AB	IN	02:00	Punches Not In Pair		
3	1	SALIM ANSARI	02/06/2013 23	08:25	10:00	12:10	12:41	AB	IN	02:06	Punches Not In Pair		
4	1	SALIM ANSARI	02/07/2013 23	08:27	09:55	10:07	12:42	PR	IN	04:03	Punches Not In Pair		
5	1	SALIM ANSARI	02/26/2013 23	08:26	09:54	10:09	12:07	PR	IN	06:10	Punches Not In Pair		
6	1	SALIM ANSARI	02/28/2013 23	08:28	10:18	10:29	12:17	AB	AB	03:38	AB:Less Work Hrs		
7	1	SALIM ANSARI	09/30/2013 23	08:26	12:43			PR	AB	04:17	AB:Less Work Hrs		
8	1	SALIM ANSARI	10/07/2013 23	12:34	17:01			AB	FR	04:27	AB:Late-IN		
9	1	SALIM ANSARI	10/19/2013 22	12:00				CO	AB	00:00	Punches Not In Pair		
10	1	SALIM ANSARI	10/31/2013 23	08:26	12:08	12:32	14:49	PR	AB	05:59	AB:Less Work Hrs		
11	1	SALIM ANSARI	11/01/2013 23	08:47				IN	AB	00:00	Punches Not In Pair		
12	1	SALIM ANSARI	04/27/2014 22					AB	AB	00:00	No Punches Available		
13	1	SALIM ANSARI	07/17/2014 23	09:24	13:07			FR	AB	04:13	AB:Early-OUT		
14	1	SALIM ANSARI	07/29/2014 23					AB	AB	00:00	No Punches Available		
15	1	SALIM ANSARI	09/06/2014 22	08:26				IN	AB	00:00	Punches Not In Pair		

## Attendance Exception

This report provides a group wise list of the users with details of the Attendance Exceptions during the specified time period.

Set the report filters as per requirement.

- **Date:** Select the to and from date for which the report is to be generated.

### Optional Parameters

- **Group By:** Select the desired enterprise group from the drop-down list — Organization, Branch, Department, Section, Category, Grade, Designation, Custom Group1/2/3.
- **Format Selection:** Select the desired format from the drop-down list— **Format 1**, **Format 2** or **Format 3**.
- **Exception Type:** Select the desired check boxes for exceptions according to which you wish to filter the records.
- **Add Custom Footer:** Select the check box if you wish to add a custom footer to the report and specify the desired footer.
- **Organization Name in Header As Per:** Select the desired option — User Selection or Customized Selection.

If you select **Customized Selection**, click **Customize Report Header**.

You can select the desired option from the drop-down list or can also add a new header according to your choice.

### User Selection

- **Select Users:** Select the desired option —**User-Wise**, **Group Wise**, or **All**.

- If you select **User Wise**, click the **User** picklist. The **Picklist for All Users** pop-up appears.

Picklist For All Users

Total Selected: 0 Records

Search

<input type="checkbox"/>	User ID ▲	Name
<input type="checkbox"/>	1	SALIM ANSARI
<input type="checkbox"/>	10	RAJENDRA GOSWAMI
<input type="checkbox"/>	1001	ANKITKUMAR SOHLIYA
<input type="checkbox"/>	1002	MEGHA H SHUKLA
<input type="checkbox"/>	1003	UMESH M TALANPURI
<input type="checkbox"/>	1004	DARSHAK B PATEL
<input type="checkbox"/>	1007	DHAVAL I PATEL
<input type="checkbox"/>	1008	MAYANK K KORAT
<input type="checkbox"/>	1009	DIPTI K RATHWA
<input type="checkbox"/>	1010	RAHUL S SHAH

1 - 10 of 2476 records

1 2 3 ... 248 249

- Select check boxes of the desired users. Click **OK**.
- The selected Users appear in the grid.

Search

User ID ▲	Name	
1	SALIM ANSARI	
10	RAJENDRA GOSWAMI	
1001	ANKITKUMAR SOHLIYA	
1002	MEGHA H SHUKLA	

Generate Report For: All Users

- You can also delete the desired User. To do so, click **Delete** of the respective user.
- If you select **Group Wise** option, select the desired enterprise group from the drop-down list— Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1/2/3.
- For each enterprise group — Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1/2/3, click the corresponding picklist to select the desired option/s.

- The selected Groups appear in the grid.

Search <input type="text"/>			
ID	Name	Group	
1	MATRIX COMSEC PVT. LTD.	Organization	
2	SAMARTH	Organization	
3	AVDHOT	Organization	
4	ELSENGARD	Organization	
<a href="#">Generate Report</a>			

- You can also delete particular group. To do so, click **Delete** of the respective group.
- If you select **All**, then all users will be selected.
- Generate Report For:** Select the desired option from the drop-down list— **All Users**, **Active Users** or **Inactive Users**.
- Click **Generate Report**.

## Sample Report

Attendance Exception													
Back													
1 of 34													
100%													
<div> <b>MATRIX COMSEC PVT. LTD.</b> <span>Page 1 of 34</span> </div>													
Organization-Wise Attendance Exception From 01/01/2000 To 06/27/2023													
Run by: System Admin													
Sr No	Date	User ID	Name	1st Half	2nd Half	First IN	Last OUT	Shift	Work Hrs	Remark	Date:	06/27/2023	23:20
MATRIX COMSEC PVT. LTD.													
1	01/01/2000	1	SALIM ANSARI	IN	AB	20:35				Absent			
2	02/01/2013	1	SALIM ANSARI	AB	IN	08:25	17:02	23		Absent			
3	02/06/2013	1	SALIM ANSARI	AB	IN	08:25	17:04	23		Absent			
4	02/28/2013	1	SALIM ANSARI	AB	AB	08:28	12:17	23		Absent			
5	04/28/2013	1	SALIM ANSARI	WO	WO	07:25	16:03	22		Worked On Week-Off			
6	07/19/2013	1	SALIM ANSARI	CL	FR	12:18	17:01	23		Worked On Leave			
7	07/30/2013	1	SALIM ANSARI	CL	FR	12:10	19:00	23		Worked On Leave			
8	08/21/2013	1	SALIM ANSARI	CO	FR	12:16	18:02	23		Worked On Leave			
9	09/30/2013	1	SALIM ANSARI	PR	AB	08:26	12:43	23		Absent			
10	10/01/2013	1	SALIM ANSARI	WO	WO	05:06	11:59	23		Worked On Week-Off			
11	10/07/2013	1	SALIM ANSARI	AB	FR	12:34	17:01	23		Absent			
12	10/19/2013	1	SALIM ANSARI	CO	AB	12:00		23		Absent			
13	10/31/2013	1	SALIM ANSARI	PR	AB	08:26	14:49	23		Absent			
14	11/01/2013	1	SALIM ANSARI	IN	AB	05:47		23		Absent			
15	02/12/2014	1	SALIM ANSARI	CO	FL	08:00	17:30	23		Worked On Leave			

## Manual Correction

This report provides a group wise list of the users with details of the Manual Correction in Attendance during the specified time period.

Set the report filters as per requirement.

- **Date:** Select the to and from date for which the report is to be generated.

### Optional Parameters

- **Group By:** Select the desired enterprise group from the drop-down list — Organization, Branch, Department, Section, Category, Grade, Designation, Custom Group1/2/3.
- **Format Selection:** Select the desired format from the drop-down list— **Format 1** or **Format 2**.
- **Organization Name in Header As Per:** Select the desired option — User Selection or Customized Selection.

If you select **Customized Selection**, click **Customize Report Header**.

You can select the desired option from the drop-down list or can also add a new header according to your choice.

### User Selection

- **Select Users:** Select the desired option —**User-Wise**, **Group Wise**, or **All**.

- If you select **User Wise**, click the **User** picklist. The **Picklist for All Users** pop-up appears.

Picklist For All Users

Total Selected: 0 Records

Search  Show Selected

<input type="checkbox"/>	User ID	Name
<input type="checkbox"/>	1	SALIM ANSARI
<input type="checkbox"/>	10	RAJENDRA GOSWAMI
<input type="checkbox"/>	1001	ANKITKUMAR SOHLIYA
<input type="checkbox"/>	1002	MEGHA H SHUKLA
<input type="checkbox"/>	1003	UMESH M TALANPURI
<input type="checkbox"/>	1004	DARSHAK B PATEL
<input type="checkbox"/>	1007	DHAVAL I PATEL
<input type="checkbox"/>	1008	MAYANK K KORAT
<input type="checkbox"/>	1009	DIPTI K RATHWA
<input type="checkbox"/>	1010	RAHUL S SHAH

1 - 10 of 2476 records

1 2 3 ... 248

OK Cancel

- Select check boxes of the desired users. Click **OK**.
- The selected Users appear in the grid.

Search

User ID	Name	
1	SALIM ANSARI	
10	RAJENDRA GOSWAMI	
1001	ANKITKUMAR SOHLIYA	
1002	MEGHA H SHUKLA	

Generate Report For: All Users

Generate Report

- You can also delete the desired User. To do so, click **Delete** of the respective user.
- If you select **Group Wise** option, select the desired enterprise group from the drop-down list— Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1/2/3.
- For each enterprise group — Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1/2/3, click the corresponding picklist to select the desired option/s.

- The selected Groups appear in the grid.

Search <input type="text"/>			
ID	Name	Group	
1	MATRIX COMSEC PVT. LTD.	Organization	
2	SAMARTH	Organization	
3	AVDHOT	Organization	
4	ELSENGARD	Organization	
<div>Generate Report</div>			

- You can also delete particular group. To do so, click **Delete** of the respective group.
- If you select **All**, then all users will be selected.
- Generate Report For:** Select the desired option from the drop-down list— **All Users, Active Users or Inactive Users**.
- Click **Generate Report**.

## Sample Report

Manual Correction									
<div> <div>Back</div> <div> <div>1 of 21</div> <div> <div>100%</div> <div>+</div> <div>-</div> </div> </div> </div>									
<div> <div> <div>MATRIX</div> <div> <div>Organization-Wise Manual Correction From 01/01/2000 To 06/27/2023</div> <div> <div>Run By: System Admin</div> <div>Date: 06/27/2023 23:24</div> </div> </div> </div> </div>									
User ID	Name	Department	Attendance Date	Changed Parameter	Previous value	Current Value	Corrected By	Correction Date	
MATRIX COMSEC PVT. LTD.									
1	SALIM ANSARI	MANUFACTURING	11/01/2014	Day	Normal	WO	vishal	11/30/2014	
1	SALIM ANSARI	MANUFACTURING	11/14/2014	IN Punch 1	08:25	08:25	vishal	11/30/2014	
1	SALIM ANSARI	MANUFACTURING	11/14/2014	OUT Punch 2	13:04	17:00	vishal	11/30/2014	
1	SALIM ANSARI	MANUFACTURING	03/21/2015	OUT Punch 2	12:56	17:04	JAYESH PATEL	03/30/2015	
1	SALIM ANSARI	MANUFACTURING	04/18/2015	OUT Punch 2	13:10	17:05	JAYESH PATEL	04/28/2015	
1	SALIM ANSARI	MANUFACTURING	05/02/2015	SP-IN Punch 1	08:24	08:24	Subin	05/31/2015	
1	SALIM ANSARI	MANUFACTURING	05/02/2015	IN Punch 1	08:24	08:24	Subin	05/31/2015	
1	SALIM ANSARI	MANUFACTURING	05/02/2015	OUT Punch 2	15:00	17:55	Subin	05/31/2015	
1	SALIM ANSARI	MANUFACTURING	05/14/2015	OUT Punch 2	15:00	17:00	Subin	05/31/2015	
1	SALIM ANSARI	MANUFACTURING	05/14/2015	IN Punch 1	10:52	08:30	Subin	05/31/2015	
1	SALIM ANSARI	MANUFACTURING	05/15/2015	OUT Punch 2	17:00	17:00	Subin	05/31/2015	
1	SALIM ANSARI	MANUFACTURING	05/15/2015	IN Punch 1	09:55	09:30	Subin	05/31/2015	
1	SALIM ANSARI	MANUFACTURING	06/28/2015	OUT Punch 2	17:04	17:04	Subin	06/30/2015	

## Pending Authorization

This report provides a group wise list of the users with details of the records which are Pending for Authorization during the specified time period.

Set the report filters as per requirement.



- **Date:** Select the to and from date for which the report is to be generated.

### Optional Parameters

- **Group By:** Select the desired enterprise group from the drop-down list — Organization, Branch, Department, Section, Category, Grade, Designation, Custom Group1/2/3.
- **Approval Type:** Select the desired check boxes for approval type according to which you wish to filter the records.
- **Organization Name in Header As Per:** Select the desired option — User Selection or Customized Selection.

If you select **Customized Selection**, click **Customize Report Header**.

You can select the desired option from the drop-down list or can also add a new header according to your choice.

### User Selection

- **Select Users:** Select the desired option — **User-Wise**, **Group Wise**, or **All**.

- If you select **User Wise**, click the **User** picklist. The **Picklist for All Users** pop-up appears.

Picklist For All Users

Total Selected: 0 Records

Search  Show Selected

<input type="checkbox"/>	User ID	Name
<input type="checkbox"/>	1	SALIM ANSARI
<input type="checkbox"/>	10	RAJENDRA GOSWAMI
<input type="checkbox"/>	1001	ANKITKUMAR SOHLIYA
<input type="checkbox"/>	1002	MEGHA H SHUKLA
<input type="checkbox"/>	1003	UMESH M TALANPURI
<input type="checkbox"/>	1004	DARSHAK B PATEL
<input type="checkbox"/>	1007	DHAVAL I PATEL
<input type="checkbox"/>	1008	MAYANK K KORAT
<input type="checkbox"/>	1009	DIPTI K RATHWA
<input type="checkbox"/>	1010	RAHUL S SHAH

1 - 10 of 2476 records

1 2 3 ... 248 249

OK Cancel

- Select check boxes of the desired users. Click **OK**.
- The selected Users appear in the grid.

Search

User ID	Name	
1	SALIM ANSARI	
10	RAJENDRA GOSWAMI	
1001	ANKITKUMAR SOHLIYA	
1002	MEGHA H SHUKLA	

Generate Report For: All Users

Generate Report

- You can also delete the desired User. To do so, click **Delete** of the respective user.
- If you select **Group Wise** option, select the desired enterprise group from the drop-down list— Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1/2/3.
- For each enterprise group — Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1/2/3, click the corresponding picklist to select the desired option/s.

- The selected Groups appear in the grid.

Search <input type="text"/>			
ID	Name	Group	
1	MATRIX COMSEC PVT. LTD.	Organization	
2	SAMARTH	Organization	
3	AVDHOT	Organization	
4	ELSENGARD	Organization	
<button>Generate Report</button>			

- You can also delete particular group. To do so, click **Delete** of the respective group.
- If you select **All**, then all users will be selected.
- **Generate Report For:** Select the desired option from the drop-down list— **All Users, Active Users** or **Inactive Users**.
- Click **Generate Report**.

## Sample Report

Pending Authorization

Back

1 of 21

100%

+

-

MATRIX

MATRIX COMSEC PVT. LTD.

Organization-Wise Pending Authorization From 01/01/2000 To 06/29/2023

Page 1 of 21

Run by: System Admin

Date: 06/29/2023 15:42

User ID	Name	Department	Attendance Date	Authorization Type	Reporting Group	Reason
MATRIX COMSEC PVT. LTD.						
1	SALIM ANSARI	MANUFACTURING	11/11/2013	Overtime/C-OFF OT1	Mahesh P _ Jayesh P	
1	SALIM ANSARI	MANUFACTURING	11/25/2013	Overtime/C-OFF OT1	Mahesh P _ Jayesh P	
1	SALIM ANSARI	MANUFACTURING	11/26/2013	Overtime/C-OFF OT1	Mahesh P _ Jayesh P	
1	SALIM ANSARI	MANUFACTURING	11/27/2013	Overtime/C-OFF OT1	Mahesh P _ Jayesh P	
1	SALIM ANSARI	MANUFACTURING	12/11/2013	Overtime/C-OFF OT1	Mahesh P _ Jayesh P	
1	SALIM ANSARI	MANUFACTURING	12/13/2013	Overtime/C-OFF OT1	Mahesh P _ Jayesh P	
1	SALIM ANSARI	MANUFACTURING	12/16/2013	Overtime/C-OFF OT1	Mahesh P _ Jayesh P	
1	SALIM ANSARI	MANUFACTURING	12/20/2013	Overtime/C-OFF OT1	Mahesh P _ Jayesh P	
1	SALIM ANSARI	MANUFACTURING	12/24/2013	Overtime/C-OFF OT1	Mahesh P _ Jayesh P	

## Special Function Punch

This report provides a event wise or punch wise list of the users with details of the Special Function Punch during the specified time period.

Set the report filters as per requirement.

- **Date:** Select the to and from date for which the report is to be generated.

### Optional Parameters

- **Format Selection:** Select the desired option from the drop-down list—**Event-Wise** or **Punch-Wise**.
- **Special Function Punch:** Select the desired check boxes for special function punch type according to which you wish to filter the records.
- **Organization Name in Header As Per:** Select the desired option — User Selection or Customized Selection.

If you select **Customized Selection**, click **Customize Report Header**.

You can select the desired option from the drop-down list or can also add a new header according to your choice.

### User Selection

- **Select Users:** Select the desired option —**User-Wise**, **Group Wise**, or **All**.

- If you select **User Wise**, click the **User** picklist. The **Picklist for All Users** pop-up appears.

Picklist For All Users

Total Selected: 0 Records

Search  Show Selected

<input type="checkbox"/>	User ID ▲	Name
<input type="checkbox"/>	1	SALIM ANSARI
<input type="checkbox"/>	10	RAJENDRA GOSWAMI
<input type="checkbox"/>	1001	ANKITKUMAR SOHLIYA
<input type="checkbox"/>	1002	MEGHA H SHUKLA
<input type="checkbox"/>	1003	UMESH M TALANPURI
<input type="checkbox"/>	1004	DARSHAK B PATEL
<input type="checkbox"/>	1007	DHAVAL I PATEL
<input type="checkbox"/>	1008	MAYANK K KORAT
<input type="checkbox"/>	1009	DIPTI K RATHWA
<input type="checkbox"/>	1010	RAHUL S SHAH

1 - 10 of 2476 records

1 2 3 ... 248

OK Cancel

- Select check boxes of the desired users. Click **OK**.
- The selected Users appear in the grid.

Search

User ID ▲	Name	
1	SALIM ANSARI	
10	RAJENDRA GOSWAMI	
1001	ANKITKUMAR SOHLIYA	
1002	MEGHA H SHUKLA	

Generate Report For: All Users

Generate Report

- You can also delete the desired User. To do so, click **Delete** of the respective user.
- If you select **Group Wise** option, select the desired enterprise group from the drop-down list—Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1/2/3.
- For each enterprise group — Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1/2/3, click the corresponding picklist to select the desired option/s.

- The selected Groups appear in the grid.

Search <input type="text"/>			
ID	Name	Group	
1	MATRIX COMSEC PVT. LTD.	Organization	
2	SAMARTH	Organization	
3	AVDHOOT	Organization	
4	ELSENGARD	Organization	
<button>Generate Report</button>			

- You can also delete particular group. To do so, click **Delete** of the respective group.
- If you select **All**, then all users will be selected.
- Generate Report For:** Select the desired option from the drop-down list— **All Users, Active Users or Inactive Users**.
- Click **Generate Report**.

## Sample Report

Special Function Punch							
<div>Back</div> <div>   1 of 14     </div>							
<div> <div> <b>MATRIX COMSEC PVT. LTD.</b> Page 1 of 14 </div> </div>							
<div> <div>Run by: System Admin</div> <div>Special Function Punch From 01/01/2000 To 06/29/2023</div> <div>Date: 05/29/2023 16:10</div> </div>							
Sr No	User ID	Name	Date	OUT	IN	Duration	
<b>Official</b>							
1	10	RAJENDRA GOSWAMI	01/08/2014	10:18			
2	10	RAJENDRA GOSWAMI	07/11/2016		10:15		
3	1003	UMESH M TALANPURI	01/02/2013	15:18	17:57	02:39	
4	1003	UMESH M TALANPURI	01/04/2013	15:03	15:23	00:20	
5	1003	UMESH M TALANPURI	01/07/2013	12:13	14:49	02:36	
6	1003	UMESH M TALANPURI	01/09/2013	14:49	17:19	02:30	
7	1003	UMESH M TALANPURI	01/12/2013	16:58			
8	1003	UMESH M TALANPURI	01/16/2013	09:46			
9	1003	UMESH M TALANPURI	01/18/2013	10:36	14:10	03:34	
10	1003	UMESH M TALANPURI	01/22/2013	16:25	18:08	01:43	
11	1003	UMESH M TALANPURI	01/23/2013	14:36	18:14	03:38	
12	1003	UMESH M TALANPURI	01/25/2013	17:45			
13	1003	UMESH M TALANPURI	01/28/2013	15:49	18:04	02:15	
14	1003	UMESH M TALANPURI	01/29/2013	15:00	18:07	03:07	
15	1003	UMESH M TALANPURI	01/30/2013	12:17	18:47	06:30	

## Shift Change

This report provides a group wise list of the users with details of the changes in Shifts during the specified time period.

Set the report filters as per requirement.

- **Date:** Select the to and from date for which the report is to be generated.

### Optional Parameters

- **Group By:** Select the desired enterprise group from the drop-down list — Organization, Branch, Department, Section, Category, Grade, Designation, Custom Group1/2/3.
- **Organization Name in Header As Per:** Select the desired option — User Selection or Customized Selection.

If you select **Customized Selection**, click **Customize Report Header**.

You can select the desired option from the drop-down list or can also add a new header according to your choice.

### User Selection

- **Select Users:** Select the desired option —**User-Wise, Group Wise, or All.**
- If you select **User Wise**, click the **User** picklist. The **Picklist for All Users** pop-up appears.


<input type="checkbox"/>	User ID	Name
<input type="checkbox"/>	1	SALIM ANSARI
<input type="checkbox"/>	10	RAJENDRA GOSWAMI
<input type="checkbox"/>	1001	ANKITKUMAR SOHLIYA
<input type="checkbox"/>	1002	MEGHA H SHUKLA
<input type="checkbox"/>	1003	UMESH M TALANPURI
<input type="checkbox"/>	1004	DARSHAK B PATEL
<input type="checkbox"/>	1007	DHAVAL I PATEL
<input type="checkbox"/>	1008	MAYANK K KORAT
<input type="checkbox"/>	1009	DIPTI K RATHWA
<input type="checkbox"/>	1010	RAHUL S SHAH

- Select check boxes of the desired users. Click **OK**.
- The selected Users appear in the grid.

User ID	Name	
1	SALIM ANSARI	
10	RAJENDRA GOSWAMI	
1001	ANKITKUMAR SOHLIYA	
1002	MEGHA H SHUKLA	


Generate Report For
All Users

Generate Report

- You can also delete the desired User. To do so, click **Delete**  of the respective user.
- If you select **Group Wise** option, select the desired enterprise group from the drop-down list— Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1/2/3.
- For each enterprise group — Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1/2/3, click the corresponding picklist to select the desired option/s.
- The selected Groups appear in the grid.

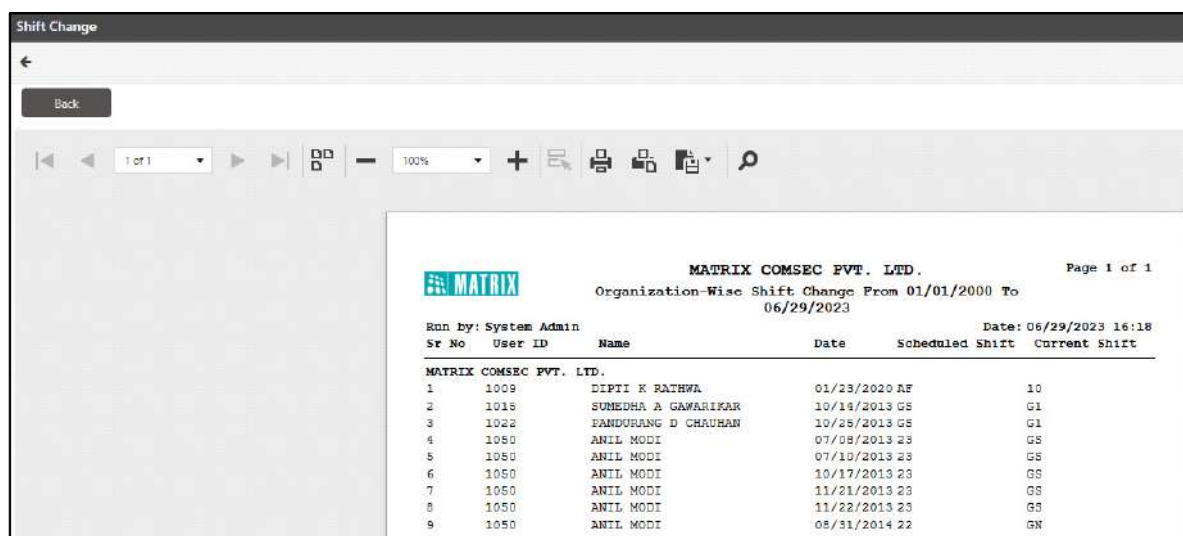
ID	Name	Group	
1	MATRIX COMSEC PVT. LTD.	Organization	
2	SAMARTH	Organization	
3	AVDHOT	Organization	
4	ELSENGARD	Organization	

Generate Report

- You can also delete particular group. To do so, click **Delete**  of the respective group.
- If you select **All**, then all users will be selected.
- **Generate Report For:** Select the desired option from the drop-down list— **All Users, Active Users** or **Inactive Users**.
- Click **Generate Report**.



## Sample Report

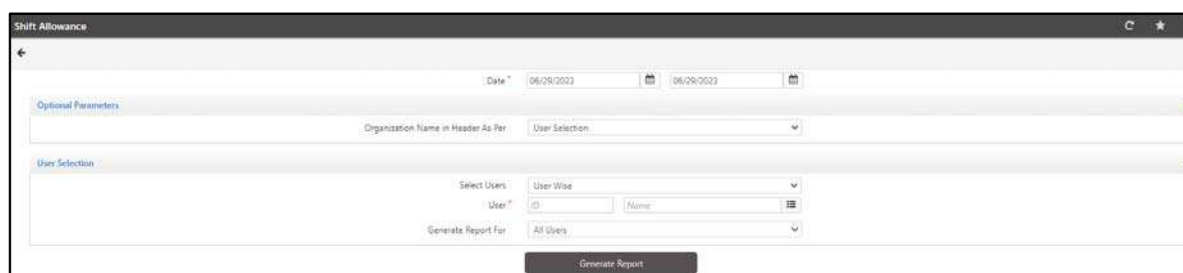


Sr No	User ID	Name	Date	Scheduled Shift	Current Shift
1	1009	DIPTI K RATHWA	01/23/2020 AF		10
2	1015	SUMEDHA A GAWARIKAR	10/14/2013 GS		G1
3	1022	PANDURANG D CHAUHAN	10/25/2013 GS		G1
4	1050	ANIL MODI	07/08/2013 23		GS
5	1050	ANIL MODI	07/10/2013 23		GS
6	1050	ANIL MODI	10/17/2013 23		GS
7	1050	ANIL MODI	11/21/2013 23		GS
8	1050	ANIL MODI	11/22/2013 23		GS
9	1050	ANIL MODI	05/31/2014 22		GN

## Shift Allowance

This report provides a user wise list of the details of the Shift Allowance during the specified time period.

Set the report filters as per requirement.



- **Date:** Select the to and from date for which the report is to be generated.

### Optional Parameters

- **Organization Name in Header As Per:** Select the desired option — User Selection or Customized Selection.

If you select **Customized Selection**, click **Customize Report Header**.

You can select the desired option from the drop-down list or can also add a new header according to your choice.

### User Selection

- **Select Users:** Select the desired option —User-Wise, Group Wise, or All.

- If you select **User Wise**, click the **User** picklist. The **Picklist for All Users** pop-up appears.

Picklist For All Users

Total Selected: 0 Records

Search  Show Selected

<input type="checkbox"/>	User ID	Name
<input type="checkbox"/>	1	SALIM ANSARI
<input type="checkbox"/>	10	RAJENDRA GOSWAMI
<input type="checkbox"/>	1001	ANKITKUMAR SOHLIYA
<input type="checkbox"/>	1002	MEGHA H SHUKLA
<input type="checkbox"/>	1003	UMESH M TALANPURI
<input type="checkbox"/>	1004	DARSHAK B PATEL
<input type="checkbox"/>	1007	DHAVAL I PATEL
<input type="checkbox"/>	1008	MAYANK K KORAT
<input type="checkbox"/>	1009	DIPTI K RATHWA
<input type="checkbox"/>	1010	RAHUL S SHAH

1 - 10 of 2476 records

1 2 3 ... 248

OK Cancel

- Select check boxes of the desired users. Click **OK**.
- The selected Users appear in the grid.

Search

User ID	Name	<input type="checkbox"/>
1	SALIM ANSARI	<input type="checkbox"/>
10	RAJENDRA GOSWAMI	<input type="checkbox"/>
1001	ANKITKUMAR SOHLIYA	<input type="checkbox"/>
1002	MEGHA H SHUKLA	<input type="checkbox"/>

Generate Report For: All Users

Generate Report

- You can also delete the desired User. To do so, click **Delete** of the respective user.
- If you select **Group Wise** option, select the desired enterprise group from the drop-down list— Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1/2/3.
- For each enterprise group — Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1/2/3, click the corresponding picklist to select the desired option/s.

- The selected Groups appear in the grid.

Search <input type="text"/>			
ID	Name	Group	
1	MATRIX COMSEC PVT. LTD.	Organization	
2	SAMARTH	Organization	
3	AV/DHQOT	Organization	
4	ELSENGARD	Organization	
<div>Generate Report</div>			

- You can also delete particular group. To do so, click **Delete** of the respective group.
- If you select **All**, then all users will be selected.
- **Generate Report For:** Select the desired option from the drop-down list— **All Users, Active Users** or **Inactive Users**.
- Click **Generate Report**.

## Authorization Status

This report provides a group wise list of the users with details of their application records based on the Authorization Status during the specified time period.

Set the report filters as per requirement.

Date

Optional Parameters

Group By

Organization

Status

Approved

Approval Type

☒ Short Leave  
☐ Official In-Out  
☐ Overtime/C-Off  
☐ Attendance

Organization Name in Header As Per

User Selection

User Selection

Select Users

User Wise

User ID

Name

Generate Report For

All Users

Generate Report

- **Date:** Select the to and from date for which the report is to be generated.

### Optional Parameters

- **Group By:** Select the desired enterprise group from the drop-down list — Organization, Branch, Department, Section, Category, Grade, Designation, Custom Group1/2/3.
- **Status:** Select the desired approval status from the drop-down list— Approved, Rejected or Both.
- **Approval Type:** Select the desired check boxes for approval type according to which you wish to filter the records.

- **Organization Name in Header As Per:** Select the desired option — User Selection or Customized Selection.

If you select **Customized Selection**, click **Customize Report Header**.

You can select the desired option from the drop-down list or can also add a new header according to your choice.

## User Selection

- **Select Users:** Select the desired option —**User-Wise**, **Group Wise**, or **All**.
- If you select **User Wise**, click the **User** picklist. The **Picklist for All Users** pop-up appears.

Picklist For All Users

Total Selected: 0 Records

Search  Show Selected

<input type="checkbox"/>	User ID	Name
<input type="checkbox"/>	1	SALIM ANSARI
<input type="checkbox"/>	10	RAJENDRA GOSWAMI
<input type="checkbox"/>	1001	ANKITKUMAR SOHLIYA
<input type="checkbox"/>	1002	MEGHA H SHUKLA
<input type="checkbox"/>	1003	UMESH M TALANPURI
<input type="checkbox"/>	1004	DARSHAK B PATEL
<input type="checkbox"/>	1007	DHAYAL I PATEL
<input type="checkbox"/>	1008	MAYANK K KORAT
<input type="checkbox"/>	1009	DIPTI K RATHWA
<input type="checkbox"/>	1010	RAHUL S SHAH

1 - 10 of 2476 records

1 2 3 ... 248

OK Cancel

- Select check boxes of the desired users. Click **OK**.
- The selected Users appear in the grid.

Search

User ID	Name	
1	SALIM ANSARI	
10	RAJENDRA GOSWAMI	
1001	ANKITKUMAR SOHLIYA	
1002	MEGHA H SHUKLA	

Generate Report For: All Users

Generate Report

- You can also delete the desired User. To do so, click **Delete** of the respective user.
- If you select **Group Wise** option, select the desired enterprise group from the drop-down list— Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1/2/3.

- For each enterprise group — Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1/2/3, click the corresponding picklist to select the desired option/s.
- The selected Groups appear in the grid.

Search <input type="text"/>			
ID	Name	Group	
1	MATRIX COMSEC PVT. LTD.	Organization	
2	SAMARTH	Organization	
3	AVDHOT	Organization	
4	ELSENGARD	Organization	
<div>Generate Report</div>			

- You can also delete particular group. To do so, click **Delete** of the respective group.
- If you select **All**, then all users will be selected.
- **Generate Report For:** Select the desired option from the drop-down list— **All Users, Active Users or Inactive Users.**
- Click **Generate Report.**

## Sample Report

Authorization Status							
Back							
1 of 15							
100%							
<div> <b>MATRIX COMSEC PVT. LTD.</b> <span>Page 1 of 15</span> </div>							
Organization-Wise Authorization Status From 01/01/2000 To 06/29/2023							
Run by:	System Admin	Date: 06/29/2023		16:48			
User ID	Name	Attendance Date	Authorization Type	Authorized By	Status	Status Date	
MATRIX COMSEC PVT. LTD.							
1	SALIM ANSARI	11/14/2014	Attendance Correction	vishal	Approved	11/30/2014	
1	SALIM ANSARI	09/21/2015	Attendance Correction	JAYESH PATEL	Approved	09/30/2015	
1	SALIM ANSARI	04/18/2015	Attendance Correction	JAYESH PATEL	Approved	04/28/2015	
1	SALIM ANSARI	05/14/2015	Attendance Correction	Subin	Approved	05/31/2015	
1	SALIM ANSARI	05/15/2015	Attendance Correction	Subin	Approved	05/31/2015	
1	SALIM ANSARI	09/19/2015	Attendance Correction	Subin	Approved	09/29/2015	
1	SALIM ANSARI	10/15/2015	Attendance Correction	Subin	Approved	10/29/2015	
1	SALIM ANSARI	10/16/2015	Attendance Correction	Subin	Approved	10/29/2015	
1	SALIM ANSARI	10/18/2015	Attendance Correction	Subin	Approved	10/29/2015	
1	SALIM ANSARI	10/19/2015	Attendance Correction	Subin	Approved	10/29/2015	
1	SALIM ANSARI	10/20/2015	Attendance Correction	Subin	Approved	10/29/2015	
1	SALIM ANSARI	10/27/2015	Attendance Correction	Subin	Approved	10/29/2015	
1	SALIM ANSARI	12/19/2015	Attendance Correction	JAYESH PATEL	Approved	12/30/2015	

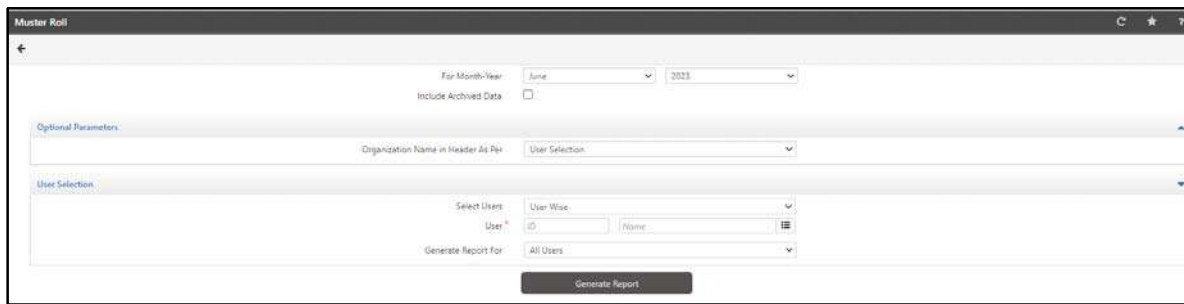
## Monthly Reports

This section allows the user to generate Monthly Reports related to various attendance parameters. The following reports fall under this category:

### Muster Roll

This report provides a group wise list of the users with details of the Muster Roll for the specified month and year.

Set the report filters as per requirement.

The screenshot shows a web application window titled "Muster Roll". At the top, there are two dropdown menus for "For Month-Year" with "June" and "2023" selected. Below these is a checkbox labeled "Include Archived Data" which is currently unchecked. A section titled "Optional Parameters" is expanded, showing a dropdown for "Organization Name in Header As Per" with "User Selection" chosen. Below this is another section titled "User Selection" which contains a "Select Users" dropdown set to "User Wise", and two input fields for "ID" and "Name". At the bottom of this section is a "Generate Report For" dropdown set to "All Users". A "Generate Report" button is located at the very bottom of the form.

- **For Month-Year:** Select the month and year for which the report is to be generated.
- **Include Archived Data:** Select the check box if you wish to include archived data for the Muster Roll report.

### Optional Parameters

- **Organization Name in Header As Per:** Select the desired option — User Selection or Customized Selection.

If you select **Customized Selection**, click **Customize Report Header**.

You can select the desired option from the drop-down list or can also add a new header according to your choice.

### User Selection

- **Select Users:** Select the desired option— **User-Wise, Group Wise** or **All**.

- If you select **User Wise**, click the **User** picklist. The **Picklist for All Users** pop-up appears

Picklist For All Users

Total Selected: 0 Records

Search  Show Selected

<input type="checkbox"/>	User ID	Name
<input checked="" type="checkbox"/>	1	SALIM ANSARI
<input checked="" type="checkbox"/>	10	RAJENDRA GOSWAMI
<input checked="" type="checkbox"/>	1001	ANKITKUMAR SOHLIYA
<input checked="" type="checkbox"/>	1002	MEGHA H SHUKLA
<input type="checkbox"/>	1003	UMESH M TALANPURI
<input type="checkbox"/>	1004	DARSHAK B PATEL
<input type="checkbox"/>	1007	DHAVAL I PATEL
<input type="checkbox"/>	1008	MAYANK K KORAT
<input type="checkbox"/>	1009	DIPTI K RATHWA
<input type="checkbox"/>	1010	RAHUL S SHAH

1 - 10 of 2476 records

1 2 3 ... 248

OK Cancel

- Select check boxes of the desired user. Click **OK**.
- The selected Users appear in the grid

Search

User ID	Name	
1	SALIM ANSARI	
10	RAJENDRA GOSWAMI	
1001	ANKITKUMAR SOHLIYA	
1002	MEGHA H SHUKLA	

Generate Report For: All Users

Generate Report

- You can also delete the desired User. To do so, click **Delete** of the respective user.
- If you select **Group Wise** option, select the desired enterprise group from the drop-down list— Organization, Branch, Department, Section, Category, Grade, Designation, Custom Group1/2/3
- For each enterprise group — Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1/2/3, click the corresponding picklist to select the desired option/s.





**Master Summary**

For Month-Year: June 2023

**Optional Parameters**

Group By: Organization  
Organization Name in Header As Per: User Selection

**User Selection**

Select Users: User Wise  
User ID: [ ] Name: [ ]  
Generate Report For: All Users

**Generate Report**

- **For Month-Year:** Select the month and year for which the report is to be generated.

### Optional Parameters

- **Group By:** Select the desired enterprise group from the drop-down list — Organization, Branch, Department, Section, Category, Grade, Designation, Custom Group1/2/3.
- **Organization Name in Header As Per:** Select the desired option — User Selection or Customized Selection.

If you select **Customized Selection**, click **Customize Report Header**.

You can select the desired option from the drop-down list or can also add a new header according to your choice.

### User Selection

- **Select Users:** Select the desired option— **User-Wise**, **Group Wise** or **All**.
- If you select **User Wise**, click the **User** picklist. The **Picklist for All Users** pop-up appears.

**Picklist For All Users**

Total Selected: 0 Records

Search [ ] Show Selected

<input type="checkbox"/>	User ID	Name
<input type="checkbox"/>	1	SALIM ANSARI
<input type="checkbox"/>	10	RAJENDRA GOSWAMI
<input type="checkbox"/>	1001	ANKITKUMAR SOHLIYA
<input type="checkbox"/>	1002	MEGHA H SHUKLA
<input type="checkbox"/>	1003	UMESH M TALANPURI
<input type="checkbox"/>	1004	DARSHAK B PATEL
<input type="checkbox"/>	1007	DHAVAL I PATEL
<input type="checkbox"/>	1008	MAYANK K KORAT
<input type="checkbox"/>	1009	DIPTI K RATHWA
<input type="checkbox"/>	1010	RAHUL S SHAH

1 - 10 of 2476 records

1 2 3 ... 248


**OK** **Cancel**

- Select check boxes of the desired user. Click **OK**.
- The selected users appear in the grid

User ID	Name
1	SALIM ANSARI
10	RAJENDRA GOSWAMI
1001	ANKITKUMAR SOHLIYA
1002	MEGHA H SHUKLA


Generate Report For: All Users

Generate Report

- You can also delete the desired User. To do so, click **Delete**  of the respective user.
- If you select **Group Wise** option, select the desired enterprise group from the drop-down list— Organization, Branch, Department, Section, Category, Grade, Designation, Custom Group1/2/3
- For each enterprise group — Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1/2/3, click the corresponding picklist to select the desired option/s.
- The selected Groups appear in the grid.

ID	Name	Group
1	MATRIX COMSEC PVT. LTD.	Organization
2	SAMARTH	Organization
3	AV/DHCOT	Organization
4	ELSENGARD	Organization

Generate Report

- You can also delete particular group. To do so, click **Delete**  of the respective group
- If you select **All**, then all users will be selected.
- **Generate Report For:** Select the desired option from the drop-down list— **All Users, Active Users** or **Inactive Users**.
- Click **Generate Report**.

## Sample Report

**Muster Summary**

Back

1 of 2

**MATRIX COMSEC PVT. LTD.** Page 1 of 2

Organization-Wise Muster Summary For JANUARY-2013

Run by: System Admin Date: 06/29/2023 17:22

Sr No	User ID	Name/Designation	FR	WO	PH	TR	PL	AB	UL	LO	Total	Auth	Total	Total
											OT	OT	WrkTime	C-Off
MATRIX COMSEC PVT. LTD.														
1	1	SALIM ANSARI Designation 1	22.0	5	2	0.0	2.0	0.0	0.0	0.0	24:23	00:00	197:21	00:00
2	10	RAJENDRA GOSWAMI Designation 1	22.5	5	2	0.0	1.5	0.0	0.0	0.0	03:02	00:00	184:35	00:00
3	1001	ANKITKUMAR SOHLIYA Designation 1	23.5	6	1	0.0	0.5	0.0	0.0	0.0	26:55	00:00	228:17	00:00
4	1002	MEGHA K SHUKLA Designation 1	23.0	6	1	0.0	2.0	0.0	0.0	0.0	23:48	00:00	211:21	00:00
5	1003	UMESH M TALAMPURI Designation 1	23.0	6	1	0.5	0.5	0.0	0.0	0.0	01:16	00:00	210:15	00:00
6	1004	DARSHAK B PATEL Designation 1	22.0	6	1	0.0	2.0	0.0	0.0	0.0	02:39	00:00	202:44	00:00
7	1007	DHAVAL I PATEL Designation 1	21.0	6	1	0.0	3.0	0.0	0.0	0.0	35:30	00:00	213:07	00:00
8	1008	MAYANK K KORAT Designation 1	23.0	6	1	0.0	1.0	0.0	0.0	0.0	26:25	00:00	223:53	00:00
9	1009	DIPTI K RATHWA Designation 1	19.0	6	1	0.0	2.5	1.0	1.5	0.0	02:22	00:00	179:59	00:00
10	1010	RAHUL S SHAH Designation 1	24.0	6	1	0.0	0.0	0.0	0.0	0.0	18:03	00:00	224:08	00:00

## Previous Adjustment Summary

This report provides a user wise summary details of the Previous Adjustment for the specified month and year.

Set the report filters as per requirement.

**Previous Adjustment Summary**

For Month/Year: June 2023

Optional Parameters

Organization Name in Header As Per: User Selection

User Selection

Select Users: User Wise

User ID: Name:

Generate Report For: All Users

Generate Report

- **For Month-Year:** Select the month and year for which the report is to be generated.

### Optional Parameters

- **Organization Name in Header As Per:** Select the desired option — User Selection or Customized Selection.

If you select **Customized Selection**, click **Customize Report Header**.

You can select the desired option from the drop-down list or can also add a new header according to your choice.

### User Selection

- **Select Users:** Select the desired option— **User-Wise, Group Wise** or **All**.

- If you select **User Wise**, click the **User** picklist. The **Picklist for All Users** pop-up appears.

Picklist For All Users

Total Selected: 0 Records

Search  Show Selected

<input type="checkbox"/>	User ID	Name
<input checked="" type="checkbox"/>	1	SALIM ANSARI
<input checked="" type="checkbox"/>	10	RAJENDRA GOSWAMI
<input checked="" type="checkbox"/>	1001	ANKITKUMAR SOHLIYA
<input checked="" type="checkbox"/>	1002	MEGHA H SHUKLA
<input type="checkbox"/>	1003	UMESH M TALANPURI
<input type="checkbox"/>	1004	DARSHAK B PATEL
<input type="checkbox"/>	1007	DHAVAL I PATEL
<input type="checkbox"/>	1008	MAYANK K KORAT
<input type="checkbox"/>	1009	DIPTI K RATHWA
<input type="checkbox"/>	1010	RAHUL S SHAH

1 - 10 of 2476 records

1 2 3 ... 248

OK Cancel

- Select check boxes of the desired user. Click **OK**.

- The selected users appear in the grid

Search

User ID	Name	
1	SALIM ANSARI	
10	RAJENDRA GOSWAMI	
1001	ANKITKUMAR SOHLIYA	
1002	MEGHA H SHUKLA	


Generate Report For: All Users

Generate Report

- You can also delete the desired User. To do so, click **Delete** of the respective user.
- If you select **Group Wise** option, select the desired enterprise group from the drop-down list— Organization, Branch, Department, Section, Category, Grade, Designation, Custom Group1/2/3
- For each enterprise group — Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1/2/3, click the corresponding picklist to select the desired option/s.

- The selected Groups appear in the grid.

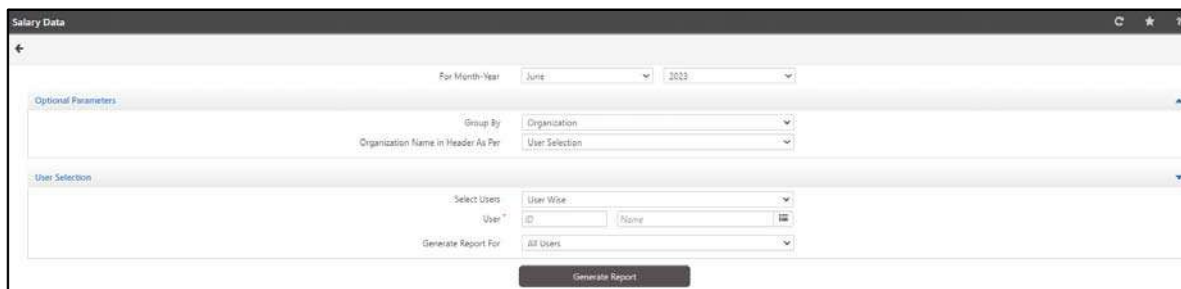
Search <input type="text"/>			
ID	Name	Group	
1	MATRIX COMSEC PVT. LTD.	Organization	
2	SAMARTH	Organization	
3	AVDHOT	Organization	
4	ELSENGARD	Organization	
Generate Report			

- You can also delete particular group. To do so, click **Delete**  of the respective group
- If you select **All**, then all users will be selected.
- **Generate Report For:** Select the desired option from the drop-down list— **All Users, Active Users** or **Inactive Users**.
- Click **Generate Report**.

## Salary Data

This report provides a group wise list of the users with details of the Salary Data for the specified month and year.

Set the report filters as per requirement.



Salary Data

For Month-Year: June 2023

Optional Parameters:

Group By: Organization

Organization Name in Header As Per: User Selection

User Selection:

Select Users: User Wise

User: ID Name

Generate Report For: All Users

Generate Report

- **For Month-Year:** Select the month and year for which the report is to be generated.

### Optional Parameters

- **Group By:** Select the desired enterprise group from the drop-down list — Organization, Branch, Department, Section, Category, Grade, Designation, Custom Group1/2/3.
- **Organization Name in Header As Per:** Select the desired option — User Selection or Customized Selection.

If you select **Customized Selection**, click **Customize Report Header**.

You can select the desired option from the drop-down list or can also add a new header according to your choice.

## User Selection

- **Select Users:** Select the desired option— **User-Wise**, **Group Wise** or **All**
- If you select **User Wise**, click the **User** picklist. The **Picklist for All Users** pop-up appears

Picklist For All Users

Total Selected: 0 Records

Search  Show Selected

<input type="checkbox"/>	User ID ▲	Name
<input type="checkbox"/>	1	SALIM ANSARI
<input type="checkbox"/>	10	RAJENDRA GOSWAMI
<input type="checkbox"/>	1001	ANKITKUMAR SOHLIYA
<input type="checkbox"/>	1002	MEGHA H SHUKLA
<input type="checkbox"/>	1003	UMESH M TALANPURI
<input type="checkbox"/>	1004	DARSHAK B PATEL
<input type="checkbox"/>	1007	DHAVAL I PATEL
<input type="checkbox"/>	1008	MAYANK K KORAT
<input type="checkbox"/>	1009	DIPTI K RATHWA
<input type="checkbox"/>	1010	RAHUL S SHAH

1 - 10 of 2476 records

« < 1 2 3 ... 248 > »

OK Cancel

- Select check boxes of the desired users. Click **OK**.
- The selected users appear in the grid

Search

User ID ▲	Name	
1	SALIM ANSARI	
10	RAJENDRA GOSWAMI	
1001	ANKITKUMAR SOHLIYA	
1002	MEGHA H SHUKLA	

Generate Report For: All Users

Generate Report

- You can also delete the desired User. To do so, click **Delete** of the respective user.
- If you select **Group Wise** option, select the desired enterprise group from the drop-down list— Organization, Branch, Department, Section, Category, Grade, Designation, Custom Group1/2/3
- For each enterprise group — Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1/2/3, click the corresponding picklist to select the desired option/s.

- The selected Groups appear in the grid.

Search <input type="text"/>			
ID	Name	Group	
1	MATRIX COMSEC PVT. LTD.	Organization	
2	SAMARTH	Organization	
3	AVDHOT	Organization	
4	ELSENGARD	Organization	
<b>Generate Report</b>			

- You can also delete particular group. To do so, click **Delete** of the respective group
- If you select **All**, then all users will be selected.
- Generate Report For:** Select the desired option from the drop-down list— **All Users, Active Users or Inactive Users.**
- Click **Generate Report.**

## Sample Report

Salary Data

←

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100%

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MATRIX COMSEC PVT. LTD.  
Organization-Wise Salary Data For JANUARY-2013

Page 1 of 4

Run by: System Admin  
Sr No    User    ID    Name/Designation    PR    MD    PH    PL    TR    AB    Not Reported    UL    LJ    Shift    Pay    Auth    Total    Total

Date: 06/29/2023 18:21

Auth

OT

WorkTime

C-DEF

MATRIX COMSEC PVT. LTD.

1    1    SALIM ANSARI  
Designation 1    22.0    5    2    2.0    0.0    0.0    0.0    0.0    0.0    0.0    0    31.0    00:00    197:21    00:00

CL:2

Previous Adjustment :    Adj Days    0.0    Overtime    00:00    WorkTime    00:00    Shift Allowance    0

2    10    RAJENDRA GOSWAMI  
Designation 1    22.5    5    2    1.5    0.0    0.0    0.0    0.0    0.0    0    31.0    00:00    184:35    00:00

CL:1.5

Previous Adjustment :    Adj Days    0.0    Overtime    00:00    WorkTime    00:00    Shift Allowance    0

3    1001    ANKITHKUMAR SCHLIYA  
Designation 1    23.5    6    1    0.5    0.0    0.0    0.0    0.0    0.0    0    31.0    00:00    228:17    00:00

CL:0.5

Previous Adjustment :    Adj Days    0.0    Overtime    00:00    WorkTime    00:00    Shift Allowance    0

4    1002    MESHA B SHUKLA  
Designation 1    22.0    6    1    2.0    0.0    0.0    0.0    0.0    0.0    0    31.0    00:00    211:21    00:00

CL:1.0

Previous Adjustment :    Adj Days    0.0    Overtime    00:00    WorkTime    00:00    Shift Allowance    0

5    1003    OMESH M TALAMPURI  
Designation 1    23.0    6    1    0.5    0.5    0.0    0.0    0.0    0.0    0    31.0    00:00    210:15    00:00

CL:0.5

Previous Adjustment :    Adj Days    0.0    Overtime    00:00    WorkTime    00:00    Shift Allowance    0

6    1004    DARSHAK B PATEL  
Designation 1    22.0    6    1    2.0    0.0    0.0    0.0    0.0    0.0    0    31.0    00:00    202:44    00:00

CL:2

Previous Adjustment :    Adj Days    0.0    Overtime    00:00    WorkTime    00:00    Shift Allowance    0

## Absentee Detail

This report provides a group wise list of the users with details of the Absent days for the specified month and year.

Set the report filters as per requirement.

- **For Month-Year:** Select the month and year for which the report is to be generated.

### Optional Parameters

- **Group By:** Select the desired enterprise group from the drop-down list — Organization, Branch, Department, Section, Category, Grade, Designation, Custom Group1/2/3.
- **Organization Name in Header As Per:** Select the desired option — User Selection or Customized Selection.

If you select **Customized Selection**, click **Customize Report Header**.

You can select the desired option from the drop-down list or can also add a new header according to your choice.

### User Selection

- **Select Users:** Select the desired option— **Group Wise** or **All**
- If you select **Group Wise** option, select the desired enterprise group from the drop-down list— Organization, Branch, Department, Section, Category, Grade, Designation, Custom Group1/2/3
- For each enterprise group — Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1/2/3, click the corresponding picklist to select the desired option/s.
- The selected Groups appear in the grid.

ID	Name	Group	
1	MATRIX COMSEC PVT. LTD.	Organization	
2	SAMARTH	Organization	
3	AVDHQOT	Organization	
4	ELSENGARD	Organization	

**Generate Report**

- You can also delete particular group. To do so, click **Delete** of the respective group
- If you select **All**, then all users will be selected.
- **Generate Report For:** Select the desired option from the drop-down list— **All Users**, **Active Users** or **Inactive Users**.



- Click **Generate Report**.

## Sample Report

Absentee Detail

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MATRIX COMSEC PVT. LTD.

Organization-Wise Absentee Detail For JANUARY-2013

Run by: System Admin Date: 06/29/2023 10:36

Sr No	User ID	Name	Designation	Absent Dates	Total AB Days
MATRIX COMSEC PVT. LTD.					
1	1009	DIPTI K RATHWA	Designation 1	23h,30h	1
2	1045	SHUBHANGINI VATTOKAR	Designation 1	5h	0.5
3	105	Satish Raje	Designation 1	30h	0.5
4	1053	JINU SAM	Designation 1	3h	0.5
5	1055	SANDEEP PATEL	Designation 1	1h, 5, 12, 25, 30, 31	6.5
6	1056	RITESH RAJPUT	Designation 1	9, 25	2
7	1059	PRATIK PATEL	Designation 1	16, 29, 30, 31	4
8	1063	KISHOR HEMNANI	Designation 1	18h	0.5
9	1069	SHRADHA TAMBE	Designation 1	6, 13, 14, 15, 20, 26, 27	7
10	1076	VIJAYKUMAR PRATAPATI	Designation 1	28h, 29	1.5
11	1079	HARSHIT PATEL	Designation 1	30h, 31	1.5
12	1086	SOMEN RAY	Designation 1	12h	0.5
13	1087	KALPESH DIYORA	Designation 1	18h	0.5
14	1089	KAPIL SANGHANI	Designation 1	2h	0.5
15	1097	DARSHAN MISTRY	Designation 1	19h, 21, 22	2.5

Page 1 of 14

## Monthly Details

This report provides a group wise list of the users with details of the Monthly Attendance for the specified month and year. You can select from one of the five available templates to view the data in the required format.

Set the report filters as per requirement.

Monthly Details

For Month-Year: January, 2013

Optional Parameters

Group By: Organization

Format Selection: Count-Wise

Include Excess Break In Loss Hours: ☐

Organization Name in Header As Per:

User Selection

Select Users: User-Wise

User ID:  Name:

Generate Report For: All Users

Generate Report

- For Month-Year:** Select the month and year for which the report is to be generated.

## Optional Parameters

- Group By:** Select the desired enterprise group from the drop-down list — Organization, Branch, Department, Section, Category, Grade, Designation, Custom Group1/2/3.
- Format Selection:** Select the desired option from the drop-down list— **Count-Wise**, **Day-Wise**, **Day-Wise Status**, **Month-Wise Attendance** or **Status & Cost Summary**.
- Include Excess Break In Loss Hours:** If you select **Count-Wise** format, select the check box to include the excess time taken in break period in the loss hours.

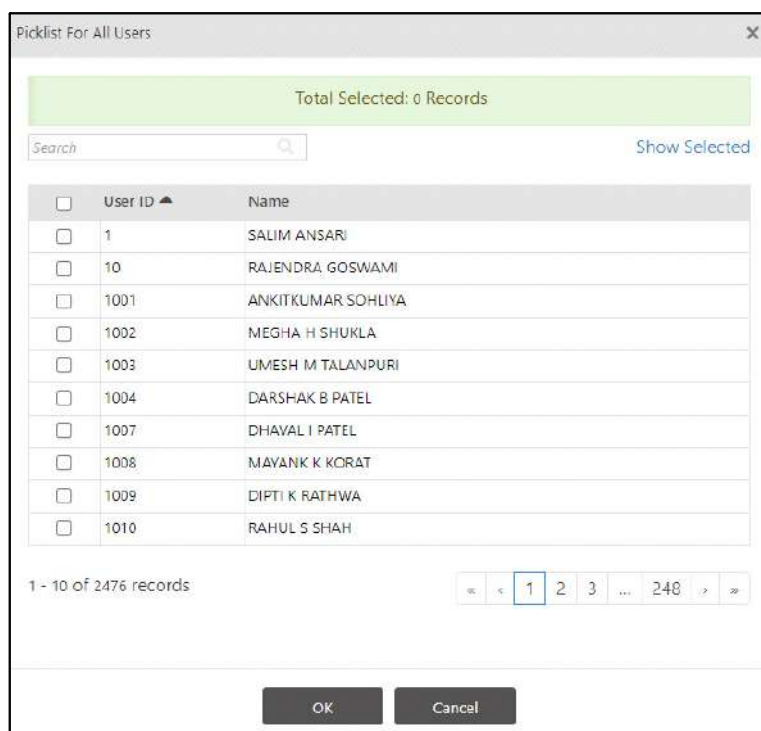
- **Enterprise Group In Report:** If you select **Month-Wise Attendance** format, select the desired enterprise group — Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1(Association Maps) Custom Group /2/3.
- **Add Custom Footer:** If you select **Month-Wise Attendance** format, select the check box to add a custom footer to the report and specify the footer text.
- **Organization Name in Header As Per:** Select the desired option — User Selection or Customized Selection.

If you select **Customized Selection**, click **Customize Report Header**.

You can select the desired option from the drop-down list or can also add a new header according to your choice.

### User Selection

- **Select Users:** Select the desired option— **User-Wise**, **Group Wise** or **All**
  - If you select **User Wise**, click the **User** picklist. The **Picklist for All Users** pop-up appears



Picklist For All Users

Total Selected: 0 Records

Search  Show Selected

<input type="checkbox"/>	User ID	Name
<input type="checkbox"/>	1	SALIM ANSARI
<input type="checkbox"/>	10	RAJENDRA GOSWAMI
<input type="checkbox"/>	1001	ANKITKUMAR SOHLIYA
<input type="checkbox"/>	1002	MEGHA H SHUKLA
<input type="checkbox"/>	1003	UMESH M TALANPURI
<input type="checkbox"/>	1004	DARSHAK B PATEL
<input type="checkbox"/>	1007	DHAVAL I PATEL
<input type="checkbox"/>	1008	MAYANK K KORAT
<input type="checkbox"/>	1009	DIPTI K RATHWA
<input type="checkbox"/>	1010	RAHUL S SHAH

1 - 10 of 2476 records

1 2 3 ... 248

OK Cancel

- Select check boxes of the desired users. Click **OK**.

- The selected users appear in the grid

Search

User ID	Name	
1	SALIM ANSARI	
10	RAJENDRA GOSWAMI	
1001	ANKITKUMAR SOHLIYA	
1002	MEGHA H SHUKLA	

Generate Report For: All Users

**Generate Report**

- You can also delete the desired User. To do so, click **Delete** of the respective user.
- If you select **Group Wise** option, select the desired enterprise group from the drop-down list— Organization, Branch, Department, Section, Category, Grade, Designation, Custom Group1/2/3
- For each enterprise group — Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1/2/3, click the corresponding picklist to select the desired option/s.
- The selected Group appears in the grid.

Search

ID	Name	Group	
1	MATRIX COMSEC PVT. LTD.	Organization	
2	SAMARTH	Organization	
3	AVDHOT	Organization	
4	ELSENGARD	Organization	

**Generate Report**

- You can also delete particular group. To do so, click **Delete** of the respective group
- If you select **All**, then all users will be selected.
- **Generate Report For:** Select the desired option from the drop-down list— **All Users, Active Users** or **Inactive Users**.
- Click **Generate Report**.

## Sample Report- Count-Wise Format

Monthly Details

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1 of 1

100%

MATRIX COMSEC PVT. LTD. Page 1 of 1

Organization-Wise Monthly Details For JANUARY-2013

Run by: System Admin Date: 06/29/2023 20:42

User ID	User Name	N	WO	PH	PL	UL	TR	PR	AB	SL	Net-Work	Auth	Loss
MATRIX COMSEC PVT. LTD.													
1	SALIM ANSARI	24	5	2	2.0	0.0	0.0	22.0	0.0	2	00:00	00:00	00:00
10	RAJENDRA GOSWAMI	24	5	2	1.5	0.0	0.0	22.5	0.0	2	00:00	00:00	00:12
1001	ANKITKUMAR SOHLIYA	24	6	1	0.5	0.0	0.0	23.5	0.0	2	00:00	00:00	00:19
1002	MEGHA H SHUKLA	24	6	1	2.0	0.0	0.0	22.0	0.0	2	00:00	00:00	00:08
1003	UMESH M TALANPURI	24	6	1	0.5	0.0	0.5	23.0	0.0	2	00:00	00:00	00:00
1004	DARSHAK B PATEL	24	6	1	2.0	0.0	0.0	22.0	0.0	1	00:00	00:00	00:17
1007	DHRAVAL I PATEL	24	6	1	3.0	0.0	0.0	21.0	0.0	0	00:00	00:00	00:00
1008	MAYANK K KOGAT	24	6	1	1.0	0.0	0.0	23.0	0.0	2	00:00	00:00	00:00
1009	DIPTI K RATHWA	24	6	1	2.5	1.5	0.0	19.0	1.0	2	18:22	00:00	00:23
1010	RAHUL S SHAH	24	6	1	0.0	0.0	0.0	24.0	0.0	2	00:00	00:00	00:06
1011	PARAG S PANDEY	24	6	1	1.0	0.0	2.0	21.0	0.0	2	00:00	00:00	00:12
1012	PARIKSHIT DAS	24	6	1	0.0	0.0	0.0	24.0	0.0	1	00:00	00:00	00:29
1015	SUMEDHA A GAWARTKAR	24	6	1	1.5	0.0	0.0	22.5	0.0	2	00:00	00:00	00:00
1016	BALAJI A	26	4	1	2.0	0.0	0.0	24.0	0.0	0	00:00	00:00	00:00
1020	VAISHALI M THAKER	24	6	1	0.5	0.0	0.0	23.5	0.0	2	00:00	00:00	00:01
1022	PANDURANG D CHAVHAN	24	6	1	0.5	0.0	0.0	23.5	0.0	2	00:00	00:00	00:18
1030	KEYUR BEHALODIYA	24	6	1	2.5	0.0	0.0	21.5	0.0	0	00:00	00:00	00:52
1038	TANMAY SHAH	24	6	1	0.5	0.0	0.0	23.5	0.0	2	00:00	00:00	00:21
104	ASHVIN NAVADIA	24	6	1	0.5	0.0	0.0	23.5	0.0	1	00:00	00:00	00:00
CONSULTANT													
102	AKSHAY SHETH	24	6	1	1.5	0.0	9.0	13.5	6.0	2	00:00	00:00	00:05

## Monthly Summary

This report provides a group wise list of the users with summary of the Monthly Status, Work Hours or Overtime for the specified month and year.

Set the report filters as per requirement.

Monthly Summary

For Month-Year: June 2023

Optional Parameters

Group By: Organization

Format Selection: Status Summary

Organization Name in Header As Per: User Selection

User Selection

Select Users: User Wise

User ID: / Name

Generate Report For: All Users

Generate Report

- **For Month-Year:** Select the month and year for which the report is to be generated.

### Optional Parameters

- **Group By:** Select the desired enterprise group from the drop-down list — Organization, Branch, Department, Section, Category, Grade, Designation, Custom Group1/2/3.
- **Format Selection:** Select the desired option from the drop-down list — **Status Summary**, **Work Hours Summary** or **Overtime Summary**.
- **Organization Name in Header As Per:** Select the desired option — User Selection or Customized Selection.

If you select **Customized Selection**, click **Customize Report Header**.

You can select the desired option from the drop-down list or can also add a new header according to your choice.

## User Selection

- **Select Users:** Select the desired option— **User-Wise**, **Group Wise** or **All**.
- If you select **User Wise**, click the **User** picklist. The **Picklist for All Users** pop-up appears

Picklist For All Users

Total Selected: 0 Records

Search  Show Selected

<input type="checkbox"/>	User ID	Name
<input type="checkbox"/>	1	SALIM ANSARI
<input type="checkbox"/>	10	RAJENDRA GOSWAMI
<input type="checkbox"/>	1001	ANKITKUMAR SOHLIYA
<input type="checkbox"/>	1002	MEGHA H SHUKLA
<input type="checkbox"/>	1003	UMESH M TALANPURI
<input type="checkbox"/>	1004	DARSHAK B PATEL
<input type="checkbox"/>	1007	DHAVAL I PATEL
<input type="checkbox"/>	1008	MAYANK K KORAT
<input type="checkbox"/>	1009	DIPTI K RATHWA
<input type="checkbox"/>	1010	RAHUL S SHAH

1 - 10 of 2476 records

1 2 3 ... 248

OK Cancel


- Select check boxes of the desired user. Click **OK**.
- The selected users appear in the grid

Search

User ID	Name
1	SALIM ANSARI
10	RAJENDRA GOSWAMI
1001	ANKITKUMAR SOHLIYA
1002	MEGHA H SHUKLA


Generate Report For: All Users

Generate Report

- You can also delete the desired User. To do so, click **Delete**  of the respective user.
- If you select **Group Wise** option, select the desired enterprise group from the drop-down list— Organization, Branch, Department, Section, Category, Grade, Designation, Custom Group1/2/3
- For each enterprise group — Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1/2/3, click the corresponding picklist to select the desired option/s.

- The selected Groups appear in the grid.

<input type="text" value="Search"/>			
ID	Name	Group 	
1	MATRIX COMSEC PVT. LTD.	Organization	
2	SAMARTH	Organization	
3	AVDHOOT	Organization	
4	ELSENGARD	Organization	

- You can also delete particular group. To do so, click **Delete**  of the respective group
- If you select **All**, then all users will be selected.
- **Generate Report For:** Select the desired option from the drop-down list— **All Users, Active Users** or **Inactive Users**.
- Click **Generate Report**.

## Sample Report- Status Summary

[illegible]

## Monthly Log

This report provides a group wise list of the users with details of the Monthly Attendance such as IN Punch, OUT Punch, Break Time, Overtime, Leave and Shift Duration for the specified month and year.

Set the report filters as per requirement.

Monthly Log

For Month-Year: June 2023

Optional Parameters

Group By: Organization

Organization Name in Header As Per: User Selection

User Selection

Select Users: User-Wise

User ID: Name

Generate Report For: All Users

Generate Report

- **For Month-Year:** Select the month and year for which the report is to be generated.

### Optional Parameters

- **Group By:** Select the desired enterprise group from the drop-down list — Organization, Branch, Department, Section, Category, Grade, Designation, Custom Group1/2/3.
- **Organization Name in Header As Per:** Select the desired option — User Selection or Customized Selection.

If you select **Customized Selection**, click **Customize Report Header**.

You can select the desired option from the drop-down list or can also add a new header according to your choice.

### User Selection

- **Select Users:** Select the desired option— **User-Wise, Group Wise or All**.
- If you select **User Wise**, click the **User** picklist. The **Picklist for All Users** pop-up appears

Picklist For All Users

Total Selected: 0 Records

Search

Show Selected

<input type="checkbox"/>	User ID	Name
<input type="checkbox"/>	1	SALIM ANSARI
<input type="checkbox"/>	10	RAJENDRA GOSWAMI
<input type="checkbox"/>	1001	ANKITKUMAR SOHLIYA
<input type="checkbox"/>	1002	MEGHA H SHUKLA
<input type="checkbox"/>	1003	UMESH M TALANPURI
<input type="checkbox"/>	1004	DARSHAK B PATEL
<input type="checkbox"/>	1007	DHAVAL I PATEL
<input type="checkbox"/>	1008	MAYANK K KORAT
<input type="checkbox"/>	1009	DIPTI K RATHWA
<input type="checkbox"/>	1010	RAHUL S SHAH

1 - 10 of 2476 records


OK Cancel

- Select check boxes of the desired users. Click **OK**.
- The selected users appear in the grid

User ID	Name	
1	SALIM ANSARI	<input type="checkbox"/>
10	RAJENDRA GOSWAMI	<input type="checkbox"/>
1001	ANKITKUMAR SOHLIYA	<input type="checkbox"/>
1002	MEGHA H SHUKLA	<input type="checkbox"/>


Generate Report For: All Users

Generate Report

- You can also delete the desired User. To do so, click **Delete**  of the respective user.
- If you select **Group Wise** option, select the desired enterprise group from the drop-down list— Organization, Branch, Department, Section, Category, Grade, Designation, Custom Group1/2/3
- For each enterprise group — Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1/2/3, click the corresponding picklist to select the desired option/s.
- The selected Groups appear in the grid.

ID	Name	Group	
1	MATRIX COMSEC PVT. LTD.	Organization	<input type="checkbox"/>
2	SAMARTH	Organization	<input type="checkbox"/>
3	AVDHOT	Organization	<input type="checkbox"/>
4	ELSENGARD	Organization	<input type="checkbox"/>

Generate Report

- You can also delete particular group. To do so, click **Delete**  of the respective group
- If you select **All**, then all users will be selected.
- **Generate Report For:** Select the desired option from the drop-down list— **All Users, Active Users or Inactive Users**.
- Click **Generate Report**.



## Sample Report

Monthly Log

Back

1 of 30

100%

Print

Copy

Paste

Search

MATRIX

MATRIX COMSEC PVT. LTD.

Run by: System Admin

Organization-Wise Monthly Log For JANUARY-2013

Date: 06/29/2023

21:56

ST. No

User ID

Name

Department

Designation

Day Count : PR AB FL UL WO PH FD RD TH

MATRIX COMSEC PVT. LTD.

22.0 0.0 2.0 0.0

9 2 0 0 0.0

1

1

SALIM ANSARI

MANUFACTURING

Designation 1

22.0 0.0 2.0 0.0

9 2 0 0 0.0

	01	02	03	04	05	06	07	08	09	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	Thu
Shift	23	23	23	23	23	23	23	23	23	23	23	23	23	23	23	23	23	23	23	23	23	23	23	23	23	23	23	23	23	23	23	23
First IN	-	08:24	08:27	08:31	08:25	-	08:25	08:24	08:24	08:27	08:25	08:23	-	-	08:24	08:25	08:25	08:27	-	08:23	08:24	08:24	08:27	-	-	-	08:25	08:24	08:24	08:26	08:31	
Last OUT	-	17:01	17:01	17:00	16:00	-	17:01	17:02	17:00	17:02	17:00	16:17	-	-	17:01	17:59	18:00	17:01	-	19:01	19:02	18:19	19:00	-	-	-	19:02	21:39	21:30	22:14		
Gross	-	09:05	07:54	09:05	07:05	-	08:21	08:04	07:57	08:07	08:17	07:07	-	-	07:48	09:42	09:42	07:52	-	09:43	09:44	09:04	09:50	-	-	-	09:46	12:27	12:24	13:13		
Net-Work	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
Break	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
Early-IN	-	00:04	00:03	-	00:08	-	00:18	00:04	00:04	00:03	00:05	00:07	-	-	00:15	00:13	00:09	00:13	-	00:10	00:11	00:13	-	-	-	00:12	00:11	00:13	-	-	-	
Late-IN	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
Early-OUT	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
Net-Work	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
Late-OUT	-	00:01	00:01	-	-	-	00:01	00:02	-	00:02	-	-	-	-	00:01	00:59	01:00	01:01	-	02:01	02:02	-	02:00	-	-	-	02:02	04:33	04:30	05:14		
Extra	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
Loss	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
1st Half	WO	PR	PR	PR	PR	WO	PR	PR	PR	PR	PR	PR	WO	PR	WO	PR	PR	PR	PR	WO	PR	PR	PR	PR	CL	PR	CL	PR	PR	PR	PR	
2nd Half	WO	PR	PR	PR	PR	WO	PR	PR	PR	PR	PR	PR	WO	PR	WO	PR	PR	PR	PR	WO	PR	PR	PR	PR	CL	PR	CL	PR	PR	PR	PR	

Total Gross Hours:

Hours

197:21

Break

03:32

Net-Work

24:23

Extra

-

Loss

-

Adjusted

-

Authorized

-

Authorized

-

</

## Shift Details

This report provides a group wise list of the users with details of the Scheduled and Working Shifts for the specified month and year.

Set the report filters as per requirement.



*For monthly reports, user's customized attendance period (as set in Attendance Policy) will be ignored. Records for the calendar month will be shown. Hence, there can be a mismatch in the summary shown in the report, and that shown in COSEC Web.*

**Shift Details**

For Month-Year: June 2023

**Optional Parameters**

Group By: Organization  
Organization Name in Header As Per: User Selection

**User Selection**

Select Users: User Wise  
User ID: [ ] Name: [ ]  
Generate Report For: All Users

**Generate Report**

- **For Month-Year:** Select the month and year for which the report is to be generated.

## Optional Parameters

- **Group By:** Select the desired enterprise group from the drop-down list — Organization, Branch, Department, Section, Category, Grade, Designation, Custom Group1/2/3.
- **Organization Name in Header As Per:** Select the desired option — User Selection or Customized Selection.

If you select **Customized Selection**, click **Customize Report Header**.

You can select the desired option from the drop-down list or can also add a new header according to your choice.

## User Selection

- **Select Users:** Select the desired option— **User-Wise**, **Group Wise** or **All**
- If you select **User Wise**, click the **User** picklist. The **Picklist for All Users** pop-up appears

Picklist For All Users

Total Selected: 0 Records

Search  Show Selected

<input type="checkbox"/>	User ID	Name
<input type="checkbox"/>	1	SALIM ANSARI
<input type="checkbox"/>	10	RAJENDRA GOSWAMI
<input type="checkbox"/>	1001	ANKITKUMAR SOHLIYA
<input type="checkbox"/>	1002	MEGHA H SHUKLA
<input type="checkbox"/>	1003	UMESH M TALANPURI
<input type="checkbox"/>	1004	DARSHAK B PATEL
<input type="checkbox"/>	1007	DHAVAL I PATEL
<input type="checkbox"/>	1008	MAYANK K KORAT
<input type="checkbox"/>	1009	DIPTI K RATHWA
<input type="checkbox"/>	1010	RAHUL S SHAH

1 - 10 of 2476 records

1 2 3 ... 248

OK Cancel

- Select check boxes of the desired users. Click **OK**.
- The selected users appear in the grid

Search

User ID	Name	
1	SALIM ANSARI	
10	RAJENDRA GOSWAMI	
1001	ANKITKUMAR SOHLIYA	
1002	MEGHA H SHUKLA	

Generate Report For: All Users

Generate Report

- You can also delete the desired User. To do so, click **Delete** of the respective user.
- If you select **Group Wise** option, select the desired enterprise group from the drop-down list— Organization, Branch, Department, Section, Category, Grade, Designation, Custom Group1/2/3
- For each enterprise group — Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1/2/3, click the corresponding picklist to select the desired option/s.

- The selected Groups appear in the grid.

Search <input type="text"/>			
ID	Name	Group	
1	MATRIX COMSEC PVT. LTD.	Organization	
2	SAMARTH	Organization	
3	AVDHOT	Organization	
4	ELSENGARD	Organization	
Generate Report			

- You can also delete particular group. To do so, click **Delete** of the respective group
- If you select **All**, then all users will be selected.
- Generate Report For:** Select the desired option from the drop-down list— **All Users, Active Users or Inactive Users.**
- Click **Generate Report.**

## Sample Report

Shift Details																														
Back																														
1 of 5																														
100%																														
MATRIX COMSEC PVT. LTD.																														
Organization-Wise Shift Details For JANUARY-2013																														
Page 1 of 5																														
Run by: System Admin																														
User ID: Name																														
Designation																														
Date: 06/29/2023 22:21																														
MATRIX COMSEC PVT. LTD.																														
1 SALIN ANSARI Designation 1																														
01	02	03	04	05	06	07	08	09	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31
Schedule Shift	23	23	23	23	22	22	23	23	23	23	22	22	23	23	23	23	23	22	22	23	23	23	23	23	23	22	22	23	23	23
Working Shift	23	23	23	23	22	22	23	23	23	23	22	22	23	23	23	23	23	22	22	23	23	23	23	23	23	22	22	23	23	23
Update Type	-	A	A	A	A	-	A	A	A	A	A	-	-	-	A	A	A	A	-	A	A	A	A	-	-	-	A	A	A	A
10 RAJENDRA GOSWAMI Designation 1																														
01	02	03	04	05	06	07	08	09	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31
Schedule Shift	23	23	23	23	22	22	23	23	23	23	22	22	23	23	23	23	23	22	22	23	23	23	23	23	23	22	22	23	23	23
Working Shift	23	23	23	23	22	22	23	23	23	23	22	22	23	23	23	23	23	22	22	23	23	23	23	23	23	22	22	23	23	23
Update Type	-	A	A	A	A	-	A	A	A	A	A	-	-	-	A	A	A	A	-	A	A	A	A	-	-	-	A	A	A	A
1001 ANKITHUMAR SOHLIYA Designation 2																														
01	02	03	04	05	06	07	08	09	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31
Schedule Shift	05	05	05	05	05	05	05	05	05	05	05	05	05	05	05	05	05	05	05	05	05	05	05	05	05	05	05	05	05	05
Working Shift	05	05	05	05	05	05	05	05	05	05	05	05	05	05	05	05	05	05	05	05	05	05	05	05	05	05	05	05	05	05
Update Type	A	A	A	A	A	-	A	A	A	A	A	-	-	-	A	A	A	A	A	A	A	A	A	A	-	-	A	A	A	A
1002 MECHA H SHUKLA Designation 1																														
01	02	03	04	05	06	07	08	09	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31
Schedule Shift	05	05	05	05	05	05	05	05	05	05	05	05	05	05	05	05	05	05	05	05	05	05	05	05	05	05	05	05	05	05
Working Shift	05	05	05	05	05	05	05	05	05	05	05	05	05	05	05	05	05	05	05	05	05	05	05	05	05	05	05	05	05	05
Update Type	A	A	A	A	A	-	A	A	A	A	A	-	-	-	A	A	A	A	A	A	A	A	A	A	-	-	A	A	A	A

## Head Count

This report provides a group wise list of the users with details of Head Count for the specified month and year.

Set the report filters as per requirement.

Head Count	
For Month-Year: June 2023	
Optional Parameters	
Head Count For:	Shift
Select Shift:	All
Generate Report	

- **For Month-Year:** Select the month and year for which the report is to be generated.

### Optional Parameters

- **Head Count For:** Select the desired enterprise group from the drop-down list — Shift, Organization, Branch, Department, Section, Category, Grade, Designation, Custom Group1/2/3.
- **Select Shift:** Select the desired option— **All** or **Selected**.
  - If you select **All**, a report for all the shifts will be generated.
  - If you select **Selected**, click the **Selected** picklist. The **Picklist For Shift** pop-up appears.

Picklist For Shift

Total Selected: 0 Records

Search  [Show Selected](#)

☐ Select All

<input type="checkbox"/>	ID ▼	Name ▼
<input type="checkbox"/>	US	USA 14:30-00:00
<input type="checkbox"/>	U2	US 17:30-02:30
<input type="checkbox"/>	U1	USA 1820-0300
<input type="checkbox"/>	TS	1100 to 1930
<input type="checkbox"/>	SU	Support US
<input type="checkbox"/>	SS	Saturday 0900-1330
<input type="checkbox"/>	SN	Support Night
<input type="checkbox"/>	SF	Saturday First
<input type="checkbox"/>	SE	Support Evening
<input type="checkbox"/>	S5	Guard 2300 to 0700

1 - 10 of 60 records

« < 1 2 3 ... 6 > »

OK Cancel

- You can either select particular shifts or can select all the shifts at once.

- To select particular shifts, select the desired check boxes.

Picklist For Shift

Total Selected: 2 Records

Search  Show Selected

☐ Select All

<input type="checkbox"/>	ID ▼	Name ▼
<input checked="" type="checkbox"/>	US	USA 14.30-00.00
<input checked="" type="checkbox"/>	U2	US 17.30-02.30
<input type="checkbox"/>	U1	USA 1820-0300
<input type="checkbox"/>	TS	1100 to 1930
<input type="checkbox"/>	SU	Support US
<input type="checkbox"/>	SS	Saturday 0900-1330
<input type="checkbox"/>	SN	Support Night
<input type="checkbox"/>	SF	Saturday First
<input type="checkbox"/>	SE	Support Evening
<input type="checkbox"/>	S5	Guard 2300 to 0700

1 - 10 of 60 records

« < 1 2 3 ... 6 > »

OK Cancel

OR

- To select all the shifts at once, select the **Select All** check box. The shifts on all the pages will be selected.

Picklist For Shift

Total Selected: 60 Records

Search  Show Selected

☒ Select All

<input checked="" type="checkbox"/>	ID ▼	Name ▼
<input checked="" type="checkbox"/>	US	USA 14.30-00.00
<input checked="" type="checkbox"/>	U2	US 17.30-02.30
<input checked="" type="checkbox"/>	U1	USA 1820-0300
<input checked="" type="checkbox"/>	TS	1100 to 1930
<input checked="" type="checkbox"/>	SU	Support US
<input checked="" type="checkbox"/>	SS	Saturday 0900-1330
<input checked="" type="checkbox"/>	SN	Support Night
<input checked="" type="checkbox"/>	SF	Saturday First
<input checked="" type="checkbox"/>	SE	Support Evening
<input checked="" type="checkbox"/>	S5	Guard 2300 to 0700

1 - 10 of 60 records


« < 1 2 3 ... 6 > »

OK Cancel

- Click **OK**.

- The selected shifts appear in the grid.

Search		
ID	Name	
10	GENERAL 9:30 TO 7:00	
11	General Shift	
21	Fac Gen Shift 2	
22	Fac Saturday Shift	
23	Fac General Shift	
A1	Asia 0830-1800	
AF	Africa (10.00-19.30)	
U2	US 17.30-02.30	
U5	USA 14.30-00.00	
Generate Report		

- You can also delete particular shift. To do so, click **Delete**  of the respective shift.
- Click **Generate Report**.

## Sample Report

Head Count

Back

1 of 1

100%

MATRIX COMSEC PVT. LTD.

Shift-Wise Head Count For JANUARY-2013

Page 1 of 1

Run by: System Admin

Date: 06/29/2023 23:24

Shift

1

2

3

4

5

6

7

8

9

10

11

12

13

14

15

16

17

18

19

20

21

22

23

24

25

26

27

28

29

30

31

Monthly

Headcount

11-General Shift

1

1

1

1

1

1

1

1

1

1

1

1

1

1

1

1

1

1

1

1

1

1

1

1

1

1

1

1

1

1

1

1

25

21-Fac Gen Shift 2

2

22-Fac Saturday Shift

## Flexible Summary

This report provides a group wise list of the users with details of the Shortfall/Extra Hours and Days for the specified month and year.

Set the report filters as per requirement.

Flexible Summary	
For Month/Year: June 2023	
Optional Parameters	
Group By:	Organization
Flexible Target:	None
Organization Name in Header As Per:	User Selection
User Selection	
Select Users:	User Wise
User:	ID: Name
Generate Report For:	All Users
Generate Report	

- **For Month-Year:** Select the month and year for which the report is to be generated.

### Optional Parameters

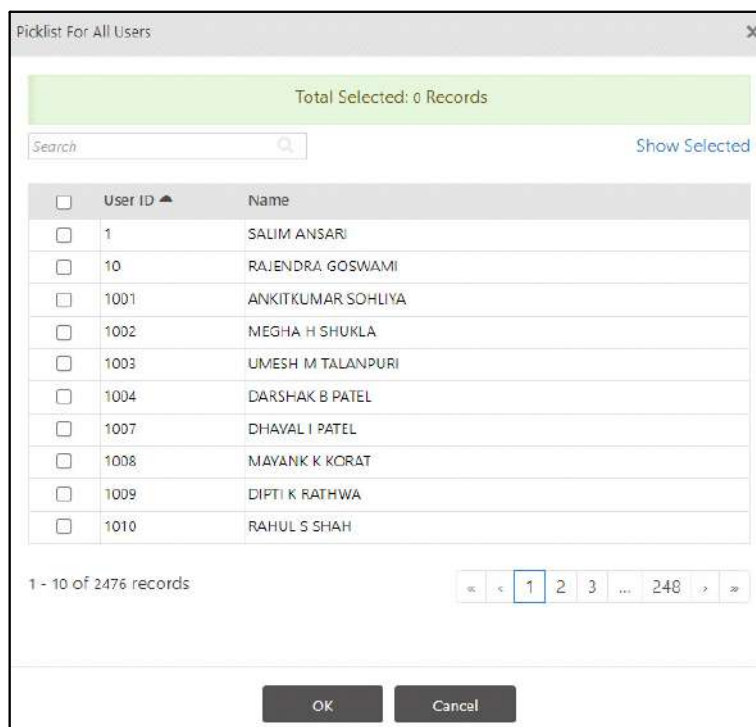
- **Group By:** Select the desired enterprise group from the drop-down list — Organization, Branch, Department, Section, Category, Grade, Designation, Custom Group1/2/3.
- **Flexible Target:** Select the desired option from the drop-down list— **None**, **Weekly** or **Monthly**.
- **Organization Name in Header As Per:** Select the desired option — User Selection or Customized Selection.

If you select **Customized Selection**, click **Customize Report Header**.

You can select the desired option from the drop-down list or can also add a new header according to your choice.

### User Selection

- **Select Users:** Select the desired option— **User Wise**, **Group Wise** or **All**
- If you select **User Wise**, click the **User** picklist. The **Picklist for All Users** pop-up appears



Picklist For All Users

Total Selected: 0 Records

Search  Show Selected

<input type="checkbox"/>	User ID	Name
<input type="checkbox"/>	1	SALIM ANSARI
<input type="checkbox"/>	10	RAJENDRA GOSWAMI
<input type="checkbox"/>	1001	ANKITKUMAR SOHLIYA
<input type="checkbox"/>	1002	MEGHA H SHUKLA
<input type="checkbox"/>	1003	UMESH M TALANPURI
<input type="checkbox"/>	1004	DARSHAK B PATEL
<input type="checkbox"/>	1007	DHAVAL I PATEL
<input type="checkbox"/>	1008	MAYANK K KORAT
<input type="checkbox"/>	1009	DIPTI K RATHWA
<input type="checkbox"/>	1010	RAHUL S SHAH

1 - 10 of 2476 records

1 2 3 ... 248

OK Cancel

- Select check boxes of the desired users. Click **OK**.

- The selected users appear in the grid

User ID ▲	Name	
1	SALIM ANSARI	
10	RAJENDRA GOSWAMI	
1001	ANKITKUMAR SOHLIYA	
1002	MEGHA H SHUKLA	

Generate Report For: All Users

Generate Report

- You can also delete the desired User. To do so, click **Delete** of the respective user.
- If you select **Group Wise** option, select the desired enterprise group from the drop-down list— Organization, Branch, Department, Section, Category, Grade, Designation, Custom Group1/2/3
- For each enterprise group — Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1/2/3, click the corresponding picklist to select the desired option/s.
- The selected Groups appear in the grid.

ID	Name	Group ▲	
1	MATRIX COMSEC PVT. LTD.	Organization	
2	SAMARTH	Organization	
3	AVDHOOT	Organization	
4	ELSENGARD	Organization	

Generate Report

- You can also delete particular group. To do so, click **Delete** of the respective group
- If you select **All**, then all users will be selected.
- **Generate Report For:** Select the desired option from the drop-down list— **All Users, Active Users** or **Inactive Users**.
- Click **Generate Report**.



## Sample Report

Run by:	System Admin	Date:	06/29/2023	23:28
Week No.	Target	Total Work Hours	Shortfall/Extra Hours	Shortfall Days
<b>TECH SERVICES</b>				
User	801	Anupam Sendhani		
Availed Grace Count:	0	Availed Grace Hours:	00:00	
Week1	51:00	29:08	21:52	3.0
Week2	51:00	36:25	14:35	2.0
Week3	34:00	24:25	09:35	1.5
Week4	51:00	36:00	15:00	2.0
Week5	00:00	00:00	00:00	0.0

## Registers

This section allows the user to generate detailed Attendance reports in various Register formats. The following reports fall under this category:

### Attendance Register

This report provides a group wise list of the users with Attendance details in two different Attendance Register Formats for the specified month and year.

Set the report filters as per requirement.

For Month-Year: June 2023

Include Archived Data: ☐

Optional Parameters:

Group By: Organization

Format Selection: Attendance Register 2

Organization Name in Header As Per: User Selection

User Selection:

Select Users: User Wise

User ID:  Name:

Generate Report For: All Users

Generate Report

- **For Month-Year:** Select the month and year for which the report is to be generated.
- **Include Archived Data:** Select the check box if you wish to include archived data for the Muster Roll report.

### Optional Parameters

- **Group By:** Select the desired enterprise group from the drop-down list — Organization, Branch, Department, Section, Category, Grade, Designation, Custom Group1/2/3.
- **Format Selection:** Select the desired option from the drop-down list— **Attendance Register 1** or **Attendance Register 2**

- **Organization Name in Header As Per:** Select the desired option — User Selection or Customized Selection.

If you select **Customized Selection**, click **Customize Report Header**.

You can select the desired option from the drop-down list or can also add a new header according to your choice.

## User Selection

- **Select Users:** Select the desired option — **User-Wise**, **Group Wise**, or **All**.
- If you select **User Wise**, click the **User** picklist. The **Picklist for All Users** pop-up appears.

Picklist For All Users

Total Selected: 0 Records

Search  Show Selected

<input type="checkbox"/>	User ID ▲	Name
<input type="checkbox"/>	1	SALIM ANSARI
<input type="checkbox"/>	10	RAJENDRA GOSWAMI
<input type="checkbox"/>	1001	ANKITKUMAR SOHLIYA
<input type="checkbox"/>	1002	MEGHA H SHUKLA
<input type="checkbox"/>	1003	UMESH M TALANPURI
<input type="checkbox"/>	1004	DARSHAK B PATEL
<input type="checkbox"/>	1007	DHAVAL I PATEL
<input type="checkbox"/>	1008	MAYANK K KORAT
<input type="checkbox"/>	1009	DIPTI K RATHWA
<input type="checkbox"/>	1010	RAHUL S SHAH

1 - 10 of 2476 records

OK Cancel

- Select check boxes of the desired users. Click **OK**.
- The selected Users appear in the grid.

Search

User ID ▲	Name	
1	SALIM ANSARI	
10	RAJENDRA GOSWAMI	
1001	ANKITKUMAR SOHLIYA	
1002	MEGHA H SHUKLA	

Generate Report For: All Users

Generate Report

- You can also delete the desired User. To do so, click **Delete** of the respective user.

- If you select **Group Wise** option, select the desired enterprise group from the drop-down list— Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1/2/3.
- For each enterprise group — Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1/2/3, click the corresponding picklist to select the desired option/s.
- The selected Groups appear in the grid.

Search <input type="text"/>			
ID	Name	Group	
1	MATRIX COMSEC PVT. LTD.	Organization	
2	SAMARTH	Organization	
3	AVDHOT	Organization	
4	ELSENGARD	Organization	
<div>Generate Report</div>			

- You can also delete particular group. To do so, click **Delete** of the respective group.
- If you select **All**, then all users will be selected.
- **Generate Report For:** Select the desired option from the drop-down list— **All Users, Active Users or Inactive Users.**
- Click **Generate Report.**

## Sample Report

Attendance Register

Back

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100%

MATRIX

MATRIX COMSEC PVT. LTD.

Organization-Wise Attendance Register For JANUARY-2013

Run by: System Admin

Date: 06/29/2023 23:50

Sr No	User ID	Name	Total														Date: 06/29/2023 23:50														
			PR	MD	PL	TR	AB	UL	PR	MD	LI	MD	OT	Auth OT	Auth C-OFF	WkHrs															
1	1	SALIN ANSARI	22.0	5	2	2.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	24:13	00:00	00:00	197:2														
Department: MANUFACTURING			Designation: Designation 1																												
Shifts	01	02	03	04	05	06	07	08	09	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31
IN	08:26	08:27	08:31	08:25	08:25	08:24	08:24	08:27	08:25	08:23	-	-	-	08:24	08:25	08:25	08:27	-	08:23	08:24	08:24	08:27	-	-	-	08:25	08:24	08:24	08:25	-	
OUT	17:01	17:01	17:00	16:00	17:01	17:02	17:00	17:02	17:00	16:17	-	-	-	17:01	17:59	18:00	17:01	-	19:01	19:02	19:19	19:00	-	-	-	19:02	21:39	21:30	22:14	-	
Brk Start	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
Brk End	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
Leave-IN	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
Early-OUT	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
WkHrs	08:05	07:14	08:05	07:05	08:21	04:04	07:07	08:07	08:17	07:07	-	-	-	07:44	08:42	08:42	07:52	-	09:43	09:44	08:04	09:50	-	-	-	09:44	12:37	12:34	13:13	-	
Overtime	-	-	-	-	-	-	-	-	-	-	-	-	-	-	02:00	01:01	02:01	02:02	-	02:02	04:38	04:30	05:14	-	-	-	-	-	-	-	
Auth OT	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
Auth C-OFF	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
Adj. Hours	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
Stat1	MD	PR	PR	PR	MD	PR	PR	PR	PR	PR	MD	PR	MD	PR	PR	PR	MD	PR	PR	PR	MD	PR	PR	PR	PR	PR	PR	PR	PR	PR	
Stat2	MD	PR	PR	PR	MD	PR	PR	PR	PR	PR	MD	PR	MD	PR	PR	PR	MD	PR	PR	PR	MD	PR	PR	PR	PR	PR	PR	PR	PR	PR	

CL-2

## Late-IN Register

This report provides a list of the users with details of the Late-IN days for the specified month and year.

Set the report filters as per requirement.

- **For Month-Year:** Select the month year to specify the time period for which the data is to be generated.

### Optional Parameters

- **Organization Name in Header As Per:** Select the desired option — User Selection or Customized Selection.

If you select **Customized Selection**, click **Customize Report Header**.

You can select the desired option from the drop-down list or can also add a new header according to your choice.

### User Selection

- **Select Users:** Select the desired option —**User-Wise**, **Group Wise**, or **All**.
- If you select **User Wise**, click the **User** picklist. The **Picklist for All Users** pop-up appears.

<input type="checkbox"/>	User ID	Name
<input type="checkbox"/>	1	SALIM ANSARI
<input type="checkbox"/>	10	RAJENDRA GOSWAMI
<input type="checkbox"/>	1001	ANKITKUMAR SOHLIYA
<input type="checkbox"/>	1002	MEGHA H SHUKLA
<input type="checkbox"/>	1003	UMESH M TALANPURI
<input type="checkbox"/>	1004	DARSHAK B PATEL
<input type="checkbox"/>	1007	DHAVAL I PATEL
<input type="checkbox"/>	1008	MAYANK K KORAT
<input type="checkbox"/>	1009	DIPTI K RATHWA
<input type="checkbox"/>	1010	RAHUL S SHAH


- Select check boxes of the desired users. Click **OK**.

- The selected Users appear in the grid.

User ID	Name
1	SALIM ANSARI
10	RAJENDRA GOSWAMI
1001	ANKITKUMAR SOHLIYA
1002	MEGHA H SHUKLA


Generate Report For: All Users

Generate Report

- You can also delete the desired User. To do so, click **Delete**  of the respective user.
- If you select **Group Wise** option, select the desired enterprise group from the drop-down list— Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1/2/3.
- For each enterprise group — Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1/2/3, click the corresponding picklist to select the desired option/s.
- The selected Groups appear in the grid.

ID	Name	Group
1	MATRIX COMSEC PVT. LTD.	Organization
2	SAMARTH	Organization
3	AV/DHCOT	Organization
4	ELSENGARD	Organization

Generate Report

- You can also delete particular group. To do so, click **Delete**  of the respective group.
- If you select **All**, then all users will be selected.
- **Generate Report For:** Select the desired option from the drop-down list— **All Users, Active Users** or **Inactive Users**.
- Click **Generate Report**.



- If you select **User Wise**, click the **User** picklist. The **Picklist for All Users** pop-up appears.

Picklist For All Users

Total Selected: 0 Records

Search  Show Selected

<input type="checkbox"/>	User ID	Name
<input type="checkbox"/>	1	SALIM ANSARI
<input type="checkbox"/>	10	RAJENDRA GOSWAMI
<input type="checkbox"/>	1001	ANKITKUMAR SOHLIYA
<input type="checkbox"/>	1002	MEGHA H SHUKLA
<input type="checkbox"/>	1003	UMESH M TALANPURI
<input type="checkbox"/>	1004	DARSHAK B PATEL
<input type="checkbox"/>	1007	DHAVAL I PATEL
<input type="checkbox"/>	1008	MAYANK K KORAT
<input type="checkbox"/>	1009	DIPTI K RATHWA
<input type="checkbox"/>	1010	RAHUL S SHAH

1 - 10 of 2476 records

OK Cancel

- Select check boxes of the desired users. Click **OK**.
- The selected Users appear in the grid.

Search

User ID	Name	
1	SALIM ANSARI	
10	RAJENDRA GOSWAMI	
1001	ANKITKUMAR SOHLIYA	
1002	MEGHA H SHUKLA	

Generate Report For: All Users

Generate Report

- You can also delete the desired User. To do so, click **Delete** of the respective user.
- If you select **Group Wise** option, select the desired enterprise group from the drop-down list— Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1/2/3.
- For each enterprise group — Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1/2/3, click the corresponding picklist to select the desired option/s.





## Optional Parameters

- **Organization Name in Header As Per:** Select the desired option — User Selection or Customized Selection.

If you select **Customized Selection**, click **Customize Report Header**.

You can select the desired option from the drop-down list or can also add a new header according to your choice.

## User Selection

- **Select Users:** Select the desired option — **User-Wise**, **Group Wise**, or **All**.
- If you select **User Wise**, click the **User** picklist. The **Picklist for All Users** pop-up appears.

Picklist For All Users

Total Selected: 0 Records

Search  Show Selected

<input type="checkbox"/>	User ID	Name
<input type="checkbox"/>	1	SALIM ANSARI
<input type="checkbox"/>	10	RAJENDRA GOSWAMI
<input type="checkbox"/>	1001	ANKITKUMAR SOHLIYA
<input type="checkbox"/>	1002	MEGHA H SHUKLA
<input type="checkbox"/>	1003	UMESH M TALANPURI
<input type="checkbox"/>	1004	DARSHAK B PATEL
<input type="checkbox"/>	1007	DHAVAL I PATEL
<input type="checkbox"/>	1008	MAYANK K KORAT
<input type="checkbox"/>	1009	DIPTI K RATHWA
<input type="checkbox"/>	1010	RAHUL S SHAH

1 - 10 of 2476 records

1 2 3 ... 248

OK Cancel


- Select check boxes of the desired users. Click **OK**.
- The selected Users appear in the grid.

Search

User ID	Name
1	SALIM ANSARI
10	RAJENDRA GOSWAMI
1001	ANKITKUMAR SOHLIYA
1002	MEGHA H SHUKLA


Generate Report For: All Users

Generate Report

- You can also delete the desired User. To do so, click **Delete**  of the respective user.

- If you select **Group Wise** option, select the desired enterprise group from the drop-down list— Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1/2/3.
- For each enterprise group — Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1/2/3, click the corresponding picklist to select the desired option/s.
- The selected Groups appear in the grid.

Search			
ID	Name	Group	
1	MATRIX COMSEC PVT. LTD.	Organization	
2	SAMARTH	Organization	
3	AVDHOT	Organization	
4	ELSENGARD	Organization	
Generate Report			

- You can also delete particular group. To do so, click **Delete**  of the respective group.
- If you select **All**, then all users will be selected.
- **Generate Report For:** Select the desired option from the drop-down list— **All Users, Active Users** or **Inactive Users**.
- Click **Generate Report**.

## Sample Report

Overtime Register

Back

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MATRIX

MATRIX COMSEC PVT. LTD.  
Overtime Register For JANUARY-2013

Page 1 of 2

Run by: System Admin

Date: 07/02/2023 20:49

Sr No	User ID	Name	Department	Designation	Total OT
1	1	SALIN ANSARI	MANUFACTURING	Designation 1	24:23

	01	02	03	04	05	06	07	08	09	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31		
Shifts	28	29	28	29	22	22	29	28	28	29	28	22	22	28	28	28	28	28	28	22	22	28	29	28	28	28	28	22	28	29	28	29	31
IR	-	08:24	08:27	08:31	08:25	-	08:28	08:26	08:26	08:27	08:26	08:25	-	-	-	08:26	08:26	08:26	08:27	-	08:23	08:24	08:24	08:27	-	-	-	08:26	08:26	08:26	08:31		
DOT	-	17:01	17:01	17:00	16:00	-	17:01	17:02	17:00	17:02	17:00	16:17	-	-	-	17:01	17:09	16:00	17:01	-	19:01	19:02	16:19	19:00	-	-	-	19:02	21:33	21:30	22:14		
Overtime	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	02:00	02:01	-	02:01	02:02	-	02:00	-	-	-	-		
Authorized	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-		
Credits	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-		
Debit	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-		
Available	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-		

## Yearly Reports

This section allows the user to generate detailed Performance report in various formats. The following reports fall under this category:

### Yearly Performance

This report provides a list of the users with a monthly summary of Attendance details during the specified time period.

Set the report filters as per requirement.

- **For Month-Year:** Select the month year to specify the time period for which the data is to be generated.

### Optional Parameters

- **Format Selection:** Select the desired option from the drop-down list— **Format 1** or **Format 2**
- **Organization Name in Header As Per:** Select the desired option — User Selection or Customized Selection.

If you select **Customized Selection**, click **Customize Report Header**.

You can select the desired option from the drop-down list or can also add a new header according to your choice.

### User Selection

- **Select Users:** Select the desired option —**User-Wise**, **Group Wise**, or **All**.
- If you select **User Wise**, click the **User** picklist. The **Picklist for All Users** pop-up appears.

<input type="checkbox"/>	User ID	Name
<input type="checkbox"/>	1	SALIM ANSARI
<input type="checkbox"/>	10	RAJENDRA GOSWAMI
<input type="checkbox"/>	1001	ANKITKUMAR SOHLIYA
<input type="checkbox"/>	1002	MEGHA H SHUKLA
<input type="checkbox"/>	1003	UMESH M TALANPURI
<input type="checkbox"/>	1004	DARSHAK B PATEL
<input type="checkbox"/>	1007	DHAYAL I PATEL
<input type="checkbox"/>	1008	MAYANK K KORAT
<input type="checkbox"/>	1009	DIPTI K RATHWA
<input type="checkbox"/>	1010	RAHUL S SHAH

- Select check boxes of the desired users. Click **OK**.

- The selected Users appear in the grid.

User ID	Name	
1	SALIM ANSARI	
10	RAJENDRA GOSWAMI	
1001	ANKITKUMAR SOHLIYA	
1002	MEGHA H SHUKLA	

Generate Report For: All Users

Generate Report

- You can also delete the desired User. To do so, click **Delete** of the respective user.
- If you select **Group Wise** option, select the desired enterprise group from the drop-down list— Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1/2/3.
- For each enterprise group — Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1/2/3, click the corresponding picklist to select the desired option/s.
- The selected Groups appear in the grid.

ID	Name	Group	
1	MATRIX COMSEC PVT. LTD.	Organization	
2	SAMARTH	Organization	
3	AVDHICOT	Organization	
4	ELSENGARD	Organization	

Generate Report

- You can also delete particular group. To do so, click **Delete** of the respective group.
- If you select **All**, then all users will be selected.
- **Generate Report For:** Select the desired option from the drop-down list— **All Users, Active Users** or **Inactive Users**.
- Click **Generate Report**

## Sample Report

The screenshot shows a 'Yearly Performance' report for SALIM ANSARI, a user in the MANUFACTURING department. The report is for the year 2023, from January to July. It includes a summary table with columns for months and rows for various performance metrics. Below the summary table, there are detailed metrics for PR, MD, PL, TR, LE, and OT.

	JAN	FEB	MAR	APR	MAY	JUN	JUL
PR	22.0	19.0	24.5	23.5	21.5	25.0	20.0
MD	5.0	3.0	4.0	4.0	4.0	4.0	5.0
PL	2.0	0.0	1.0	0.0	0.0	0.0	0.0
TR	2.0	2.0	0.0	0.5	5.5	1.0	1.0
LE	0.0	0.0	0.0	0.0	0.0	0.0	0.0
OT	0.0	4.0	1.5	0.0	0.0	0.0	5.0
Work Hrs	197:21	178:19	241:58	199:51	186:06	207:28	171:18
Loss	00:00	00:00	00:00	00:00	00:00	00:00	00:00
OT	00:00	00:00	00:00	00:00	00:00	00:00	00:00

PR:	155.5	MD:	31	PL:	3	TR:	0.0	PL:	12.0	AB:	10.5	UL:	0.0	Loss:	00:00
OT:	00:00	Workhrs:	1381:51												

## User Defined Reports

This section allows the user to generate user defined attendance reports. The following reports fall under this category:

### Muster Roll



Use the “[Attendance Status Template](#)” option in this section to customize the Output Code for different Attendance Status combinations for First and Second Half. Output Codes defined here will reflect accordingly in the User-defined **Muster Roll** report.

This report provides a group wise list of the users with details of the Muster Roll with user defined attendance status for the specified month and year.

Set the report filters as per requirement.

The screenshot shows the 'Muster Roll' report generation interface. It includes a 'For Month-Year' dropdown set to 'July 2023'. Under 'Optional Parameters', there is a 'Display Legend On' section with checkboxes for 'First Page', 'Last Page', and 'All Pages'. Below this is a 'User Selection' section with a 'User Wise' dropdown and input fields for 'User ID' and 'Name'. At the bottom, there is a 'Generate Report' button.

- **For Month-Year:** Select the month year to specify the time period for which the data is to be generated.

### Optional Parameters

- **Display Legend On:** Select the check boxes of the desired option— **First Page**, **Last Page** or **All pages**.

- **Organization Name in Header As Per:** Select the desired option — User Selection or Customized Selection.

If you select **Customized Selection**, click **Customize Report Header**.

You can select the desired option from the drop-down list or can also add a new header according to your choice.

## User Selection

- **Select Users:** Select the desired option —**User-Wise**, **Group Wise**, or **All**.
- If you select **User Wise**, click the **User** picklist. The **Picklist for All Users** pop-up appears.

Picklist For All Users

Total Selected: 0 Records

Search  Show Selected

<input type="checkbox"/>	User ID	Name
<input type="checkbox"/>	1	SALIM ANSARI
<input type="checkbox"/>	10	RAJENDRA GOSWAMI
<input type="checkbox"/>	1001	ANKITKUMAR SOHLIYA
<input type="checkbox"/>	1002	MEGHA H SHUKLA
<input type="checkbox"/>	1003	UMESH M TALANPURI
<input type="checkbox"/>	1004	DARSHAK B PATEL
<input type="checkbox"/>	1007	DHAVAL I PATEL
<input type="checkbox"/>	1008	MAYANK K KORAT
<input type="checkbox"/>	1009	DIPTI K RATHWA
<input type="checkbox"/>	1010	RAHUL S SHAH

1 - 10 of 2476 records

1 2 3 ... 248 29

OK Cancel

- Select check boxes of the desired users. Click **OK**.
- The selected Users appear in the grid.

Search

User ID	Name	
1	SALIM ANSARI	
10	RAJENDRA GOSWAMI	
1001	ANKITKUMAR SOHLIYA	
1002	MEGHA H SHUKLA	


Generate Report For: All Users

Generate Report

- You can also delete the desired User. To do so, click **Delete** of the respective user.
- If you select **Group Wise** option, select the desired enterprise group from the drop-down list—Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1/2/3.

- For each enterprise group — Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1/2/3, click the corresponding picklist to select the desired option/s.
- The selected Groups appear in the grid.

Search			
ID	Name	Group	
1	MATRIX COMSEC PVT. LTD.	Organization	
2	SAMARTH	Organization	
3	AVDHOT	Organization	
4	ELSENGARD	Organization	
Generate Report			

- You can also delete particular group. To do so, click **Delete**  of the respective group.
- If you select **All**, then all users will be selected.
- Generate Report For:** Select the desired option from the drop-down list— **All Users, Active Users** or **Inactive Users**.
- Click **Generate Report**.

## Sample Report

Muster Roll

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MATRIX

MATRIX COMSEC PVT. LTD.

Muster Roll For JANUARY-2013

Page 2 of 65

Run by: System Admin

Date: 07/02/2023 21:48

Sr No	User ID	Name	Designation	PR	WO	PH	PL	TR	AB	UL
ACCOUNTS & FINANCE										
1	1003	UMESH M TALANPURI	Designation 1	23.0	6.00	1.00	0.5	0.5	0.0	0.0
Shift	GS	GS	GS	GS	GS	GS	GS	GS	GS	GS
Status	P	P	P	P	P	WO	P	P	P	???

2	1077	ANIL TAILOR	Designation 1	24.0	6.00	1.00	0.0	0.0	0.0	0.0
Shift	GS	GS	GS	GS	GS	GS	GS	GS	GS	GS
Status	P	P	P	P	P	WO	P	P	P	P

3	1083	JAY K DOSHI	Designation 1	21.0	6.00	1.00	2.5	0.0	0.0	0.5
Shift	GS	GS	GS	GS	GS	GS	GS	GS	GS	GS
Status	???	???	P	P	P	WO	P	P	P	P

4	184	MRUGESH PATEL	Designation 1	24.0	6.00	1.00	0.0	0.0	0.0	0.0
Shift	GS	GS	GS	GS	GS	GS	GS	GS	GS	GS
Status	P	P	P	P	P	WO	P	P	P	P

## Custom Attendance Register

This report provides a group wise list of the users with customized details of the Attendance during the specified time period.

Set the report filters as per requirement.

- **Attendance Period:** Select the attendance period format and specify the month and year or to and from date for which the report is to be generated.

### Optional Parameters

- **Available Fields:** Select the check boxes for the desired fields to be included in the report. Click **Add** to add the selected fields to the **Selected Fields** list.
- **Selected Fields:** Select the check boxes for the desired fields to be removed from the report. Click **Remove** to remove the selected fields from the list.
- **Organization Name in Header As Per:** Select the desired option — User Selection or Customized Selection.

If you select **Customized Selection**, click **Customize Report Header**.

You can select the desired option from the drop-down list or can also add a new header according to your choice.

### User Selection

- **Select Users:** Select the desired option— **User Wise**, **Group Wise** or **All**



- If you select **User Wise**, click the **User** picklist. The **Picklist for All Users** pop-up appears

Picklist For All Users

Total Selected: 0 Records

Search  Show Selected

<input type="checkbox"/>	User ID	Name
<input type="checkbox"/>	1	SALIM ANSARI
<input type="checkbox"/>	10	RAJENDRA GOSWAMI
<input type="checkbox"/>	1001	ANKITKUMAR SOHLIYA
<input type="checkbox"/>	1002	MEGHA H SHUKLA
<input type="checkbox"/>	1003	UMESH M TALANPURI
<input type="checkbox"/>	1004	DARSHAK B PATEL
<input type="checkbox"/>	1007	DHAVAL I PATEL
<input type="checkbox"/>	1008	MAVANK K KORAT
<input type="checkbox"/>	1009	DIPTI K RATHWA
<input type="checkbox"/>	1010	RAHUL S SHAH

1 - 10 of 2476 records

1 2 3 ... 248

OK Cancel

- Select check boxes of the desired users. Click **OK**.
- The selected Users appear in the grid.

Search

User ID	Name	
1	SALIM ANSARI	
10	RAJENDRA GOSWAMI	
1001	ANKITKUMAR SOHLIYA	
1002	MEGHA H SHUKLA	

Generate Report For: All Users


Generate Report

- You can also delete the desired User. To do so, click **Delete** of the respective user.
- If you select **Group Wise** option, select the desired enterprise group from the drop-down list— Organization, Branch, Department, Section, Category, Grade, Designation, Custom Group1/2/3
- For each enterprise group — Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1/2/3, click the corresponding picklist to select the desired option/s.

- The selected Groups appear in the grid.

ID	Name	Group	
1	MATRIX COMSEC PVT. LTD.	Organization	
2	SAMARTH	Organization	
3	AWDHOT	Organization	
4	ELSENGARD	Organization	

Generate Report

- You can also delete particular group. To do so, click **Delete**  of the respective group
- If you select **All**, then all users will be selected.
- Generate Report For:** Select the desired option from the drop-down list— **All Users, Active Users or Inactive Users.**
- Click **Generate Report.**

Sample Report.

CUSTOM ATTENDANCE REGISTER		MATRIX COMSEC PVT. LTD.		Custom Attendance Register For JANUARY-2013		Date: 07/02/2023 22:05						
Run by: System Admin		Page 1 of 149										
Sr No	User ID	Name	Department	Designation	Branch	PR	MD	PL	TR	AB	OT	WkHrs
1	1	SALIM ANSARI	MANUFACTURING	Designation 1	FACTORY	22.0	5	2	2.0	0.0	0.0	197.21
Shift	28	28	28	28	28	28	28	28	28	28	28	28
Shift Start Time	00:30	00:30	00:30	00:30	00:30	00:30	00:30	00:30	00:30	00:30	00:30	00:30
Shift End Time	17:00	17:00	17:00	17:00	17:00	17:00	17:00	17:00	17:00	17:00	17:00	17:00
First In	08:24	08:24	08:24	08:24	08:24	08:24	08:24	08:24	08:24	08:24	08:24	08:24
First Out	17:01	17:01	17:01	17:01	17:01	17:01	17:01	17:01	17:01	17:01	17:01	17:01
Break In	00:00	00:00	00:00	00:00	00:00	00:00	00:00	00:00	00:00	00:00	00:00	00:00
Break Out	00:00	00:00	00:00	00:00	00:00	00:00	00:00	00:00	00:00	00:00	00:00	00:00
Late In	00:00	00:00	00:00	00:00	00:00	00:00	00:00	00:00	00:00	00:00	00:00	00:00
Late Out	00:00	00:00	00:00	00:00	00:00	00:00	00:00	00:00	00:00	00:00	00:00	00:00
WkHrs	00:00	00:00	00:00	00:00	00:00	00:00	00:00	00:00	00:00	00:00	00:00	00:00
OverTime	00:00	00:00	00:00	00:00	00:00	00:00	00:00	00:00	00:00	00:00	00:00	00:00
Shift	PR	PR	PR	PR	PR	PR	PR	PR	PR	PR	PR	PR
Shift	MD	MD	MD	MD	MD	MD	MD	MD	MD	MD	MD	MD

## Attendance Status Template

The Attendance Status Template allows you to create Attendance Status and configure the desired Output Code for the same. You can also customize the Output Code for different combinations of First Half and Second Half by selecting the status.

Attendance Status Template		Search	
ID	1	First Half	Second Half
Output Status Length	4	PL	PL
Attendance Status	PL-ABD LEAVE	PL	PL
Output Code	PL	PL	PL
		PR	PR
		AB	AB
		AB	AB
		IN	AB
		WO	WO
		TR	TR
		PH	PH


Click **Add**  to add a new Attendance Template. Configure the following parameters:

- **ID:** This field is un-editable as the ID is assigned automatically.
- **Output Status Length:** Select the desired maximum length of characters that can be configured as the Output Code.
- **Attendance Status:** Select the desired Attendance Status for First Half from the first drop-down list and for Second Half from the second drop-down list.

Once you select the Attendance Status, click **Select Reason** and click again to select the desired reason from the list. The list of reasons varies according to the selected Attendance Status.

The selected reason appears in the text box.


- **Output Code:** Specify the Output Code to be displayed in the reports for the selected Attendance Status.


Click **Save**  to save the configuration. The new Attendance Template appears in the list on the right hand side.



First Half	Second Half	Output Code
PL	PL	PL
PR	AB	AB
PR	PR	PR
AB	PR	AB
AB	AB	AB
IN	AB	AB
WO	WO	WO
TR	TR	TR
PH	PH	PH
CL	CL	CL

You can edit or delete the desired Attendance Template.

Click **Edit**  to edit the Template.

Click **Delete**  to delete the Template.

## Statutory Reports

This section allows the user to generate reports based on the requirement of certain governmental organizations that are required to follow statutory formats for the employee data. The following reports fall under this category:

### Form T

The Form T is based on the statutory norms of government monthly attendance summary register. This report provides a group wise list of the users with details of the Attendance for the specified month and year.

Set the report filters as per requirement.

Form T

For Month-Year: July 2023

Custom Attendance Period: ☐

Month Start-End Date: 2 End Date

Optional Parameters

Message: 500 Chom

Organization Name: 700 Chom

Organization Address: 700 Chom

Leave: ID Name

ID	Name
CL	CASUAL LEAVE
CO	C-off
ML	MATERNITY LEAVE
PL	PAID LEAVE

Save

User Selection

Select Users: User Wise

User: ID Name

Generate Report For: All Users

Generate Report

- **For Month-Year:** Select the month year to specify the time period for which the data is to be generated.
- **Custom Attendance Period:** Select the check box if you wish to customize the month Month Start-End Date.
- **Month Start-End Date:** Select the desired Start Date for the month. The End Date automatically appears besides the Start Date.

#### Optional Parameters

- **Message:** Specify the message details as per requirement.
- **Organization Name:** Specify the Organization Name as per requirement.
- **Organization Address:** Specify the Organization Address as per requirement.

- **Leave:** Click the **Leave** picklist. The **Picklist For Leave Masters** pop-up appears.

Picklist For Leave Masters

Total Selected: 2 Records

Search Show Selected

☐ Select All

<input type="checkbox"/> LeavID ▲	Name
<input type="checkbox"/> CL	CASUAL LEAVE
<input type="checkbox"/> CO	C-off
<input type="checkbox"/> L1	Leave Type 1
<input type="checkbox"/> L2	Leave Type 2
<input type="checkbox"/> L3	Leave Type 3
<input type="checkbox"/> L4	Leave Type 4
<input type="checkbox"/> L5	Leave Type 5
<input type="checkbox"/> L6	Leave Type 6
<input type="checkbox"/> L7	Leave Type 7
<input type="checkbox"/> L8	Leave Type 8

1 - 10 of 13 records

« < 1 2 > »

OK Cancel

- You can either select particular leave types or can select all the leave types at once.
- To select particular leave type, select the check boxes of the desired leave types.

Picklist For Leave Masters

Total Selected: 4 Records

Search Show Selected

☐ Select All

<input type="checkbox"/> LeavID ▲	Name
<input checked="" type="checkbox"/> CL	CASUAL LEAVE
<input checked="" type="checkbox"/> CO	C-off
<input type="checkbox"/> L1	Leave Type 1
<input type="checkbox"/> L2	Leave Type 2
<input type="checkbox"/> L3	Leave Type 3
<input type="checkbox"/> L4	Leave Type 4
<input type="checkbox"/> L5	Leave Type 5
<input type="checkbox"/> L6	Leave Type 6
<input type="checkbox"/> L7	Leave Type 7
<input type="checkbox"/> L8	Leave Type 8

1 - 10 of 13 records

« < 1 2 > »

OK Cancel

OR

- To select all the leave types at once, select the **Select All** check box. The leaves types on all the pages will be selected.

Picklist For Leave Masters

Total Selected: 13 Records

Search  Show Selected

☒ Select All

LeaveID	Name
<input checked="" type="checkbox"/> CL	CASUAL LEAVE
<input checked="" type="checkbox"/> CO	C-off
<input checked="" type="checkbox"/> L1	Leave Type 1
<input checked="" type="checkbox"/> L2	Leave Type 2
<input checked="" type="checkbox"/> L3	Leave Type 3
<input checked="" type="checkbox"/> L4	Leave Type 4
<input checked="" type="checkbox"/> L5	Leave Type 5
<input checked="" type="checkbox"/> L6	Leave Type 6
<input checked="" type="checkbox"/> L7	Leave Type 7
<input checked="" type="checkbox"/> L8	Leave Type 8

1 - 10 of 13 records

OK Cancel

- Click **OK**.
- The selected leave types appears in the grid.

ID	Name	
CL	CASUAL LEAVE	
CO	C-off	
L1	Leave Type 1	

Save

- Click **Save** to save the configurations.

## User Selection

- **Select Users:** Select the desired option —**User-Wise**, **Group Wise**, or **All**.

- If you select **User Wise**, click the **User** picklist. The **Picklist for All Users** pop-up appears.

Picklist For All Users

Total Selected: 0 Records

Search  Show Selected

<input type="checkbox"/>	User ID ▲	Name
<input type="checkbox"/>	1	SALIM ANSARI
<input type="checkbox"/>	10	RAJENDRA GOSWAMI
<input type="checkbox"/>	1001	ANKITKUMAR SOHLIYA
<input type="checkbox"/>	1002	MEGHA H SHUKLA
<input type="checkbox"/>	1003	UMESH M TALANPURI
<input type="checkbox"/>	1004	DARSHAK B PATEL
<input type="checkbox"/>	1007	DHAVAL I PATEL
<input type="checkbox"/>	1008	MAYANK K KORAT
<input type="checkbox"/>	1009	DIPTI K RATHWA
<input type="checkbox"/>	1010	RAHUL S SHAH

1 - 10 of 2476 records

1 2 3 ... 248

OK Cancel

- Select check boxes of the desired users. Click **OK**.
- The selected Users appear in the grid.

Search

User ID ▲	Name	
1	SALIM ANSARI	
10	RAJENDRA GOSWAMI	
1001	ANKITKUMAR SOHLIYA	
1002	MEGHA H SHUKLA	

Generate Report For: All Users

Generate Report

- You can also delete the desired User. To do so, click **Delete** of the respective user.
- If you select **Group Wise** option, select the desired enterprise group from the drop-down list—Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1/2/3.
- For each enterprise group — Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1/2/3, click the corresponding picklist to select the desired option/s.

- The selected Groups appear in the grid.

Search <input type="text"/>			
ID	Name	Group	
1	MATRIX COMSEC PVT. LTD.	Organization	
2	SAMARTH	Organization	
3	AVDHOT	Organization	
4	ELSENGARD	Organization	
<div>Generate Report</div>			

- You can also delete particular group. To do so, click **Delete** of the respective group.
- If you select **All**, then all users will be selected.
- Generate Report For:** Select the desired option from the drop-down list— **All Users, Active Users** or **Inactive Users**.
- Click **Generate Report**.

## Sample Report

Form T

1

Back

1 of 25

100%

Master Roll

Wages Period From: 01/01/2013 To: 01/31/2013

Sr. No	Ref. No	Name Designation	Daily Attendance																															Total Attendance						
			1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	PR	AD	ML	TOT			
1	1	SALIM ANSARI Designation 1	WO	PR	PR	PR	PR	WO	PR	PR	PR	PR	PR	PR	PR	WO	PR	PR	PR	PR	PR	PR	PR	PR	PR	PR	PR	PR	PR	PR	PR	PR	PR	PR	22.0	WO	5	PR	2	TOT
																																		AD	0.0	CL	2	CD	0	
																																		ML	0	PL	0		31	
2	10	RAJENDRA GOSWAMI Designation 1	WO	PR	PR	PR	CL	WO	PR	PR	PR	PR	PR	PR	PR	WO	PR	PR	PR	PR	PR	PR	PR	PR	PR	PR	PR	PR	PR	PR	PR	PR	PR	PR	22.5	WO	3	PR	2	TOT
																																		AD	0.0	CL	1.5	CD	0	
																																		ML	0	PL	0		31	
3	1001	ANKITKUMAR SCHLIYA Designation 1	PR	PR	PR	PR	PR	WO	PR	PR	PR	PR	PR	PR	PR	WO	PR	PR	PR	PR	PR	PR	PR	PR	PR	PR	PR	PR	PR	PR	PR	PR	PR	PR	23.5	WO	6	PR	1	TOT
																																		AD	0.0	CL	0.5	CD	0	
																																		ML	0	PL	0		31	
4	1002	MEGHNA H SHUKLA Designation 1	PR	PR	PR	PR	WO	PR	PR	PR	PR	PR	PR	PR	PR	WO	PR	PR	PR	PR	PR	PR	PR	PR	PR	PR	PR	PR	PR	PR	PR	PR	PR	PR	22.0	WO	4	PR	1	TOT
																																		AD	0.0	CL	2	CD	0	
																																		ML	0	PL	0		31	
5	1003	UMESH M TALAKPURI Designation 1	PR	PR	PR	PR	WO	PR	PR	PR	PR	PR	PR	PR	PR	WO	PR	PR	PR	PR	PR	PR	PR	PR	PR	PR	PR	PR	PR	PR	PR	PR	PR	PR	23.0	WO	6	PR	1	TOT
																																		AD	0.0	CL	0.5	CD	0	
																																		ML	0	PL	0		31	

## Form 18

The Form 18 is based on the statutory norms of government yearly leave wage register. This report provides a group wise list of the users with details of the Attendance for the year.

Set the report filters as per requirement.



Form 10

For Year: 2022

Custom Attendance Period: ☐

Year Start-End Month: February End Month:

Optional Parameters

Header Message: FORM 10

Organization Name: Matrix ComSec

Organization Address: Makarpara QIDC, Vadodra

Leave:

ID	Name
CO	C-off
PL	PAID LEAVE

Footer Message: Have a nice day

Save

User Selection

Select Users: User Wise

User\*: ID Name

Generate Report For: All Users

Generate Report

- **For Month-Year:** Select the desired year for which report is to be generated.
- **Custom Attendance Period:** Select the check box if you want to customize the Year Start-End Month.
- **Year Start-End Month:** Select the desired Start Month for the year. The End Month automatically appears besides the Start Month.

#### Optional Parameters

- **Header Message:** Specify the header message details as per requirement.
- **Organization Name:** Specify the Organization Name as per requirement.
- **Organization Address:** Specify the Organization Address as per requirement.

- **Leave:** Click the **Leave** picklist. The **Picklist For Leave Masters** pop-up appears.

Picklist For Leave Masters

Total Selected: 1 Records

Search  Show Selected

☐ Select All

<input type="checkbox"/>	LeaveID ▲	Name
<input checked="" type="checkbox"/>	CL	CASUAL LEAVE
<input type="checkbox"/>	CO	C-off
<input type="checkbox"/>	L1	Leave Type 1
<input type="checkbox"/>	L2	Leave Type 2
<input type="checkbox"/>	L3	Leave Type 3
<input type="checkbox"/>	L4	Leave Type 4
<input type="checkbox"/>	L5	Leave Type 5
<input type="checkbox"/>	L6	Leave Type 6
<input type="checkbox"/>	L7	Leave Type 7
<input type="checkbox"/>	L8	Leave Type 8

1 - 10 of 13 records

OK Cancel

- You can either select particular Leave types or can select all the Leave types at once.
- To select particular Leave types, select the check boxes of the desired Leave types.

Picklist For Leave Masters

Total Selected: 4 Records

Search  Show Selected

☐ Select All

<input type="checkbox"/>	LeaveID ▲	Name
<input checked="" type="checkbox"/>	CL	CASUAL LEAVE
<input checked="" type="checkbox"/>	CO	C-off
<input checked="" type="checkbox"/>	L1	Leave Type 1
<input type="checkbox"/>	L2	Leave Type 2
<input type="checkbox"/>	L3	Leave Type 3
<input type="checkbox"/>	L4	Leave Type 4
<input type="checkbox"/>	L5	Leave Type 5
<input type="checkbox"/>	L6	Leave Type 6
<input type="checkbox"/>	L7	Leave Type 7
<input type="checkbox"/>	L8	Leave Type 8

1 - 10 of 13 records

OK Cancel

**OR**

- To select all the Leave types at once, select the **Select All** check box. The Leave types on all the pages will be selected.

Picklist For Leave Masters

Total Selected: 13 Records

Search  Show Selected

☒ Select All

<input checked="" type="checkbox"/>	LeaveID ▲	Name
<input checked="" type="checkbox"/>	CL	CASUAL LEAVE
<input checked="" type="checkbox"/>	CO	C-off
<input checked="" type="checkbox"/>	L1	Leave Type 1
<input checked="" type="checkbox"/>	L2	Leave Type 2
<input checked="" type="checkbox"/>	L3	Leave Type 3
<input checked="" type="checkbox"/>	L4	Leave Type 4
<input checked="" type="checkbox"/>	L5	Leave Type 5
<input checked="" type="checkbox"/>	L6	Leave Type 6
<input checked="" type="checkbox"/>	L7	Leave Type 7
<input checked="" type="checkbox"/>	L8	Leave Type 8

1 - 10 of 13 records

OK Cancel

- Click **OK**.
- The selected Leave types appears in the grid.

Leave: ID  Name

ID ▲	Name	
CL	CASUAL LEAVE	
CO	C-off	
L1	Leave Type 1	
L2	Leave Type 2	

Footer Message:

Save

- You can also delete the desired Leave type. To do so, click **Delete** of the respective Leave type.
- **Footer Message:** Specify the footer message details as per requirement.

Header Message:

Organization Name:

Organization Address:

Leave: ID  Name

ID ▲	Name	
CL	CASUAL LEAVE	
CO	C-off	
L1	Leave Type 1	
L2	Leave Type 2	

Footer Message:

Save

- Click **Save** to save the configurations.

## User Selection

- **Select Users:** Select the desired option— **User-Wise**, **Group Wise**, or **All**.
- If you select **User-Wise**, click **User** picklist. The **Picklist For All Users** pop-up appears.

Picklist For All Users

Total Selected: 0 Records

Search

<input type="checkbox"/>	User ID ▲	Name
<input type="checkbox"/>	1	SALIM ANSARI
<input type="checkbox"/>	10	RAJENDRA GOSWAMI
<input type="checkbox"/>	1001	ANKITKUMAR SOHLIYA
<input type="checkbox"/>	1002	MEGHA H SHUKLA
<input type="checkbox"/>	1003	UMESH M TALANPURI
<input type="checkbox"/>	1004	DARSHAK B PATEL
<input type="checkbox"/>	1007	DHAWALI PATEL
<input type="checkbox"/>	1008	MAYANK K KORAT
<input type="checkbox"/>	1009	DIPTI K RATHWA
<input type="checkbox"/>	1010	RAHUL S SHAH

1 - 10 of 1986 records

OK Cancel

- Select the desired check boxes from the list. Click **OK**.
- The selected users appear in the grid.

Select Users

User Wise

User

Search

User ID ▲	Name	
1	SALIM ANSARI	
10	RAJENDRA GOSWAMI	
1001	ANKITKUMAR SOHLIYA	

Apply

- You can also delete the desired Users. To do so, click **Delete** of the respective user.
- If you select **Group Wise** option, select the desired enterprise group — Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1/2/3.
- For each enterprise group — Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1/2/3, click the corresponding picklist to select the desired option/s.

- The selected Groups appear in the grid.

Search <input type="text"/>			
ID	Name	Group	
1	MATRIX COMSEC PVT. LTD.	Organization	
2	SAMARTH	Organization	
3	AVDHOT	Organization	
4	ELSENGARD	Organization	
Generate Report			

- You can also delete particular Group. To do so, click **Delete** of the respective Group.
- If you select **All**, then all users will be selected.
- Generate Report For:** Select the desired option— **All Users**, **Active Users**, or **Inactive Users**.
- Click **Generate Report**.

## Sample Report

Form 18

Back

1 of 30

FORM NO. 18 Register of Leave with Wages

1	Full Name	SALIM ANSARI		4	Department	MANUFACTURING		7	Date of Discharge/ Dismissal/ Quitting Employment/ Superannuation/Death while in Service
2	Sex	Male		5	Designation	Designation 1		8	Date of Payment in lieu of Leave with Wages Due in Such Case.
3	Dr. No. in the Register	1		6	Date of Joining Employment	11/01/1992		9	Whether Leave in Accordance with Scheme Under Section 79(8) Refused.
Calendar Year of Service (i.e. Previous)		Leave Deemed to be taken in the Year in Col. 3		Leave Deemed to be taken in the Year in Col. 3		Leave Deemed to be taken in the Year in Col. 3		Leave Deemed to be taken in the Year in Col. 3	
Present		Off		Field Holiday		Restricted Holiday		CD	
From		To		From		To		From	
1		2		3		4		5	
JAN.		22.00		5.00		2.00		0.00	
FEB.		19.00		3.00		0.00		0.00	
MAR.		24.50		4.00		1.00		0.00	
APR.		23.50		4.00		0.00		0.00	
MAY.		21.50		4.00		0.00		0.00	
JUN.		25.00		4.00		0.00		0.00	
JUL.		20.00		3.00		0.00		0.00	
AUG.		21.50		5.00		2.00		0.00	
TOTAL		228.00		28.00		10.00		0.00	

## Form 28

The Form 28 is based on the statutory norms of government monthly wage register. This report provides a group wise list of the users with combined details of the Muster Roll and Wages for the specified month and year.

Set the report filters as per requirement.

The screenshot shows a web application window titled 'Form 28'. It contains two main sections: 'Optional Parameters' and 'User Selection'.

**Optional Parameters:**

- For Month-Year:** A dropdown menu showing 'July' and a year dropdown showing '2022'.
- Custom Attendance Period:** A checkbox that is currently unchecked.
- Month Start-End Date:** A dropdown menu showing '2' and an 'End Date' field.
- Report Format:** A dropdown menu showing 'Format 1'.
- Message:** A text input field containing '730 Chars'.
- Organization Name:** A text input field containing 'ABC Ltd'.
- Organization Address:** A text input field containing 'Makarपुरा GIDC, Vadodara'.
- Save:** A button to save the configuration.

**User Selection:**

- Select Users:** A dropdown menu showing 'User Wise'.
- User:** A text input field containing 'ID' and a 'Name' field.
- Generate Report For:** A dropdown menu showing 'All Users'.
- Generate Report:** A button to generate the report.

- **For Month-Year:** Select the month year to specify the time period for which the data is to be generated.
- **Custom Attendance Period:** Select the check box if you wish to customize the month Month Start-End Date.
- **Month Start-End Date:** Select the desired Start Date for the month. The End Date automatically appears besides the Start Date.

### Optional Parameters

- **Report Format:** Select the desired option from the drop-down list—Format 1 or Format 2.
- **Message:** Specify the message details as per requirement.
- **Organization Name:** Specify the Organization Name as per requirement.
- **Organization Address:** Specify the Organization Address as per requirement.

This screenshot shows a close-up of the 'Optional Parameters' section. It includes the same fields as the previous screenshot: 'Report Format' (Format 1), 'Message' (730 Chars), 'Organization Name' (ABC Ltd), and 'Organization Address' (Makarपुरा GIDC, Vadodara). A 'Save' button is visible at the bottom right of this section.

- Click **Save** to save the configurations.

### User Selection

- **Select Users:** Select the desired option —**User-Wise**, **Group Wise**, or **All**.

- If you select **User Wise**, click the **User** picklist. The **Picklist for All Users** pop-up appears.

Picklist For All Users

Total Selected: 0 Records

Search  Show Selected

<input type="checkbox"/>	User ID	Name
<input checked="" type="checkbox"/>	1	SALIM ANSARI
<input checked="" type="checkbox"/>	10	RAJENDRA GOSWAMI
<input checked="" type="checkbox"/>	1001	ANKITKUMAR SOHLIYA
<input checked="" type="checkbox"/>	1002	MEGHA H SHUKLA
<input type="checkbox"/>	1003	UMESH M TALANPURI
<input type="checkbox"/>	1004	DARSHAK B PATEL
<input type="checkbox"/>	1007	DHAVAL I PATEL
<input type="checkbox"/>	1008	MAYANK K KORAT
<input type="checkbox"/>	1009	DIPTI K RATHWA
<input type="checkbox"/>	1010	RAHUL S SHAH

1 - 10 of 2476 records

1 2 3 ... 248

OK Cancel

- Select check boxes of the desired users. Click **OK**.
- The selected Users appear in the grid.

Search

User ID	Name	
1	SALIM ANSARI	
10	RAJENDRA GOSWAMI	
1001	ANKITKUMAR SOHLIYA	
1002	MEGHA H SHUKLA	

Generate Report For: All Users

Generate Report

- You can also delete the desired User. To do so, click **Delete** of the respective user.
- If you select **Group Wise** option, select the desired enterprise group from the drop-down list—Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1/2/3.
- For each enterprise group — Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1/2/3, click the corresponding picklist to select the desired option/s.

- | <input type="text" value="Search"/> |                         |   |   |
|-------------------------------------|-------------------------|---|---|
| ID                                  | Name                    | Group  |  |
| 1                                   | MATRIX COMSEC PVT. LTD. | Organization  |  |
| 2                                   | SAMARTH                 | Organization  |  |
| 3                                   | AVDHOT                  | Organization  |  |
| 4                                   | ELSENGARD               | Organization  |  |

- ## Sample Report

[illegible]

The Form 26 is based on the statutory norms of government's The Shops and Establishment Act. This report provides a group wise list of the users with details of the Muster Roll for the specified month and year.

2262



Form 26

For Month-Year: July, 2023

Custom Attendance Period: ☐

Month Start-End Date: 2, End Date

**Optional Parameters**

Sub-Header Message: 200 Chars

Left Align Upper Label: 100 Chars

Left Align Lower Label: 100 Chars

Right Align Upper Label: 100 Chars

Right Align Lower Label: 100 Chars

Footer Message: 200 Chars

Save

**User Selection**

Select Users: User Wise

User ID: , User Name:

Generate Report For: All Users

Generate Report

- **For Month-Year:** Select the month year to specify the time period for which the data is to be generated.
- **Custom Attendance Period:** Select the check box if you wish to customize the month Month Start-End Date.
- **Month Start-End Date:** Select the desired Start Date for the month. The End Date automatically appears besides the Start Date.

### Optional Parameters

- **Sub-Header Message:** Specify the sub header message details as per requirement
- **Left Align Upper Label:** Specify the details as per requirement
- **Left Align Lower Label:** Specify the details as per requirement
- **Right Align Upper Label:** Specify the details as per requirement
- **Right Align Lower Label:** Specify the details as per requirement
- **Footer Message:** Specify the footer message details as per requirement
- Click **Save** to save the configurations.

### User Selection

- **Select Users:** Select the desired option —**User-Wise**, **Group Wise**, or **All**.

- If you select **User Wise**, click the **User** picklist. The **Picklist for All Users** pop-up appears.

Picklist For All Users

Total Selected: 0 Records

Search  Show Selected

<input type="checkbox"/>	User ID ▲	Name
<input checked="" type="checkbox"/>	1	SALIM ANSARI
<input checked="" type="checkbox"/>	10	RAJENDRA GOSWAMI
<input checked="" type="checkbox"/>	1001	ANKITKUMAR SOHLIYA
<input checked="" type="checkbox"/>	1002	MEGHA H SHUKLA
<input type="checkbox"/>	1003	UMESH M TALANPURI
<input type="checkbox"/>	1004	DARSHAK B PATEL
<input type="checkbox"/>	1007	DHAVAL I PATEL
<input type="checkbox"/>	1008	MAYANK K KORAT
<input type="checkbox"/>	1009	DIPTI K RATHWA
<input type="checkbox"/>	1010	RAHUL S SHAH

1 - 10 of 2476 records

OK Cancel

- Select check boxes of the desired users. Click **OK**
- The selected Users appear in the grid.

Search

User ID ▲	Name	
1	SALIM ANSARI	
10	RAJENDRA GOSWAMI	
1001	ANKITKUMAR SOHLIYA	
1002	MEGHA H SHUKLA	

Generate Report For: All Users

Generate Report

- You can also delete the desired User. To do so, click **Delete** of the respective user.
- If you select **Group Wise** option, select the desired enterprise group from the drop-down list—Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1/2/3.
- For each enterprise group — Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1/2/3, click the corresponding picklist to select the desired option/s.

- The selected Groups appear in the grid.

Search <input type="text"/>			
ID	Name	Group	
1	MATRIX COMSEC PVT. LTD.	Organization	
2	SAMARTH	Organization	
3	AVDHOOT	Organization	
4	ELSENGARD	Organization	
<b>Generate Report</b>			

- You can also delete particular group. To do so, click **Delete** of the respective group.
- If you select **All**, then all users will be selected.
- Generate Report For:** Select the desired option from the drop-down list— **All Users, Active Users or Inactive Users**.
- Click **Generate Report**.

## Sample Report

Form 26

Back

1 of 1

100%

FORM XXVI

MUSTER ROLL FOR THE MONTH OF JANUARY - 2013

For the month of January/2013

Serial Number	Employee Number	Name of workman	Father's / Husband's Name	Sex	FOR THE PERIOD ENDING																															No. of days worked	No. of days of leave granted with wages	Aggregate No. of days worked	
					DATES																																		
					1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31				
1	2	3	4	5	6																															7	8	9	
1	1	SALIM ANSARI		M	WO	FR	FR	FR	FR	WO	FR	FR	FR	FR	FR	FR	FR	FR	FR	FR	FR	FR	FR	FR	FR	FR	FR	FR	FR	FR	FR	FR	FR	FR	22.0	2.0	31		
2	10	RAJENDRA GOSWAMI		M	WO	FR	FR	FR	CL	WO	FR	FR	FR	FR	FR	FR	FR	FR	FR	FR	FR	FR	FR	FR	FR	FR	FR	FR	FR	FR	FR	FR	FR	FR	FR	22.5	1.5	31	
3	1001	AKHILKUMAR SOHLIYA	SHIKHARAJ SOHLIYA	M	FR	FR	FR	FR	FR	FR	FR	FR	FR	FR	FR	FR	FR	FR	FR	FR	FR	FR	FR	FR	FR	FR	FR	FR	FR	FR	FR	FR	FR	FR	FR	FR	23.5	0.5	31
4	1002	MEGHA H SHUKLA	Harikeshbhai	F	FR	FR	FR	FR	FR	FR	FR	FR	FR	FR	FR	FR	FR	FR	FR	FR	FR	FR	FR	FR	FR	FR	FR	FR	FR	FR	FR	FR	FR	FR	FR	FR	22.0	2.0	31
5	1003	EMESH M TALANFORI	Late. Motilal	M	FR	FR	FR	FR	FR	FR	FR	FR	FR	FR	FR	FR	FR	FR	FR	FR	FR	FR	FR	FR	FR	FR	FR	FR	FR	FR	FR	FR	FR	FR	FR	FR	23.0	1.0	31
6	1004	DANSHAK B PATEL	SHUGILAL	M	FR	FR	FR	FR	FR	FR	FR	FR	FR	FR	FR	FR	FR	FR	FR	FR	FR	FR	FR	FR	FR	FR	FR	FR	FR	FR	FR	FR	FR	FR	FR	FR	24.0	2.0	31
7	1007	SHIVAJI I PATEL	SHUGILAL	M	FR	FR	FR	FR	FR	FR	FR	FR	FR	FR	FR	FR	FR	FR	FR	FR	FR	FR	FR	FR	FR	FR	FR	FR	FR	FR	FR	FR	FR	FR	FR	FR	21.0	2.0	31
8	1008	NAVANK K KORAI	SHIKHARAJ	M	FR	FR	FR	FR	FR	FR	FR	FR	FR	FR	FR	FR	FR	FR	FR	FR	FR	FR	FR	FR	FR	FR	FR	FR	FR	FR	FR	FR	FR	FR	FR	FR	23.0	1.0	31
9	1009	DIPTI K RATIWA	KUMARISINGH	F	FR	FR	FR	FR	FR	FR	FR	FR	FR	FR	FR	FR	FR	FR	FR	FR	FR	FR	FR	FR	FR	FR	FR	FR	FR	FR	FR	FR	FR	FR	FR	FR	19.0	2.0	31
10	1010	RANUL S SHAI	RATNABHAYAN	M	FR	FR	FR	FR	FR	FR	FR	FR	FR	FR	FR	FR	FR	FR	FR	FR	FR	FR	FR	FR	FR	FR	FR	FR	FR	FR	FR	FR	FR	FR	FR	FR	24.0	0.0	31

## Charts

This section allows the user to generate attendance related reports in the form of Pie Charts and Bar Graphs. The following reports fall under this category:

## Time Loss

This report provides a group wise Time Loss data during the specified time period in the form of a Bar Graph.

Set the report filters as per requirement.

- **Date:** Select the to and from date for which the report is to be generated.

### Optional Parameters

- **Select For:** Select the desired enterprise group from the drop-down list — Organization, Branch, Department, Section, Category, Grade, Designation, Custom Group1/2/3.
- **Organization Name in Header As Per:** Select the desired option — User Selection or Customized Selection.

If you select **Customized Selection**, click **Customize Report Header**.

You can select the desired option from the drop-down list or can also add a new header according to your choice.

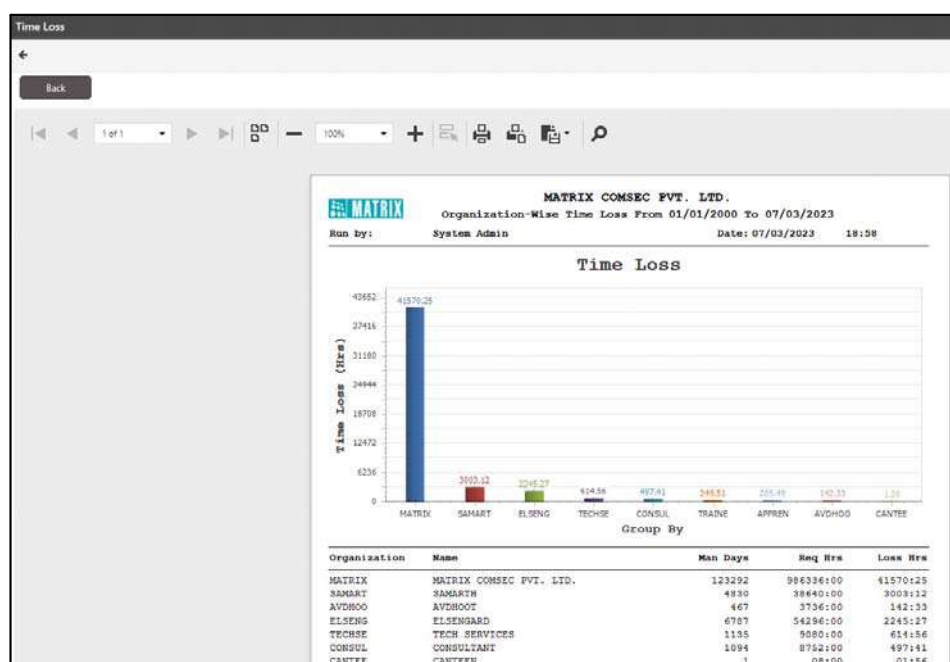
### User Selection

- **Select Users:** Select the desired option— **Group-Wise** or **All**
- If you select **Group Wise** option, select the desired enterprise group from the drop-down list— Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1/2/3.
- For each enterprise group — Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1/2/3, click the corresponding picklist to select the desired option/s.
- The selected Groups appear in the grid.

Search <input type="text"/>			
ID	Name	Group	
1	MATRIX COMSEC PVT. LTD.	Organization	
2	SAMARTH	Organization	
3	AVDHGOT	Organization	
4	ELSENGARD	Organization	
Generate Report			

- You can also delete particular group. To do so, click **Delete** of the respective group.
- If you select **All**, then all groups will be selected.
- Click **Generate Report**.

## Sample Report



## Overtime

This report provides a group wise Overtime data during the specified time period in the form of a Bar Graph.

Set the report filters as per requirement.

The screenshot shows the 'Overtime' report generation interface. It includes a date range selector set to '07/03/2023' to '07/03/2023'. Under 'Optional Parameters', there is a 'Select For' dropdown set to 'Organization' and an 'Organization Name in Header As Per' dropdown set to 'User Selection'. Under 'User Selection', there is a 'Select Users' dropdown set to 'Group Wise', a 'Select Group' dropdown set to 'Organization', and an 'Organization' field with 'ID' and 'Name' sub-fields. A 'Generate Report' button is located at the bottom.

- **Date:** Select the to and from date for which the report is to be generated.

### Optional Parameters

- **Select For:** Select the desired enterprise group from the drop-down list — Organization, Branch, Department, Section, Category, Grade, Designation, Custom Group1/2/3.
- **Organization Name in Header As Per:** Select the desired option — User Selection or Customized Selection.


If you select **Customized Selection**, click **Customize Report Header**.

You can select the desired option from the drop-down list or can also add a new header according to your choice.

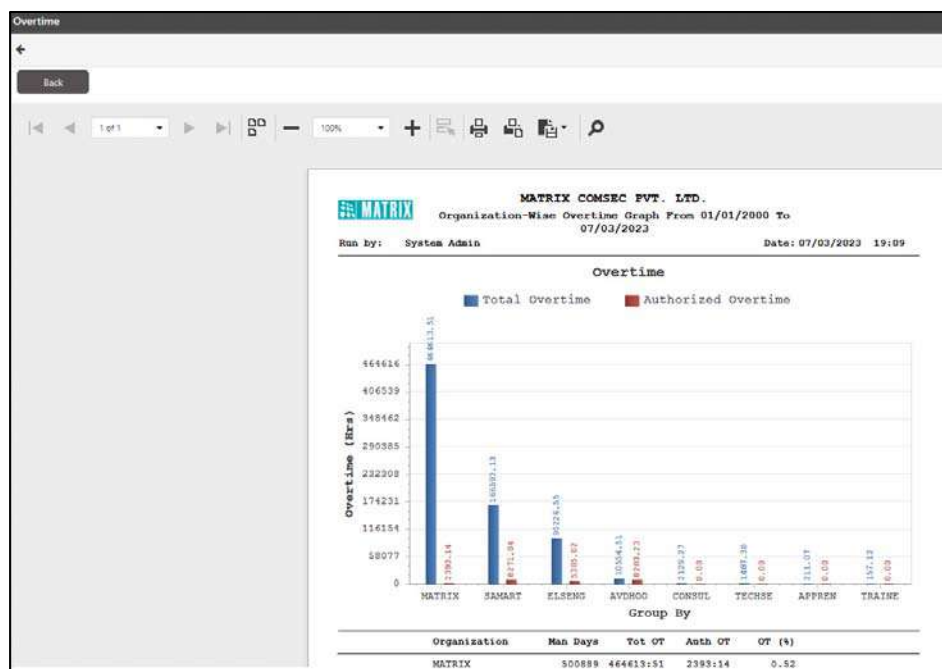
## User Selection

- **Select Users:** Select the desired option —**Group Wise**, or **All**.
- If you select **Group Wise** option, select the desired enterprise group from the drop-down list— Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1/2/3.
- For each enterprise group — Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1/2/3, click the corresponding picklist to select the desired option/s.
- The selected Groups appear in the grid.

Search		
ID	Name	Group
1	MATRIX COMSEC PVT. LTD.	Organization
2	SAMARTH	Organization
3	AVDHOOT	Organization
4	ELSENGARD	Organization
Generate Report		

- You can also delete particular group. To do so, click **Delete**  of the respective group.
- If you select **All**, then all groups will be selected.
- Click **Generate Report**.

## Sample Report



## Absent

This report provides a group wise Absentee data during the specified time period in the form of a Pie Chart.

Set the report filters as per requirement.

- **Date:** Select the to and from date for which the report is to be generated.

### Optional Parameters

- **Select For:** Select the desired enterprise group from the drop-down list — Organization, Branch, Department, Section, Category, Grade, Designation, Custom Group1/2/3.
- **Organization Name in Header As Per:** Select the desired option — User Selection or Customized Selection.

If you select **Customized Selection**, click **Customize Report Header**.

You can select the desired option from the drop-down list or can also add a new header according to your choice.

### User Selection

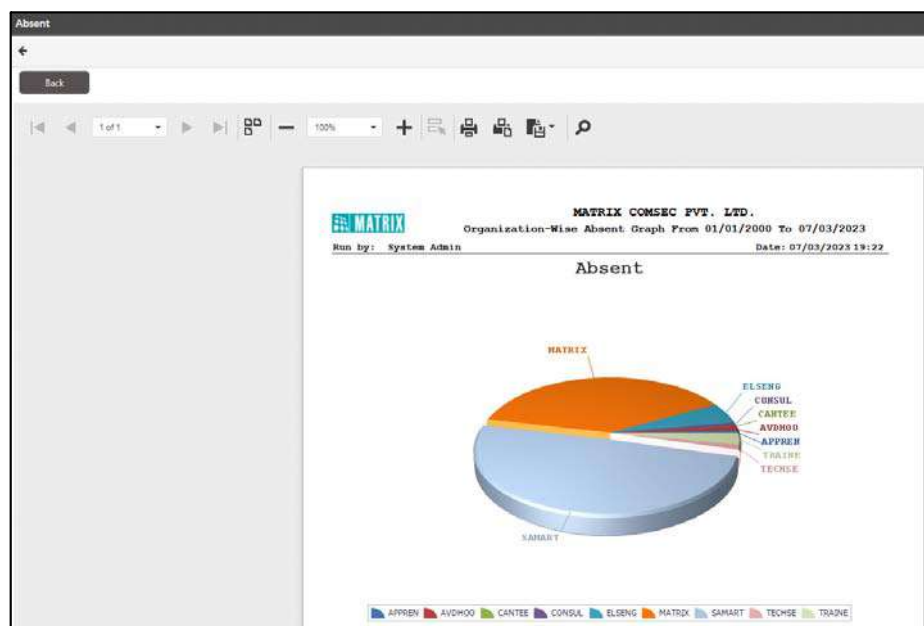
- **Select Users:** Select the desired option —**Group Wise**, or **All**.
- If you select **Group Wise** option, select the desired enterprise group from the drop-down list— Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1/2/3.
- For each enterprise group — Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1/2/3, click the corresponding picklist to select the desired option/s.
- The selected Groups appear in the grid.

ID	Name	Group	
1	MATRIX COMSEC PVT. LTD.	Organization	
2	SAMARTH	Organization	
3	AVDHOT	Organization	
4	ELSENGARD	Organization	

**Generate Report**

- You can also delete particular group. To do so, click **Delete** of the respective group.
- If you select **All**, then all groups will be selected.
- Click **Generate Report**.

## Sample Report



## User Absent

This report provides a user wise Absentee data during the specified time period in the form of a Bar Graph.

Set the report filters as per requirement.

The image shows the "User Absent" report filter form. It includes the following fields and options:

- Date:** Two date pickers set to "07/03/2023".
- Optional Parameters:** A section containing a dropdown menu for "Organization Name in Header As Per" with the value "User Selection".
- User Selection:** A section containing a "Select Users" dropdown menu with the value "User Wise". Below it are input fields for "User ID" and "Name".
- Generate Report For:** A dropdown menu with the value "All Users".
- Generate Report:** A button at the bottom right.

- **Date:** Select the to and from date for which the report is to be generated.

### Optional Parameters

- **Organization Name in Header As Per:** Select the desired option — User Selection or Customized Selection.

If you select **Customized Selection**, click **Customize Report Header**.

You can select the desired option from the drop-down list or can also add a new header according to your choice.

### User Selection

- **Select Users:** Select the desired option —User-Wise, Group Wise, or All.



- If you select **User Wise**, click the **User** picklist. The **Picklist for All Users** pop-up appears.

Picklist For All Users

Total Selected: 0 Records

Search  Show Selected

<input type="checkbox"/>	User ID	Name
<input type="checkbox"/>	1	SALIM ANSARI
<input type="checkbox"/>	10	RAJENDRA GOSWAMI
<input type="checkbox"/>	1001	ANKITKUMAR SOHLIYA
<input type="checkbox"/>	1002	MEGHA H SHUKLA
<input type="checkbox"/>	1003	UMESH M TALANPURI
<input type="checkbox"/>	1004	DARSHAK B PATEL
<input type="checkbox"/>	1007	DHAVAL I PATEL
<input type="checkbox"/>	1008	MAVANK K KORAT
<input type="checkbox"/>	1009	DIPTI K RATHWA
<input type="checkbox"/>	1010	RAHUL S SHAH

1 - 10 of 2476 records

OK Cancel

- Select check boxes of the desired users. Click **OK**.
- The selected Users appear in the grid.

Search

User ID	Name	
1	SALIM ANSARI	
10	RAJENDRA GOSWAMI	
1001	ANKITKUMAR SOHLIYA	
1002	MEGHA H SHUKLA	

Generate Report For: All Users

Generate Report

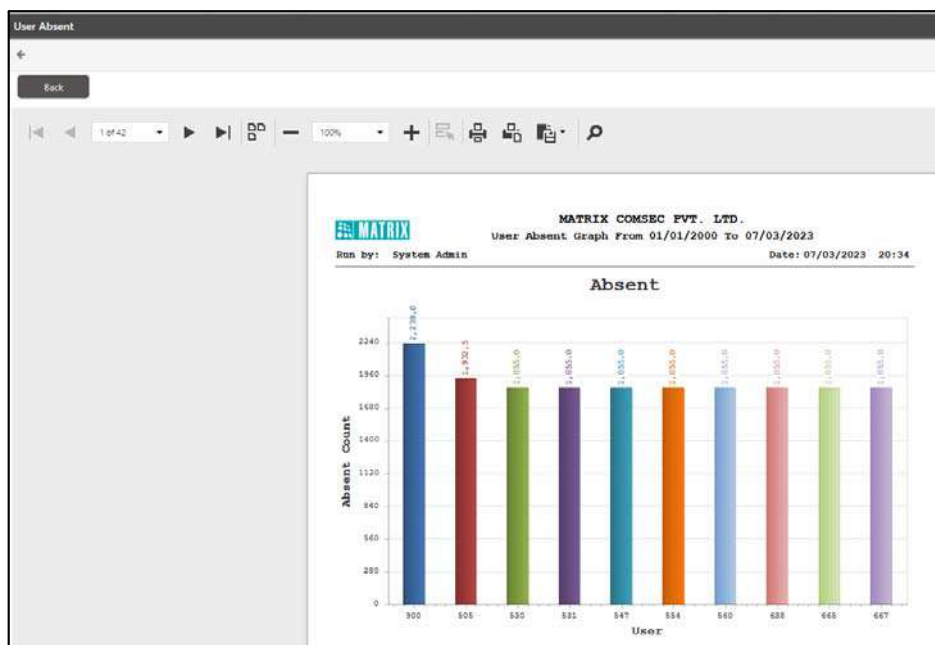
- You can also delete the desired User. To do so, click **Delete** of the respective user.
- If you select **Group Wise** option, select the desired enterprise group from the drop-down list—Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1/2/3.
- For each enterprise group — Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1/2/3, click the corresponding picklist to select the desired option/s.

- The selected Groups appear in the grid.

Search <input type="text"/>			
ID	Name	Group	
1	MATRIX COMSEC PVT. LTD.	Organization	
2	SAMARTH	Organization	
3	AVDHOOT	Organization	
4	ELSENGARD	Organization	
<div>Generate Report</div>			

- You can also delete particular group. To do so, click **Delete** of the respective group.
- If you select **All**, then all users will be selected.
- **Generate Report For:** Select the desired option from the drop-down list— **All Users, Active Users** or **Inactive Users**.
- Click **Generate Report**.

## Sample Report



## User Late-IN

This report provides a user wise Late-IN data during the specified time period in the form of a Bar Graph.

Set the report filters as per requirement.

- **Date:** Select the to and from date for which the report is to be generated.

## Optional Parameters

- **Organization Name in Header As Per:** Select the desired option — User Selection or Customized Selection.

If you select **Customized Selection**, click **Customize Report Header**.

You can select the desired option from the drop-down list or can also add a new header according to your choice.

## User Selection

- **Select Users:** Select the desired option —**User-Wise**, **Group Wise**, or **All**.
- If you select **User Wise**, click the **User** picklist. The **Picklist for All Users** pop-up appears.

<input type="checkbox"/>	User ID	Name
<input type="checkbox"/>	1	SALIM ANSARI
<input type="checkbox"/>	10	RAJENDRA GOSWAMI
<input type="checkbox"/>	1001	ANKITKUMAR SOHLIYA
<input type="checkbox"/>	1002	MEGHA H SHUKLA
<input type="checkbox"/>	1003	UMESH M TALANPURI
<input type="checkbox"/>	1004	DARSHAK B PATEL
<input type="checkbox"/>	1007	DHAVAL I PATEL
<input type="checkbox"/>	1008	MAYANK K KORAT
<input type="checkbox"/>	1009	DIPTI K RATHWA
<input type="checkbox"/>	1010	RAHUL S SHAH

- Select check boxes of the desired users. Click **OK**.

- The selected Users appear in the grid.

User ID ▲	Name	
1	SALIM ANSARI	
10	RAJENDRA GOSWAMI	
1001	ANKITKUMAR SOHLIYA	
1002	MEGHA H SHUKLA	

Generate Report For: All Users

Generate Report

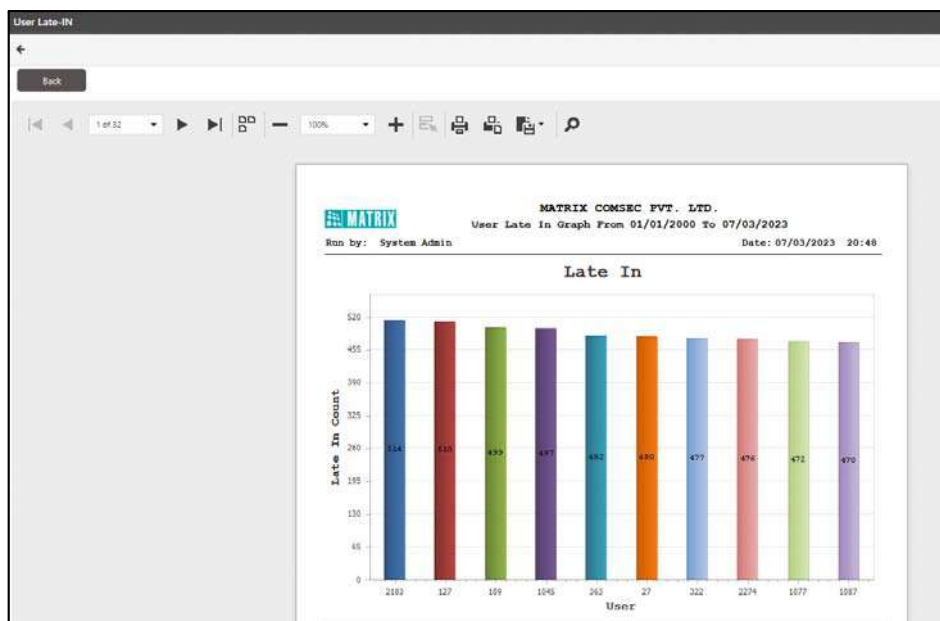
- You can also delete the desired User. To do so, click **Delete** of the respective user.
- If you select **Group Wise** option, select the desired enterprise group from the drop-down list— Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1/2/3.
- For each enterprise group — Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1/2/3, click the corresponding picklist to select the desired option/s.
- The selected Groups appear in the grid.

ID	Name	Group ▲	
1	MATRIX COMSEC PVT. LTD.	Organization	
2	SAMARTH	Organization	
3	AVDHOOT	Organization	
4	ELSENGARD	Organization	

Generate Report

- You can also delete particular group. To do so, click **Delete** of the respective group.
- If you select **All**, then all users will be selected.
- **Generate Report For:** Select the desired option from the drop-down list— **All Users, Active Users** or **Inactive Users**.
- Click **Generate Report**.

## Sample Report



## User Early-OUT

This report provides a user wise Early-OUT data during the specified time period in the form of a Bar Graph.

Set the report filters as per requirement.

Date: 07/03/2023 to 07/03/2023

Organization Name in Header As Per: User Selection

User Selection: User Wise

Generate Report For: All Users

Generate Report

- **Date:** Select the to and from date for which the report is to be generated.

### Optional Parameters

- **Organization Name in Header As Per:** Select the desired option — User Selection or Customized Selection.

If you select **Customized Selection**, click **Customize Report Header**.

You can select the desired option from the drop-down list or can also add a new header according to your choice.

### User Selection

- **Select Users:** Select the desired option —User-Wise, Group Wise, or All.

- If you select **User Wise**, click the **User** picklist. The **Picklist for All Users** pop-up appears.

Picklist For All Users

Total Selected: 0 Records

Search  Show Selected

<input type="checkbox"/>	User ID ▲	Name
<input type="checkbox"/>	1	SALIM ANSARI
<input type="checkbox"/>	10	RAJENDRA GOSWAMI
<input type="checkbox"/>	1001	ANKITKUMAR SOHLIYA
<input type="checkbox"/>	1002	MEGHA H SHUKLA
<input type="checkbox"/>	1003	UMESH M TALANPURI
<input type="checkbox"/>	1004	DARSHAK B PATEL
<input type="checkbox"/>	1007	DHAVAL I PATEL
<input type="checkbox"/>	1008	MAYANK K KORAT
<input type="checkbox"/>	1009	DIPTI K RATHWA
<input type="checkbox"/>	1010	RAHUL S SHAH

1 - 10 of 2476 records

1 2 3 ... 248

OK Cancel

- Select check boxes of the desired users. Click **OK**.
- The selected Users appear in the grid.

Search

User ID ▲	Name	
1	SALIM ANSARI	
10	RAJENDRA GOSWAMI	
1001	ANKITKUMAR SOHLIYA	
1002	MEGHA H SHUKLA	

Generate Report For: All Users


Generate Report

- You can also delete the desired User. To do so, click **Delete** of the respective user.
- If you select **Group Wise** option, select the desired enterprise group from the drop-down list— Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1/2/3.
- For each enterprise group — Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1/2/3, click the corresponding picklist to select the desired option/s.

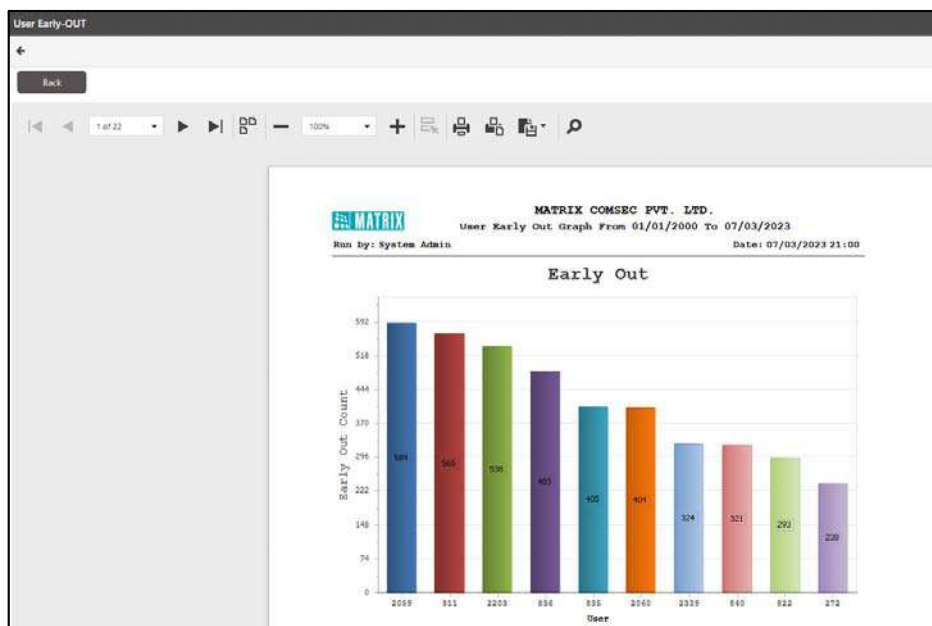
- The selected Groups appear in the grid.

ID	Name	Group	
1	MATRIX COMSEC PVT. LTD.	Organization	
2	SAMARTH	Organization	
3	AVDHOOT	Organization	
4	ELSENGARD	Organization	

Generate Report

- You can also delete particular group. To do so, click **Delete**  of the respective group.
- If you select **All**, then all users will be selected.
- **Generate Report For:** Select the desired option from the drop-down list— **All Users, Active Users** or **Inactive Users**.
- Click **Generate Report**.

## Sample Report



## User Irregularity

This report provides a user wise Late-IN, Early-OUT and Absent data during the specified time period in the form of a Bar Graph.

Set the report filters as per requirement.

- **Date:** Select the to and from date for which the report is to be generated.

### Optional Parameters

- **Organization Name in Header As Per:** Select the desired option — User Selection or Customized Selection.

If you select **Customized Selection**, click **Customize Report Header**.

You can select the desired option from the drop-down list or can also add a new header according to your choice.

### User Selection

- **Select Users:** Select the desired option —**User-Wise**, **Group Wise**, or **All**.
- If you select **User Wise**, click the **User** picklist. The **Picklist for All Users** pop-up appears.

User ID	Name
1	SALIM ANSARI
10	RAJENDRA GOSWAMI
1001	ANKITKUMAR SOHLIYA
1002	MEGHA H SHUKLA
1003	UMESH M TALANPURI
1004	DARSHAK B PATEL
1007	DHAVAL I PATEL
1008	MAYANK K KORAT
1009	DIPTI K RATHWA
1010	RAHUL S SHAH

- Select check boxes of the desired users. Click **OK**.



- The selected Users appear in the grid.

User ID	Name	
1	SALIM ANSARI	
10	RAJENDRA GOSWAMI	
1001	ANKITKUMAR SOHLIYA	
1002	MEGHA H SHUKLA	

Generate Report For: All Users

Generate Report

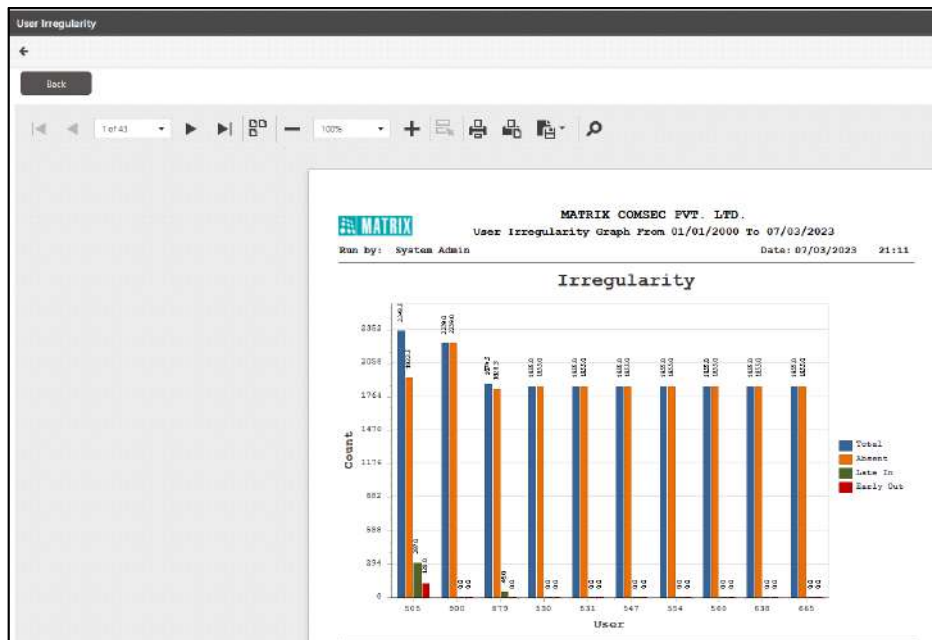
- You can also delete the desired User. To do so, click **Delete** of the respective user.
- If you select **Group Wise** option, select the desired enterprise group from the drop-down list— Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1/2/3.
- For each enterprise group — Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1/2/3, click the corresponding picklist to select the desired option/s.
- The selected Groups appear in the grid.

ID	Name	Group	
1	MATRIX COMSEC PVT. LTD.	Organization	
2	SAMARTH	Organization	
3	AVDHQOT	Organization	
4	ELSENGARD	Organization	

Generate Report

- You can also delete particular group. To do so, click **Delete** of the respective group.
- If you select **All**, then all users will be selected.
- **Generate Report For:** Select the desired option from the drop-down list— **All Users, Active Users** or **Inactive Users**.
- Click **Generate Report**.

## Sample Report



## Month-Wise Overtime

This report provides a month wise total and authorized Overtime data during the specified time period in the form of a Bar Graph.

Set the report filters as per requirement.

Month-Wise Overtime

←

For Month-Year

July2023

July2023

Optional Parameters

Organization Name in Header As PerUser Selection

User Selection

Select Users

User Wise

User\*

ID

Name

Generate Report For

All Users

Generate Report

- **For Month-Year:** Select month and year to specify the time period for which the data is to be generated.

## Optional Parameters

- **Organization Name in Header As Per:** Select the desired option — User Selection or Customized Selection.

If you select **Customized Selection**, click **Customize Report Header**.

You can select the desired option from the drop-down list or can also add a new header according to your choice.

## User Selection

- **Select Users:** Select the desired option —**User-Wise**, **Group Wise**, or **All**.

- If you select **User Wise**, click the **User** picklist. The **Picklist for All Users** pop-up appears.

Picklist For All Users

Total Selected: 0 Records

Search  Show Selected

<input type="checkbox"/>	User ID ▲	Name
<input type="checkbox"/>	1	SALIM ANSARI
<input type="checkbox"/>	10	RAJENDRA GOSWAMI
<input type="checkbox"/>	1001	ANKITKUMAR SOHLIYA
<input type="checkbox"/>	1002	MEGHA H SHUKLA
<input type="checkbox"/>	1003	UMESH M TALANPURI
<input type="checkbox"/>	1004	DARSHAK B PATEL
<input type="checkbox"/>	1007	DHAVAL I PATEL
<input type="checkbox"/>	1008	MAYANK K KORAT
<input type="checkbox"/>	1009	DIPTI K RATHWA
<input type="checkbox"/>	1010	RAHUL S SHAH

1 - 10 of 2476 records

1 2 3 ... 248


OK Cancel

- Select check boxes of the desired users. Click **OK**.
- The selected Users appear in the grid.

Search

ID	Name	Group ▲	
1	MATRIX COMSEC PVT. LTD.	Organization	
2	SAMARTH	Organization	
3	AVDHICOT	Organization	
4	ELSENGARD	Organization	


Generate Report

- You can also delete the desired User. To do so, click **Delete**  of the respective user.
- If you select **Group Wise** option, select the desired enterprise group from the drop-down list— Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1/2/3.
- For each enterprise group — Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1/2/3, click the corresponding picklist to select the desired option/s.
- The selected Groups appear in the grid.

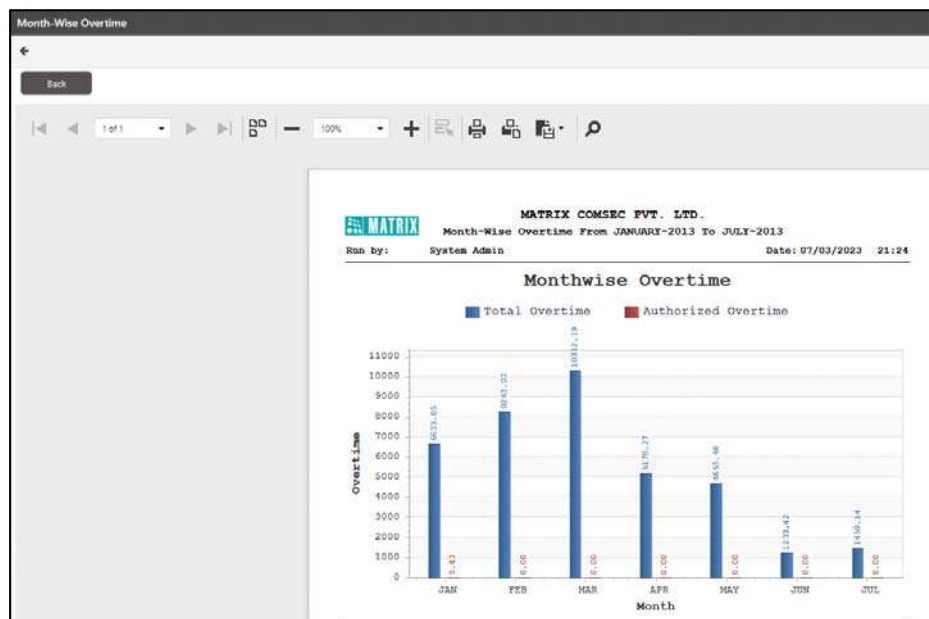
Search

ID	Name	Group ▲	
1	MATRIX COMSEC PVT. LTD.	Organization	
2	SAMARTH	Organization	
3	AVDHICOT	Organization	
4	ELSENGARD	Organization	

Generate Report

- You can also delete particular group. To do so, click **Delete**  of the respective group.
- If you select **All**, then all users will be selected.
- **Generate Report For:** Select the desired option from the drop-down list— **All Users, Active Users** or **Inactive Users**.
- Click **Generate Report**.

## Sample Report



## Attendance Summary

This report provides a group wise Attendance summary data during the specified time period in the form of a Pie Chart.

Set the report filters as per requirement.



**Attendance Summary**

Date: 07/03/2023 to 07/03/2023

Optional Parameters:

Select Group: Organization  
Group Value: MATRIX  
Organization Name in Header As Per: User Selection

**Generate Report**

- **Date:** Select the to and from date for which the report is to be generated.

## Optional Parameters

- **Select Group:** Select the desired enterprise group from the drop-down list — Organization, Branch, Department, Section, Category, Grade, Designation, Custom Group 1/ 2/3.
- **Group Value:** Select the desired Group Value according to the selected group from the drop-down list.

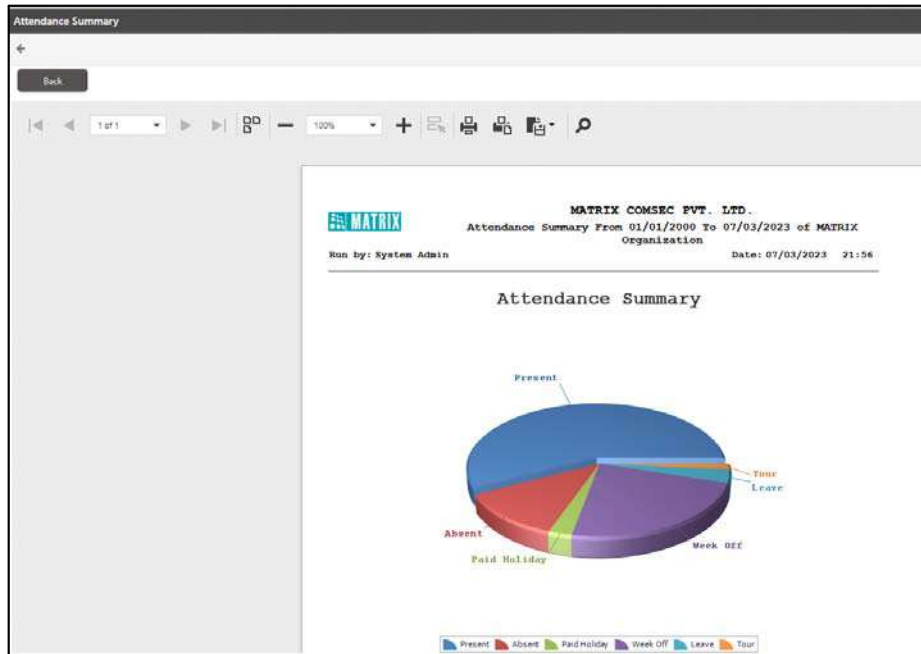
- **Organization Name in Header As Per:** Select the desired option — User Selection or Customized Selection.

If you select **Customized Selection**, click **Customize Report Header**.

You can select the desired option from the drop-down list or can also add a new header according to your choice.

- Click **Generate Report**.

## Sample Report





The COSEC Leave Management gives wide options for HR to create different leave types like PL, CL, SL, EL, ML, OD etc. with different parameters like balance check enable/disable, paid/unpaid leave, lay off, accumulation, minimum and maximum leaves availed at a time etc.

With the COSEC Leave Management module, you have an efficient way to:

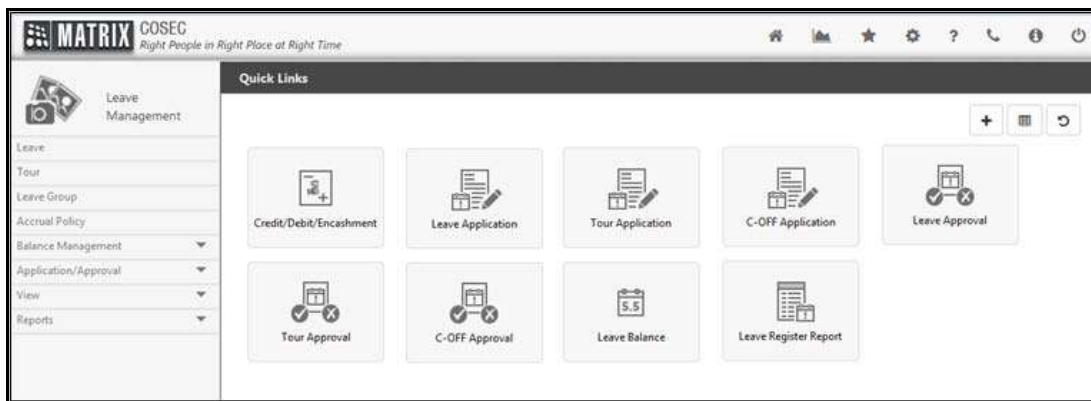
- Set up and change leave rules and policies
- Submit and record a leave request, before, during or after the leave occurs.
- Change or cancel a leave request
- Get information on leave entitlements
- Review employee leave data including leave summary.

To use this functionality, click on the **Leave Management**



module. The Leave Management page will

appear on your screen as shown below.

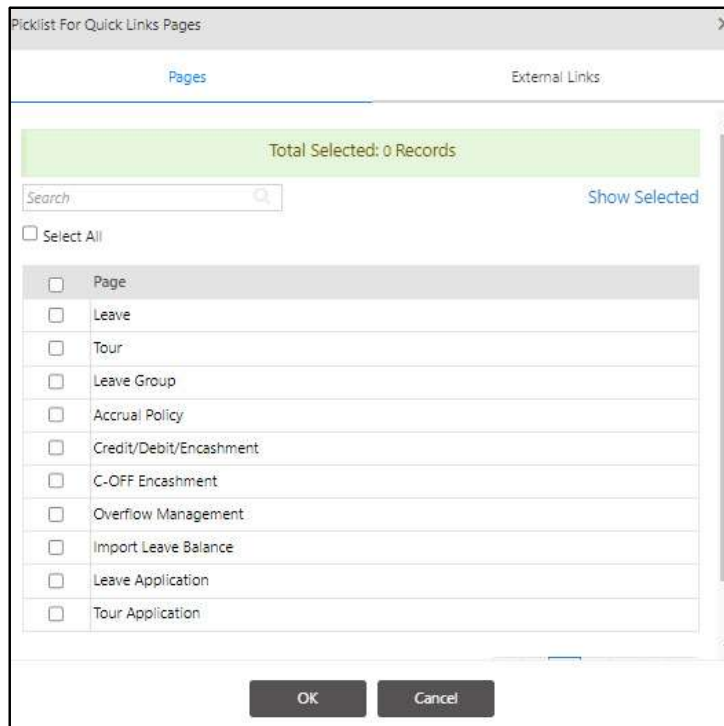


*This functionality is available only with the COSEC **Time and Attendance** module license.*

The page displays a menu and **Quick Links** to go to the required page in just one click. Quick Links are shortcuts to reach to a specific page easily. You can configure these options for Quick Links — **Add Quick Link, Select Layout** and **Reset to Default**.

## Add Quick Links


- Click **Add**  . The **Picklist For Quick Links Pages** pop-up appears.



Picklist For Quick Links Pages

Pages External Links

Total Selected: 0 Records

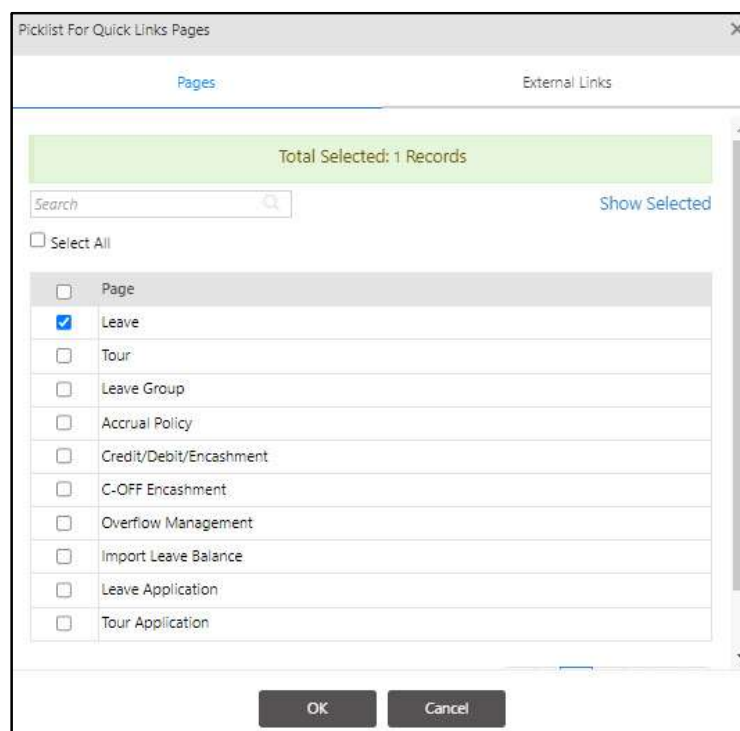
Search  Show Selected

☐ Select All

<input type="checkbox"/> Page
<input type="checkbox"/> Leave
<input type="checkbox"/> Tour
<input type="checkbox"/> Leave Group
<input type="checkbox"/> Accrual Policy
<input type="checkbox"/> Credit/Debit/Encashment
<input type="checkbox"/> C-OFF Encashment
<input type="checkbox"/> Overflow Management
<input type="checkbox"/> Import Leave Balance
<input type="checkbox"/> Leave Application
<input type="checkbox"/> Tour Application

OK Cancel


- You can either select particular page or can select all the pages at once. Maximum **20** quick links can be displayed.
- To select particular pages, select the check boxes of the desired pages.



Picklist For Quick Links Pages

Pages External Links

Total Selected: 1 Records

Search  Show Selected

☐ Select All

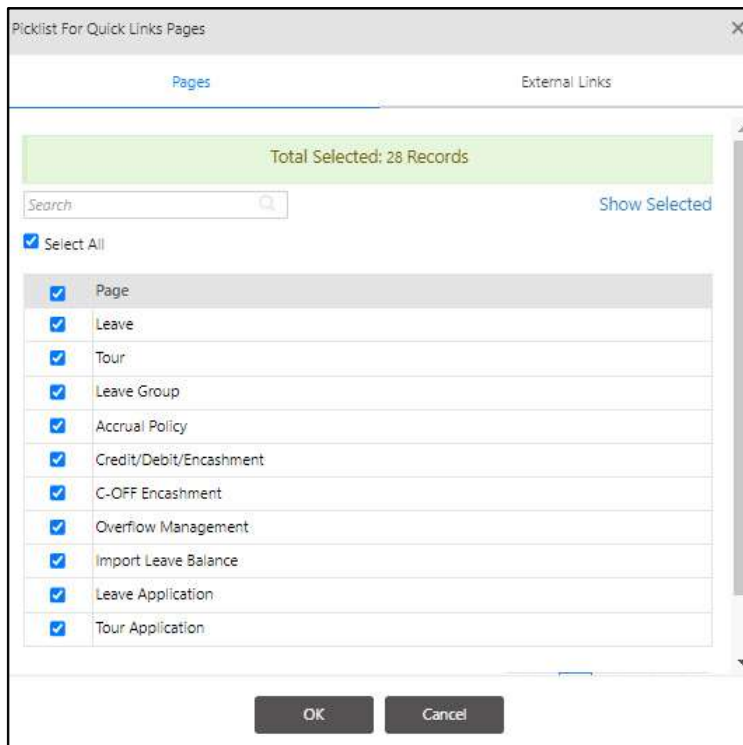
<input type="checkbox"/> Page
<input checked="" type="checkbox"/> Leave
<input type="checkbox"/> Tour
<input type="checkbox"/> Leave Group
<input type="checkbox"/> Accrual Policy
<input type="checkbox"/> Credit/Debit/Encashment
<input type="checkbox"/> C-OFF Encashment
<input type="checkbox"/> Overflow Management
<input type="checkbox"/> Import Leave Balance
<input type="checkbox"/> Leave Application
<input type="checkbox"/> Tour Application

OK Cancel




OR

- To select all the pages at once, select the **Select All** check box. All the pages will be selected.



- Click **OK**.
- The Quick Links for selected pages appear on the Quick Link page.

#### Adding External Links,

- Select **External Link** tab and click on  button to add new external link.
- Configure the **Title** and **URL** of the external link under the respective fields. Select the check box to display the Quick Link for the configured link.



Picklist For Quick Links Pages

Pages External Links

Search

Title	URL
<input checked="" type="checkbox"/> Google	www.google.com

OK Cancel

- Click **Save**  to save the configuration.
- Once you have saved the configuration, you can edit it. Click **Edit**  to edit the saved configuration.
- Click **OK** to save the configuration of the external link. The Quick Link for the external link appears on the Quick Link page.

Quick Links

+ [Grid Icon] [Refresh Icon]

Credit/Debit/Encashment

Leave Application

Tour Application

C-OFF Application

Leave Approval

Tour Approval


C-OFF Approval

Leave Balance


Leave Register Report

Google

## Select Layout

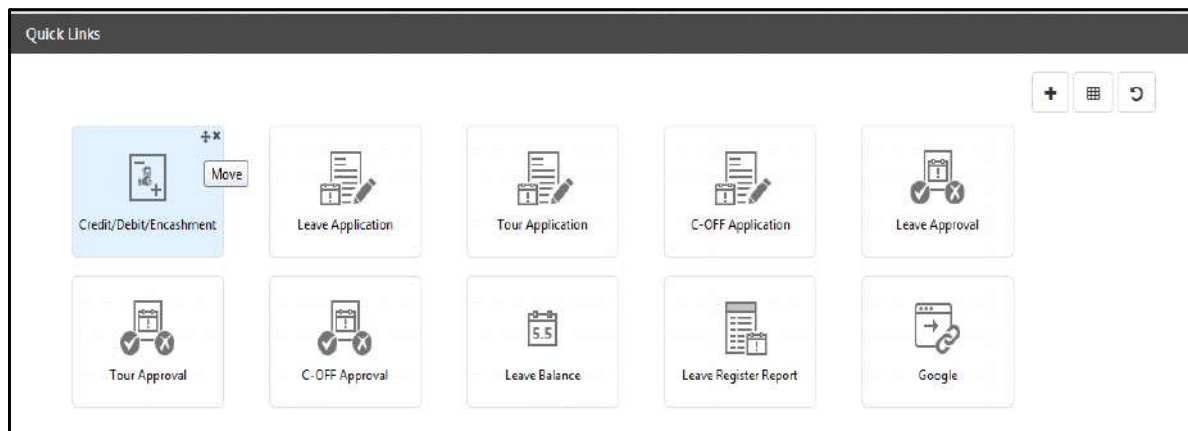
Click **Select Layout**  to select a layout for the quick links. You can select 5x4 or 4x5 layout to manage the quick links.

## Reset To Default

Click **Reset To Default**  to reset the quick links to the default quick links.

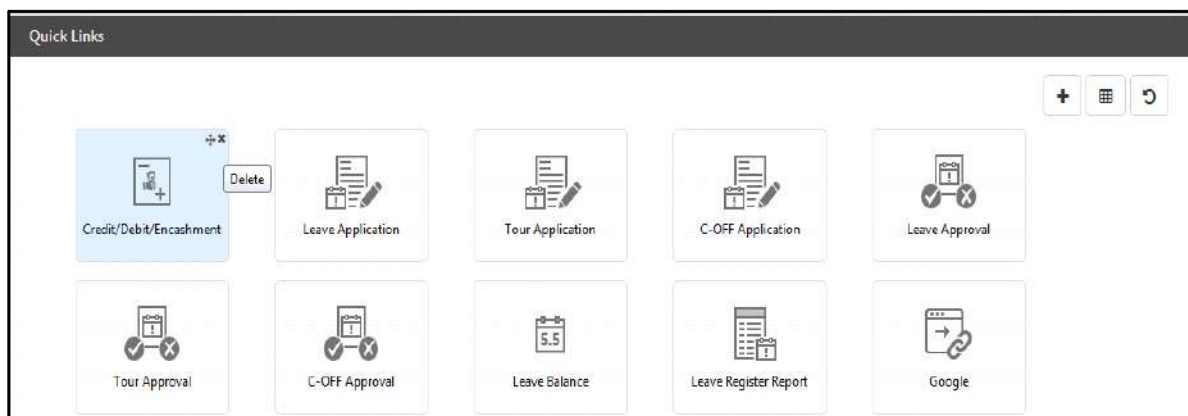
## Move the Link

To move the link from one place to another, hover on the link on top right corner and click **Move** icon as shown below. Then drag the quick link to the desired place. It will be placed at the desired location on the quick links page.




## Delete the Link

To delete a particular link, hover on the link on top right corner and click **Delete** icon as shown below.



Quick links are displayed as per rights given to System Account and ESS users.

## Leave Management Dashboard

To view the **Leave Management** Dashboard, click the Dashboard button  on the **Leave Management** page. The Dashboard displays two panels: User Summary and Pending Approval as shown below.



## User Summary

User Summary panel displays a bar graph indicating the number of users on leave, on tour and on C-OFF for particular month or day as per the settings configured. Click **Settings** icon on the title bar of the panel and the following screen appears.

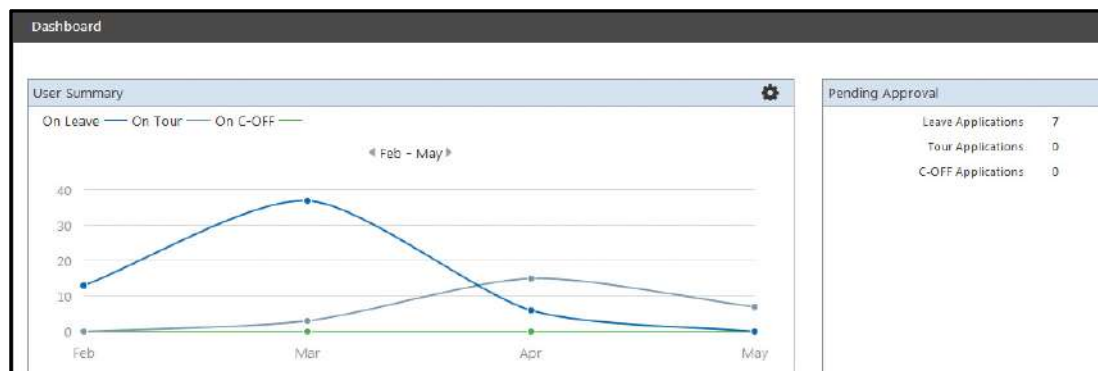
The screenshot shows the 'User Summary' settings dialog box. It contains three dropdown menus: 'View' set to 'Cumulative Data', 'Period' set to 'Daily', and 'User Selection' set to 'All Users'. There are 'View' and 'Cancel' buttons at the bottom.

Configure the following details based on which the graph is to be obtained.

- **View:** Select the view from the dropdown list to be displayed in the graph. Options are: Cumulative Data and Trending Data.
- **Period:** Select the period for which data is to be obtained as monthly or daily.
- **User Selection:** Select the users from the enterprise groups or All users based on which the data is to be obtained.

Click **View** button and the data is displayed in the form of a graph as shown below.

The screenshot shows the 'User Summary' settings dialog box with updated values. The 'View' dropdown is now 'Trending Data', the 'Period' is 'Monthly', and there are date pickers for 'Feb 2017' and 'May 2017'. The 'User Selection' remains 'All Users'. 'View' and 'Cancel' buttons are at the bottom.



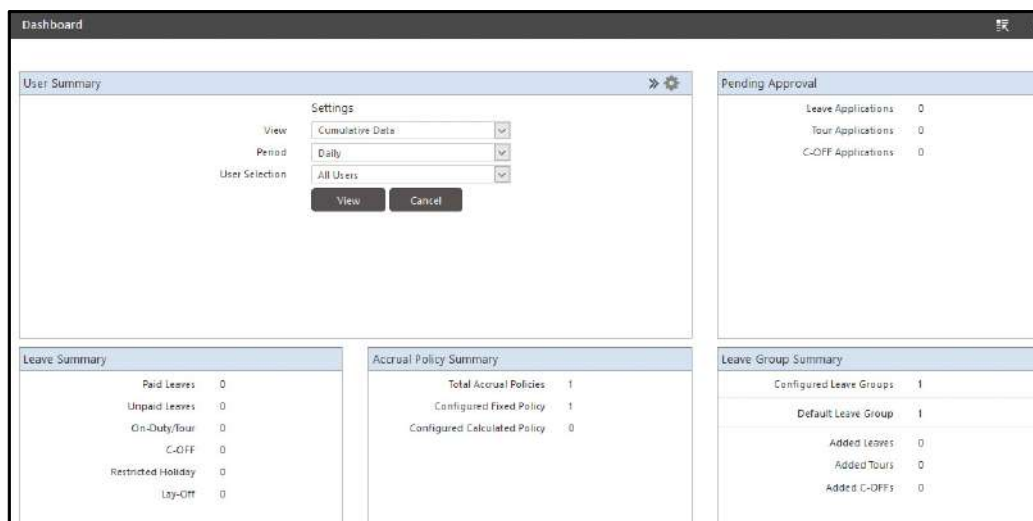
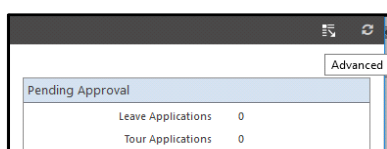
## Pending Approval


It displays the total number of leave applications, tour applications and C-OFF applications in pending state. This number will depend on the login user based on their rights on users/groups.



*The information displayed here will consider only such group of users on whom the login user has rights.*

Click on **Advanced** button to view the advanced details of leave management dashboard.



For more information on the above Dashboard options, click the respective information links on the Dashboard. The latest values on Dashboard are updated on clicking the Refresh  button.

# Configuring Leaves

The COSEC Leave Management module enables the HR administrator to define multiple leaves as per the company policy. Leaves other than the commonly used leaves, can also be created and parameters for such leaves can be defined as per the organization's requirement.

## Defining New Leaves

To define a new leave, go to **Leave Management > Leave** and the following page appears.

Code	Name
SL	Sick Leave

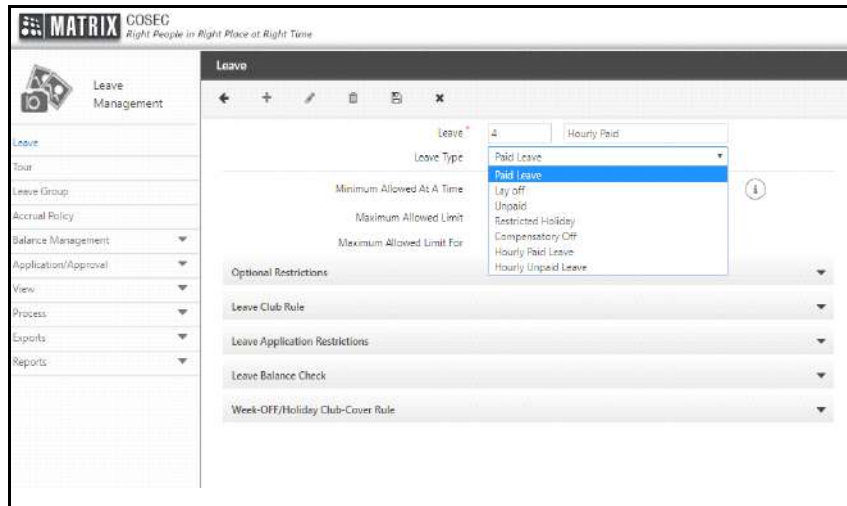
The page displays configurations on the left side and to the right is a grid containing existing created leaves.

To add a new leave, click the new button **+** and configure the below given parameters:

- **Leave:** Every new leave must be defined with a **Code** and a **Name**. Enter the details in the respective fields. The leave code can be of maximum 2 alphanumeric characters. For example, for the leave name "Maternity Leave", the leave code can be "ML".
- **Leave Type:** Select the type of leave or the leave category from the dropdown list to indicate whether the leave is one of the following types —
  - **Paid Leave-** This leave can be availed when the user has sufficient balance. When the user avails the paid leave, then his salary for that day is not deducted as it is managed by deducting from the total leave balance.

If you select **Paid Leave**, then configure the below parameters:

- *"Optional Restrictions"*
- *"Leave Club Rule"*
- *"Leave Application Restrictions"*
- *"Keeping Check on Leave Balance"*
- *"Week-OFF/Holiday Club-Cover Rule"*



- **Lay Off-** This leave is granted to regularize unexplained absence resulting into discontinuation of service. It is a type of unpaid leave.

If you select **Lay Off**, then configure the below parameters:

- *“Optional Restrictions”*
- *“Leave Club Rule”*
- *“Leave Application Restrictions”*
- *“Week-OFF/Holiday Club-Cover Rule”*

- **Unpaid-** This leave can be availed when the user do not have Paid leave balance. This will result in loss of pay for the day when leave is availed.

If you select **Unpaid**, then configure the below parameters:

- *“Optional Restrictions”*
- *“Leave Club Rule”*
- *“Leave Application Restrictions”*
- *“Week-OFF/Holiday Club-Cover Rule”*

- **Restricted Holiday-** This is an optional holiday which the user can avail for cultural reasons or celebrations.

If you select **Restricted Holiday**, then configure the below parameters:

- *“Optional Restrictions”*
- *“Leave Club Rule”*
- *“Leave Application Restrictions”*
- *“Keeping Check on Leave Balance”*
- *“Week-OFF/Holiday Club-Cover Rule”*

- **Compensatory Off-** This is an hourly based leave which can be availed when the user has authorized overtime hours.

If you select **Compensatory Off**, then configure the below parameters:

- *“Optional Restrictions”*
- *“Leave Club Rule”*
- *“Leave Application Restrictions”*
- *“Week-OFF/Holiday Club-Cover Rule”*

- **Hourly Leave** - This is an hourly based leave, where the user can get leave considering hours as per their requirement instead of taking *Full Day* or *Half Day* leave.

Select **Hourly Paid Leave** or **Hourly Unpaid Leave** from given drop down list.

**Hourly Paid Leave** will be deducted from the accumulated Leave balance whereas **Hourly Unpaid Leave** will result in salary deduction.

If you select **Hourly Leave**, then configure the below parameters:

- *“Optional Restrictions”*
- *“Leave Club Rule”*
- *“Leave Application Restrictions”*
- *“Week-OFF/Holiday Club-Cover Rule”*



*If you select the “**Hourly Unpaid Leave**” in leave type, then the option of **Leave balance Check** will be disabled.*

If you select **Leave Type** other than **Hourly Paid Leave** or **Hourly Unpaid Leave**, then configure the following parameters:

- **Minimum Allowed At a Time:** Specify the minimum number of days for which the employees can apply leave at one time.
- **Maximum Allowed Limit:** Specify the maximum number of days for which the employees can apply leave.
- **Maximum Allowed Limit For:** Select the application for which the maximum limit can be set.
- **Single App:** If this option is selected and the maximum allowed limit is configured as 2, then an employee will be able to apply for a maximum of 2 leaves at a time.
- **Consecutive Apps:** In this case, the maximum allowed limit applies not only to a single application but to all applications made consecutively for the same leave type before or after it.

**E.g.:** In case of this leave, an employee can apply for a total of 2 leaves inclusive of all applications for the same leave type before or after the current leave application. So if an employee applies for a “Sick Leave” from 2nd-3rd December, he will not be allowed to apply for a sick leave for 4th-5th December in this case. But if he applies leave from 5th-7th December, he will be able to do so.

However, for Single Application, a new sick leave of 2 days can be applied for, 4th-5th December.

If you select **Leave Type** as **Hourly Paid Leave** or **Hourly Unpaid Leave**, then configure below parameters:



- **Minimum Allowed Duration**

Set the minimum hours that should be used while applying for hourly leaves. (i.e., if the minimum value is set as 01:00, and the user wishes to apply hourly leave with less than 01:00 of applied duration, then the system will not allow for such leave application.)

- **Max Allowed Duration Per Application**

Set the maximum hours per application that should be used while applying for hourly leaves. (i.e., if the maximum value is set as 04:00, and the user wishes to apply hourly leave with more than 04:00 of applied duration, then the system will not allow for such leave application.)

- **Max Allowed Duration Per Day**

Set the maximum hours per day that should be used while applying for Hourly leaves.



*Minimum allowed duration, maximum allowed duration per day/per application are applicable on posted duration and not on applied duration.*

Click **Save** to define the new leave on the system successfully. The leave gets displayed in the grid as shown in the screen below.

### Example: Hourly Leave

#### 1. Shift Configuration (*Shifts and Schedules Module > Shift Configuration*)

Shift	9:00 - 18:00
Minimum hours required for Half Day	2 hours
Minimum hours required for Full Day	4 hours
Break (Break Deviation - Disable)	12:00 - 13:00
Grace for Shift Late IN (Overlap Grace time with Shift Late IN - Disable)	30 minutes
Include Grace in Work Hours	Enable
Late IN	60 minutes
Add Break Late IN in Total Late IN	Enable
Early OUT	60 minutes
Add Break Early OUT in Total Early OUT	Enable

## 2. Hourly Leave Configuration (*Leave Management Module> Leave*)

Type	Hourly Paid Leave
Minimum Allowed Duration	00:00
Max Allowed Duration Per Application	08:00
Max Allowed Duration Per Day	12:00
Add Leave Hours into Work Hours	Enable

## 3. User Punches for 1st January

IN Punch	OUT Punch	IN Punch	OUT Punch
10:00	11:30	13:00	14:00

## 4. Hourly Leave Applied for 1st January (*Leave Management Module> Leave Application*)

Attendance Date	01/01/2021
From	02/01/2021
To	02/01/2021
Applied	03:30
Posted	03:30

## 5. Attendance Details (*Time and Attendance Module> Attendance Correction > Attendance Details*)

Status	PR - PR
Work Hours:	6 hours
Grace Time:	30 minutes (09:00 - 09:30)
Late IN	30 minutes (09:30 - 10:00)
Early OUT Total	60 minutes [30 minutes Shift Early OUT (17:30 - 18:00) + 30 minutes Break Early OUT (11:30 - 12:00)]

- Now, select the desired leave from the grid and click **Edit** to configure additional parameters for the leave as described in the following sections.



Once used on the system (e.g. for leave application), a leave cannot be modified or deleted. Therefore the HR administrator must configure leaves with care before they are used on the system.

### Optional Restrictions

These options can be used to impose certain leave application rights and requirements on employees. To configure this, expand the Optional Restrictions panel and the following screen appears.

- **Allowed Users:** Select an option specifying whether the selected leave should be applicable to all users or to either male or female users.
- **Medical Certificate Required:** Select the desired option from the drop down list— None, Ensure Availability, Upload Document.

Select **None** if you do not want the applicant to submit the medical certificate.

Select **Ensure availability**, if you just want to check the documents are available with the applicant and keep the medical document upload optional.

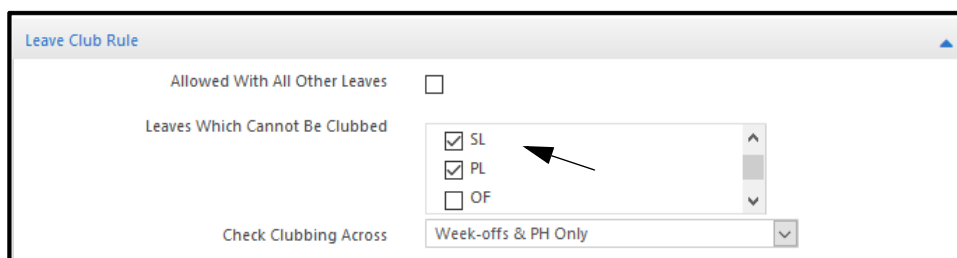
Select **Upload Document**, if you want to make it mandatory for the applicant to upload the document.

- **Min. Leave For Certificate Compulsion:** Specify a minimum period (in days) for leave application within which the applicant needs to submit the medical certificate.

Example: If 3 days are specified, then the user will be required to submit a medical certificate on taking leave for 3 or more than 3 days. And if he takes leave for 2 days then medical certificate is not required to be submitted to the company.

## Leave Club Rule

The concept of **Leave Club Rule** in COSEC allows employees to use the selected leave along with other leaves configured in the system. For instance, an employee may be allowed to club a Compensatory Off with a Casual Leave in certain organizations, while others may not allow it. To define this rule, expand the **Leave Club Rule** panel as shown below.



- **Allowed With All Other Leaves:** Select the checkbox to allow the selected leave to be clubbed with any other leave pre-configured in the system.
- **Leaves Which Cannot Be Clubbed:** If some leaves are not to be allowed for clubbing with the selected leave, specify such leaves by selecting the appropriate checkboxes corresponding to each leave. Scroll up or down to view the entire list of available leaves on the system. These are the pre-created leaves.



*While configuring a new Leave, if you do not wish to club this leave with other leaves, click the **Self** checkbox. After this Leave is saved the name assigned to this leave will be displayed instead of Self.*

- **Check Clubbing Across:** Select the option for checking the leave clubbing rule across weekdays, week offs or both.

Suppose if invalid leave clubbing is detected (e.g. say, two leaves which cannot be clubbed are applied on either side of a Week-Off), user will not be able to apply for the leave.

- **Week-Offs & PH Only:** In this leave clubbing will be checked only for WO and PH.
- **Normal Days:** In this leave clubbing will be checked only for Normal days i.e. week days.
- **Both:** In this leave clubbing will be checked for both WO, PH and Week days.

### Example1: Leaves Which Cannot Be Clubbed

Create a PL leave and configure the parameter "**Leaves Which Cannot Be Clubbed**" as shown in the above screen.

Now, apply one Casual Leave on 14th November either from ESS module or from Leave Management module and then apply one Paid Leave on 15th November.

On applying leave for 15th November, the system displays an error message stating "This leave should not be clubbed with CL" as shown in the screen below.

**Leave Application**

! This Leave should not be clubbed with CL

From Date: 05/11/2016 To Date: 05/11/2016 Full Day

Applied Days: 1 Posted Days:

Leave: P - Paid Leave Current Balance: 10.00

**Reason And Contact Info**

Reason: 50 Char Address: 20 Char Contact Number: 20 Char Medical Certificate Required: ☐

Submit Cancel

Oct 2016 Dec 2016 Availed Leaves : 1

32.5 days Absent 1 day Pending 0 day Approved 0 day Rejected

Attendance Details

Date	Shift	1st Half	2nd Half	First IN	Last OUT	Work Hours
09/11/2016	NS	AB	AB			
08/11/2016	NS	AB	AB			
07/11/2016	GS	AB	AB			
05/11/2016	GS	AB	AB			
04/11/2016	GS	AB	AB			
03/11/2016	GS	IN	AB	12:26		
02/11/2016	GS	AB	AB			

8 - 14 of 38 records

Thus, if you try to apply Casual Leave and Paid Leave one after another, the system will not allow to do so and displays the error message as shown in the above screen.

### Example 2: Check Clubbing Across Week-Off/Holiday

Create a PL leave and configure the parameters “Leaves Which Cannot Be Clubbed” and select **Check Clubbing Across** as “**Week-Offs & PH only**” as shown in the below screen.

**Leave Club Rule**

Allowed With All Other Leaves: ☐

Leaves Which Cannot Be Clubbed: ☒ Casual Leave ☐ Head Office ☒ Paid Leave

Check Clubbing Across Week-Off/Holiday: ☒

Check Clubbing Across: Normal Days, Normal Days, **Week-offs & PH Only**, Both

Leave Application Restrictions

5th Nov	6th Nov	7 Nov	Remarks
CL	WO	PL	CL and PL cannot be clubbed

Now, apply one Casual Leave on 5th November either from ESS module or from Leave Management module and then apply one Paid Leave on 7th November. 6th November is the Week-Off.

On applying leave for 7th November, the system displays an error message stating “This leave should not be clubbed with CL” as shown in the screen below.

**Leave Application** ! This Leave should not be clubbed with CL

From Date: 07/11/2016 To Date: 07/11/2016 Full Day

Applied Days: 1 Posted Days:

Leave: P - Paid Leave Current Balance: 10.00

Reason And Contact Info:

Reason: 50 Char Address: 30 Char Contact Number: 20 Char Medical Certificate Required: ☐

Submit Cancel

Oct 2016 Dec 2016 Availed Leaves : 1

32.5 days Absent 1 day Pending 0 day Approved 0 day Rejected

Application Details Show All

From	To	Leave	Application Date	Application Type	Status
05/11/2016	05/11/2016	CL	17/11/2016	New	

Thus, if **Check Clubbing Across Week-Off & PH** option is enabled while configuring the leave and if you try to apply Casual Leave and Paid Leave one after another, the system will not allow to do so and will display an error message as shown in the above screen.

Similarly, if leaves are applied between the Public Holidays, then also the user will be restricted from applying.

#### Example 3: Check Clubbing across Normal days

Friday	Saturday	Sunday	Monday	Tuesday	Remarks
GS	WO	WO	GS	GS	
			SL	PL	SL and PL cannot be clubbed on normal days

The rule is configured to not allow SL & PL together so if the user has applied leave on Monday & Tuesday so while trying to approve the leaves; the leave on Tuesday will not be allowed to be approved.

#### Example 4: Check Clubbing for both i.e. across Normal days and WO/PH

Friday	Saturday	Sunday	Monday	Tuesday	Wednesday	Remarks
GS	WO	WO	GS	GS	GS/PH	
			SL	SL	PL	SL and PL cannot be clubbed on normal days

Normal Days include public holidays falling on weekdays.

The rule is configured to not allow SL & PL together so if the user has applied for leave on Public Holiday then the leave of Wednesday will not be allowed to be approved.

## Leave Application Restrictions

Certain restrictions can be enabled for the leave application process in an organization, making it mandatory for an employee to follow some rules while applying for leaves. For e.g., hospitals and other emergency care facilities often need to arrange for substitutes beforehand, for any employee who goes on a leave. In such cases, employees may be required compulsorily to offer leave notification in advance.

To apply such restrictions, click the **Leave Application Restrictions** panel and configure the required parameters as shown below.

**Leave Type** = Paid Leave, Lay off, Unpaid, Restricted Holiday and Compensatory Off

The screenshot shows the 'Leave Application Restrictions' panel. It contains the following settings:

- Application Allowed Before Leave:** ☒
- Minimum Days Before Leave Start Date:**
- Application Allowed After Leave:** ☒
- Maximum Days After Leave End Date:**
- Restrict Application Within Specified Period:** ☐
- Restriction Type:**
- Restriction Period:**

**Leave Type** = Hourly Paid Leave / Hourly Unpaid Leave

The screenshot shows the 'Leave Application Restrictions' panel for hourly leave types. It contains the following settings:

- Application Allowed Before Leave:** ☒
- Minimum Duration Before Leave Start Date:**
- Application Allowed After Leave:** ☒
- Maximum Duration After Leave End Date:**
- Restrict Application Within Specified Period:** ☐
- Restriction Type:**
- Restriction Period:**



*The effect of these configurations are reflected while applying for leave from the ESS module.*

Leave can be applied prior to the Leave Start Date as well as after the Leave End Date depending on the restriction applied. Leave can be applied even on the Leave Start Day.

- **Application Allowed Before Leave:** Select this checkbox to permit users to apply a leave request prior to as well as on the Leave Start Date.
- **Minimum Days Before Leave Start Date:** When the **Leave Type** is — Paid Leave, Lay off, Unpaid, Restricted Holiday and Compensatory Off, set the minimum day/s required for users to apply a leave request prior to the Leave Start Date.

When the **Leave Type** is Hourly Paid Leave or Hourly Unpaid Leave, you will be required to select desired format — Days or Hours, in which you wish to restrict a user for applying a leave.

If you select **Days**, then set the minimum day/s required for users to apply a leave request prior to the Leave Start Date.

If you select **Hours**, then set the minimum hours required for users to apply a leave request prior to the Leave Start Date/Time.

Users will be restricted to apply the leave request before / after the specified period.

If **Application Allowed Before Leave** is enabled and **Minimum Days Before Leave Start Date** is not specified then the user can apply leave before/ on the Leave Start Date.

#### Example 1: Minimum Days Before Leave Start Date = 2 Days

**Leave Date:** 19/11/2016

In this case, the User will be allowed to apply leave on 17/11/2016.

If the user tries to apply leave on 18/11/2016, he/she will be restricted and the system will display an error as shown below:

**Leave Application**

! Paid Leave application allowed only 2 days before leave start...

From Date: 18/11/2016 To Date: 18/11/2016

Applied Days: 0.5 Posted Days:

Leave: P - Paid Leave Current Balance: 7.50

Reason And Contact Info

Reason: 30 Chor Address: 30 Chor Contact Number: 30 Chor Medical Certificate Required: ☐

Submit Cancel

Oct 2016 Dec 2016 Availed Leaves : 4

31 days Absent 3 days Pending 1 day Approved 0 day Rejected

Attendance Details

Date	Shift	1st Half	2nd Half	First IN	Last OUT	Work Hours
18/11/2016	G5	AB	AB			
17/11/2016	G5	AB	AB			
16/11/2016	G5	AB	AB			
12/11/2016	N5	AB	AB			
11/11/2016	N5	AB	AB			
10/11/2016	N5	AB	AB			
09/11/2016	N5	AB	AB			

1 - 7 of 37 records

#### Example 2: Minimum Days Before Leave Start Date (Leave Type = Hourly Paid/Unpaid Leave) = Format: Hours and Minimum Time: 2 Hours

**Leave Date and Time:** 19/11/2016 and 09.00 to 18:00

In this case, the User will be allowed to apply leave on 19/11/2016 at 07:00.

If the user tries to apply leave at 08:00, he/she will be restricted and the system will display an error.



If you set the **Minimum Days Before Leave Start Date**, then **Application Allowed After Leave** and **Max. Days After Leave End Date** will not be configurable.



- **Application Allowed After Leave:** Select this checkbox to permit users to apply a leave request after the Leave End Date.
- **Maximum Days After Leave End Date:** When the **Leave Type** is — Paid Leave, Lay off, Unpaid, Restricted Holiday and Compensatory Off — set the maximum day/s required for users to apply a leave request after the Leave End Date.

When the **Leave Type** is — Hourly Paid Leave or Hourly Unpaid Leave — you will be required to select the desired format — Days or Hours — in which you wish to restrict a user for applying a leave.

If you select **Days**, then set the maximum day/s required for users to apply a leave request after the Leave End Date.

If you select **Hours**, then set the maximum hours required for users to apply a leave request after the Leave End Date/ Time.

Users will be restricted to apply the leave request after the specified period.

Example: **Maximum Days After Leave End Date** = 1

**Leave Date:** 16/11/2016

In this case, the User will be allowed to apply leave on 17/11/2016.

If the user tries to apply leave on 18/11/2016, he/she will be restricted and the system will display an error.

**Example 2: Maximum Days After Leave End Date (Leave Type = Hourly Paid/Unpaid Leave) =**  
Format: Hours and Maximum Time: 2 Hours

**Leave Date and Time:** 19/11/2016 and 09.00 to 18:00

In this case, the User will be allowed to apply leave on 19/11/2016 till 20:00 hour.

If the user tries to apply leave at 21:00 hour, he/she will be restricted and the system will display an error.

There are many different cases related to — **Application Allowed Before Leave, Minimum Days Before Leave Start Date, Application Allowed After Leave, Maximum Days After Leave End Date** — one may encounter while applying a leave. So to understand such scenarios, refer the following cases.

#### **CASE 1: Consider all the possibilities for Leave types other than Hourly Leave.**

A user wants to apply a leave from **20-02-2020** to **22-02-2020**.

<b>Application Allowed Before Leave</b>	<b>Minimum Days Before Leave Start Date</b>	<b>Application Allowed After Leave</b>	<b>Maximum Days After Leave End Date</b>	<b>Valid Leave Application Date Range</b>
Disabled	-	Disabled	-	Not Allowed
Enabled	-	Disabled	-	Till 20-02-2020
Enabled	2	Disabled	-	Till 18-02-2020

Application Allowed Before Leave	Minimum Days Before Leave Start Date	Application Allowed After Leave	Maximum Days After Leave End Date	Valid Leave Application Date Range
Disabled	-	Enabled	-	From 20-02-2020 onwards
Disabled	-	Enabled	0	From 20-02-2020 till 22-02-2020
Disabled	-	Enabled	3	From 20-02-2020 till 25-02-2020
Enabled	-	Enabled	-	All dates
Enabled	-	Enabled	0	Till 22-02-2020
Enabled	-	Enabled	3	Till 25-02-2020
Enabled	2	Enabled	3	Not Possible

**CASE 2: Consider all the possibilities for Leave types — Hourly Paid Leave and Hourly Unpaid Leave.**

A user wants to apply a leave on **20-02-2020** from **14:00 to 18:00** hours.

Application Allowed Before Leave	Minimum Days Before Leave Start Date Format = Hours	Application Allowed After Leave	Maximum Days After Leave End Date Format = Hours	Valid Leave Application Date Range
Disabled	-	Disabled	-	Not Allowed
Enabled	-	Disabled	-	Till 20-02-2020 14:00 hours
Enabled	05:00	Disabled	-	Till 20-02-2020 09:00 hours
Disabled	-	Enabled	-	From 20-02-2020 14:00 hours onwards
Disabled	-	Enabled	03:00	From 20-02-2020 14:00 hours to 21:00 hours
Enabled	-	Enabled	-	All dates
Enabled	-	Enabled	03:00	Till 20-02-2020 21:00 hours
Enabled	02:00	Enabled	03:00	Not Possible

**CASE 3: Consider all the possibilities for Leave types — Hourly Paid Leave and Hourly Unpaid Leave.**

A user wants to apply a leave on **20-02-2020** from **14:00** to **18:00** hours.

<b>Application Allowed Before Leave</b>	<b>Minimum Days Before Leave Start Date</b> Format = Days	<b>Application Allowed After Leave</b>	<b>Maximum Days After Leave End Date</b> Format = Days	<b>Valid Leave Application Date Range</b>
Disabled	-	Disabled	-	Not Allowed
Enabled	-	Disabled	-	Till 20-02-2020
Enabled	2	Disabled	-	Till 18-02-2020
Disabled	-	Enabled	-	From 20-02-2020 onwards
Disabled	-	Enabled	0	From 20-02-2020 to 21-02-2020
Disabled	-	Enabled	3	From 20-02-2020 to 24-02-2020
Enabled	-	Enabled	-	All days allowed
Enabled	-	Enabled	0	Till 21-02-2020
Enabled	-	Enabled	3	Till 24-02-2020
Enabled	2	Enabled	3	Not Possible

**CASE 4: Consider all the possibilities for Leave types — Hourly Paid Leave and Hourly Unpaid Leave.**

A user wants to apply a leave from **20-02-2020, 20:00** hours to **21-02-2020, 04:00** hours.

<b>Application Allowed Before Leave</b>	<b>Minimum Days Before Leave Start Date</b> Format = Hours	<b>Application Allowed After Leave</b>	<b>Maximum Days After Leave End Date</b> Format = Days	<b>Valid Leave Application Date Range</b>
Disabled	-	Disabled	-	Not Allowed
Enabled	-	Disabled	-	Till 20-02-2020 20:00 hours
Enabled	05:00	Disabled	-	Till 20-02-2020 15:00 hours
Disabled	-	Enabled	-	From 20-02-2020 onwards
Disabled	-	Enabled	-	20-02-2020 to 21-02-2020
Disabled	-	Enabled	3	20-02-2020 to 24-02-2020
Enabled	-	Enabled	-	All days at any time
Enabled	-	Enabled	0	Till 21-02-2020
Enabled	-	Enabled	3	Till 24-02-2020
Enabled	02:00	Enabled	3	Not Possible

**CASE 5: Consider all the possibilities for Leave types — Hourly Paid Leave and Hourly Unpaid Leave.**

A user wants to apply a leave from **20-02-2020, 20:00 hours** to **21-02-2020, 04:00 hours**.

Application Allowed Before Leave	Minimum Days Before Leave Start Date Format = Days	Application Allowed After Leave	Maximum Days After Leave End Date Format = Hours	Valid Leave Application Date Range
Disabled	-	Disabled	-	Not Allowed
Enabled	-	Disabled	-	Till 20-02-2020
Enabled	2	Disabled	-	Till 18-02-2020
Disabled	-	Enabled	-	From 20-02-2020 20:00 hours onwards
Disabled	-	Enabled	05:00	From 20-02-2020 20:00 hours to 21-02-2020 09:00 hours
Enabled	-	Enabled	-	All days at any time
Enabled	-	Enabled	05:00	Till 21-02-2020 09:00 hours
Enabled	02:00	Enabled	03:00	Not Possible

- **Restrict Application Within Specified Period:** Enable the checkbox to impose a restriction on leave application for a specific period. This is usually used in certain organizations where employees are restricted from taking paid leaves during their probationary period.
- **Restriction Type:** Select the type of restriction till which an employee cannot apply for leave. The restriction type can be till the employee's Confirmation Date or for a specific duration (**Restriction Period**) starting from the employee's Joining Date.

For this restriction to work, care must be taken to save user's joining and confirmation dates in COSEC before any leaves are applied. Also, any auto-attendance correction or attendance regularization using leaves for dates that fall within the Restriction Period will be overruled.

**Example:** Consider The restriction type as "Joining Date" and specify the Restriction Period as "month" and number of months as "6" for "PL" leave type. Current month is "November".

Now, if a user Rosy has joined in the month of July and she tries to apply for leave, then she will not be allowed for the restricted period.

## Keeping Check on Leave Balance

This option allows the HR administrator to keep a check on the leave balance of any user configured in COSEC. To do this, expand the **Leave Balance Check** panel as shown below.

The screenshot shows the 'Leave Balance Check' configuration panel. It contains several sections with checkboxes and input fields:

- Enable Balance Check:** A checkbox that is checked.
- Maximum Limit In Attendance Period:** A section with an 'Enable' checkbox (unchecked) and a 'Maximum Limit' input field.
- Carry Forward To Next Year:** A section with an 'Enable' checkbox (unchecked) and a 'Maximum Carry Forward Limit Check' input field.
- Balance Mgmt. From Other Leave:** A section with an 'Enable' checkbox (checked), a 'Balance To Be Managed From' dropdown menu set to 'Casual Leave', and a 'Multiplication Factor For Deduction' input field set to '1'.
- Leave Encashment:** A section with an 'Enable' checkbox (unchecked) and a 'Min. Balance Check After Encashment' input field.
- Maximum Accumulation Check:** A section with an 'Enable' checkbox (unchecked) and a 'Maximum Accumulation Check' input field set to '0.00'.

- **Enable Balance Check:** Select the checkbox to enable users to check their leave balance. If disabled for a particular leave then users cannot credit/debit/encash leaves to this type of leave. But when the user will apply for leave from the ESS module it will act as unpaid leave. But it is recommended that this option is enabled so that the user can use other facilities of leaves.

## Maximum Limit in Attendance Period

Select the checkbox to maintain an upper limit restriction for leaves applied in Attendance Period. Specify the maximum allowed leave limit in attendance period for the specific leave type.

**Example:** Suppose the maximum limit in Attendance Period is 4 for Casual Leave type. Then user will be allowed to apply leave for 4 days only. Now, if user tries to apply leave for more than 4 days in a month then he will not be allowed to apply for any more casual leave in that particular month and will receive an error message on the screen as shown below.

### Carry Forward To Next Year

- **Enable:** Select the checkbox to enable the unused leave balance to be carried over to the next year.
- **Maximum Carry Forward Limit Check:** Select the checkbox to put a restriction on the number of leaves to be carry forwarded to the next year. Specify the maximum number of leaves in the textbox that can be carried forward to the next year. E.g. If for one year the leave balance is 40 leaves and the maximum leave to be carry forwarded is 10, then only 10 leaves will be carry forwarded to the next year. While the remaining 30 leaves will get lapsed.

### Balance Mgmt. From Other Leave

- **Enable:** Select the checkbox, if the balance of another leave defined on the system is to be managed from the currently selected leave.

- **Balance To Be Managed From:** Select the leave from the dropdown list to be managed from the leave being configured.
- **Multiplication Factor For Deduction:** Enter a value for this balance management. E.g. If the value specified is 1 for Casual Leave, then 1 leave of Privilege Leave will be given to the Casual leave when the Casual Leave balance becomes 0 and still Casual Leave is applied.

**Example:** Balance to be Managed From is selected as “Casual Leave” and the multiplication factor is specified as “1” for Privilege type of leave.

### Leave Application Scenario

Suppose the Availed Balance of Casual Leave is 2 days in the Leave Balance page as shown in the screen below.

Year	Month	Code	Name	Opening	Credit	Debit	Encashment	Availed	Closing	Overflow
2016	Dec	CL	Casual Leave	0.00	10.00	0.00	0.00	2.00	8.00	0.00
2016	Dec	PL	Privilege	0.00					0.00	0.00
2016	Dec	SL	Sick Leave	0.00					0.00	0.00

Now apply one Privilege leave.

From	To	Leave	Application Date	Application Type	Status
15/12/2016	15/12/2016	PL	19/12/2016	New	✓
12/12/2016	13/12/2016	CL	19/12/2016	New	✓

Once the leave gets applied, check the balance from the Leave Balance page.

Year	Month	Code	Name	Opening	Credit	Debit	Encashment	Availd	Closing	Overflow
2016	Nov	CL	Casual Leave	0.00	20.00	0.00	0.00	3.0	17.00	0.00
2016	Nov	PL	Privilege Leave	0.00				0.0	0.00	0.00
2016	Nov	SL	Sick Leave	0.00	10.00	0.00	0.00	0.0	10.00	0.00

The Availd balance of Casual Leave becomes 3 and Privilege Leave is still 0. This is because the Privilege Leave balance is managed from Casual Leave balance. Hence, any leave applied, credited, debited or encashed will be deducted from Casual Leave only and not from the Privilege Leave.

### Credit Scenario

Now if 3 leaves are credited for Privilege Leave from **Balance Management > Credit/Debit/Encashment** page, then the balance of 3 leaves will be credited to Casual Leave. The number of leaves credited to Privilege Leave can be viewed from the **Leave Balance** page.

### Debit Scenario

If 3 leaves are debited for Privilege Leave from **Balance Management > Credit/Debit/Encashment** page, then the balance of 3 leaves will be debited from Casual Leave and not the Privilege Leave. The number of leaves debited from Privilege Leave can be viewed from the **Leave Balance** page.

### Encashment Scenario

If 3 leaves are encashed for Privilege Leave from **Balance Management > Credit/Debit/Encashment** page, then the balance of 3 leaves encashed will be deducted from the Casual Leave only. The number of leaves encashed for Privilege Leave can be viewed from the **Leave Balance** page. For encashment the Leave Encashment checkbox should be enabled.

### Leave Encashment

- **Enable:** Select the checkbox to make the selected leave available for encashment.
- **Min. Balance Check After Encashment:** Select the checkbox to define whether the system should maintain a certain balance before allowing encashment. If enabled, enter the minimum required leave balance for allowing encashment.

**Example:** If 2 is specified and out of total 5 leaves; 4 leaves are applied for encashment, then the user will not be allowed as minimum 2 leaves are required to be left in the leave balance after encashment.

### Maximum Accumulation Check

- **Enable:** Select the checkbox and enter a value for Maximum Accumulation Check to enable restriction on maximum leave balance accumulation for a year. In case a leave credit is made that causes the leave balance to exceed the specified Maximum Accumulation limit, only a partial credit will be allowed.

**Example:** Say, a user's leave balance is 48 and Maximum Accumulation limit is of 50 leaves, then a maximum leave credit of 2 leaves shall be allowed.



## Week-OFF/Holiday Club-Cover Rule

This is a conditional rule that enables the administrator to determine whether a Week-Off/Holiday that lies in continuity with a leave (either before, after or on both sides of Week-Off/Holiday), should be allowed. If this is not allowed, then the Week-Off/Holiday will be clubbed/covered by the system as a leave.

To apply this rule, expand the **Week-OFF/Holiday Club-Cover Rule** panel as shown below.

The screenshot shows a configuration panel titled "Week-Off/Holiday Club-Cover Rule". It is divided into two sections: "Week-Off Club/Cover Rule" and "Holiday Club/Cover Rule".

**Week-Off Club/Cover Rule**

- Allowed On Single Sided Leave: ☒
- Allowed On Both Sided Leave: ☒
- Atleast Full Day Leave For Club-Cover: ☐
- Enable Minimum Limit Check: ☒
- Minimum Limit Around Week-Off \*:

**Holiday Club/Cover Rule**

- Allowed On Single Sided Leave: ☒
- Allowed On Both Sided Leave: ☒
- Atleast Full Day Leave For Club-Cover: ☐
- Enable Minimum Limit Check: ☐
- Minimum Limit Around Holiday:

Select the appropriate checkboxes to apply Week-Off/Holiday club and cover rule for the following conditions:

### Week-Off Club/Cover Rule

- **Allowed on Single Sided Leave:** Leave is allowed only if the user is on leave on any one side of the Week-Off. Single side can be second half of previous day or first half of next day or either of the full day.  
  
**E.g.** If Week Off is on 6th November (Sunday) and Leave is applied for 5th November (Saturday) then user will be allowed to apply. But if the user applies for leave on 7th November (Monday) also then he will not be allowed to apply and an error message will be displayed on the screen.
- **Allowed on Both Sided Leave:** Leave is allowed only if the user is on leave on both sides of a Week-Off. The both sides can be second half of previous day or first half of the next day or full day on both the sides of Week-Off. In this case single sided leave will not be considered. i.e. If leave is applied for 5th November only and Week Off is on 6th November, then user will not be allowed. He will have to apply for leave on 7th November also.
- **Atleast Full Day Leave For Club-Cover** - Applies club-cover rule for the following scenarios:
  - When **Allowed on Single Sided Leave** is also checked, Week-Off will be allowed only if the user is on a *full day leave* on any one side of a Week-Off.

- When **Allowed on Both Sided Leave** is also checked, Week-Off will be allowed only if the user is on a *full day leave* on both sides of a Week-Off.
- **Enable Minimum Limit Check** - Select this checkbox to enable a check on the minimum number of leaves that can be availed on both sides of a Week-Off.
- **Minimum limit around Week-Off**: Specify the minimum number of leaves that can be applied around the week-off. This check will be applicable only for similar leave types on both sides of a Week-Off.

**Example:** Consider Minimum Limit Around Week-Off as “3” as shown in the screen below.

**Week-Off/Holiday Club-Cover Rule**

**Week-Off Club/Cover Rule**

Allowed On Single Sided Leave ☒

Allowed On Both Sided Leave ☒

Atleast Full Day Leave For Club-Cover ☐

Enable Minimum Limit Check ☒

Minimum Limit Around Week-Off\* 3.0

Now apply Casual Leave from 4th November to 8th November as shown in the screen below.

**Leave Application**

! All Days are not Posted because of Weekly Off in Application...

User: 1 Rony

From Date: 04/11/2016 Full Day

To Date: 08/11/2016 Full Day

Applied Days: 5

Posted Days:

Leave: CL - Casual Leave

Current Balance: 20.00

Reason And Contact Info

Reason: 50 Char

Address: 30 Char

Contact Number: 20 Char

Submit Cancel

Oct 2016 Dec 2016 Availed Leaves : 2

31.5 days Absent 0 day Pending 2 days Approved 0 day Rejected

Application Details Show All

From	To	Leave	Application Date	Application Type	Status
18/11/2016	18/11/2016	11	17/11/2016	New	✓
21/10/2016	21/10/2016	P1	17/11/2016	New	✓

The user will not be allowed to apply leave and an error message will be displayed as shown in the screen above.

This is because only “3” leaves can be applied around the week-off and in the above example leave is applied for “4” days.

Thus, the user will not be allowed to apply leave more than the number configured in the parameter “Minimum Limit Around Week-Off”.

## Holiday Club/Cover Rule



The Holiday Club/Cover Rule will work similar to the Week-Off Club/Cover rule. Hence, for examples and better understanding of parameters See “Week-Off Club/Cover Rule” on page 2311.

- **Allowed on Single Sided Leave** - Holiday is allowed only if the user is on leave on any one side of the Holiday. Single side can be second half of previous day or first half of next day or either of the full day.
- **Allowed on Both Sided Leave** - Holiday is allowed only if the user is on leave on both sides of a Holiday. The both sides can be second half of previous day or first half of the next day or full day on both the sides of holiday.
- **Atleast Full Day Leave For Club-Cover** - Applies club-cover rule for the following scenarios:
  - When **Allowed on Single Sided Leave** is also checked, Holiday will be allowed only if the user is on a *full day leave* on any one side of a Holiday.
  - When **Allowed on Both Sided Leave** is also checked, Holiday will be allowed only if the user is on a *full day leave* on both sides of a Holiday.
- **Enable Minimum Limit Check** - Select this checkbox to enable a check on the minimum number of leaves that can be availed on both sides of a Public Holiday.
- **Minimum limit around Holiday**: Specify the minimum number of leaves that can be applied around the holiday. This check will be applicable only for similar leave types on both sides of a Holiday.

Once all the parameters get configured, click **Save** button and the created leave gets displayed in the grid as shown in the screen below.

Code	Name
11	1234
C1	C-OFF1
C2	C-OFF2
C3	C-OFF3
CF	C-OFF
CL	Casual Leave
P	Paid Leave
P1	Primary Leave
PL	Privilege Leave
SL	Sick Leave

You can also delete the created leave by selecting the leave from the grid and clicking **Delete** button.

# Tours

A tour is an official trip undertaken by an employee for work-related purposes. Many organizations follow a formal procedure for tour application and approval. This procedure may vary depending upon organizational norms and practices. For example, some establishments may allow employees to club tours with other leaves, while others may not.

The Leave Management module supports creation of customized tour types alongside a flexible option to generate tour applications and tour authorization by the concerned personnel. This section will describe the process of tour configuration, application and approval as performed using the *Leave Management* module.



*Tour Application and Approval can be performed both using the **Leave Management** module by system-account users with appropriate page rights, as well as using the **Employee Self Service** module by employees and their respective reporting in-charges. For more information on tour application/approval via ESS, please refer to the respective user documentation.*

## Defining New Tours

To define a new tour, go to **Leave Management > Tour** and the following page appears.

Code	Name
HO	Head Office
US	USA

The page displays configurations on the left side and a grid containing existing tours on the right hand side.



*Tours and Leaves on COSEC have a similar configuration. To know more about configuring for leaves, refer to ["Defining New Leaves"](#).*

- **Tour:** Every new tour must be defined with a **Code** and a **Name**. Enter the details in the respective fields. The tour Code can be of maximum 2 alphanumeric characters. For example, for the tour name "Head Office", the leave code has been assigned as "HO".
- **Tour Type:** Select the tour type as **Tour/ON Duty**.
- **Minimum Allowed At A Time:** Specify the minimum number of tours in days which will be allowed to employees at a time.
- **Maximum Allowed Limit:** Specify the maximum number of tours in days which will be allowed to employees at a time.

- **Maximum Allowed Limit For:** The maximum allowed limit can be set for:
  - **Single App** - Here the maximum allowed limit is applicable only to a single tour application. Hence when, the Maximum Allowed Limit for a Single Application is 5, then an employee will be able to apply for a maximum of 5 days of tour at a time.
  - **Consecutive Apps** - Here the maximum allowed limit applies not only to a single application but to all applications for the same tour made consecutively before or after it.

### Optional Restrictions

This options can be used to impose certain tour application rights and requirements on employees. To configure this, expand the **Optional Restrictions** panel as shown below.

- **Allowed Users:** Select an option from the dropdown list to specify whether the tour should be applicable to all users or only to either male or female users.
- **Tour Document Required:** Select the desired option from the drop down list— None, Ensure Availability, Upload Document.

Select **None** if you do not want the applicant to submit the tour document.

Select **Ensure availability**, if you just want to check the documents are available with the applicant and keep the tour document upload optional.

Select **Upload Document**, if you want to make it mandatory for the applicant to upload the document.

- **Min. Tour Days for Document Compulsion:** Specify a minimum period (in days) for Tour application within which the applicant needs to submit the tour document.

Example: If 2 days are configured as **Min. Tour Days for Document Compulsion**, then user will be required to submit document on tour within 2 or more days

### Tour Club Rule

The concept of **Tour Club Rule** in COSEC allows employees to use the selected tour along with other leaves configured in the system. To define this rule, expand the **Tour Club Rule** tab as shown below.

- **Allowed With All Other Tour:** Select the checkbox to allow the selected tour to be clubbed with any other leave pre-configured in the system.
- **Tours Which Cannot Be Clubbed:** If all leaves are not to be allowed for clubbing with the selected tour, specify such leaves by selecting the appropriate checkboxes corresponding to each leave. Scroll up or down to view the entire list of available leaves on the system.
- **Check Clubbing Across:** Select the option for checking the tour clubbing rule across weekdays, week offs or both.  
Suppose if invalid tour clubbing is detected (e.g. say, two leaves which cannot be clubbed are applied on either side of a Week-Off), user will not be able to apply for the leave.
  - **Week-Offs & PH Only:** In this tour clubbing will be checked only for WO and PH.
  - **Normal Days:** In this tour clubbing will be checked only for Normal days i.e. week days.
  - **Both:** In this tour clubbing will be checked for both WO, PH and Week days.

### Tour Application Restrictions

Certain restrictions can also be enabled for the tour application process in an organization, making it mandatory for an employee to follow some rules when applying for tours. To apply such restrictions, click the **Tour Application Restrictions** collapsible panel as shown below.

The screenshot shows a panel titled "Tour Application Restrictions" with the following settings:

- Consider Application on Week-Off: ☐
- Consider Application on Holiday: ☐
- Application Allowed Before Tour: ☒
- Minimum Days Before Tour Start Date:
- Application Allowed After Tour: ☒
- Maximum Days After Tour End Date:
- Restrict Application Within Specified Period: ☐
- Restriction Type:
- Restriction Period:

- **Consider Application on Week-Off:** Select this check box if you wish to allow employees to apply for Tour on Weekly-Off. By default it is disabled.



If the check box is enabled and the employee applies for Tour, then this will be reflected in the Posted Days. For example if Tour is applied for Sunday (which is a Weekly Off - WO), then Sunday will display Tour (TR - after approval) instead of Weekly Off (WO).

In the following condition Auto Week Off Assignment functionality will not work:

- Tour is applied for and approved for the Week-Off
- Auto Week Off Assignment is enabled (either from Shifts and Schedules > Shift Schedule or Week Off Group) as in this case the Week Off is converted to Tour.

In the following condition Absentee Policy > Week-Off Club/Cover Rule functionality will not work:

- Tour is applied for and approved for the Week-Off
- Week-Off Club/Cover Rule > Allowed On Single Sided Absent is enabled (from Time and Attendance > Policies > Absentee Policy > Week-Off Club/Cover Rule) and the user is Absent on both side of Week Off as in this case the Week Off is converted to Tour.

- **Consider Application on Holiday:** Select this check box if you wish to allow employees to apply for Tour on Holiday. By default it is disabled.



If the check box is enabled and the employee applies for Tour, then this will be reflected in the Tour Posted Days. For example if Tour is applied for Monday (which is a Paid Holiday-PH), then Monday will display Tour (TR - after approval) instead of Paid Holiday (PH).

In the following condition Absentee Policy > Holiday Club/Cover Rule > Allowed On Single Sided Absent functionality will not work:

- Tour is applied for and approved for the Holiday
- Holiday Club/Cover Rule > Allowed On Single Sided Absent is enabled (from Time and Attendance > Policies > Absentee Policy > Holiday Club/Cover Rule) and the user is Absent on both side of Holiday as in this case the Holiday is converted to Tour.

- **Application Allowed Before Tour:** Select this option for allowing employees to apply before going on tour. By default it is in enabled state.
- **Min. Days Before Tour Start Date:** Specify the minimum number of days from the tour start date, after which application for the tour taken will not be allowed any more.
- **Application Allowed After Tour:** Select this option for allowing employees to apply after going on tour. By default it is in enabled state.
- **Max. Days After Tour End Date:** Specify the maximum number of days after the tour ends, after which application for the tour taken won't be allowed any more.

### Week-OFF/Holiday Club-Cover Rule

To configure this option for tours, refer to ["Week-OFF/Holiday Club-Cover Rule"](#) for leave configuration.

Once all the parameters get configured, click **Save** button and the created tour gets displayed in the grid as shown in the screen below.

Tour

✓ Saved Successfully

✕

←

+

✎

✖

📄

✕

Search

Tour \*

HO

Head Office

Tour Type

Tour / ON Duty

Minimum Allowed At A Time \*

1.0

Maximum Allowed Limit \*

5.0

Maximum Allowed Limit For

Single App

Optional Restrictions

▼

Tour Club Rule

▼

Tour Application Restrictions

▼

Week-Off/Holiday Club-Cover Rule

▼

Code ▲

Name

HO

Head Office

US

USA

You can also delete the created tour by selecting the tour from the grid and clicking **Delete** button.



*Tour cannot be deleted if it is being used in the system or assigned to a user.*



# Leave Group

This option enables the user to club multiple leaves into groups to assign them to users. The COSEC system has a capacity to create unlimited leave groups with different IDs and leaves as member of the groups.

To create a new leave group, go to **Leave Management module > Leave Group** and the following screen appears.

The screenshot displays the 'Leave Group' management interface. At the top, there's a header bar with a search bar and a list of groups. Below this, the 'Leave Rounding Parameters' section contains several settings: 'Default' (checked), 'Enable Pro-rata' (unchecked), 'Enable Leave Rounding' (unchecked), 'Credit Leave in Multiples Of' (set to 0), and 'Rounding Limit' (set to Lower). The 'Group Members' section features a table with columns for 'Leave', 'ID', 'Name', 'Priority', 'Code', 'Name', 'Leave Type', 'Up/Down', and an icon. The table is currently empty, showing 'No Data'.

Click **Add** to add a new leave group and configure the following parameters:

**Leave Group:** Configure a **Name** for the new leave group. The ID will be generated by the system while saving the group.

## Leave Rounding Parameters

- **Default:** Select this check box if you wish to set the current leave group as the default one.
- **Enable Pro-rata:** Select the check box to enable leave credit on pro-rata basis (that is on the basis of the actual number of days worked by an employee). This shall be applicable to all leaves added in the new leave group. **For example:** The user has joined a company on 21st of month. You are crediting 10 leaves but actually 3.5 leaves will be credited to the user on Pro-rata basis.



*The users who are expected to get credited leaves using pro-rata should be assigned a Leave Group wherein **Enable Pro-rata** check box is enabled.*

*Make sure **Apply Pro-rata** check box is also enabled in Balance Management > Credit/Debit/Encashment page to apply pro-rata for the selected users.*

- **Enable Leave Rounding:** If **Enable Pro-rata** is enabled then you can enable leave rounding. This will allow the leaves to be credited in multiples of value as set in **Credit Leave in Multiples Of**.
- **Credit Leave in Multiples of:** You can enter a value, in whose multiples, the leave will be credited. The Valid values are 0.00 to 1.00.
- **Rounding Limit:** Select the desired option — Lower, Upper.

If you select **Lower**, credited leave should be rounded to the largest multiple of the value as set in **Credit Leave in Multiples Of**, which is less than the actual leave value calculated as per Pro-rata.

If **Upper** is selected, credited leave should be rounded to the smallest multiple of value as set in **Credit Leave in Multiples Of**, which is greater than the current leave value calculated as per Pro-rata.

#### Example: Pro-rata with rounding

Joining Date of selected User = 21/06/2016

Credit Leave for June, 2016 = 1.75 [for whole month]

Credit Leaves in Multiples of = 0.25

Thus, according to pro-rata calculation, the credited leave = (No. of leaves to be credited in month/ No. of days in month)\* [(No. of days in month- Date of joining) +1] = [(1.75/30)\*(30-21+1)] = 0.58

0.58 will be rounded off to lower limit as 0.5 days or Upper limit as 0.75 days as described in table:

Rounding Limit	Selection of value as per rounding limit and comparison with credited leave	
Lower	select a value in multiples of 0.25 such that it is the greatest value in multiples of 0.25 which is <b>less</b> than the current leave value calculated as per pro-rata feature.	The leave amount credited for selected user for June, 2016 is <b>0.5</b> days.
Upper	select a value in multiples of 0.25 such that it is the smallest value in multiples of 0.25 which is <b>greater</b> than the current leave value calculated as per pro-rata feature.	The leave amount credited for selected user for June, 2016 is <b>0.75</b> days.

#### Group Members

You can add different leave types to the leave group.To do so,

- **Leave:** Click the **Leave** picklist. The **Picklist For Leave Masters** pop-up appears.

Picklist For Leave Masters

Total Selected: 0 Records

Search  Show Selected

☐ Select All

<input type="checkbox"/>	Leave Code ▲	Name
<input type="checkbox"/>	CL	CASUAL LEAVE
<input type="checkbox"/>	CO	C-off
<input type="checkbox"/>	L1	Leave Type 1
<input type="checkbox"/>	L2	Leave Type 2
<input type="checkbox"/>	L3	Leave Type 3
<input type="checkbox"/>	L4	Leave Type 4
<input type="checkbox"/>	L5	Leave Type 5
<input type="checkbox"/>	L6	Leave Type 6
<input type="checkbox"/>	L7	Leave Type 7
<input type="checkbox"/>	L8	Leave Type 8

1 - 10 of 14 records

<< < 1 2 > >>

OK Cancel

- You can either select particular leave types or can select all the leave types at once.
- To select particular leave type, select the check boxes of the desired leave types.

Picklist For Leave Masters

Total Selected: 1 Records

Search  Show Selected

☐ Select All

<input type="checkbox"/>	Leave Code ▲	Name
<input checked="" type="checkbox"/>	CL	CASUAL LEAVE
<input type="checkbox"/>	CO	C-off
<input type="checkbox"/>	L1	Leave Type 1
<input type="checkbox"/>	L2	Leave Type 2
<input type="checkbox"/>	L3	Leave Type 3
<input type="checkbox"/>	L4	Leave Type 4
<input type="checkbox"/>	L5	Leave Type 5
<input type="checkbox"/>	L6	Leave Type 6
<input type="checkbox"/>	L7	Leave Type 7
<input type="checkbox"/>	L8	Leave Type 8

1 - 10 of 14 records

<< < 1 2 > >>

OK Cancel

**OR**

- To select all the leave types at once, select the **Select All** check box. The leave types on all the pages will be selected.

Picklist For Leave Masters

Total Selected: 14 Records

Search  Show Selected

☒ Select All

<input checked="" type="checkbox"/>	Leave Code ▲	Name
<input checked="" type="checkbox"/>	CL	CASUAL LEAVE
<input checked="" type="checkbox"/>	CO	C-off
<input checked="" type="checkbox"/>	L1	Leave Type 1
<input checked="" type="checkbox"/>	L2	Leave Type 2
<input checked="" type="checkbox"/>	L3	Leave Type 3
<input checked="" type="checkbox"/>	L4	Leave Type 4
<input checked="" type="checkbox"/>	L5	Leave Type 5
<input checked="" type="checkbox"/>	L6	Leave Type 6
<input checked="" type="checkbox"/>	L7	Leave Type 7
<input checked="" type="checkbox"/>	L8	Leave Type 8

1 - 10 of 14 records

« < 1 2 > »

OK Cancel

- Click **OK**.

For configuring different leave types, refer to [“Configuring Leaves”](#).

- The selected leave types appear in the grid.

Leave Group

Leave Group: 1 Leave Group-1

Leave Rounding Parameters

Default ☒

Enable Pro-rata ☒

Enable Leave Rounding ☒

Credit Leave in Multiples Of: 0.1

Rounding Limit: Lower

Group Members

Leave: ID Name

Auto Adjustme nt	Auto Debit Leave	Negative Balance Handling	Priority	Code	Name	Leave Type	Up/Down	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	1	P1	Paid Leave1	Paid Leave	▼	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	2	P2	Paid Leave2	Paid Leave	▲▼	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	3	R	Restricted Holiday	Restricted Holiday	▲	

Search

ID ▲ Name

1 Leave Group-1

Each Leave type has the following details/options:


- **Auto Adjustment:** Select this check box if you wish to consider the leave type for auto adjustment. For details refer T&A > Attendance Policy > Auto Attendance Correction > Auto Adjustment with Leave in [“Auto Attendance Correction”](#).
- **Auto Debit Leave:** Select the check box if you wish to automatically deduct leave from the leave balance of users. This check box is configurable for Paid Leave types with **Enable Balance Check** check box enabled and Attendance Policy wherein **Action on Exceeding Max Late-IN or Early-OUT or Both** are configured as **Debit Leave** and the same is also assigned to the users. For details refer to [“Absent Marking Rule”](#).



*If **Balance To Be Managed From** is configured for a **Paid Leave** intended for Debit Leave functionality, the system will deduct leave from the balance associated with the configured source. However, if a multiplication factor is set for that leave, it will not be considered. For example, if 5 leaves were to be debited from Paid Leave (due to Auto Debit Leave functionality), and Paid Leave's Balance To Be Managed From is set as KL with a multiplication factor for deduction as 2, then only 5 leaves will be deducted from KL and the multiplication factor will be discarded.*

*For any leave that has **Optional Restrictions** set for **Allowed User**, these restrictions will be taken into account during the execution of the auto debit leave functionality. For instance, if PL is designated only for female users, and auto debit leave functionality attempts to deduct PL from male users, no leave will be deducted for the male users due the restrictions in place.*

*In cases wherein both Auto Adjustment and Auto Debit are enabled, the system will prioritize Auto Debit. It is possible that Auto Adjustment might not be executed if the leave balance is exhausted during the Auto Debit process.*

- **Negative Balance Handling:** This check box is configurable only if you have enabled the **Auto Debit Leave** check box. Select this check box if you wish to automatically debit leave even if there is no/negative leave balance. If this check box is disabled, then the system will check for other Paid Leave for Auto Debit and if no leave balance is found in any leaves as per the priority then the Auto Debit Leave functionality will not be executed.
- **Priority:** It displays the Priority assigned to the Leave for executing further actions. By default, priority will be defined as per the order in which the leaves are added in the grid of the leave group. However, you can change the same using the **Up/Down**  arrows. As per the set priorities of the leaves in the group, the leaves will be used in set sequence to cover any absence in attendance.
- **Code:** Displays the code assigned to the leave.
- **Name Leave Type:** Displays the name assigned to the leave.
- **Leave Type:** Displays the type of leave.
- **Up/Down:** These arrows are used to move the Leave type up/down to set its Priority.
- **Delete:** Click the delete icon to remove the leave from the grid.

Click **Save** to save the configured leave group.



*The Leave Group must be assigned to the user from **User module > User Configuration > Group** so that user can use the leaves available in the leave group, provided there is sufficient leave balance.*

# Accrual Policy

Many organizations prefer the concept of providing leaves to their employees in the form of accruals i.e. advance credit of paid leave balance which can be used over a definite period of time. This leave balance is credited to employees as per the accrual policy of the organization. The Accrual Policy feature in COSEC enables the HR administrator to set parameters for crediting leaves to an employee based on predefined rules. The user can configure a set of rules and group them together in policies.

To define an Accrual Policy, go to **Leave Management > Accrual Policy** and the following screen appears.

Month	Value
January	0.00
February	0.00
March	0.00
April	0.00
May	0.00
June	0.00
July	0.00
August	0.00
September	0.00
October	0.00
November	0.00
December	0.00

The page displays configurations on the left side and a grid on the right hand side containing created accrual policies.

To add a new accrual policy click the New button and provide the following parameters:

- **Accrual Policy:** Every new leave policy is automatically assigned a system-generated **ID**. Enter a suitable **Name** for the new policy.
- **Policy Period:** Select the policy period for monthly or yearly accrual of leaves.



*An organization should always operate either on Yearly period or Monthly period approach completely for leave management. Using a mixed period approach must be avoided to prevent data mismatch.*

- **Accrual Mode:** Select the mode which determines how leaves are to be credited to users on whom this Accrual Policy applies. This will depend on the Policy Period selected. Specify the Accrual Mode as one of the following:

- **Fixed** - For Monthly accrual, this mode enables the user to define the number of leaves to be credited for each month of the year as shown in the following figure:

**Accrual Policy**

Accrual Policy \* ID: [ ] Name: [ ]

Policy Period: Monthly

Accrual Mode: Fixed

Credit In Terms Of: Days

**Month-Wise Fixed Accrual**

January	0.00
February	0.00
March	0.00
April	0.00
May	0.00
June	0.00
July	0.00
August	0.00
September	0.00
October	0.00
November	0.00
December	0.00

Search

ID	Name
1	Leave_Policy_1
2	Leave_Policy_2

For **Yearly** accrual, define number of credit days for single credit of leaves for the entire year.

**Accrual Policy**

Accrual Policy \* ID: [ ] Name: [Leave\_Policy\_2]

Policy Period: Yearly

Accrual Mode: Fixed

Credit In Terms Of: Days

**Year-Wise Fixed Accrual**

Credit Days: 21

- **Credit In Terms of:** Select the type of term for which you want to credit the accrual policy. You will get only two option in the list **Days** and **Hours**.

**Accrual Policy**

Accrual Policy \* ID: [ ] Name: [Leave\_Policy\_2]

Policy Period: Yearly

Accrual Mode: Fixed

Credit In Terms Of: Days

**Year-Wise Fixed Accrual**

Credit Days: 21

- If you select **Days** from the list then you have to enter credit days.
- If you select **Hours** from the list then you have to enter credit hours in HHH:MM format.

The top screenshot shows the 'Accrual Policy' form with the following settings: ID: Leave\_Policy\_2, Policy Period: Yearly, Accrual Mode: Fixed, Credit In Terms Of: Days, and Credit Days: 21. An arrow points to the 'Credit Days' field.

The bottom screenshot shows the same form with 'Credit In Terms Of' set to 'Hours' and 'Credit Hours' set to 120:00. An arrow points to the 'Credit Hours' field.

- **Calculated** - This mode enables the user to configure parameters for leave credit based on the attendance of the user in a previous attendance period. This previous attendance period can be defined using the **Previous Months to consider** (in case of Monthly accrual) or **Previous Year to Consider** (in case of Yearly accrual) drop-down list. Specify the number of months (or year) from the previous attendance period against which the leave accrual is to be calculated as shown below.

The screenshot shows the 'Accrual Policy' form with 'Accrual Mode' set to 'Calculated'. The 'Credit In Terms Of' is set to 'Hours'. Under 'Considered Attendance', 'Previous Year To Consider' is 1, 'Attendance Days' is 'Payable Days', and 'Payable Days' is 'Presents'. Below this is an 'Optional Parameters For Calculation' section with a table for 'Considered Attendance'.

From	To	Replace Value	Fixed Value
No Data			

- **Attendance Days:** Once the previous attendance period is defined, specify whether the attendance days to be considered for calculation should be the user's **Payable Days** or **Non-Payable Days** as shown.
- **Payable Days:** If user's Payable Days are selected for calculation, specify one of the following components against which the leave credit calculation is to be performed:
  - **Presents** - Total number of days on which the user was present.
  - **Paid Leaves** - Total number of days on which the user took paid leaves.
  - **Presents/Paid Leaves** - Total number of days on which the user was either present or took paid leave.



- **Non-Payable Days:** If user's Non-Payable Days are selected for calculation, specify one of the following components against which the leave credit calculation is to be performed:
  - **Un-Paid Leaves** - Total number of days on which the user took un-paid leaves.
  - **Absents** - Total number of days on which the user was absent.
  - **Un-Paid Leaves/Absents** - Total number of days on which the user was either absent or took un-paid leave.

Considered Attendance				
<input type="text" value="Search"/>				+
From ▲	To	Replace Value	Fixed Value	
1	19	Fixed	1.00	
20	25	Fixed	3.00	

Click **Add** button. Enter the Calculated Days Range (From-To) and specify the fixed value of leave which will be credited to the user.



*The From day value can start with "0" and you can enter the values in multiples of 0.5*

The administrator can credit a fixed number of leaves to a user, based on the previous attendance data, as specified above.

For example, the administrator can specify that a user who was present for a minimum of 20 days and a maximum of 25 days in the previous 1 month attendance period, will be credited 3 leaves. This can be configured as shown in the above example.

Click **Save** to define this new Accrual Policy on the system. Every new policy created on the system, will be reflected on the policy list on the right hand side of the **Accrual Policy** page as shown below.

### Optional Parameters For Calculation

Optionally, the following parameters can be defined for a calculated Accrual Policy, on expanding the **Optional Parameters For Calculation** tab as shown:

Optional Parameters For Calculation

Include Week-Offs ☐

Include Holidays ☐

Include Overtime ☐

Include Overtime All

Overtime For Half Day Conversion

- **Include Week-Offs** - Select this check box to include week-offs of the previous attendance period in the leave credit calculation.
- **Include Holidays** - Select this check box to include holidays of the previous attendance period in the leave credit calculation.
- **Include Overtime** - Select this check box to include overtime of the previous attendance period in the leave credit calculation. In the **Include Overtime** dropdown list, specify which overtime hours are to be considered when overtime is included in leave credit calculation.
- **Overtime For Half Day Conversion** - Specify the minimum number of hours required for overtime to be converted to a half day in leave credit calculation.

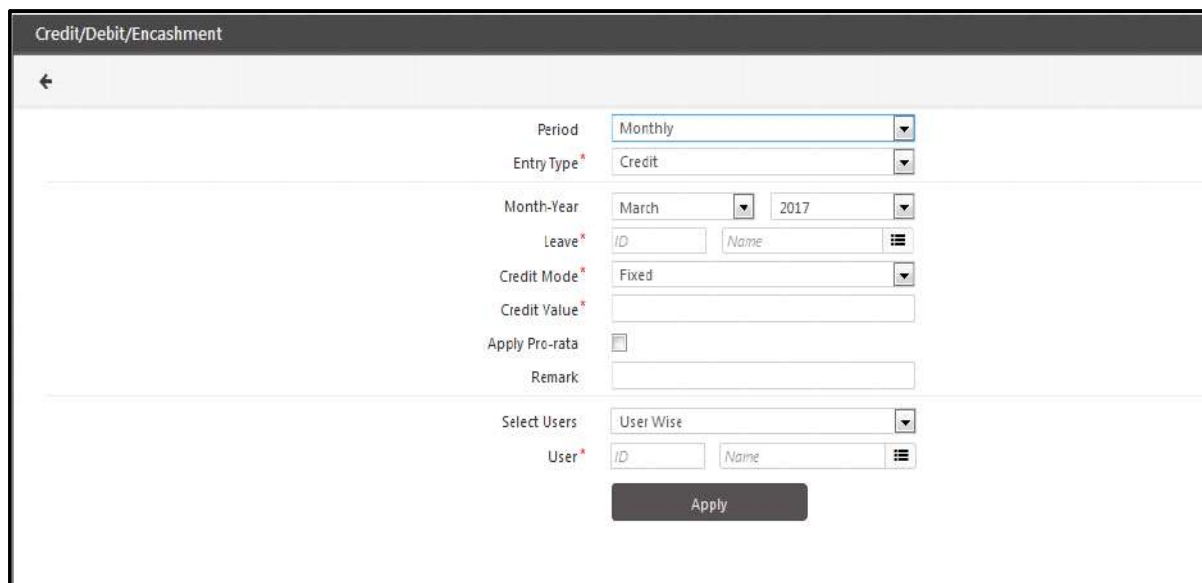
Click the **Add** button to save this configuration.

# Leave Credit/Debit/Encashment

This option enables the HR administrator to credit a certain value of leave to the user on monthly or yearly basis. Also the leave can be debited or encashed from the existing leave balance and thus helps in the Leave balance adjustment process. The leave balance adjustment can be done for a single user or multiple users.

Also See [“How to credit leaves to the Employees automatically?”](#) on page 2331.

To credit or debit leaves for users, go to **Leave Management> Balance Management > Credit/Debit/Encashment** and the following screen appears.

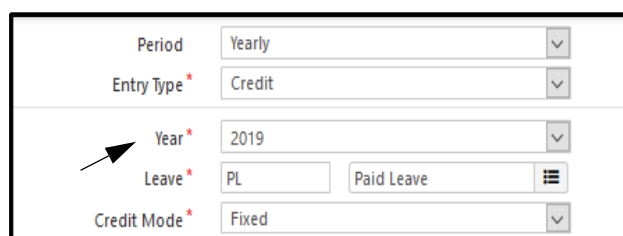


**Period:** Select the period as Monthly or Yearly for the credit/debit of leaves.

- For Monthly period, specify the **Month-Year** for which the leave credit/debit is to be performed.
- For Yearly period, specify the **Year** for which the leave credit/debit is to be performed.



*For Custom yearly period say for April 2018 to March 2019; leave can be credited by selecting year 2019 as shown below.*



**Entry Type:** Select the entry type as **Credit** or **Debit** (For encashing of leaves see [“Click on Save button to save the leave credit schedule.”](#))



*An organization should always operate either on Yearly period or Monthly period approach completely for leave management. Using a mixed period approach must be avoided to prevent data mismatch.*

**Leave:** Select a Leave from the leave selection picklist which is to be credited or debited to the user. The leaves are created from the Leave page.

**Credit/Debit/Encashment**

Period: Monthly  
 Entry Type: Credit  
 Month-Year: January 2020  
 Leave: HP  
 Credit Mode: Fixed  
 Credit Value: HHH  
 Apply Pro-rata: ☒  
 Remark:  
 Select Users: User Wise  
 User: ID Name

**Picklist For Leave Masters**

LeaveID	Name
1	RANDOM LEAVE
2	Divali
3	Random Leave 2
HP	Hourly Paid Leave
PL	Paid Leave

Cancel

**Credit Mode:** If leaves are to be credited, select the mode as one of the following:

- **Fixed:** On selecting this option, specify the number of leaves to be credited in the **Credit Value** field.
- **Using Accrual Policy:** On selecting this option, select the Accrual Policy using the pick list button based on which leaves will be credited.



*If user's joining date lies in the current year then yearly credit/debit of leave should be done in the joining month-year. Also leave cannot be credited after the leaving date of user.*

For the Fixed Credit Mode/Fixed Accrual Mode (See ["Accrual Policy"](#)), the administrator has an option to apply Pro-rata calculation on the credit of leaves.

**Apply Pro-rata:** Select the checkbox to enable credit of leaves on pro-rata basis (i.e. on the basis of the actual number of days worked). For more details on Pro-rata see ["Leave Group"](#).

**Credit/Debit/Encashment**

Period: Monthly  
 Entry Type: Credit  
 Month-Year: March 2017  
 Leave: PL  
 Credit Mode: Fixed  
 Credit Value: 10  
 Apply Pro-rata: ☒  
 Remark:  
 Select Users: User Wise  
 User: ID Name

User ID	Name
1567	Sheetal

Apply

**Remark:** If required provide remark for crediting or debiting the leave.

**Select Users:** Select a user or multiple users for whom the selected leave is to be credited or debited from the dropdown list.

Users can be selected from the filter options of User Wise, Group Wise, and All.

**Debit Value:** If a leave is to be debited from users, specify the number of days to be debited from the current leave balance in the **Debit Value** field as shown. In the following example, 2 leaves are being debited from the user's leave balance for "PL".

The screenshot shows the 'Credit/Debit/Encashment' form with the following fields and values:

- Period: Monthly
- Entry Type: Debit
- Month-year: March 2017
- Leave: PL (Paid Leave)
- Debit Value: 2
- Apply Pro-rata: ☐
- Remark: (empty)
- Select Users: User Wise
- User: 1678 (Supriya)

The form includes a search bar and a table listing the selected user. An 'Apply' button is at the bottom.

Using Accrual Policy, leave credit is done as shown below

The screenshot shows the 'Credit/Debit/Encashment' form with the following fields and values:

- Period: Monthly
- Entry Type: Credit
- Month-Year: March 2017
- Leave: SL (Sick Leave)
- Credit Mode: Using Accrual Policy
- Accrual Policy: 1 (Leave\_Policy\_1)
- Apply Pro-rata: ☒
- Remark: (empty)
- Select Users: All

The form includes an 'Apply' button at the bottom.

## How to credit leaves to the Employees automatically?

### Prerequisites:

"User/Employee should be assigned the Leave group which consists of the leave to be credited.

"If different number of leave is to be credited, then Accrual Policy is to be defined.

"The COSEC Alert Service on the server computer should be "ON" before setting the Task Scheduler.

To credit the leaves automatically, following steps should be performed:

#### A. Set “Schedule Parameters”

1. Go to Admin > System Utilities > Task Scheduler.
  2. Create a task scheduler for the task Leave Credit Schedule by clicking on Add button.
  3. Specify the Schedule Run Time at which the leave will be credited automatically say at 9:00 am.
  4. Select the Schedule Run Day from the options of Monthly or Weekly.
- “For Monthly option, check the boxes to select the months and select the date of the month on which the leave is to be credited.
- “For Weekly option, select the day of the week on which the leave is to be credited.

#### B. Set “Task Parameters”

1. To credit a fixed number of leave for every month, select the credit method as Fixed.  
Now select the leave to be credited and specify the number of leaves say 1.5 PL as shown in below figure.

The screenshot shows the 'Task Scheduler' window. The 'Schedule Name' is 'Leave Schedule' and it is 'Active'. Under 'Schedule Parameter', the 'Task' is 'Leave Credit Schedule', 'Run Schedule' is 'Monthly', and 'Every (Day Of The Month)' is '1'. The months from Jan to Dec are all checked. The 'Schedule Run Time' is 'HH:MM'. A 'Task Parameters' sub-window is open, showing 'Leave Selection' with 'Credit Method' as 'Fixed', 'Leave' as 'Paid Leave', and 'No of Days' as '1.5'. The 'Apply Pro-rate' checkbox is unchecked. The 'Processing Period' is set to 'Current'. A 'Filter' button is at the bottom left. On the right, a table lists the schedule:

ID	Schedule Name
1	Leave Credit Task

2. To credit a variable number of leave for different months, select the credit method as Policy. Now select the leave to be credited and select the leave credit policy i.e. the accrual policy from the picklist as shown in below figure.
3. Now, Select the Processing period i.e. the period (month or week) for which leave is to be credited.

For example:

If Processing period is Next. On first of January, 1.5 PL will be credited for February.

If Processing period is Current. On first of January, 1.5 PL will be credited for January.

If Processing period is Previous. On first of January, 1.5 PL will be credited for December.



The “Previous” option for Processing Period is available from COSEC V7R2 onwards.

#### C. Select the Users

1. Select the user filter option of User Wise if selected user is required to be credited the leaves.

2. Select the user filter option of Group Wise if a particular group of users are required to be credited the leaves.
3. Select the user filter option of All if all the active users are required to be credited the leaves.

Click on **Save** button to save the leave credit schedule.

## Leave Encashment

It has been described earlier how some leaves can be defined as encashable leaves i.e. an employee can receive remuneration against such leaves, when unused over a defined attendance period ("Configuring Leaves"). Using the Leave Encashment feature, the administrator can assign encashment to selected users for a definite attendance period.

To encash leave, go to **Leave Management > Balance Management > Credit/Debit/Encashment** and the following screen appears.

The screenshot shows the 'Credit/Debit/Encashment' form. The fields are as follows:

- Period: Yearly
- Entry Type: Encashment
- Year: 2016
- Leave: CL (Casual Leave)
- Encashment Mode: Available
- Encashment Value: (empty)
- Apply Pro-rata: ☐
- Remark: (empty)
- Select Users: User Wise
- User: ID (1567), Name (Sheetal)

At the bottom, there is an 'Apply' button.

**Entry Type:** Select the Entry Type as **Encashment** from the dropdown list as shown above.

**Period:** Specify the Month-Year for which the leave encashment is to be performed.

**Leave:** Select a leave using the picklist which is to be encashed by the user. This picklist contains only those leaves for which the Leave Encashment checkbox is enabled while configuring the leave.



*For a leave to be available for encashment, the user must ensure that the **Leave Encashment** option is enabled while defining the particular leave. To know more, please refer to ["Defining New Leaves"](#). The same leave must also be added to the default Leave Group applicable to the organization.*

**Encashment Mode:** Select the encashment mode from the dropdown list which can be used to define the number of leaves to be encashed from current leave balance for selected user. You can select one of the following options:

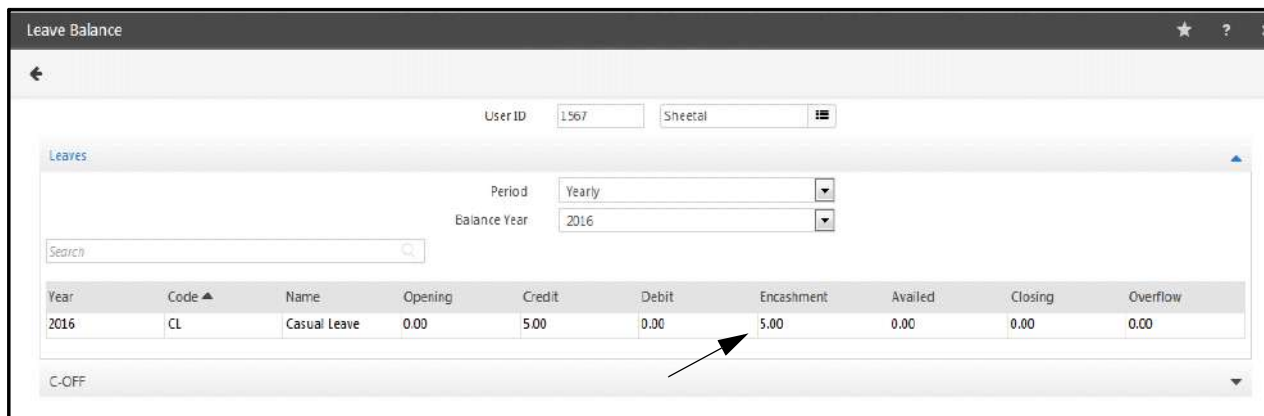
- **Defined:** Encash leaves for the number of days as defined in the **Encashment Value** field. Example: If available CL is 5, and defined encashment value is 3 then 3 CL out of available 5 CL will be encashed.
- **Available:** Encash all available leaves in leave balance. Example: If available CL is 5, then 5 CL will be encashed.

**Remark:** If required provide remark for encashing the leave.

**Select Users:** Select a user or multiple users for whom the selected leave is to be encashed from the dropdown list. Users can be selected from the filter options of User Wise, Group Wise or All.

Click the **Apply** button to apply the leave encashment settings on the specified users.

The number of Encashed leave appears in Leave Balance page as shown below.



The screenshot shows the 'Leave Balance' interface. At the top, there are input fields for 'User ID' (1967) and 'Sheetal'. Below these, a 'Leaves' section contains a 'Period' dropdown set to 'Yearly' and a 'Balance Year' dropdown set to '2016'. A search bar is also present. The main part of the interface is a table with the following columns: Year, Code, Name, Opening, Credit, Debit, Encashment, Availed, Closing, and Overflow. The table contains one row for the year 2016, with Code 'CL' and Name 'Casual Leave'. The values are: Opening 0.00, Credit 5.00, Debit 0.00, Encashment 5.00, Availed 0.00, Closing 0.00, and Overflow 0.00. An arrow points to the 'Encashment' value of 5.00. At the bottom left, there is a 'C-OFF' label.

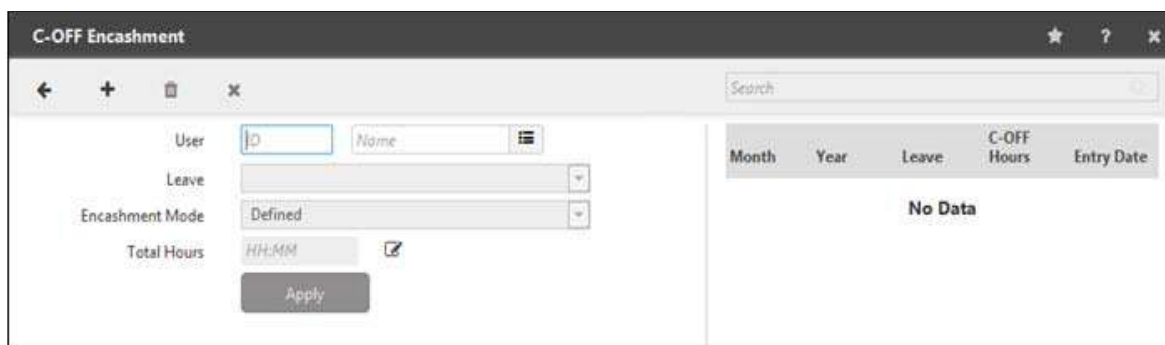
Year	Code	Name	Opening	Credit	Debit	Encashment	Availed	Closing	Overflow
2016	CL	Casual Leave	0.00	5.00	0.00	5.00	0.00	0.00	0.00



# C-OFF Encashment

Sometimes, employees may choose to encash accumulated C-OFFs instead of using them, if C-OFF encashment is permitted by the organization. C-OFF encashment is a concept similar to Leave encashment. On COSEC, this feature can be configured by an HR administrator using the *C-OFF Encashment* functionality.

To encash C-OFFs for a user, go to **Leave Management > Balance Management > C-OFF Encashment** and the following screen appears.



The page displays configurations on the left hand side and to the right is a grid containing details like: the month and year in which the C-Off hours is credited, the leave type, C-Off hours availed and the date of applying for encashment.

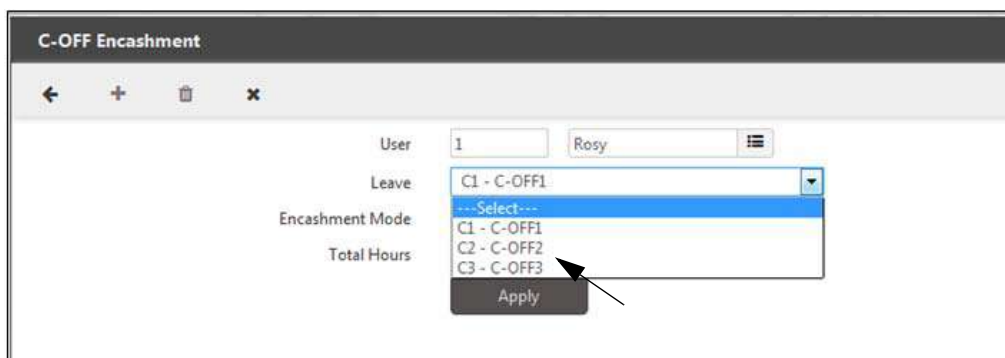
To encash C-Off click the **New** button and enter the following parameters:

- **User:** Select a **User** from the user picklist for whom the C-OFF encashment is to be performed.
- **Leave:** Select a leave from the dropdown list. All *Compensatory-Off* type of leaves available to this user will appear in this dropdown list for selection.



*For a leave to be available for C-OFF encashment, the user must ensure that the **Leave Encashment** option is enabled while defining a *Compensatory-Off* leave type. To know more, please refer to [“Defining New Leaves”](#). The same leave must also be added to the default Leave Group applicable to the organization.*

In the following example, there are two leaves available to the selected user:



- **Encashment Mode:** Select the mode for encashment from one of the following options -

- **Defined** - This mode indicates that the encashment is to be performed against the number of C-OFF hours defined by the HR administrator in the **Total Hours** field. To specify the number of hours, click the Total Hours picklist button. The **C-OFF Selection** pop-up window displays the **Available C-OFF** hours for the selected user. In the **Select C-OFF** field, specify the number of hours (HH:MM format) from the Available C-OFF hours which are to be encashed for the user. Click the **Select** button.

In the following example for **Defined** mode, the available C-OFF for the selected user is 04:00 hours of which 03:00 hours are selected for encashment.

Attendance Date	Available C-OFF	Select C-OFF
01/10/2016	04:00	03:00
03/10/2016	01:00	

Update Close

- **Available** - This mode indicates that the encashment is to be performed against the total available C-OFF hours for the selected user. Hence, for the same user as the above example, in the Available mode, the encashment will be performed for 5:00 hours as shown below.

User: 1 Rosy  
 Leave: C1 - C-OFF1  
 Encashment Mode: Available  
 Total Hours: 05:00  
 Apply

Month	Year	Leave	C-OFF Hours	Entry Date
No Data				

Click the **Apply** button to apply for encashment and the saved leave gets displayed in the grid as shown below.

✓ Saved Successfully

User: perry  
 Leave: C1 - C-OFF1  
 Encashment Mode: Available  
 Total Hours: 01:00  
 Apply

Month	Year	Leave	C-OFF Hours	Entry Date
Nov	2016	C1	01:00	09/11/2016
Nov	2016	C1	04:00	09/11/2016

# Overflow Management

*Overflow Adjustment* is a concept essential in order to check an employee's leave balance from overflowing at any point of time. This means that the leave balance of an employee should never accumulate more leaves than the maximum accumulation limit set for the employee.



The administrator can set a check on the maximum accumulation of leaves in a user's leave balance using the **Leave Balance Check** option while defining a new leave. To know more about this configuration, refer to ["Defining New Leaves"](#).

Cancellation of leave applications may be a common cause for such overflow because it restores the leave balance that was deducted on application of a leave. This may sometimes cause any additionally credited leaves to overflow over the maximum leave accumulation limit for the user. To manage this, the HR administrator can determine how the overflowing leaves should be treated, as per the company policy.

In such a scenario, one of the following can be done:

- Allowing the overflowing leaves to be *reused*.
- *Encashment* of overflowing leaves.
- *Discarding* the overflowing leaves.

To manage leave overflow, go to **Leave Management > Balance Management > Overflow Management** and the following screen appears.

The screenshot shows a web form titled "Overflow Management". It includes a back arrow in the top left. The form has several sections: "User" with a dropdown menu, "Leave" with a dropdown menu, "Overflow" with a dropdown menu, "Adjustment Type" with a dropdown menu currently showing "Discard", and "Adjustment Value \*" with a text input field. An "Apply" button is located at the bottom right of the form.

**User:** Select a User from the picklist for whom the overflow adjustment is to be performed.

**Leave:** Select a leave from the dropdown list for which the overflow is to be adjusted. This list contains only those leaves in which the "maximum accumulation check" checkbox is enabled at the time of configuration of the selected leave.

**Overflow:** The system automatically retrieves and displays the number of overflowing leaves in the field. This value is generated when the accumulated leave exceeds its maximum leave specified from the ["Keeping Check on Leave Balance"](#) section.

I.e. If the maximum accumulated check specified is 20 days and the user applies leave for 2 days. Then the leave balance becomes 18 days. Now, if the admin credits 2 days then again the leave balance will become 20 days. Now, in case for any reason if the applied leave gets rejected or cancelled then it gets credited to the user giving a balance of 22 leaves which is more than the value specified in the Maximum Accumulated check. So this extra 2 days is the value displayed in overflow.

**Adjustment Type:** Select the adjustment type for the overflowing leaves as **Discard**, **Reuse** or **Encash** as shown below.

A screenshot of a web form showing the 'Adjustment Type' dropdown menu. The menu is open, displaying three options: 'Discard', 'Reuse', and 'Encash'. The 'Discard' option is currently selected and highlighted in blue. Above the dropdown, the 'Leave' field is set to 'O1 - SL' and the 'Overflow' field is set to '1.00'. The 'User' field shows 'overflow1' and 'Ramesh'.

**Adjustment Value:** Specify the number of overflowing leaves to be discarded, reused or encashed in the field.

- If the **Adjustment Type** is **Reuse** or **Encash**, then specify the period for which adjustment is to be done.

A screenshot of the web form with 'Adjustment Type' set to 'Reuse'. The 'Adjustment Value' field is set to '1.00'. The 'Period' dropdown is set to 'Monthly'. The 'Credit/Encash To Period' fields are set to 'March' and '2017'. An 'Apply' button is visible at the bottom.

A screenshot of the web form with 'Adjustment Type' set to 'Encash'. The 'Adjustment Value' field is set to '1.00'. The 'Period' dropdown is set to 'Yearly'. The 'Credit/Encash To Period' field is set to '2017'. An 'Apply' button is visible at the bottom.

- Select the **Period as Monthly** for monthly adjustment of overflow leaves.
  - Select the month and year for which the overflow leave is to be credited in Reuse adjustment or encashed in Encash type of adjustment.
- Select the **Period as Yearly** for yearly adjustment of overflow leaves.
  - Select the year for which the overflow leave is to be credited in Reuse adjustment or encashed in Encash type of adjustment.
- If **Discard** option is selected only specify the adjustment value of leave to be discarded.



An organization should always operate either on Yearly period or Monthly period approach completely for leave management. Using a mixed period approach must be avoided to prevent data mismatch.

Click the **Apply** button to perform the overflow adjustment.

The overflow leave is shown in Leave Balance page as shown below.


Year	Month	Code	Name	Opening	Credit	Debit	Encashment	Aailed	Closing	Overflow
2017	Mar	O1	SL	0.00	7.50	0.00	0.00	0.00	6.50	1.00
2017	Mar	O2	PL	1.00	0.00	0.00	0.00	0.00	1.00	0.00
2017	Mar	O3	CF	0.00					0.00	0.00

After the encash adjustment of overflow leave, it will be shown in Encashment as shown below.

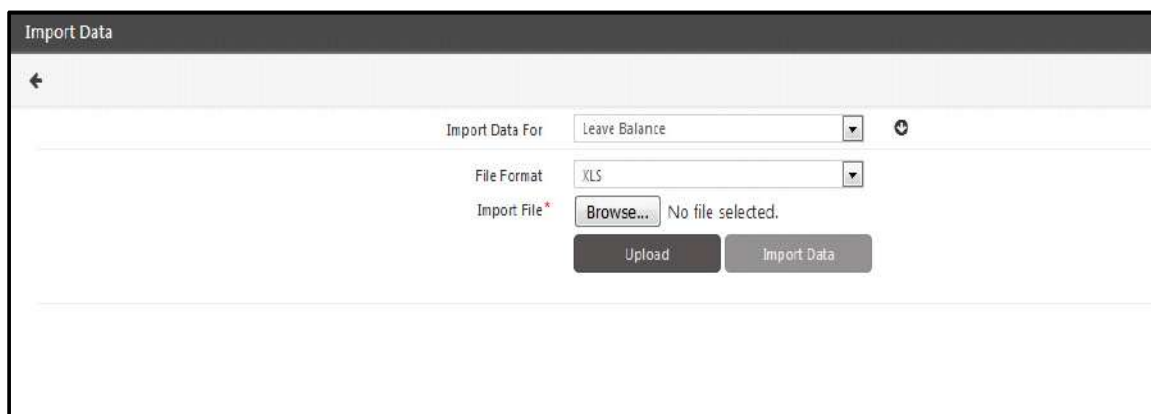
Year	Month	Code	Name	Opening	Credit	Debit	Encashment	Aailed	Closing	Overflow
2017	Mar	O1	SL	0.00	7.50	0.00	1.00	0.00	6.50	0.00
2017	Mar	O2	PL	1.00	0.00	0.00	0.00	0.00	1.00	0.00
2017	Mar	O3	CF	0.00					0.00	0.00

# Import Leave Balance

The COSEC application has an inbuilt utility for enabling users to import data from excel files with predefined format. This would thus save the end user a lot of time and effort in having to make individual data entries at the application level.

This can be done by downloading the sample import file by clicking the  button on the **Import Data** page. The user can thus insert all the data in the sample file and then upload it to the system.

To import leave balance data from a file, go to **Leave Management > Balance Management > Import Leave Balance** and the following screen appears.



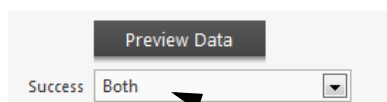
The following options appear for configuration on the **Import Data** page.

- **Import Data For** - Select the table from the dropdown list to which the data is to be imported.
- **File Format** - Select the file format of the specific file from the dropdown list. The options available are XLS and CSV.
- **Import File** - Browse and select the file from which the data is to be imported.

The **Preview Data** button enables the administrator to view the data in the respective worksheets to confirm that the data is in order prior to giving the import command.

Click on **Import Data**. The system will import all the relevant valid entries from the sheet and will display the status in the bottom grid. On successful import the, “Success” status will appear in the data preview as “Yes”. Else, a “No” status will appear with an error description as shown.

User can also filter import result records on the basis of their success value (Yes/No) using the **Success** dropdown list.



*Administrator needs to ensure that the ASP.NET user has full rights on the folder containing the Excel or .csv file for the import data operation.*

# Leave Application/Approval

---

Leave Application is a formal mode of requesting leave approval before or after an employee has taken a leave. It enables an organization to keep a track of all requested and approved leaves and enables the HR administrator or reporting in-charge to address issues such as irregularities in the attendance of employees or shortage of resources due to overlapping leaves.

The Leave applications can be made by:

- System Account User
- On Behalf System Account User
- Using the ESS Self Service Module

COSEC Web enables all *System Account users* with appropriate page rights to make leave applications using the Leave Management module. All applications made by the System Account user are pre-approved by default.

COSEC Web also enables all On Behalf System Account User with appropriate page rights to make leave applications using the *Leave Management* module. All applications made by the On Behalf System Account User are pre-approved by default. For creating and assigning the roles and rights to the On Behalf System Account User. Refer to [“On Behalf System Account User”](#). To receive a notification alert once the final verdict for such application is provided by the RIC, make sure you have configured the desired Mobile Number/Email ID in [“Optional”](#) as well as configure the Leave Approval/Leave Rejection Alert parameters. For details refer to [“Configuring Alert Messages”](#).

For leave applications made using the Employee Self Service module, the leave approval has to be done by the respective supervisors of the reporting group by logging into the ESS. However, such leaves can also be sanctioned by a System Account user from the Leave Management module on the COSEC Web Application.

The authorization is dependent on the number of Reporting In-charge in the Reporting Group, the Authorization Mode as well as the Approval Policy assigned by the system administrator. For details refer to [“Reporting In-Charge”](#), [“Approval Policy”](#) and [“Configuring Users”](#).

For leave approval [See “Leave Approval” on page 2362](#).



*ESS users can apply for leaves only using the ESS module and such leave applications require approval either from the reporting group in-charge or the COSEC Web system account user. Leaves directly approved by the system administrator do not require any further approval from respective supervisors.*

*The Leave applied from Leave Management module gets approved automatically.*



*Applied leaves can be modified or cancelled after they have been approved or rejected. Once a leave application is modified it will be submitted for approval, and once the verdict is given, it can be modified again.*

*Once the modification/cancellation application is approved/rejected, an employee can apply for modification/cancellation of it ones again.*

You can apply for Leaves as follows:

- [“Applying for a Leave \(Leave Type - Paid\)”](#)
- [“Applying for a Leave \(Leave Type- Unpaid, Layoffs, Hourly\)”](#)

For Leave Type - Compensatory-OFF, refer to [“C-OFF Application/Approval”](#).

For Leave Type - Restricted Holiday, refer to [“Restricted Holidays”](#).

## Applying for a Leave (Leave Type - Paid)

This section describes how to apply for a leave using the Leave Management module.

Leave applications can be applied for a particular day/s of the month.

For leave applications within the same month, refer to [“Leave Applications for a Single Day or Multiple Days within the same Month”](#).

When leave applications are applied for across months it is dependent on the available balance of each month. For details refer to [“Leaves Applications across Months/Years”](#).

Similarly, if leave applications are applied across years, it is dependent on the Yearly Period for Leave Balance configured, whether the check box Carry Forward to Next Year is enabled or disabled as well as if Manual Leave Credit has been provided for next year or not. For details refer to [“Leaves Applications across Months/Years”](#).

To view the details of the leaves, refer to [“Leave Balance”](#).

### Leave Applications for a Single Day or Multiple Days within the same Month

To apply for a leave, click **Leave Management > Application/Approval > Leave Application** and the following screen appears.

The screenshot shows the 'Leave Application' form. On the left, there are input fields for 'User' (with a dropdown), 'Application Date', 'Consideration In Terms Of' (set to 'Both'), 'From' (with 'From Date' and 'Full Day' dropdown), 'To' (with 'To Date' and 'Full Day' dropdown), 'Applied Duration', 'Posted Duration', 'Leave' (with a 'Select' dropdown), and 'Current Balance'. Below these is the 'Reason And Contact Info' section with fields for 'Reason' (50 Char), 'Address' (30 Char), and 'Contact Number' (20 Char), along with 'Submit' and 'Cancel' buttons. On the right, there's a summary section showing 'Dec 2019' and 'Feb 2020' with 'Availed Leaves Days: 0' and 'Hours 000:00'. Below this are four buttons: '0 day Absent', '0 Pending', '0 Approved', and '0 Rejected'. At the bottom right, there's an 'Attendance Details' table with columns: Date, Shift, 1st Half, 2nd Half, First IN, Last OUT, and Work Hours. The table currently shows 'No Data'.

The page displays configurations on the left hand side and to the right is the attendance details of the user along with all the leave application details of a particular user for a particular month. It also displays the number of leaves availed, total absent days, total leaves pending, approved and rejected.

To apply a new leave, click **New** button and enter the following parameters:

**User:** Select user from the picklist for whom the leave application is to be made.



**Application Date:** It indicates the date for which application is going to be created. Thus, “Application Date” is not editable because its an system-generated field which shows current date.

**Consideration In Terms Of:** Select the option for which type of leave you want to apply, from the given list.

**From/To Date:** Select the starting and ending date for the leave period using the date selection button. For a single day select the same date in both the fields.

- Specify whether the leave should be considered for **Full Day**, **First Half** or **Second Half** for a single day. For more than 1 leave specify the starting day of leave as full day or second half and ending leave day as full day or first half as shown below.



For a particular user, if **Restrict Half Day Considerations** is enabled in the page User > User configuration > T&A, then in **From/To Date** only full day attendance options will be visible and all the other half day options will be disabled for that particular user as shown in the screen below.

**Leave Application**

User\* 2551 Rushi Shah

Application Date 17/01/2020

Consideration In Terms Of Both

From\* From Date Full Day

To\* To Date Full Day

Applied Duration

Posted Duration

Leave 2 - Diwali

Current Balance

**Reason And Contact Info**

Reason\* Personal

Address 30 Char

Contact Number 20 Char

Submit Cancel

**Applied Duration:** It displays the total time duration for which the leave has been applied.

**Posted Duration:** It displays the number of working duration posted between the leave applied. It is automatically calculated by the system.

**Leave Application**

User\* 2551 Rushi Shah

Application Date 17/01/2020

Consideration In Terms Of Both

From\* 18/01/2020 Full Day

To\* 18/01/2020 Full Day

Applied Duration 1

Posted Duration

Leave PL - Paid Leave

Current Balance 1.75

**Reason And Contact Info**

Reason\* Sick

Address 30 Char

Contact Number 20 Char

Medical Certificate Available ☐

Submit Cancel

Dec 2019 Feb 2020

1 day Absent 0 Pending

Attendance Details

Date	Shift
17/01/2020	

**Leave:** Select the type of leave to be applied from the dropdown list. This list displays all leaves defined on the system as shown below.

Leave P - Paid Leave

Current Balance CL - Casual Leave

P - Paid Leave

PL - Privilege Leave

SL - Sick Leave



1. This feature cannot be used to apply for Compensatory-OFF leave types. Hence such leaves defined on the system will not appear on the Leave selection list. To know more about applying for C-OFF, refer to "[C-OFF Application/Approval](#)".

2. The application and Approval of Restricted holiday type leave is described in "[Restricted Holidays](#)".

**Current Balance:** It displays the current leave balance which guides the user to apply for the leave and accordingly the applied leave will be deducted from the leave balance.



The leaves are credited to the user manually by the administrator or through the scheduler using Accrual Policy. See "[Leave Credit/Debit/Encashment](#)" and "[Accrual Policy](#)"

You can also view the leave balance detail by clicking Details » icon next to the text-box. The **Leave Balance Detail** window will appear which shows the details of Paid Leave type and Restricted Leave type provided if user has the available balance for the leave.

**Example:** The user is applying leave on 7th as shown above. Before applying the type of leave; you must know which leave type has available balance. So click on » to view the available balance.

Applied Duration 1

Posted Duration

Leave PL - Paid Leave

Current Balance 1.75 »

**And Contact Info**

Reason \* Sick

Address 30 Char

Leave Balance Detail

User 2551 Rushi Shah

Attendance Period Jan 2020


Search

Code	Name	Opening	Credit	Debit	Encashed	Availed	Closing	Overflow
1	RANDOM LEAVE	00:00	04:00	00:00	00:00	01:15	02:45	00:00
3	Random Leave 2	0	5	0	0	4.5	0.5	0
HP	Hourly Paid Leave	00:00	05:00	00:00	00:00	00:00	05:00	00:00
PL	Paid Leave	0	1.75	0	0	0	1.75	0

Now you know that Paid Leave has balance of 1.75; so you can select the Paid Leave type leave in drop down and click Submit button to apply for leave.


### Reason and Contact Info

- **Reason:** Enter reason for requesting leave.
- **Address:** Provide address of the user for whom the leave application is being made.
- **Contact Number:** Provide the contact number of the user for whom the leave application is being made.
- **Medical Certificate Available:** Select the checkbox to make it mandatory for the applicant to produce a medical certificate as a proof to testify the reason behind the current leave.

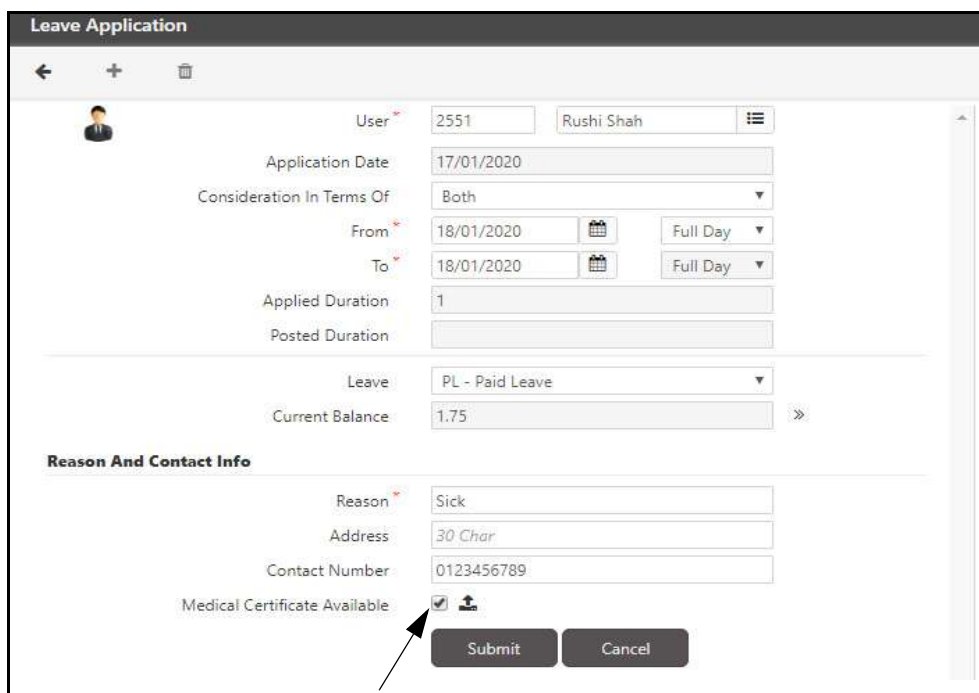
Select this checkbox if you have a Medical Certificate as a proof and reason for the current leave. To upload this certificate, click on the **Upload**  button.

Select the desired file as per the supported formats (.jpg, .bmp, .png, .pdf) and size.

Click **Update**.

The document will be uploaded and can be previewed by clicking on **Preview**  button.

This option is available only if it is enabled during configuration of the selected leave from the Leave page. For more information, refer to [“Configuring Leaves”](#).



Click **Submit** button to apply for the leave as shown below.

The applied leave gets displayed in the Application Details grid as shown below. If the number of days of the applied leave is more than the current leave balance, then the system will not allow the application to be made.

The screenshot shows the 'Leave Application' form. On the left, the form fields include: User (U4), Application Date (14/06/2021), Consideration In Terms Of (Both), From (21/06/2021), To (21/06/2021), Applied Duration (1.0), Posted Duration (1.0), Leave (PL - Paid Leave), Current Balance (81.50), Reason (Personal), Address (30 Chars), Contact Number (20 Chars), Application Status (Approved (14/06/2021 18:00)), and Remark (Approved Leave n2). On the right, a grid titled 'Application Details' shows a list of applied leaves. The grid has columns: From, To, Leave, Application Date, Application Type, Status, and Approval Details. The grid shows 10 records, with the first 7 records displayed. The first 7 records are: 21/06/2021 to 21/06/2021, PL, 14/06/2021, New, Status: Green checkmark, Approval Details: Green checkmark; 19/06/2021 to 19/06/2021, PL, 14/06/2021, New, Status: Green checkmark, Approval Details: Green checkmark; 18/06/2021 to 18/06/2021, PL, 14/06/2021, New, Status: Green checkmark, Approval Details: Green checkmark; 16/06/2021 to 16/06/2021, PL, 14/06/2021, New, Status: Green checkmark, Approval Details: Green checkmark; 15/06/2021 to 15/06/2021, PL, 11/06/2021, New, Status: Red X, Approval Details: Red X; 14/06/2021 to 14/06/2021, PL, 14/06/2021, New, Status: Red X, Approval Details: Red X; 11/06/2021 to 11/06/2021, PL, 10/06/2021, Modification, Status: Red X, Approval Details: Red X. The grid also shows 3.5 days Absent, 0 Pending, 6 Approved, and 4 Rejected. The grid is titled 'Application Details' and has a 'Show All' button. The grid is also titled 'Application Details' and has a 'Show All' button.

From this page you can also view the details of leaves which have been applied for cancellation or for modification from the ESS module, once they get approved or rejected.

To view the leave approved details, select a leave from the grid on the right hand side and the data gets loaded as shown in the screen below.

The screenshot shows the 'Leave Application' form. On the left, the form fields include: User (U4), Application Date (14/06/2021), Consideration In Terms Of (Both), From (21/06/2021), To (21/06/2021), Applied Duration (1.0), Posted Duration (1.0), Leave (PL - Paid Leave), Current Balance (81.50), Reason (Personal), Address (30 Chars), Contact Number (20 Chars), Application Status (Approved (14/06/2021 18:00)), and Remark (Approved Leave n2). On the right, a grid titled 'Application Details' shows a list of applied leaves. The grid has columns: From, To, Leave, Application Date, Application Type, Status, and Approval Details. The grid shows 10 records, with the first 7 records displayed. The first 7 records are: 21/06/2021 to 21/06/2021, PL, 14/06/2021, New, Status: Green checkmark, Approval Details: Green checkmark; 19/06/2021 to 19/06/2021, PL, 14/06/2021, New, Status: Green checkmark, Approval Details: Green checkmark; 18/06/2021 to 18/06/2021, PL, 14/06/2021, New, Status: Green checkmark, Approval Details: Green checkmark; 16/06/2021 to 16/06/2021, PL, 14/06/2021, New, Status: Green checkmark, Approval Details: Green checkmark; 15/06/2021 to 15/06/2021, PL, 11/06/2021, New, Status: Red X, Approval Details: Red X; 14/06/2021 to 14/06/2021, PL, 14/06/2021, New, Status: Red X, Approval Details: Red X; 11/06/2021 to 11/06/2021, PL, 10/06/2021, Modification, Status: Red X, Approval Details: Red X. The grid is titled 'Application Details' and has a 'Show All' button. The grid is also titled 'Application Details' and has a 'Show All' button.

Similarly, you can also view the leave modification details, by selecting a leave from the grid on the right hand side and the data gets loaded as shown in the screen below.

User

U4

User2

Application Date

10/06/2021

Consideration In Terms Of

Both

From

11/06/2021

Second Half

To

11/06/2021

Second Half

Applied Duration

0.5

Posted Duration

0.0

Leave

PL - Paid Leave

Current Balance

81.50

Reason And Contact Info

Reason

Personal

Address

30 Churs

Contact Number

20 Churs

Application Status

Rejected (10/06/2021 17:34)

Remark

Approved LeaveModification ASA

Submit

Cancel

Apply For Cancellation

Application Date

10/06/2021

Consideration In Terms Of

Both

From

11/06/2021

Second Half

To

11/06/2021

Second Half

Applied Duration

0.5

Posted Duration

0.5

Modification Reason

Applied Leave Modification

Address

30 Churs

Contact Number

20 Churs

Modification Status

Rejected (10/06/2021 17:41)

Remark

Rejected Leave Modification SA

May 2021

Jul 2021

Availed Leaves Days : 18.5 | Hours 00:00

3.5 days Absent

0 Pending

6 Approved

4 Rejected

Application Details


Show All

From	To	Leave	Application Date	Application Type	Status	Approval Details
21/06/2021	21/06/2021	PL	14/06/2021	New	✓	
19/06/2021	19/06/2021	PL	14/06/2021	New	✓	
18/06/2021	18/06/2021	PL	14/06/2021	New	✓	
16/06/2021	16/06/2021	PL	14/06/2021	New	✓	
15/06/2021	15/06/2021	PL	11/06/2021	New	✗	
14/06/2021	14/06/2021	PL	14/06/2021	New	✗	
11/06/2021	11/06/2021	PL	10/06/2021	Modification	✗	

1 - 7 of 10 records

1

2

Click **Details**  icon from the grid available on the left side of the page to view the Approval Details of the already applied application.

May 2021

Jul 2021

Availed Leaves Days : 18.5 | Hours 00:00

3.5 days Absent








0 Pending

6 Approved

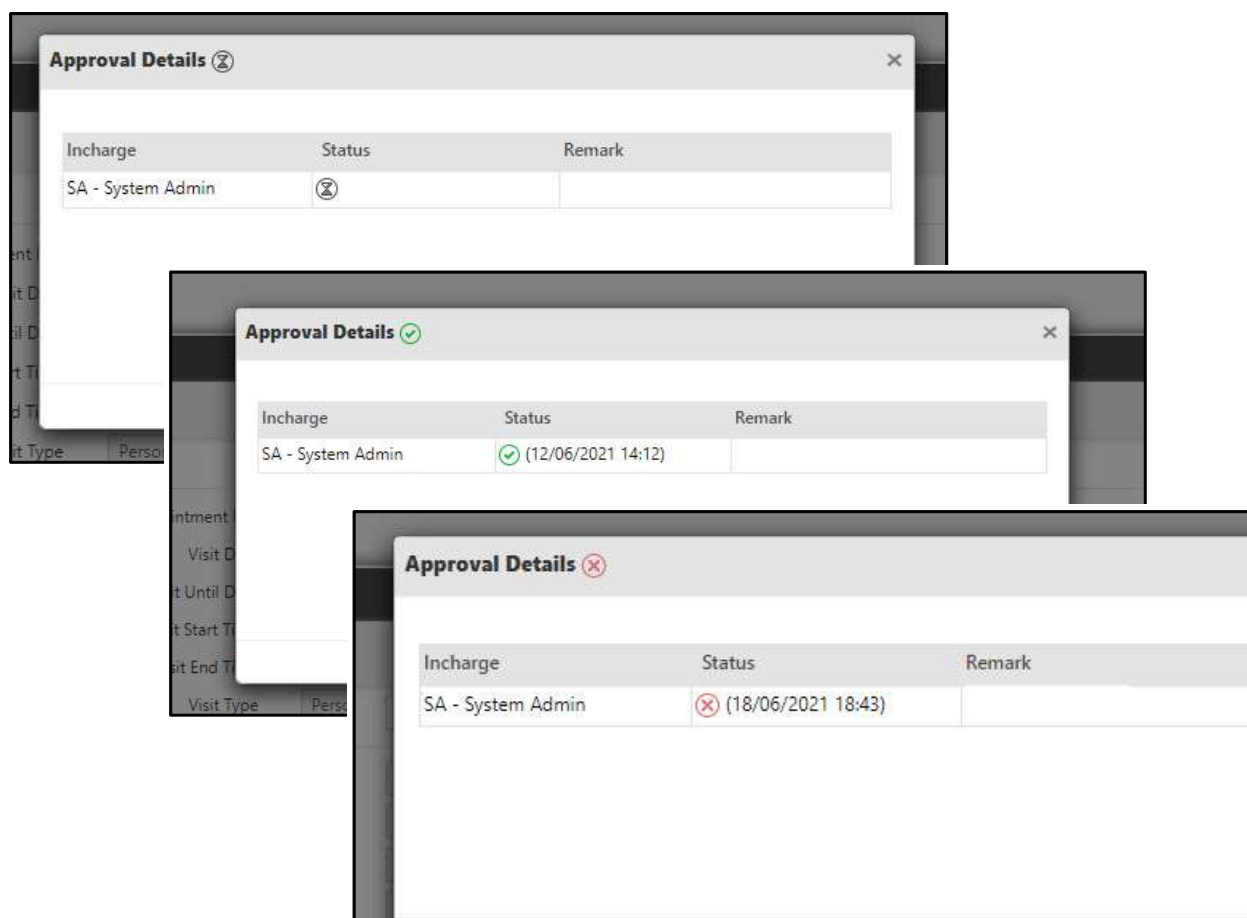
4 Rejected

Application Details

Show All

From	To	Leave	Application Date	Application Type	Status	Approval Details
21/06/2021	21/06/2021	PL	14/06/2021	New	✓	
19/06/2021	19/06/2021	PL	14/06/2021	New	✓	
18/06/2021	18/06/2021	PL	14/06/2021	New	✓	
16/06/2021	16/06/2021	PL	14/06/2021	New	✓	
15/06/2021	15/06/2021	PL	11/06/2021	New	✗	
14/06/2021	14/06/2021	PL	14/06/2021	New	✗	
11/06/2021	11/06/2021	PL	10/06/2021	Modification	✗	

**Approval Details** window appears as shown below:



It displays the status of the user's application under **Approval Details**, that is, whether it is — pending, approved or rejected.

The application's status is displayed in the **Status** column as Pending , Approved  or Rejected .

**Remark** displays the comments provided by the Admin/ RIC/ System.

System can auto approve / reject an application if the Reporting In-charge or SA fails to authorize it as per the Approval Policy assigned to the Reporting Groups. To know more about the Approval Policy, refer "[Approval Policy](#)".

### Leaves Applications across Months/Years

The configurations for the Leave Application are similar to that as mentioned above, except that the end date may either be of a different month or year.

### Leave Applications across Months

When Leave Applications are made across two months the leave of each month is deducted from the respective month only.

Consider the following example:

Time and Attendance Module > Attendance Policy > Yearly Period for leave Balance, the Start-End Month is configured as January - December

An Employee has 10 PL at end of July Month. Leaves 1.75 is credited in the month of August. Considering no leave is been applied till now., for month of August the Leave Balance Details will be as follows:

Year	Month	Code	Name	Opening	Credit	Debit	Encashment	Availed	Closing	Overflow
2022	August	PL	Paid Leave	10.00	1.75	0.00	0.00	0.00	11.75	0.00

An Employee has 11.75 PL at end of August Month. Considering no leave is been applied/credited for Month of September. Leave Balance process is done, hence for month of September the Leave Balance Details will be as follows:

Year	Month	Code	Name	Opening	Credit	Debit	Encashment	Availed	Closing	Overflow
2022	September	PL	Paid Leave	11.75	0.00	0.00	0.00	0.00	11.75	0.00

#### Case 1:

- Leave Application date = 29/08/2022
- Leave Applied-
  - From Date = 30/08/2022
  - To Date = 02/09/2022
- Applied Days = 4
- Posted Days = 4

In this case, 2 leaves will be availed from the month of August and 2 leave will be availed from the month of September.

Same deduction of leave will be updated in the "Availed" field of Leave Balance View/Reports.

Also, the field of opening and closing balance will be updated and shown as below.

Year	Month	Code	Name	Opening	Credit	Debit	Encashment	Availed	Closing	Overflow
2022	August	PL	Paid Leave	10.00	1.75	0.00	0.00	2.00	9.75	0.00
2022	September	PL	Paid Leave	9.75	0.00	0.00	0.00	2.00	7.75	0.00

Now, if the leave applied is rejected by SA/RIC or cases where the leave application is deleted by the user, in all these case the leave balance deducted from respective months, will be credited back to their respective months, that is 2 leave to be credited back in month of August and 2 leave to be credited back in month of September.

#### Case 2:

Year	Month	Code	Name	Opening	Credit	Debit	Encashment	Availed	Closing	Overflow
2022	August	PL	Paid Leave	10.00	1.75	0.00	0.00	0.00	11.75	0.00
2022	September	PL	Paid Leave	11.75	0.00	0.00	0.00	0.00	11.75	0.00

- Leave Application date = 10/08/2022
- Leave Applied-
  - From Date = 18/08/2022
  - To Date = 02/09/2022
- Applied Days = 16
- Posted Days = 12 (10 days of August and 2 days of September)



- Assuming week-off days of August are 20,21,27,28\

Hence, applied leave days for the month of August is 10, then September's opening balance will be 1.75 and applied days for the month of September is 2. Balance is not sufficient for the month of September hence the application cannot be applied and validation to be provided.

### Leave Applications across Years

When leave applications are made across years then it is dependent on:

- Time and Attendance > Policies > Attendance Policy > Yearly Period for Leave Balance
- Leave Management > Leave > Leave Balance Check > Carry Forward to Next Year, whether enabled or disabled.
- whether Manual Credit has been provided or not.

Let us understand this with the help of the following example:

- Time and Attendance Module > Attendance Policy > Yearly Period for leave Balance, Start-End Month is configured as January - December
- An Employee has 10 PL at end of November month. Considering no leave is applied till now. Hence, for the month of December the Leave Balance Details are as follows:

Year	Month	Code	Name	Opening	Credit	Debit	Encashment	Availed	Closing	Overflow
2022	December	PL	Paid Leave	10.00	0.00	0.00	0.00	0.00	10.00	0.00

#### Case1:

Leave Management > Leave > Leave Balance Check > Carry Forward To Next Year is disabled and no manual leave credit has been provided.

Year	Month	Code	Name	Opening	Credit	Debit	Encashment	Availed	Closing	Overflow
2022	December	PL	Paid Leave	10.00	0.00	0.00	0.00	0.00	10.00	0.00
2023	January	PL	Paid Leave	0.00	0.00	0.00	0.00	0.00	0.00	0.00

When leave is applied From Date = 29/12/2022 and To Date = 03/01/2023, then in such a case the application will not be allowed as sufficient leave balance is not available for January.

#### Case 2:

Leave Management > Leave > Leave Balance Check > Carry Forward To Next Year is enabled and Maximum Carry Forward Limit Check is disabled.

Year	Month	Code	Name	Opening	Credit	Debit	Encashment	Availed	Closing	Overflow
2022	December	PL	Paid Leave	10.00	0.00	0.00	0.00	0.00	10.00	0.00
2023	January	PL	Paid Leave	10.00	0.00	0.00	0.00	0.00	10.00	0.00

- Leave Application date = 10/12/2022
- Leave Applied
  - From Date = 16/12/2022
  - To Date = 02/01/2023
- Applied Days = 18

- Posted Days = 12 (11 days for month of December and 1 day for month of January)

Assuming week-off days 17,18,24,25 and 31 of December and 1 of January. Applied days for the month of December are 11 and Month of January is 1. Here, Balance is not sufficient for either month then leave application cannot be applied.

Similarly, if balance is not available for any one month also then also leave application cannot be applied.

### Case 3:

Leave Management > Leave > Leave Balance Check > Carry Forward To Next Year is enabled

Maximum Carry Forward Limit is enabled and Maximum Limit is set as 5

Year	Month	Code	Name	Opening	Credit	Debit	Encashment	Availed	Closing	Overflow
2022	December	PL	Paid Leave	10.00	0.00	0.00	0.00	0.00	10.00	0.00
2023	January	PL	Paid Leave	5.00	0.00	0.00	0.00	0.00	5.00	0.00

- Leave Application date = 10/12/2022
- Leave Applied
  - From Date = 29/12/2022
  - To Date = 03/01/2023
- Applied Days = 6
- Posted Days = 4 (Assuming 2 day week off i.e. 31/12/2022 and 01/01/2023)

In the above case, 2 leave will be availed from December month and 2 leave will be availed from January month. Same deduction of leave balance will be visible in the "Availed" field of in Leave Balance View/Reports.

The opening and closing balance will be as follows:

Year	Month	Code	Name	Opening	Credit	Debit	Encashment	Availed	Closing	Overflow
2022	December	PL	Paid Leave	10.00	0.00	0.00	0.00	2.00	8.00	0.00
2023	January	PL	Paid Leave	5.00	0.00	0.00	0.00	2.00	3.00	0.00

### Manual Credit

- Time and Attendance Module > Attendance Policy > Yearly Period for leave Balance
  - Start-End Month: September - August
- An Employee has 10 PL at end of July Month. Leaves= 1.75 gets credited in the month of August. Considering no leave is applied till now. Hence, for month of August the Leave Balance Details are as follows:

Year	Month	Code	Name	Opening	Credit	Debit	Encashment	Availed	Closing	Overflow
2021	August	PL	Paid Leave	10.00	1.75	0.00	0.00	0.00	11.75	0.00

### Case 1:

- Leave Management > Leave > Leave Balance Check > Carry Forward To Next Year is disabled
- Manual Leave credited= 5 for Month of September.

- Hence Leave Balance Details are as follows:

Year	Month	Code	Name	Opening	Credit	Debit	Encashment	Availed	Closing	Overflow
2021	August	PL	Paid Leave	10.00	1.75	0.00	0.00	0.00	11.75	0.00
2021	September	PL	Paid Leave	0.00	5.00	0.00	0.00	0.00	5.00	0.00

- Leave Application date = 30/08/2021
- Leave Application-
  - From Date = 30/08/2021
  - To Date = 02/09/2021
- Applied Days = 4
- Posted Days = 4
- Now, 2 leave will be availed from the month of August and 2 leaves will be availed from the month of September.
- Hence, Leave Balance Details will be as follows:

Year	Month	Code	Name	Opening	Credit	Debit	Encashment	Availed	Closing	Overflow
2021	August	PL	Paid Leave	10.00	1.75	0.00	0.00	2.00	9.75	0.00
2021	September	PL	Paid Leave	0.00	5.00	0.00	0.00	2.00	3.00	0.00

If the leave application is rejected by SA/RIC or if the application is deleted by the user, in all these case the leave balance deducted from respective months, will be credited back to their respective months, that is 2 leave will be credited back in month of August and 2 leave will be credited back in month of September.

Hence the after the rejection/cancellation the leave balance for months of August and September will be as follows:

Year	Month	Code	Name	Opening	Credit	Debit	Encashment	Availed	Closing	Overflow
2021	August	PL	Paid Leave	10.00	1.75	0.00	0.00	0.00	11.75	0.00
2021	September	PL	Paid Leave	0.00	5.00	0.00	0.00	0.00	5.00	0.00

## Applying for a Leave (Leave Type- Unpaid, Layoffs, Hourly)

This section describes how to apply for a leave using the Leave Management module.

To do this, click to **Leave Management module > Application/Approval > Leave Application** and the following screen appears.

The screenshot displays the 'Leave Application' interface. On the left, the configuration section includes a 'User' dropdown, 'Application Date', 'Consideration In Terms Of' (set to 'Both'), 'From' and 'To' date pickers, 'Applied Duration' and 'Posted Duration' fields, a 'Leave' type selector, 'Current Balance', and a 'Reason And Contact Info' section with fields for 'Reason', 'Address', and 'Contact Number'. On the right, the attendance details section shows a summary: '0 day Absent', '0 Pending', '0 Approved', and '0 Rejected'. Below this is a table for 'Attendance Details' with columns: Date, Shift, 1st Half, 2nd Half, First IN, Last OUT, and Work Hours. The table currently displays 'No Data'.

The page displays configurations on the left hand side and to the right is the attendance details of the user along with all the leave application details of a particular user for a particular month. It also displays the number of leaves availed, total absent days, total leaves pending, approved and rejected.

To apply a new leave, click **New** button and enter the following parameters:

**User:** Select user from the picklist for whom the leave application is to be made.

**Application Date:** It indicates the date for which application is going to be created. Thus, "Application Date" is not editable because its an system-generated field which shows current date.

**Consideration In Terms Of:** Select the option for which type of leave you want to apply, from the list — Both, First Half Only, Second Half Only, Hourly.

If you wish to apply for Hourly Leave then select **Hourly** as the **Consideration In Terms Of** option.

Then the Leave option will display the Hourly Leave Type — Paid, Unpaid — as configured by you from Leave Management Module > Leave.

**Leave Application**

User \* User1 User1

Application Date 07/12/2023

Consideration In Terms Of Hourly

Attendance Date \* Both

From \* 05/12/2023

To \* 05/12/2023

**Attendance Date:** The current date appears here by default. This is applicable for Hourly Leave only.

**From/To Date:** Select the starting and ending date for the leave period using the date selection button. For a single day select the same date in both the fields.

- Specify whether the leave should be considered for **Full Day**, **First Half** or **Second Half** (not applicable for Hourly Leave) for a single day. For more than 1 leave specify the starting day of leave as full day or second half and ending leave day as full day or first half as shown below.

User \* 1 Rosy

From Date \* 08/11/2016

To Date \* 08/11/2016

Applied Days 1

Posted Days

Full Day

First Half

Second Half

User \* 1 Rosy

From Date \* 08/11/2016

To Date \* 09/11/2016

Applied Days 2

Posted Days

Full Day

First Half



For a particular user, if **Restrict Half Day Considerations** is enabled in the page User > User configuration > T&A, then in **From/To Date** only full day attendance options will be visible and all the other half day options will be disabled for that particular user as shown in the screen below.

**Applied Duration:** It displays the total time duration for which the leave has been applied.

**Posted Duration:** It displays the number of working duration posted between the leave applied. It is automatically calculated by the system.

**Leave:** Select the type of leave to be applied from the dropdown list. This list displays all leaves defined on the system as shown below.

**Current Balance:** It displays the current leave balance which guides the user to apply for the leave and accordingly the applied leave will be deducted from the leave balance.



*The leaves are credited to the user manually by the administrator or through the scheduler using Accrual Policy. See [“Leave Credit/Debit/Encashment”](#) and [“Accrual Policy”](#).*

You can also view the leave balance detail by clicking Details » icon next to the text-box. The **Leave Balance Detail** window will appear which shows the details of Paid Leave type and Restricted Leave type provided if user has the available balance for the leave.

←

+

🗑️

👤

User \*

User1

User1

☰

Application Date

07/12/2023

Consideration In Terms Of

Hourly ▾

Attendance Date \*

Attendance Date

📅

From \*

07/12/2023

📅

HH:MM

To \*

07/12/2023

📅

HH:MM

Applied Duration

HH:MM

Posted Duration

HH:MM

Leave

HP - HourlyPaid ▾

Current Balance

19

:

30

⌵

Reason And Contact Info

Reason \*

Personal

Address

30 Chars

Contact Number

20 Chars

Submit

Cancel

**Leave Balance Detail**

User: User1      User1    ⋮

Attendance Period: Dec      2023

Search


Code ▲	Name	Opening	Credit	Debit	Encashed	Availed	Closing	Overflow
HP	HourlyPaid	00:00	20:00	00:00	00:00	00:30	19:30	00:00
PL	Paid Leave	0					0	0
RH	Restricted Holiday	0					0	0

Now you know that Hourly Leave has balance of 19.30; so you can select the Hourly Leave type leave in drop down and click Submit button to apply for leave.

### Reason and Contact Info


- **Reason:** Enter reason for requesting leave.
- **Address:** Provide address of the user for whom the leave application is being made.
- **Contact Number:** Provide the contact number of the user for whom the leave application is being made.

- **Medical Certificate Available:** Select the checkbox to make it mandatory for the applicant to produce a medical certificate as a proof to testify the reason behind the current leave.

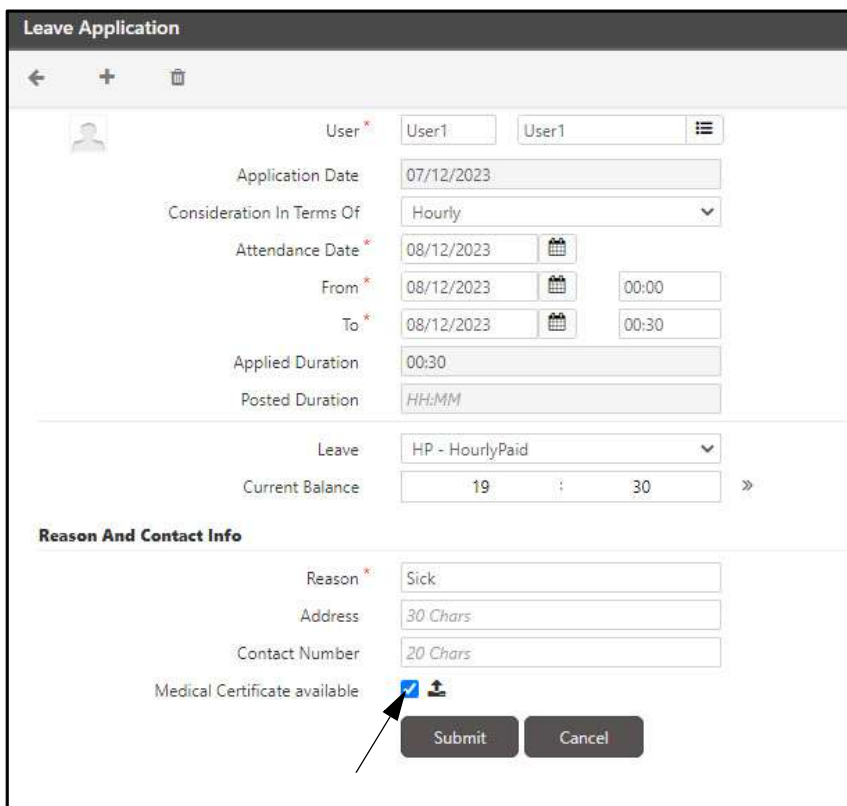
Select this checkbox if you have a Medical Certificate as a proof and reason for the current leave. To upload this certificate, click on the **Upload**  button.

Select the desired file as per the supported formats (.jpg, .bmp, .png, .pdf) and size.

Click **Update**.

The document will be uploaded and can be previewed by clicking on **Preview**  button.

This option is available only if it is enabled during configuration of the selected leave from the Leave page. For more information, refer [“Configuring Leaves”](#).



**Leave Application**

User \* User1 User1

Application Date 07/12/2023

Consideration In Terms Of Hourly

Attendance Date \* 08/12/2023

From \* 08/12/2023 00:00

To \* 08/12/2023 00:30

Applied Duration 00:30

Posted Duration HH:MM

Leave HP - HourlyPaid


Current Balance 19 : 30 »

**Reason And Contact Info**

Reason \* Sick

Address 30 Chars

Contact Number 20 Chars

Medical Certificate available ☒ 

Submit Cancel

Click **Submit** button to apply for the leave as shown below.



The applied leave gets displayed in the Application Details grid as shown below. If the number of days of the applied leave is more than the current leave balance, then the system will not allow the application to be made.

The screenshot shows the 'Leave Application' form. On the left, there are fields for User (User1), Application Date (07/12/2023), Consideration In Terms Of (Hourly), Attendance Date (03/12/2023), From (03/12/2023 00:00), To (03/12/2023 00:30), Applied Duration (00:30), Posted Duration (00:30), Leave (HP - HourlyPaid), and Current Balance (17 / 30). Below these are fields for Reason (Sick), Address (30 Chars), Contact Number (20 Chars), Medical Certificate available (checkbox), Application Status (Approved (07/12/2023 11:42)), and Remark (Approved Leave). On the right, there is a summary section showing 'Nov 2023', 'Jan 2024', and 'Availed Leaves Days : 0 | Hours 02:30'. Below this is a status bar with '3 days Absent', '2 Pending', '2 Approved', and '1 Rejected'. The 'Application Details' section shows a table of applied leaves:


From	To	Leave	Application Date	Application Type	Status	Approval Details
10/12/2023	10/12/2023	HP	07/12/2023	New	(X)	
08/12/2023	08/12/2023	HP	07/12/2023	New	✓	
07/12/2023	07/12/2023	HP	07/12/2023	New	✓	
06/12/2023	06/12/2023	HP	07/12/2023	New	(X)	
03/12/2023	03/12/2023	HP	07/12/2023	Modification	(X)	

From this page you can also view the details of leaves which have been applied for cancellation or for modification from the ESS module, once they get approved or rejected.


To view the leave cancellation details, select a leave from the grid on the right hand side and the data gets loaded in the left grid.

Similarly, you can also view the leave modification details, by selecting a leave from the grid on the right hand side and the data gets loaded in the left grid.


This screenshot is identical to the previous one, but with an arrow pointing to the last row in the 'Application Details' grid, which is highlighted in blue. This row represents a modification application for the period 03/12/2023 to 03/12/2023, with status (X).

Click **Details**  icon from the grid available on the left side of the page to view the Approval Details of the already applied application.

Nov 2023



Jan 2024



Availed Leaves Days : 0 |

Hours 02:30

3 days  
Absent











2  
Pending

2  
Approved



1  
Rejected

Application Details



Show All

From	To	Leave	Application Date	Application Type	Status	Approval Details
10/12/2023	10/12/2023	HP	07/12/2023	New		
08/12/2023	08/12/2023	HP	07/12/2023	New		
07/12/2023	07/12/2023	HP	07/12/2023	New		
06/12/2023	06/12/2023	HP	07/12/2023	New		
03/12/2023	03/12/2023	HP	07/12/2023	Modification		



**Approval Details** window appears as shown below:

Approval Details 		
Incharge	Status	Remark
SA - System Admin		




  

Approval Details 		
Incharge	Status	Remark
SA - System Admin	 (07/12/2023 10:32)	Rejected Leave

Approval Details 		
Incharge	Status	Remark
SA - System Admin	 (07/12/2023 10:26)	

It displays the status of the user's application under **Approval Details**, that is, whether it is — pending, approved or rejected.

The application's status is displayed in the **Status** column as Pending  , Approved  or Rejected  .

**Remark** displays the comments provided by the Admin/ RIC/ System.

System can auto approve / reject an application if the Reporting In-charge or SA fails to authorize it as per the Approval Policy assigned to the Reporting Groups. To know more about the Approval Policy, refer [“Approval Policy”](#).

## Leave Approval

The system administrator can view, approve or reject leaves that have been applied by the ESS user. The administrator also has the right to reject any pre-approved leaves and vice versa, if required.

To access this functionality,

Go to **Leave Management > Application/Approval > Leave Approval** and the following screen appears.

The screenshot shows the 'Leave Approval' interface. At the top, there's a 'Show All Pending Applications' button. Below it are filters: 'Leave Date' with a date range from 18/12/2019 to 01/02/2020, 'Filter Users' set to 'Individual', and a 'User' dropdown showing '2551' and 'Rushi Shah'. A 'View' button is below the filters. The main content area has three collapsible panels: 'Pending (0)', 'Approved (5)', and 'Rejected (0)'. The 'Approved (5)' panel is expanded, showing a table of approved leave applications. The table has columns: User, Name, From, To, Leave, Application Date, Posted Duration, Approve, Reject, Remark, and Details. There are five rows of data, all for user 2551 (Rushi Shah).

User	Name	From	To	Leave	Application Date	Posted Duration	Approve	Reject	Remark	Details
2551	Rushi Shah	23/01/2020	23/01/2020	Paid Leave	17/01/2020	1.0	<input checked="" type="checkbox"/>	<input type="checkbox"/>		
2551	Rushi Shah	20/01/2020	22/01/2020	Random Leave 2	16/01/2020	2.5	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Approved Leave Modification	
2551	Rushi Shah	18/01/2020	19/01/2020	Random Leave 2	17/01/2020	2.0	<input checked="" type="checkbox"/>	<input type="checkbox"/>		
2551	Rushi Shah	17/01/2020 10:00	17/01/2020 10:45	RANDOM LEAVE	16/01/2020	00:45	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Approved Leave	
2551	Rushi Shah	16/01/2020 10:00	16/01/2020 10:30	RANDOM LEAVE	16/01/2020	00:30	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Approved Leave	

By default, the Admin can view all pending applications from the last one month period. However, sometimes users may also apply for leaves on future dates.

You can either:

- view all the pending Leave Approval Applications
- set the filters — Date, Filter Users — to view the desired applications

## All Pending Applications

To view only Pending Applications,

- **Show All Pending Applications:** Select this option to enable the pending application filter. You can view all pending leave applications, including those made for future dates.
- Click the **Pending** collapsible panel. All the applications in pending state appear.

To approve the application, select the **Approve** check box of the desired entry.

To reject the application, select the **Reject** check box of the desired entry.

To know more, refer to [“Pending Applications”](#).

## Applications according to Set Filters

To Set the Filters,

- **Leave Date:** Select and specify the start and end dates using the calendar buttons to define the period for which leave approval status is to be viewed.
- **Filter Users:** You can filter records according to the desired Enterprise Group, All or for an Individual.

Select **All**, to view authorization status of the applications of all the active users on the system.

Select **Individual**, to view authorization status of the applications of a single user. Click the picklist to select the desired User ID/Name.

Select the desired Enterprise Group — Organization, Branch, Department, Section, Category, Grade, Designation, Custom Group 1,/2/3 and then click the picklist to select the desired group's ID/Name, to view authorization status of these applications.

- Click the **View** button and all the pending, approved and rejected leave applications along with their details will be displayed.

## Pending Applications

Click the **Pending** collapsible panel. The **Pending** section lists all the leave/cancellation/modification applications pending for authorization by the reporting in-charge or HR administrator as shown below.

The screenshot shows the 'Leave Approval' application window. At the top, there's a header bar with the title 'Leave Approval' and navigation icons. Below the header, there's a section for filters. It includes a radio button for 'Show All Pending Applications', a 'Leave Date' section with two date pickers (24/10/2017 and 08/12/2017), a 'Filter Users' dropdown menu set to 'All', and a 'Group/User' section with two input fields for 'ID' and 'Name'. A 'View' button is located below these filters. The main content area is divided into three collapsible panels: 'Pending (4)', 'Approved (3)', and 'Rejected (0)'. The 'Pending (4)' panel is expanded, showing a table of pending applications. The table has columns for User ID, Name, From Date, To Date, Leave, Application Type, Application Date, Posted Days, Approve, Reject, Remark, and Details. There are four rows of data, all for 'apta user'. The first row is for 'Paid Leave' (New), the second for 'Paid Leave' (New), the third for 'Leave without pay' (Modified), and the fourth for 'Maternity Leave' (New). Each row has checkboxes for 'Approve' and 'Reject'. The 'Details' column contains a magnifying glass icon for each row. Below the table, there are three more collapsible panels: 'Approved (3)' and 'Rejected (0)'. An arrow points to the 'Details' icon in the first row of the 'Pending' table.

User ID	Name	From Date	To Date	Leave	Application Type	Application Date	Posted Days	Approve	Reject	Remark	Details
apta	apta user	01/11/2017	01/11/2017	Paid Leave	New	02/11/2017	0.0	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Approved Leave	
apta	apta user	30/10/2017	30/10/2017	Paid Leave	New	31/10/2017	1.0	<input type="checkbox"/>	<input type="checkbox"/>		
apta	apta user	27/10/2017	27/10/2017	Leave without pay	Modified	31/10/2017	0.5	<input type="checkbox"/>	<input type="checkbox"/>		
apta	apta user	24/10/2017	24/10/2017	Maternity Leave	New	31/10/2017	0.5	<input type="checkbox"/>	<input type="checkbox"/>		

When any application is in the Pending state it can be authorized by the Admin or RIC.

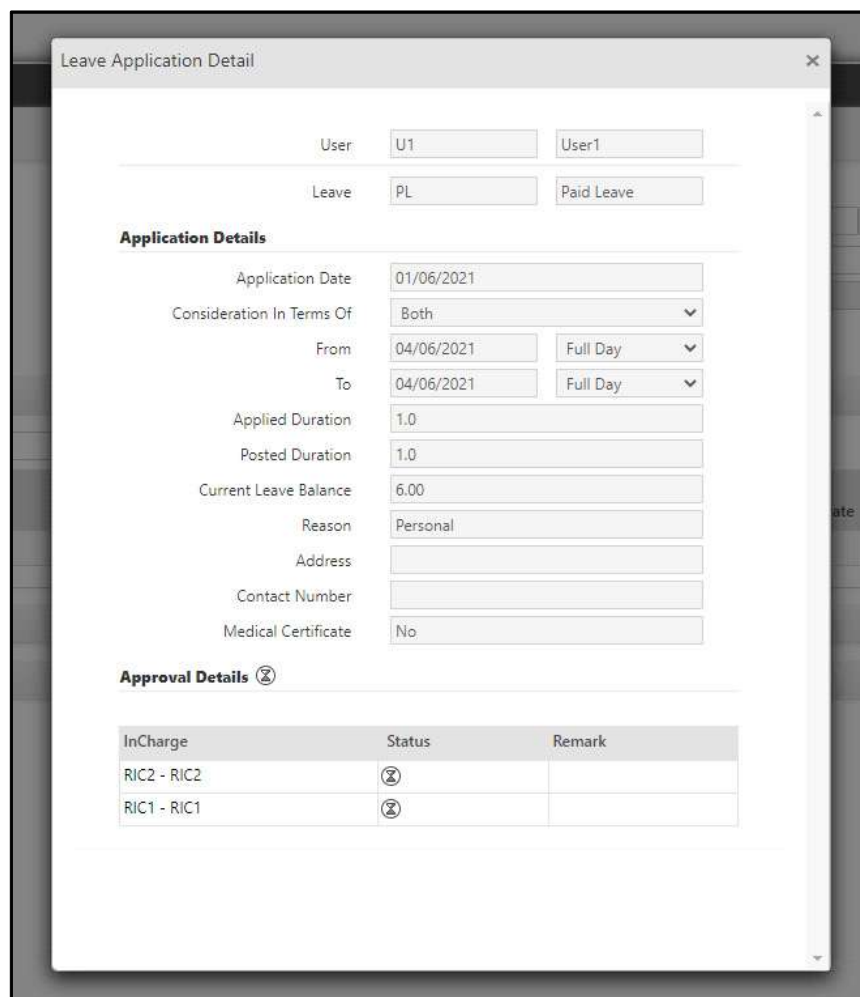
- To approve/reject applications selectively, click the respective application check box against the user.
- To approve/reject all the applications simultaneously, click the Approve /Reject checkbox in the header column.

Once the Admin approves/ rejects the application, the record will be moved from the **Pending** section to the **Approved/ Rejected** section respectively.

The default **Remark** for the Approved and Rejected application will appear in the respective fields. You can enter any customized Remark while authorizing the application.

Click the **Details**  icon to view the details of the applied leave.

**Leave Application Detail** window appears as shown below:



**Leave Application Detail**

User: U1 User1

Leave: PL Paid Leave

**Application Details**

Application Date: 01/06/2021

Consideration In Terms Of: Both

From: 04/06/2021 Full Day

To: 04/06/2021 Full Day

Applied Duration: 1.0

Posted Duration: 1.0

Current Leave Balance: 6.00

Reason: Personal

Address:

Contact Number:

Medical Certificate: No

**Approval Details**

InCharge	Status	Remark
RIC2 - RIC2		
RIC1 - RIC1		

**Leave Application Detail** window displays the user's application details.

It also displays the status of the user's application under **Approval Details**. The application's status is displayed in the **Status** column.

System can auto approve / reject an application if the Reporting In-charge or SA fails to authorize it as per the Approval Policy assigned to the Reporting Groups. To know more about the Approval Policy, refer ["Approval Policy"](#).

**Remark** displays the comments provided by the Admin/ RIC/ System.

Click **Save** to save the authorization.



The pending applications can not be authorized if the attendance period is closed while doing monthly attendance process and “Attendance Correction in Closed Period” checkbox is disabled from Time and Attendance> Policies >Attendance Policy> General.

Even though; the period is closed but if “Attendance Correction in Closed Period” checkbox in Policy is enabled then authorization can be made.

## Approved Application

Click the **Approved** collapsible panel.

The **Approved** section displays all the leave/cancellation/modification applications that have been approved by the reporting group in-charge or the system administrator. Leave applications generated using the **Leave Management** module on COSEC Web will appear in this section by default as they are pre-approved.

User ID	Name	From Date	To Date	Leave	Application Date	Posted Days	Approve	Reject	Details
1	Rosy	18/11/2016	21/11/2016	P -Paid Leave	15/11/2016	4.0	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
1	Rosy	11/11/2016	14/11/2016	P -Paid Leave	10/11/2016	4.0	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
1	Rosy	04/11/2016	07/11/2016	P -Paid Leave	10/11/2016	4.0	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
1	Rosy	03/11/2016	03/11/2016	PL -Privelege Leave	03/11/2016	1.0	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
1	Rosy	02/11/2016	02/11/2016	P -Paid Leave	10/11/2016	1.0	<input checked="" type="checkbox"/>	<input type="checkbox"/>	

To change the authorization verdict of any application, select **Reject** check box against the corresponding user. Once you reject an approved application, the record will be moved to the **Rejected** section.

Click the **Details** icon to view the application details of the corresponding user.

**Leave Application Detail** window appears as shown below:

Leave Application Detail

User: U4, User4

Leave: PL, Paid Leave

**Application Details**

Application Date: 14/06/2021

Consideration In Terms Of: Both

From: 21/06/2021, Full Day

To: 21/06/2021, Full Day

Applied Duration: 1.0

Posted Duration: 1.0

Current Leave Balance: 81.50

Reason: Personal

Address:

Contact Number:

Medical Certificate: No

**Approval Details** ✓

Incharge	Status	Remark
ri1 - Riiri1	✓ (14/06/2021 18:00)	Approved Leave ri1
ri2 - Riiri2	✓ (14/06/2021 18:00)	Approved Leave ri2

**Leave Application Detail** window displays the user's application details.

It also displays the status of the user's application under **Approval Details**. The application's status is displayed in the **Status** column.

System can auto approve / reject an application if the Reporting In-charge or SA fails to authorize it as per the Approval Policy assigned to the Reporting Groups. To know more about the Approval Policy, refer ["Approval Policy"](#).

**Remark** displays the comments provided by the Admin / RIC / System.

Click **Save** to save the authorization.

## Rejected Application

Click the **Rejected** collapsible panel.

The **Rejected** section displays all the leave/cancellation/modification applications that have been rejected by the reporting group in-charge or the system administrator.

The following screen displays the **Rejected** section with rejected leave applications:



Rejected (4)

Search

User ID ▲	Name	From Date	To Date	Leave	Application Date	Posted Days	Approve	Reject	Details
1	Rosy	18/11/2016	21/11/2016	P -Paid Leave	15/11/2016	0.0	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
1	Rosy	07/11/2016	08/11/2016	P -Paid Leave	10/11/2016	0.0	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
1	Rosy	07/11/2016	08/11/2016	P -Paid Leave	10/11/2016	0.0	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
1	Rosy	04/11/2016	04/11/2016	PL-Privelege Leave	03/11/2016	0.0	<input type="checkbox"/>	<input checked="" type="checkbox"/>	

To change the authorization verdict of any application, select **Approve** check box against the corresponding user. Once you approve a rejected application, the record will be moved to the **Approved** section.

Click the **Details** icon to view the application details of the corresponding user.

**Leave Application Detail** window appears as shown below:

Leave Application Detail

User: U4 User4

Leave: PL Paid Leave

**Application Details**

Application Date: 11/06/2021

Consideration In Terms Of: Both

From: 15/06/2021 Full Day

To: 15/06/2021 Full Day

Applied Duration: 1.0

Posted Duration: 0.0

Current Leave Balance: 81.50

Reason: Personal

Address:

Contact Number:

Medical Certificate: No

Application Verdict: Rejected

Verdict Date: 11/06/2021

**Modification Application Details**

Application Date: 11/06/2021

From: 15/06/2021 Full Day

To: 15/06/2021 Full Day

Reason: Applied Leave Modification

Address:

Contact Number:

Medical Certificate: No

**Approval Details**

Incharge	Status	Remark
RG2	(11/06/2021 10:50)	Reject Modification RG2

**Leave Application Detail** window displays the user's application details.

It also displays the status of the user's application under **Approval Details**. The application's status is displayed in the **Status** column.

System can auto approve / reject an application if the Reporting In-charge or SA fails to authorize it as per the Approval Policy assigned to the Reporting Groups. To know more about the Approval Policy, refer "[Approval Policy](#)".

**Remarks** displays the comments provided by the Admin / RIC / System.

Click **Save** button to save the changes.



*System Administrator can delete pending/approved/rejected application.*

### Half Day Restriction on posted days

On the Leave Approval page, **Half Day restriction on posted days** feature restricts the administrator to approve the posted half day leave application for that particular user.

Consider a scenario where the user has applied for the half day leave from the ESS login page and the Application has been sent for approval to the administrator.

Suppose after posting the half day leave application, **Restrict Half Day Considerations** has been enabled in the page User > User configuration > T&A for that particular user. Now when the Administrator will try to approve the Leave Application for that user, then it will show the error in the Error List that "Half-day Application is restricted for this User" as shown in the screen below.

The screenshot shows the 'Leave Approval' window. At the top, there's a tab 'Check Process Error List For User Record Not Processed.' Below it, there are filters for 'Show All Pending Applications', 'Leave Date' (From Date, To Date), 'User Selection' (All), and 'Group/User' (ID, Name). A 'View' button is present. Below the filters, there's a section 'Pending (17)' and an 'Error List' section. The 'Error List' contains a table with one row of error data. An arrow points to the 'Description' column of this row.

User ID	Name	Appl Date	From Date	To Date	Leave	Status	Description
1687	Aditi Gupta	07/18/2017	07/06/2017	07/06/2017	CL-ggg	Pending	Half-day Application is restricted for this User

# Tour Application/Approval

An employee who has to go out of the office premises for official work E.g. Meeting, for specific number of days or hours, often needs to use this type of leave. The application process for Tour on COSEC Web is similar to the leave application.

The Tour applications can be made by:

- System Account User
- On Behalf System Account User
- Using the ESS Self Service Module (For more details refer COSEC Employee Self Service User Manual)

COSEC Web enables all System Account users with appropriate page rights to make tour applications using the Leave Management module. All applications made by the System Account user are pre-approved by default.

COSEC Web also enables all On Behalf System Account User with appropriate page rights to make leave applications using the Leave Management module. All applications made by the On Behalf System Account User are pre-approved by default. For creating and assigning the roles and rights to the On Behalf System Account User. Refer to [“On Behalf System Account User”](#).

The authorization is dependent on the number of Reporting In-charge in the Reporting Group, the Authorization Mode as well as the Approval Policy assigned by the system administrator. For details refer to [“Reporting In-Charge”](#), [“Approval Policy”](#) and [“Configuring Users”](#).



*The Tour applied from System Administrator login gets approved automatically.*

## Applying for Tour

This section describes how to apply for a tour using the Leave Management module.

To do this, go to the **Leave Management > Application/Approval > Tour Application** and the following screen appears.

Date	Shift	1st Half	2nd Half	First IN	Last OUT	Work Hours
04/17/2017		AB	AB			
03/29/2017	GS	AB	AB			
03/28/2017	GS	AB	AB			
03/27/2017	GS	AB	AB			
03/25/2017	GS	AB	AB			
03/24/2017	GS	AB	AB			
03/23/2017	GS	AB	AB			

The page displays configurations on the left hand side and to the right is the attendance details of the user along with all the tour application details of a particular user for a particular month. It also displays the number of tours availed, total absent days, total tours pending, approved and rejected.

To apply a new tour for a user, click **New** button.

**User:** Select the user for whom the tour is to be applied.

**From Date:** Select the starting date for the tour period using the date selection button and specify whether the tour is to be considered for Full Day or start only from the Second Half.

**To Date:** Select the end date for the tour period using the date selection button and specify whether the tour is to be considered for Full Day or end right after the First Half.



For a particular user, if **Restrict Half Day Considerations** is enabled in the page User > User configuration > T&A, then in **From/To Date** only full day attendance options will be visible and all the other half day options will be disabled for that particular user as shown in the screen below.

The screenshot shows the 'Tour Application' form. At the top, there are navigation icons (back, add, delete). The form is divided into sections. The first section contains 'User' (U1), 'From Date' (with a calendar icon), 'To Date' (with a calendar icon), 'Applied Days', and 'Posted Days'. Below this is a 'Tour' dropdown menu showing 'TO - Tour-1'. The next section is 'Reason And Contact Info', which includes 'Reason' (Official), 'Address' (30 Chars), 'Contact Number' (20 Chars), and a 'Tour Document Available' checkbox. At the bottom are 'Submit' and 'Cancel' buttons. An arrow points to the 'Full Day' dropdown menu for the 'To Date' field.

**Applied Days:** The system automatically calculates the number of days the tour has been applied for.

**Posted Days:** The posted days are the actual days for which the tour will be applied. It will be automatically calculated by the system after saving the application.

**Tour:** Select a tour from the Tour drop down list, for which the application is to be made. It displays the list of tours available in the Leave Group assigned to the user.




Tours and Leaves on COSEC have a similar configuration and application process. To know more about applying for leaves, refer to "[Leave Application/Approval](#)".

### Reason and Contact Info

- **Reason:** Enter reason for requesting the tour.
- **Address:** Enter the address of the user for whom the tour application is being made.


- **Contact Number:** Enter the contact number of the user for whom the tour application is being made.
- **Tour Document Available:** Select the checkbox to make it mandatory for the applicant to produce a tour document to specify the reason behind the current tour.

This option is available only if it is enabled during configuration of the selected tour from the **Tour** page. For more information, refer [“Optional Restrictions”](#) in Tour page.

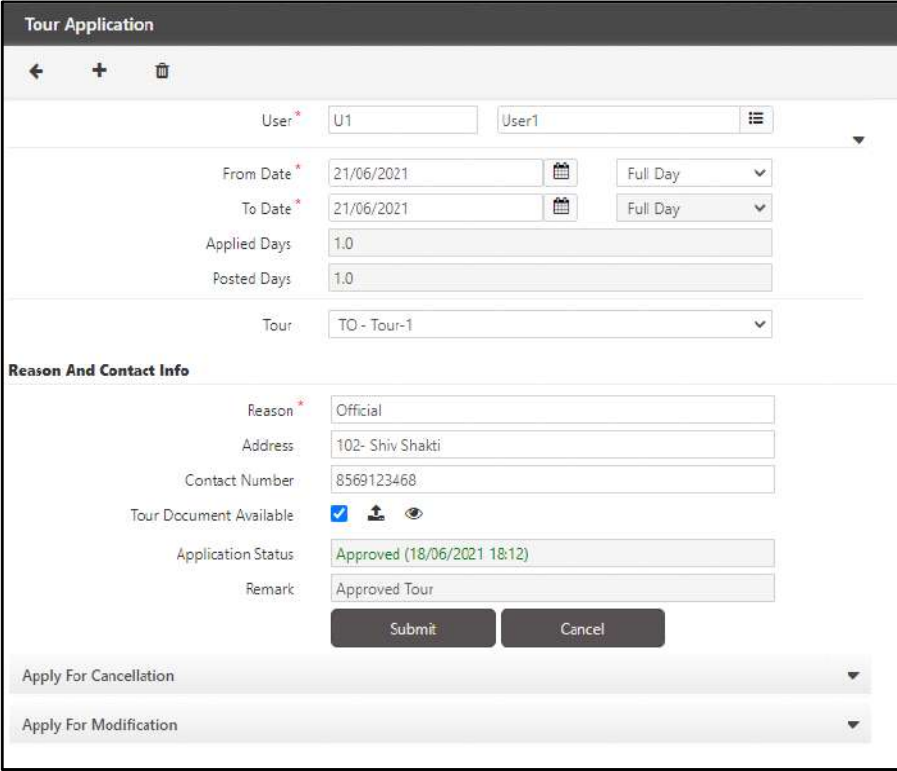
Click on the **Upload**  button and select the respective document.

Select the desired file as per the supported formats (.jpg, .bmp, .png, .pdf).

Then click **Update**.

The document will be uploaded and can be previewed by clicking on **Preview**  button.

Click the **Submit** button to apply for the tour. If applied successfully, the **Application Status** for the tour will be updated to “Approved”.



**Tour Application**

User \* U1 User1

From Date \* 21/06/2021 Full Day

To Date \* 21/06/2021 Full Day

Applied Days 1.0

Posted Days 1.0



Tour TO - Tour-1

**Reason And Contact Info**

Reason \* Official

Address 102- Shiv Shakti

Contact Number 8569123468

Tour Document Available ☒  

Application Status Approved (18/06/2021 18:12)

Remark Approved Tour

Submit Cancel

Apply For Cancellation

Apply For Modification

From this page you can also view the details of tours which have been applied for cancellation or for modification from the ESS module.



Once the tour gets approved or rejected, it can be requested for modification or cancellation from the ESS module.

## Tour Cancellation

The tour cancellation details can be viewed by selecting the tour from the grid on the right hand side as shown below.

The screenshot shows the 'Tour Application' form with the following details:

- User:** 1, Shalini
- From Date:** 03/10/2017, **To Date:** 03/11/2017, **Full Day:** Full Day
- Applied Days:** 2.0, **Posted Days:** 2.0
- Tour:** TR - Tour1
- Reason And Contact Info:**
  - Reason:** 50 Char
  - Address:** 30 Char
  - Contact Number:** 20 Char
  - Application Status:** Approved (04/20/2017 14:39)
- Buttons:** Submit, Cancel
- Apply For Cancellation:**
  - Cancellation Reason:** Tour postpone required
  - Cancellation Status:** Applied (04/20/2017 14:45)
- Apply For Modification:** (collapsed)

On the right side, there is a summary bar and a table:

Mar 2017, May 2017, Availed Tours : 3

22 days Absent, 2 Pending, 1 Approved, 0 Rejected

From	To	Leave	Application Date	Application Type	Status
04/04/2017	04/06/2017	TR	04/20/2017	New	✓
03/10/2017	03/11/2017	TR	04/20/2017	Cancellation	ⓘ
03/08/2017	03/09/2017	TR	04/20/2017	Modification	ⓘ

## Tour Modification

You can view the tour modification details, by selecting a tour from the grid on the right hand side and the data gets loaded as shown in the screen below.

The screenshot shows the 'Tour Application' form with the following details:

- User:** U1, User1
- From Date:** 23/06/2021, **To Date:** 23/06/2021, **Full Day:** Full Day
- Applied Days:** 1.0, **Posted Days:** 1.0
- Tour:** TO - Tour-1
- Reason And Contact Info:**
  - Reason:** Official
  - Address:** ATLADARA
  - Contact Number:** 84569895565
  - Tour Document Available:** ☒
  - Application Status:** Approved (18/06/2021 18:19)
- Buttons:** Submit, Cancel
- Apply For Cancellation:** (collapsed)
- Apply For Modification:**
  - From Date:** 23/06/2021, **To Date:** 23/06/2021, **Full Day:** Full Day
  - Applied Days:** 1.0, **Posted Days:** 1.0
  - Modification Reason:** Applied Tour Modification
  - Tour Document Available:** ☒
  - Modification Status:** Applied (18/06/2021 18:20)

On the right side, there is a summary bar and a table:

May 2021, Jul 2021

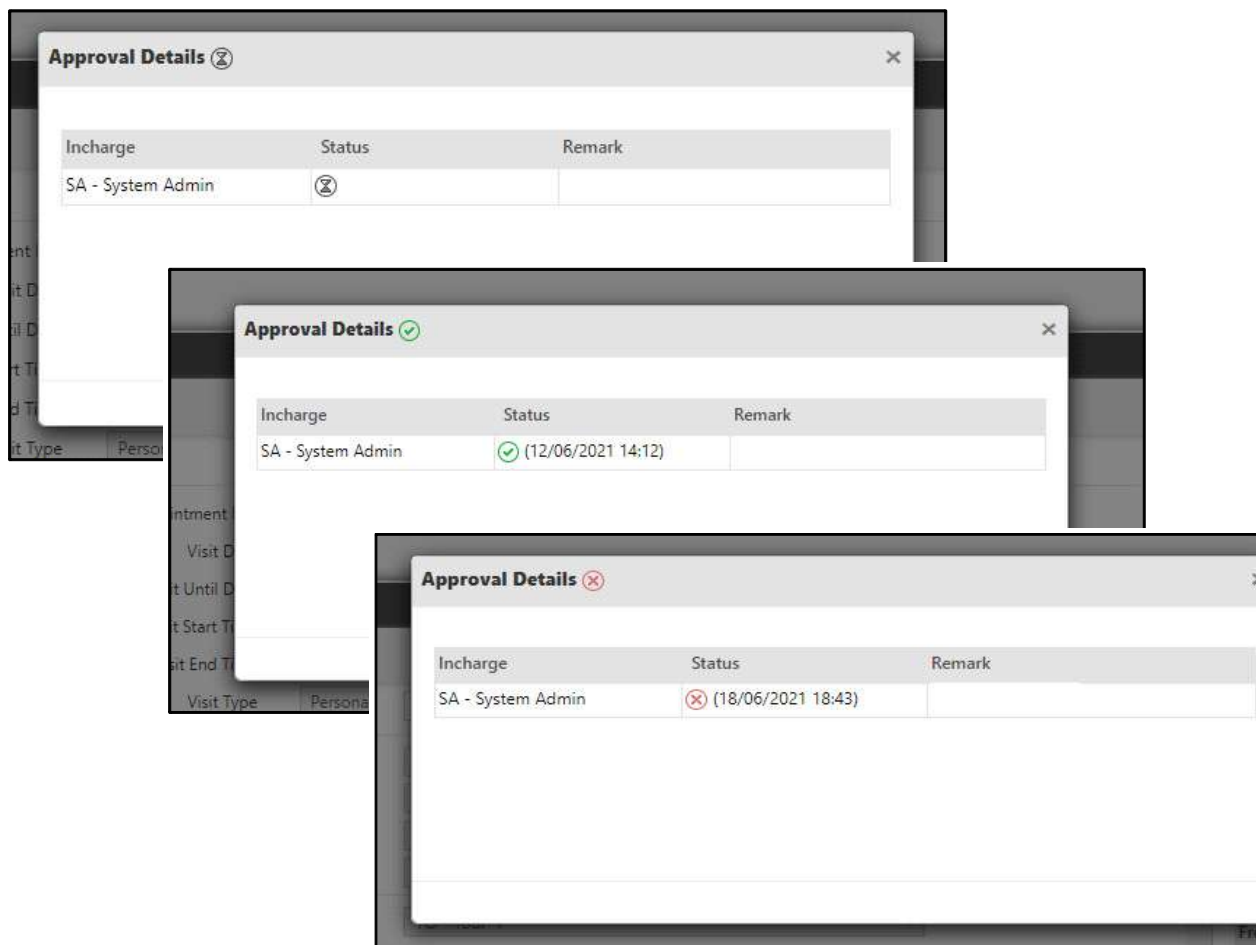
5 days Absent, 1 Pending, 1 Approved, 0 Rejected

From	To	Tour	Application Date	Application Type	Status	Approve Details
23/06/2021	23/06/2021	TO	18/06/2021	Modification	ⓘ	ⓘ
21/06/2021	21/06/2021	TO	18/06/2021	New	✓	

An arrow points to the 'Approve Details' icon (ⓘ) in the table.

Click **Details** ⓘ icon from the grid available on the left side of the page to view the Approval Details of the already applied application.

**Approval Details** window appears as shown below:



It displays the status of the user's application under **Approval Details**, that is, whether it is — pending, approved or rejected.

The application's status is displayed in the **Status** column as Pending ⌚ , Approved ✓ or Rejected ✗ .

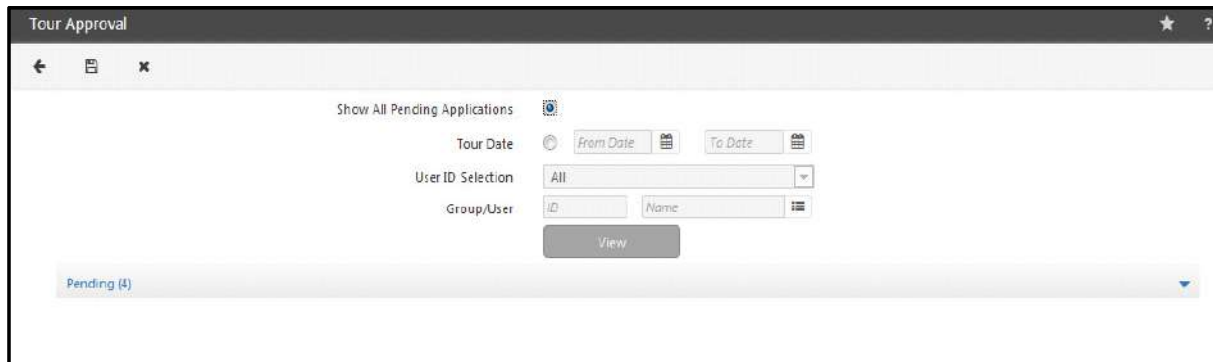
**Remark** displays the comments provided by the Admin/ RIC/ System.

System can auto approve / reject an application if the Reporting In-charge or SA fails to authorize it as per the Approval Policy assigned to the Reporting Groups. To know more about the Approval Policy, refer [“Approval Policy”](#).

## Tour Approval

The system administrator can view, approve or reject tour applications made by ESS users using the *Tour Approval* functionality. The administrator also has the right to reject any pre-approved tours and vice versa, if required.

To access this functionality, go to the **Leave Management > Application/Approval > Tour Approval** and the following screen appears.

The screenshot shows a web application window titled "Tour Approval". At the top, there is a navigation bar with a back arrow, a document icon, and a close 'x' icon. Below this, the main content area has a header "Show All Pending Applications" with a blue circular icon. Underneath, there are filter controls: "Tour Date" with a circular icon and two date pickers labeled "From Date" and "To Date"; "User ID Selection" with a dropdown menu currently set to "All"; and "Group/User" with two input fields labeled "ID" and "Name" and a list icon. A "View" button is positioned below these filters. At the bottom of the main content area, there is a collapsible panel labeled "Pending (4)" with a downward arrow.

You can either:

- view all the pending Tour Approval Applications
- set the filters — Date, Filter Users — to view the desired applications

## All Pending Applications

To view only Pending Applications,

- **Show All Pending Applications:** Select this option to enable the pending application filter. You can view all pending tour applications, including those made for future dates.
- Click the **Pending** collapsible panel. All the applications in pending state appear.

To approve the application, select the **Approve** check box of the desired entry.

- To reject the application, select the **Reject** check box of the desired entry.

To know more, refer to [“Pending Applications”](#)

## Applications according to Set Filters

To Set the Filters,

- **Tour Date:** Select the start and end dates as the period for which tour approval status is to be viewed.
- **Filter Users:** You can filter records according to the desired Enterprise Group, All or for an Individual.

Select **All**, to view authorization status of the applications of all the active users on the system.

Select **Individual**, to view authorization status of the applications of a single user. Click the picklist to select the desired User ID/Name.



Select the desired Enterprise Group — Organization, Branch, Department, Section, Category, Grade, Designation, Custom Group 1,/2/3 and then click the picklist to select the desired group's ID/Name, to view authorization status of these applications.

Click the **View** button to view all pending, approved and rejected tour applications and their details.

## Pending Applications

Click the **Pending** collapsible panel. The **Pending** section lists all the tour applications pending for approval by the reporting in-charge/SA as shown below.

The screenshot shows the 'Tour Approval' window. At the top, there's a 'Show All Pending Applications' button. Below it are filters for 'Tour Date' (From Date, To Date), 'Filter Users' (All), and 'Group/User' (ID, Name). A 'View' button is present. The main section is titled 'Pending (31)' and contains a table of pending applications. The table has columns: User ID, Name, From Date, To Date, Tour, Application Type, Application Date, Posted Days, Approve, Reject, Remark, and Details. The table shows 5 records, with the first three for user 1587 and the last two for user 25. The 'Approve' and 'Reject' columns have checkboxes. The 'Remark' column contains text like 'Approved Tour' and 'Rejected Tour Modification'. The 'Details' column has icons to view more information.

User ID	Name	From Date	To Date	Tour	Application Type	Application Date	Posted Days	Approve	Reject	Remark	Details
1587	Aditi Gupta	03/12/2017	03/12/2017	TOUR	New	03/12/2017	1.0	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Approved Tour	
1587	Aditi Gupta	04/12/2017	05/12/2017	TOUR	Modified	03/12/2017	1.0	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Rejected Tour Modification	
1587	Aditi Gupta	05/07/2017	05/07/2017	TOUR	New	18/07/2017	0.5	<input type="checkbox"/>	<input type="checkbox"/>		
25	new club user 18 aug 1-2	02/09/2017	02/09/2017	TOUR	New	25/09/2017	1.0	<input type="checkbox"/>	<input type="checkbox"/>		
25	new club user 18 aug 1-2	09/07/2017	09/07/2017	Tour-Priyank	New	31/08/2017	0.0	<input type="checkbox"/>	<input type="checkbox"/>		

1 - 5 of 31 records

When any application is in the Pending state it can be authorized by the Admin or RIC.

- To approve/reject applications selectively, click the respective application check box against the user.
- To approve/reject all the applications simultaneously, click the Approve /Reject checkbox in the header column.

Once the Admin approves/ rejects the application, the record will be moved from the **Pending** section to the **Approved/ Rejected** section respectively.

The default **Remark** for the Approved and Rejected application will appear in the respective fields. You can enter any customized Remark while authorizing the application.

Click the **Details** icon to view the application details of the corresponding user.

**Tour Application Detail** window appears as shown below:

User: U1 User1  
 Tour: TO Tour-1

**Application Details**

Application Date: 18/06/2021  
 Half Day Consideration: Both  
 From Date: 23/06/2021 Full Day  
 To Date: 23/06/2021 Full Day  
 Applied Days: 1.0  
 Posted Days: 1.0  
 Reason: Official  
 Address: ATLADARA  
 Contact Number: 84569895565  
 Tour Document: Yes  
 Application Verdict: Approved  
 Verdict Date: 18/06/2021

**Modification Application Details**

Application Date: 18/06/2021  
 From Date: 23/06/2021 Full Day  
 To Date: 23/06/2021 Full Day  
 Reason: Applied Tour Modification  
 Tour Document: Yes

**Approval Details**

Incharge	Status	Remark
SA - System Admin	X	

**Tour Application Detail** window displays the user's tour application details.

It also displays the status of the user's application under **Approval Details**. The application's status is displayed in the **Status** column.

System can auto approve / reject an application if the Reporting In-charge or SA fails to authorize it as per the Approval Policy assigned to the Reporting Groups. To know more about the Approval Policy, refer ["Approval Policy"](#).

**Remark** displays the comments provided by the Admin/ RIC/ System.

Click **Save** to save the authorization.



*The pending applications can not be authorized if the attendance period is closed while doing monthly attendance process and "Attendance Correction in Closed Period" check-box is disabled.*

*Even though; the period is closed but if "Attendance Correction in Closed Period" check-box in Policy is enabled then authorization can be made.*

The **Auto generated Tour applications** will also be listed in Pending application if “Auto Authorize Location based Tour applications” is disabled from User Configuration > T&A > Attendance.

The 'Tour Approval' window displays a search and filter section at the top. Below this, a table lists pending applications. The table has columns for User, Name, From Date, To Date, Tour, Application Type, Application Date, Posted Days, Approve, Reject, Remark, and Details.

User	Name	From Date	To Date	Tour	Application Type	Application Date	Posted Days	Approve	Reject	Remark	Details
1	Chirag	27/06/2018	27/06/2018	Tour1	New	27/06/2018	1.0	<input type="checkbox"/>	<input type="checkbox"/>		

If the location from where the Tour is automatically applied is not available in Location master; then it can be added by clicking **Add this location** as shown below.

The 'Tour Application Detail' window shows the details of a specific application. It includes fields for User, Tour, Application Date, Half Day Consideration, From Date, To Date, Applied Days, Posted Days, Reason, Address, Context Number, and Location Details. A button labeled 'Add this location' is visible at the bottom right.

**Application Details**

User: 1, Chirag  
 Tour: TR1, Tour1  
 Application Date: 27/06/2018  
 Half Day Consideration: Both  
 From Date: 27/06/2018, Full Day  
 To Date: 27/06/2018, Full Day  
 Applied Days: 1.0  
 Posted Days: 1.0  
 Reason: Auto Tour Application by System  
 Address:  
 Context Number:  
 Location Details: GPS - (+22.2575, +073.1851)

Add this location

## Approved Application

Click the **Approved** collapsible panel.

The **Approved** section displays all the tour/cancellation/modification applications that have been approved by the reporting group in-charge or the system administrator. Tour applications generated using the **Leave Management** module on COSEC Web will appear in this section by default as they are pre-approved.

The following screen displays the **Approved** section with approved tour application:

Pending (0)									
Approved (1)									
Search									
User ID ▲	Name	From Date	To Date	Tour	Application Date	Posted Days	Approve	Reject	Details
1687	Aditi Gupta	08/12/2017	08/12/2017	TOUR	03/12/2017	1.0	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Approved Tour

To change the authorization verdict of any application, select **Reject** check box against the corresponding user. Once you reject an approved application, the record will be moved to the **Rejected** section.

Click the **Details**  icon to view the application details of the corresponding user.

**Tour Application Detail** window appears as shown below:

Tour Application Detail

User

U4

User4

Tour

TO

Tour-1

Application Details

Application Date

23/06/2021

Half Day Consideration

Both

From Date

24/06/2021

Full Day

To Date

25/06/2021

Full Day

Applied Days

2.0

Posted Days

2.0

Reason

Official

Address

12-A Pashabhai Park

Contact Number

8989562374

Tour Document

Yes

Approval Details

Incharge

Status

Remark

SA - System Admin

✓

(23/06/2021 09:43)

Approved Tour

**Tour Application Detail** window also displays the status of the user's application under **Approval Details**. The application's status is displayed in the **Status** column.

System can auto approve / reject an application if the Reporting In-charge or SA fails to authorize it as per the Approval Policy assigned to the Reporting Groups. To know more about the Approval Policy, refer ["Approval Policy"](#).

**Remark** displays the comments provided by the Admin / RIC / System.

Click **Save** to save the authorization.



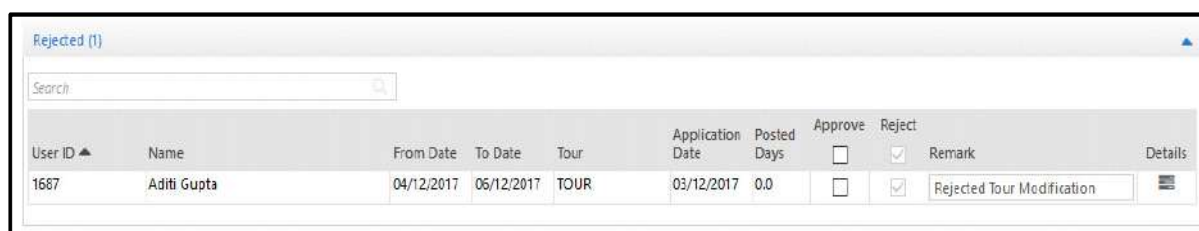
When system applies Auto Tour Application from location which is not configured as base location or not from base location group, and 'Auto Authorize Location Based Auto Tour Application' is enabled, then in detail page of such applications, Location Details will be displayed.


## Rejected Application

Click the **Rejected** collapsible panel.

The **Rejected** section displays all the tour/cancellation/modification applications that have been rejected by the reporting group in-charge or the system administrator.

The following screen displays the **Rejected** section with rejected tour applications:



User ID ▲	Name	From Date	To Date	Tour	Application Date	Posted Days	Approve	Reject	Remark	Details
1687	Aditi Gupta	04/12/2017	06/12/2017	TOUR	03/12/2017	0.0	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Rejected Tour Modification	

To change the authorization verdict of any application, select the **Approve** check box against the corresponding user.

Once you approve a rejected application, the record will be moved to the **Approved** section.

Click the **Details**  icon to view the application details of the corresponding user.

**Tour Application Detail** window appears as shown below:

**Tour Application Detail**

User: U1 User1

Tour: TO Tour-1

**Application Details**

Application Date: 18/06/2021

Half Day Consideration: Both

From Date: 23/06/2021 Full Day

To Date: 23/06/2021 Full Day

Applied Days: 1.0

Posted Days: 0.0

Reason: Official

Address: ATLADARA

Contact Number: 84569895565

Tour Document: Yes

Application Verdict: Rejected

Verdict Date: 18/06/2021

**Modification Application Details**

Application Date: 18/06/2021

From Date: 23/06/2021 Full Day

To Date: 23/06/2021 Full Day

Reason: Applied Tour Modification

Tour Document: Yes

**Approval Details** (X)

Incharge	Status	Remark
SA - System Admin	(X) (18/06/2021 18:43)	Rejected Tour

**Tour Application Detail** window displays the tour application details.

**Tour Application Detail** window also displays the status of the user's application under **Approval Details**. The application's status is displayed in the **Status** column.

System can auto approve / reject an application if the Reporting In-charge or SA fails to authorize it as per the Approval Policy assigned to the Reporting Groups. To know more about the Approval Policy, refer ["Approval Policy"](#).

**Remarks** displays the comments provided by the Admin / RIC / System.

Click **Save** button to save the changes.



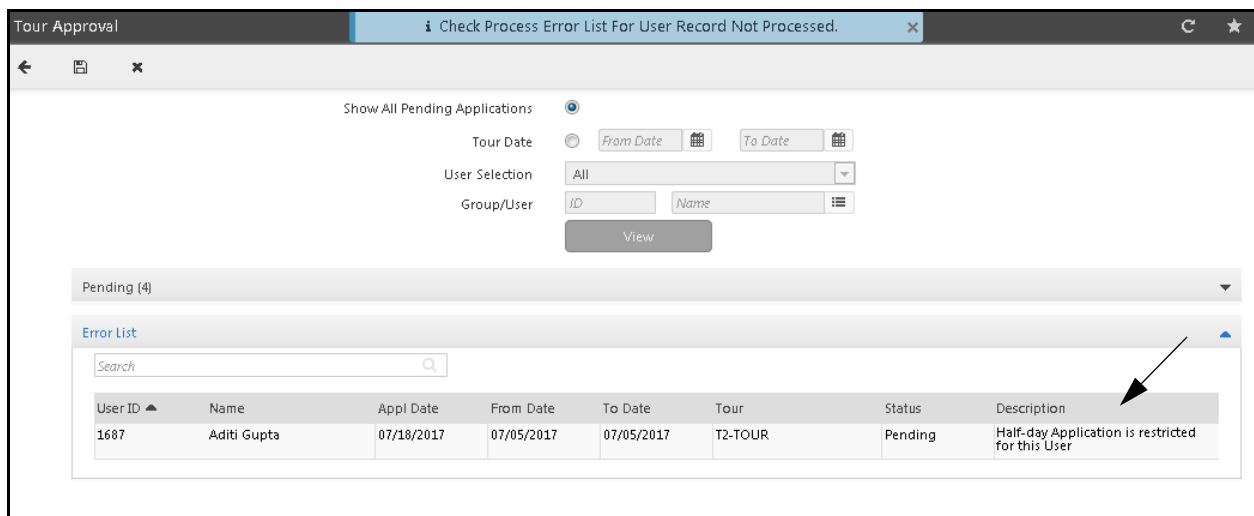
*System Administrator can delete pending/approved/rejected application.*

## Half Day Restriction on posted days

On the Tour Approval page, **Half Day restriction on posted days** feature restricts the administrator to approve the posted half day Tour application for that particular user.

Consider a scenario where the user has applied for the half day tour from the ESS login page and the Application has been sent for approval to the administrator.

Suppose after posting the half day tour application, **Restrict Half Day Considerations** has been enabled in the page User > User configuration > T&A for that particular user. Now when the Administrator will try to approve the Tour Application for that user, then it will show the error in the Error List that “Half-day Application is restricted for this User” as shown in the screen below.



The screenshot shows the 'Tour Approval' interface. At the top, there is a notification bar that says 'Check Process Error List For User Record Not Processed.' Below this, there are filters for 'Show All Pending Applications', 'Tour Date' (with 'From Date' and 'To Date' pickers), 'User Selection' (set to 'All'), and 'Group/User' (with 'ID' and 'Name' pickers). A 'View' button is present. Below the filters, there is a section for 'Pending (4)' applications. Underneath, there is an 'Error List' section with a search bar. The error list contains one entry with the following details:

User ID	Name	Appl Date	From Date	To Date	Tour	Status	Description
1687	Aditi Gupta	07/18/2017	07/05/2017	07/05/2017	T2-TOUR	Pending	Half-day Application is restricted for this User

An arrow points to the 'Description' column of the error list entry.

# C-OFF Application/Approval

An employee who has accumulated C-OFF hours often needs to use these within a validity period. C-OFF Application is a formal way of requesting a Complimentary-Off. The application process for C-OFF on COSEC Web is however, distinguished from the application process for other leave types, though both follow a similar functioning. The Application and Approval rights for a C-OFF are similar to those for a leave application. For a better understanding of C-OFF Application and Approval, also refer to [“Leave Application/Approval”](#).

The authorization is dependent on the number of Reporting In-charge in the Reporting Group, the Authorization Mode as well as the Approval Policy assigned by the system administrator. For details refer to [“Reporting In-Charge”](#), [“Approval Policy”](#) and [“Configuring Users”](#).

## Applying for a C-OFF

This section describes how to apply for a C-OFF using the Leave Management module.

To do this, go to the **Leave Management > Application/Approval > C-OFF Application** and the following screen appears.

The page displays configurations on the left hand side and to the right is the attendance details of the user along with all the C-OFF application details of a particular user for a particular month. It also displays the number of C-OFFs availed, total absent days, total C-OFFs pending, approved and rejected.

To apply a C-OFF for a user, click **New** button.

**User:** Select the user for whom the C-OFF is to be applied.

**From Date:** Select the starting date for the C-OFF using the date selection button and specify whether the C-OFF is to be considered for FullDay or start only from the Second Half.

**To Date:** Select the end date for the C-OFF using the date selection button and specify whether the C-OFF is to be considered for FullDay or end right after the First Half.



For a particular user, if **Restrict Half Day Considerations** is enabled in the page **User > User configuration > T&A**, then in **From/To Date** only full day attendance options will be visible and all the other half day options will be disabled for that particular user as shown in the screen below.



**Applied Days:** The system automatically calculates the number of days the C-OFF has been applied for.

**Posted Days:** The posted days are the number of working days posted between the C-OFF applied. It will be automatically calculated by the system after saving the application. E.g. If a C-OFF is applied for 3 days from 29th October to 31st October and there is a week off in the middle, then posted days will be 2 days only as only the actual working days are considered for C-OFF and not the week off i.e. 30th October.



*The minimum C-OFF balance (in hours) required for taking a half day or full day off is determined during C-OFF Policy configuration. To know more about this, refer to [“C-OFF Policy”](#).*

*While considering Half day application, the value for “Minimum allowed at a time” and “Maximum Allowed Limit” for the leave type is also checked.*



*To know more about how to create a C-OFF type leave, refer to [“Configuring Leaves”](#).*

- **Leave:** Select the type of leave to be applied from the dropdown list. This list displays all C-OFFs defined on the system.
- **Current Balance:** The system automatically retrieves and displays the current balance of C-OFF type leave.
- **Required Balance:** Once the leave is selected, the system retrieves and displays the balance required for applying leave. The user can successfully apply for a C-OFF only if the required balance for leave is lesser than or equal to the current C-OFF hours balance. For e.g., in the following figure, the user has sufficient C-OFF hours balance to apply for 2 days leave which requires a minimum of 18 hours C-OFF as per C-OFF policy. In such a scenario the system will allow the C-OFF application to be made. If the balance is less then the system application will not allow to apply for C-OFF.

**C-OFF Application**

User: 1 Rosy

From Date: 29/10/2016 Full Day

To Date: 31/10/2016 Full Day

Applied Days: 3

Posted Days:

Leave: CF - C-OFF

Current Balance: 46:00

Required Balance For Leave: 16:00

Selected C-OFF For Application: 18:00

**Reason And Contact Info**

Reason: 50 Char

Address: 30 Char

Contact Number: 20 Char

Submit Cancel

- **Selected C-OFF For Application:** You can select the C-OFF to be applied using the picklist, if the available C-OFF balance of a user is more than the required balance. The number of C-OFF hours which are to be selected for conversion can be entered in the picklist Leave Balance Detail pop-window as shown in the screen below. Enter the value and click **Select** button, the value appears on the main screen.

**Leave Balance Detail**

User: 1 Rosy

Attendance Period: 15/11/2016 15/11/2016

User: CF C-OFF


Search

Attendance Date	Available C-OFF	Select C-OFF
29/10/2016	28:00	08:00


Select Cancel

### Reason and Contact Info


- **Reason:** Enter reason for requesting C-Off leave.
- **Address:** Provide address of the user for whom the C-Off application is being made.
- **Contact Number:** Provide the contact number of the user for whom the C-Off application is being made.
- **Medical Certificate Available:** Select the checkbox to make it mandatory for the applicant to produce a medical certificate as a proof to testify the reason behind the current C-Off.

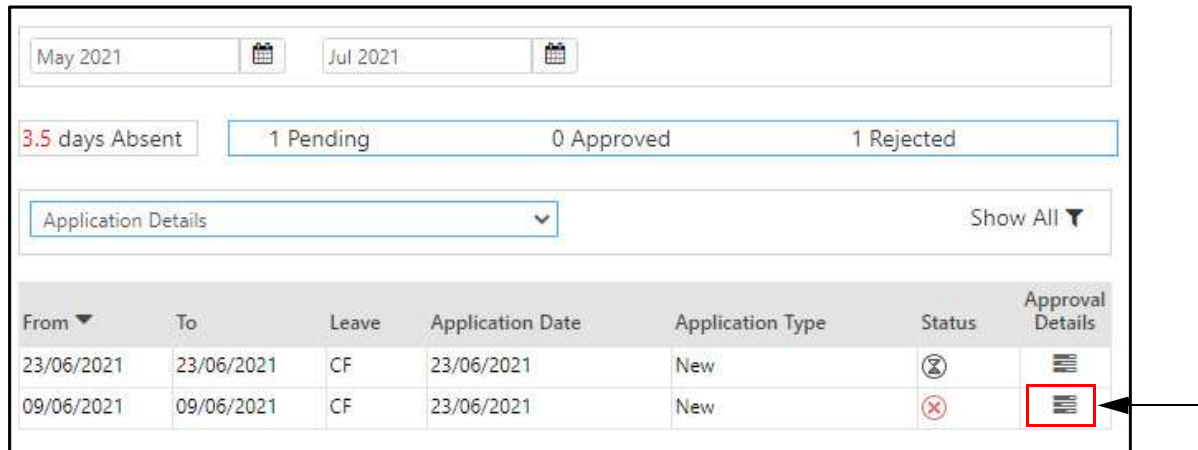
Select this checkbox if you have a Medical Certificate as a proof and reason for the current leave. To upload this certificate, click on the **Upload**  button.





Select the desired file as per the supported formats (.jpg, .bmp, .png, .pdf) and size. Click **Update**.

The document will be uploaded and can be previewed by clicking on **Preview**  button.

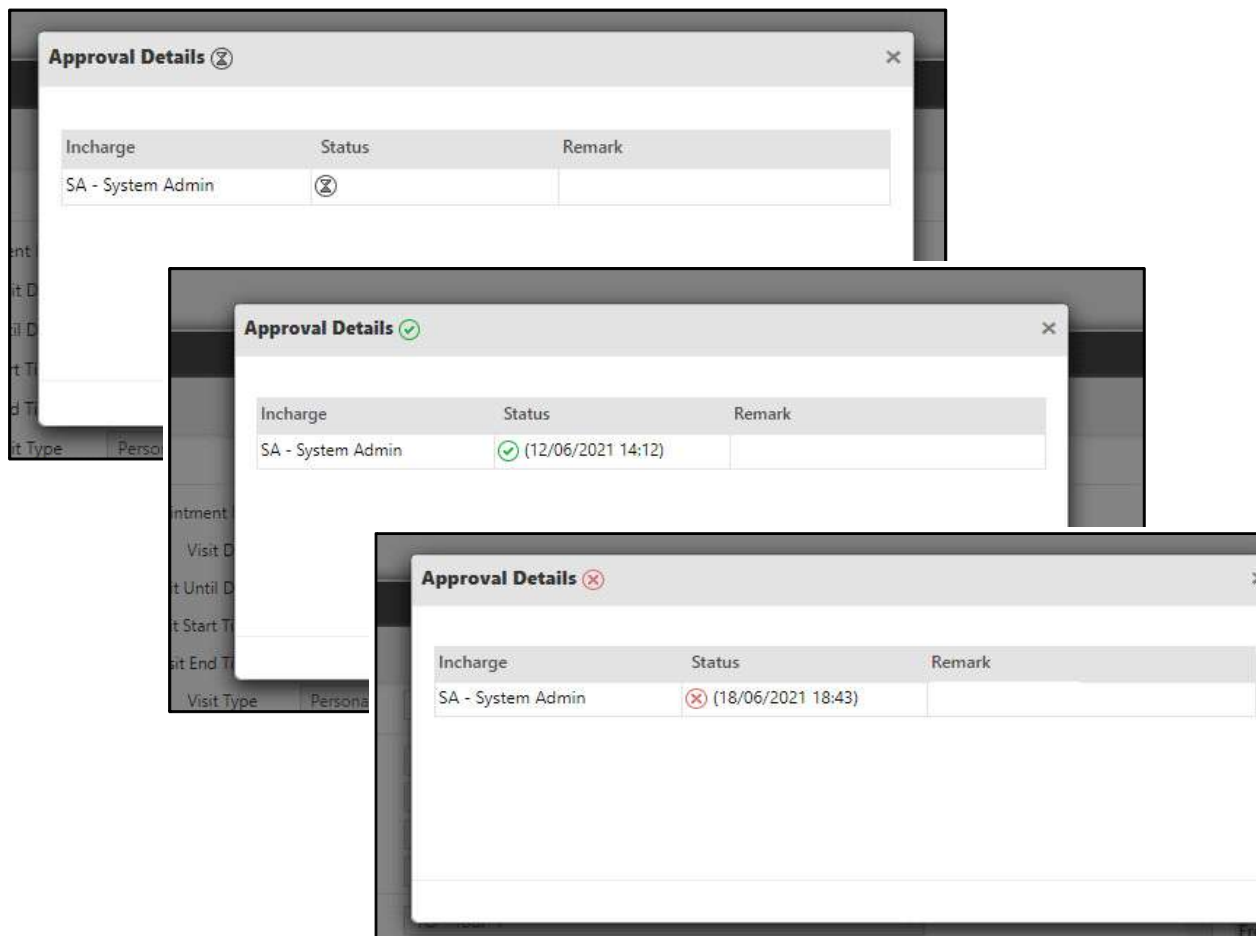
Click the **Submit** button to apply for the C-OFF. If applied successfully, the **Application Status** for the C-OFF will be updated to "Approved".

Click **Details**  icon from the grid available on the left side of the page to view the Approval Details of the already applied application.



From	To	Leave	Application Date	Application Type	Status	Approval Details
23/06/2021	23/06/2021	CF	23/06/2021	New		
09/06/2021	09/06/2021	CF	23/06/2021	New		

**Approval Details** window appears as shown below:



It displays the status of the user's application under **Approval Details**, that is, whether it is — pending, approved or rejected.

The application's status is displayed in the **Status** column as Pending , Approved  or Rejected .

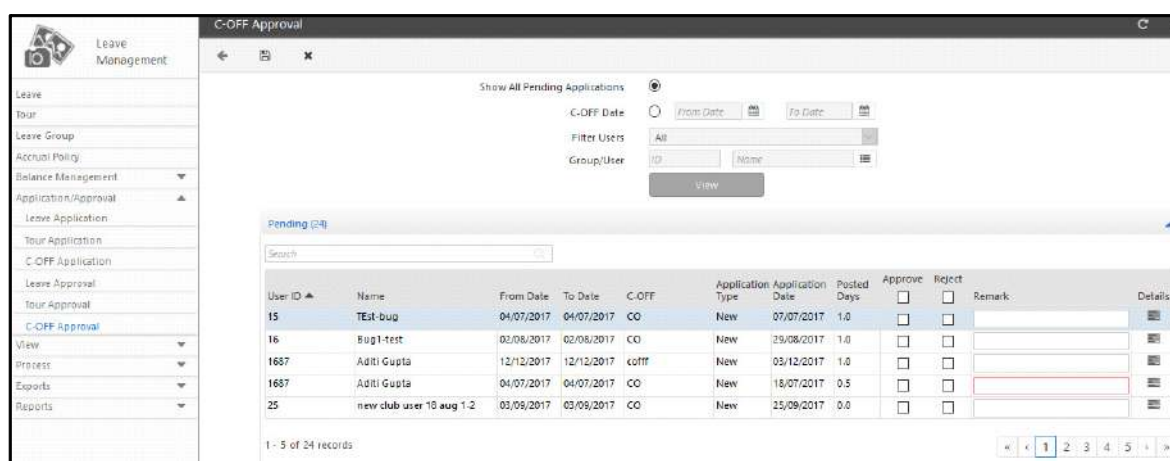
**Remark** displays the comments provided by the Admin/ RIC/ System.

System can auto approve / reject an application if the Reporting In-charge or SA fails to authorize it as per the Approval Policy assigned to the Reporting Groups. To know more about the Approval Policy, refer "[Approval Policy](#)".

## C-OFF Approval

The system administrator can view, approve or reject C-OFFs that have been applied for by any ESS user. The administrator also has the right to reject any pre-approved leaves and vice versa, if required.

To access this functionality, go to the **Leave Management > Application/Approval > C-OFF Approval** and the following screen appears.



You can either:

- view all the pending C-OFF Approval Applications
- set the filters — Date, Filter Users — to view the desired applications

## All Pending Applications

To view only Pending Applications,

By default, the Admin can view all pending C-OFF applications from the last one month period. However, sometimes users may also apply for tours on future dates.

- **Show All Pending Applications:** Select this option to enable the pending application filter. You can view all pending C-OFF applications, including those made for future dates.
- Click the **Pending** collapsible panel. All the applications in pending state appear.

To approve the application, select the **Approve** check box of the desired entry.

To reject the application, select the **Reject** check box of the desired entry.

To know more, refer to [“Pending Applications”](#).

## Applications according to Set Filters

To Set the Filters,

- **C-OFF Date:** Select and specify the start and end dates using the calendar buttons to define the period for which C-OFF approval status is to be viewed.
- **Filter Users:** You can filter records according to the desired Enterprise Group, All or for an Individual.

Select **All**, to view authorization status of the applications of all the active users on the system.

Select **Individual**, to view authorization status of the applications of a single user. Click the picklist to select the desired User ID/Name.

Select the desired Enterprise Group — Organization, Branch, Department, Section, Category, Grade, Designation, Custom Group 1,/2/3 and then click the picklist to select the desired group's ID/Name, to view authorization status of these applications.

Click the **View** button and all the pending, approved and rejected C-OFF applications along with their details gets displayed in the grid.

## Pending Applications

Click the **Pending** collapsible panel.

The **Pending** section lists all the C-OFF /cancellation applications waiting to be sanctioned by the reporting in-charge or HR administrator as shown.


Pending (24)											
<input type="text" value="Search"/>											
User ID ▲	Name	From Date	To Date	C-OFF	Application Type	Application Date	Posted Days	Approve	Reject	Remark	Details
15	TEst-bug	04/07/2017	04/07/2017	CO	New	07/07/2017	1.0	<input type="checkbox"/>	<input type="checkbox"/>		
16	Bug1-test	02/08/2017	02/08/2017	CO	New	29/08/2017	1.0	<input type="checkbox"/>	<input type="checkbox"/>		
1687	Aditi Gupta	12/12/2017	12/12/2017	cofff	New	03/12/2017	1.0	<input type="checkbox"/>	<input type="checkbox"/>		
1687	Aditi Gupta	04/07/2017	04/07/2017	CO	New	18/07/2017	0.5	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Approved C-OFF for half day	
25	new club user 18 aug 1-2	03/09/2017	03/09/2017	CO	New	25/09/2017	0.0	<input type="checkbox"/>	<input type="checkbox"/>		
1 - 5 of 24 records											
« < 1 2 3 4 5 > »											

When any application is in the Pending state it can be authorized by the Admin or RIC.


- To approve/reject applications selectively, click the respective application check box against the user.
- To approve/reject all the applications simultaneously, click the Approve /Reject checkbox in the header column.

Once the Admin approves/ rejects the application, the record will be moved from the **Pending** section to the **Approved/ Rejected** section respectively.

The default **Remark** for the Approved and Rejected application will appear in the respective fields. You can enter any customized Remark while authorizing the application.

Click the **Details**  icon to view the application details of the applied C-OFF.

**C-OFF Application Detail** window appears as shown below:



**C-OFF Application Detail**

User: U1, User1

C-OFF: CO, COFF

**Application Details**

Application Date: 17/06/2021

Half Day Consideration: Both

From Date: 15/06/2021, Full Day

To Date: 17/06/2021, Full Day

Applied Days: 3.0

Posted Days: 3.0

Reason: Personal

Address:

Contact Number:

Medical Certificate: No

**Approval Details**

Incharge	Status	Remark
SA - System Admin		

**C-OFF Application Detail** window displays the user's application details.

It also displays the status of the user's application under **Approval Details**. The application's status is displayed in the **Status** column.

System can auto approve / reject an application if the Reporting In-charge or SA fails to authorize it as per the Approval Policy assigned to the Reporting Groups. To know more about the Approval Policy, refer "[Approval Policy](#)".

**Remark** displays the comments provided by the Admin/ RIC/ System.

Click **Save** to save the authorization.



*The pending applications can not be authorized if the attendance period is closed while doing monthly attendance process and "Attendance Correction in Closed Period" checkbox is disabled from Time and Attendance> Policies> Attendance Policy> Event Authorization.*

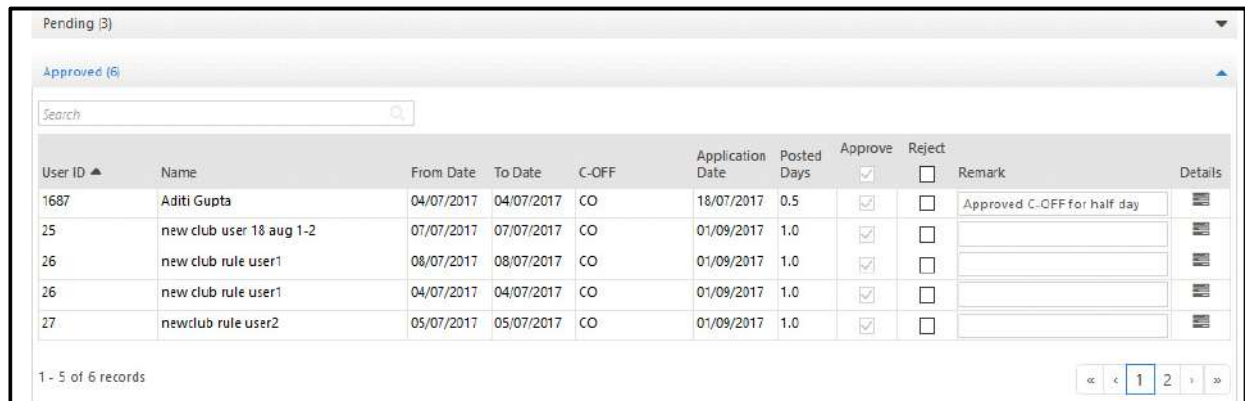
*Even though; the period is closed but if "Attendance Correction in Closed Period" checkbox in Policy is enabled then authorization can be made.*

## Approved Application

Click the **Approved** collapsible panel.

The **Approved** section displays all the C-OFF/cancellation applications that have been approved by the reporting group in-charge or the system administrator. C-OFF applications generated using the **Leave Management** module on COSEC Web will appear in this section by default as they are pre-approved.

The following screen displays the **Approved** section with approved C-OFF applications:



The screenshot shows a web interface with a 'Pending (3)' tab and an 'Approved (6)' tab. Below the tabs is a search bar. The main area contains a table with the following columns: User ID, Name, From Date, To Date, C-OFF, Application Date, Posted Days, Approve, Reject, Remark, and Details. The table lists five records. The first record is for User ID 1687, Aditi Gupta, with a C-OFF of CO from 04/07/2017 to 04/07/2017, approved on 18/07/2017 for 0.5 days, with a remark 'Approved C-OFF for half day'. The other four records are for 'new club rule user1' and 'newclub rule user2' with various dates and application dates. At the bottom, it says '1 - 5 of 6 records' and has pagination controls.

User ID	Name	From Date	To Date	C-OFF	Application Date	Posted Days	Approve	Reject	Remark	Details
1687	Aditi Gupta	04/07/2017	04/07/2017	CO	18/07/2017	0.5	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Approved C-OFF for half day	
25	new club user 18 aug 1-2	07/07/2017	07/07/2017	CO	01/09/2017	1.0	<input checked="" type="checkbox"/>	<input type="checkbox"/>		
26	new club rule user1	08/07/2017	08/07/2017	CO	01/09/2017	1.0	<input checked="" type="checkbox"/>	<input type="checkbox"/>		
26	new club rule user1	04/07/2017	04/07/2017	CO	01/09/2017	1.0	<input checked="" type="checkbox"/>	<input type="checkbox"/>		
27	newclub rule user2	05/07/2017	05/07/2017	CO	01/09/2017	1.0	<input checked="" type="checkbox"/>	<input type="checkbox"/>		

To change the authorization verdict of any application, select **Reject** check box against the corresponding user. Once you reject an approved application, the record will be moved to the **Rejected** section.

Click the **Details**  icon to view the application details of the corresponding user.

**C-OFF Application Detail** window appears as shown below:

**C-OFF Application Detail**

User: U1 User1

C-OFF: CO COFF

**Application Details**

Application Date: 17/06/2021

Half Day Consideration: Both

From Date: 15/06/2021 Full Day

To Date: 17/06/2021 Full Day

Applied Days: 3.0

Posted Days: 3.0

Reason: Personal

Address:

Contact Number:

Medical Certificate: No

**Approval Details** ✓

Incharge	Status	Remark
SA - System Admin	✓ (18/06/2021 13:40)	Approved C-OFF

**C-OFF Application Detail** window displays the user's application details.

It also displays the status of the user's application under **Approval Details**. The application's status is displayed in the **Status** column.

System can auto approve / reject an application if the Reporting In-charge or SA fails to authorize it as per the Approval Policy assigned to the Reporting Groups. To know more about the Approval Policy, refer ["Approval Policy"](#).

**Remark** displays the comments provided by the Admin / RIC / System.

Click **Save** to save the authorization.

## Rejected Application

Click the **Rejected** collapsible panel.

The **Rejected** section displays all the C-OFF/cancellation applications that have been rejected by the reporting group in-charge or the system administrator.

The following screen displays the **Rejected** section with rejected leave applications:



Pending (3)									
Approved (6)									
Rejected (1)									
Search									
User ID ▲	Name	From Date	To Date	C-OFF	Application Date	Posted Days	Approve	Reject	Details
1687	Aditi Gupta	04/07/2017	04/07/2017	CO	18/07/2017	0.0	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="text"/> 

Click the **Details**  icon to view the application details of the corresponding user.

**C-OFF Application Detail** window appears as shown below:

User

C-OFF

**Application Details**

Application Date

Half Day Consideration

From Date

To Date

Applied Days

Posted Days


Reason

Address

Contact Number

Medical Certificate

**Approval Details**

Incharge	Status	Remark
SA - System Admin	 (10/06/2021 17:41)	

**C-OFF Application Detail** window displays the user's application details.

It also displays the status of the user's application under **Approval Details**. The application's status is displayed in the **Status** column.

System can auto approve / reject an application if the Reporting In-charge or SA fails to authorize it as per the Approval Policy assigned to the Reporting Groups. To know more about the Approval Policy, refer ["Approval Policy"](#).

**Remarks** displays the comments provided by the Admin / RIC / System.

Click **Save** button to save the changes.



*System Administrator can delete pending/approved/rejected application.*

### Half Day Restriction on posted days

On the C-OFF Approval page, **Half Day restriction on posted days** feature restricts the administrator to approve the posted half day C-OFF application for that particular user.

Consider a scenario where the user has applied for the half day tour from the ESS login page and the Application has been sent for approval to the administrator.

Suppose after posting the half day tour application, **Restrict Half Day Considerations** has been enabled in the page User > User configuration > T&A for that particular user. Now when the Administrator will try to approve the C-OFF Application for that user, then it will show the error in the Error List that “Half-day Application is restricted for this User” as shown in the screen below.

The screenshot shows the 'C-OFF Approval' interface. At the top, there is a message bar that says 'Check Process Error List For User Record Not Processed.' Below this, there are filters for 'Show All Pending Applications' (radio button), 'C-OFF Date' (From Date and To Date), 'User Selection' (All), and 'Group/User' (ID and Name). A 'View' button is present. Below the filters, there is a 'Pending (5)' section. Underneath, there is an 'Error List' section with a search bar. The error list contains one entry with the following details:

User ID	Name	Appl Date	From Date	To Date	C-OFF	Status	Description
1687	Aditi Gupta	07/18/2017	07/04/2017	07/04/2017	CO-CO	Pending	Half-day Application is restricted for this User

An arrow points to the 'Description' column of the error list entry.

# Leave Balance

This functionality enables the system administrator to view the leave balance details for a particular user for a particular attendance period.

To view leave balance for a user, go to the **Leave Management > View > Leave Balance** and the following screen appears.

The screenshot shows the 'Leave Balance' screen with the following details:

- User ID:** ID (selected from a list)
- Name:** (empty)
- Period:** Monthly (selected from a dropdown)
- Balance Month-Year:** March (selected from a dropdown), 2017 (selected from a dropdown)
- Search:** (empty search bar)
- Table Headers:** Year, Month, Code, Name, Opening, Credit, Debit, Encashment, Availed, Closing, Overflow
- Table Content:** No Data
- C-OFF:** (selected from a dropdown)

- **User ID:** Select a User from the user picklist for whom the leave balance is to be viewed.
- **Period:** Specify the period as Month and Year for which the balance is to be viewed.
- **Balance:** For Monthly Period, select the Month and Year for which balance is to be viewed. For Yearly Period select the year to view the yearly balance.

The Leave and C-OFF Balance details appears on your screen as shown below. You can also search for a particular record by using the **Search** field.

The screenshot shows the 'Leave Balance' screen with the following details:

- User ID:** 1 (selected from a list)
- Name:** Shalini (selected from a list)
- Period:** Yearly (selected from a dropdown)
- Balance Year:** 2017 (selected from a dropdown)
- Search:** (empty search bar)
- Table Headers:** Year, Code, Name, Opening, Credit, Debit, Encashment, Availed, Closing, Overflow
- Table Content:**

Year	Code	Name	Opening	Credit	Debit	Encashment	Availed	Closing	Overflow
2017	PL	Paid Leave	0.00	20.00	0.00	0.00	1.50	18.50	0.00
2017	SL	Sick Leave	0.00	10.00	0.00	0.00	0.00	10.00	0.00
- C-OFF:** (selected from a dropdown)

To view C-OFF balance for the selected user, select the **C-OFF** section. The details of the selected user's C-OFF balance, such as validity period, total hours and available C-OFF details will be displayed as follows:

Leave Balance

★ ?

←

User ID

4

Sweta

☰

Leaves

▼

C-OFF

▲

Validity Period

01/14/2017

03/14/2017

Total Hours

02:00

Available C-OFF Details

Search

Q

Date ▲	Authorized	Manual Credit	Manual Debit	Encashed	Availed	Available
02/26/2017		02:00				02:00

Leave Balance

★ ? ✕

←

User ID

NP

Nisha

☰

Leaves

▼

C-OFF

▲

Validity Period

11/03/2017

11/05/2017

Total Hours

02:00

Available C-OFF Details

Search

Q

Date ▲	Authorized	Manual Credit	Manual Debit	Encashed	Availed	Available
02/05/2017	02:00					02:00

# Leave Balance Process

Leave Balance Process generates the leave balance records of the user till selected month year.

Suppose if organization's policy is of yearly leave crediting and user does not avail leave for first 4 months. In such scenario leave balance record for only start month of the year is available in Database. If user visits leave application page/leave balance view page then no data is shown as record is not available for corresponding month.

So you must run the Leave Balance Process to update the details.

To process the leave balance for a user, Select the **Leave Management >Process > Leave Balance Process**

The **Leave Balance Process** page appears on your screen as follows:

Leave Balance Process

Balance Month-Year: April 2017

Select Users: User Wise

User ID: 1320 Name: SHRUTI SAGAR PATI

Process

Select the **Balance Month-Year** upto which the leave balance is to be processed to view the available balance of leaves.

Select the **user** by filtering the options of User Wise, Group Wise or All for whom the leave balance process is to be run.

Click on **Process** button to execute the process.

The Leave Balance details can be viewed from Leave Management module> View > Leave Balance as shown below.

Leave Balance

User ID: 1320 Name: SHRUTI SAGAR PATI

Period: Monthly

Balance Month-Year: April 2017

Year	Month	Code	Name	Opening	Credit	Debit	Encashment	Availed	Closing	Overflow
2017	Apr	CL	cl	45.00					45.00	0.00
2017	Apr	KL	KLL	0.00					0.00	0.00
2017	Apr	LP	PAID LL	0.00					0.00	0.00
2017	Apr	PL	Paid Leave	0.00					0.00	0.00
2017	Apr	PM	pm	0.00					0.00	0.00

1 - 5 of 7 records

Process

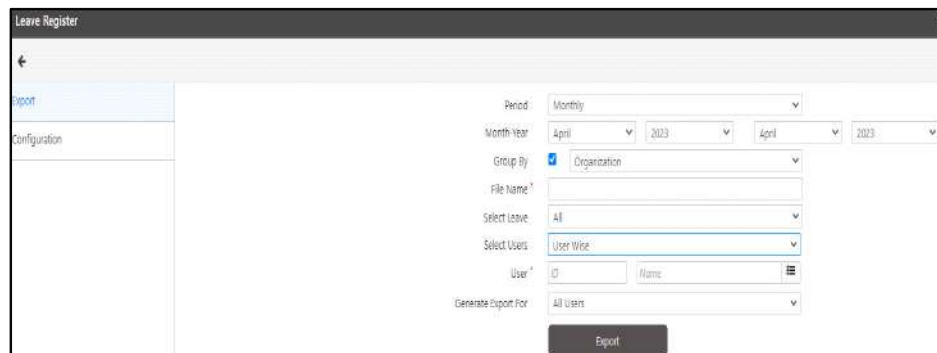
# Leave Register Export

---

To export the records of leave select **Leave Management module > Exports > Leave Register**.

## Export

The **Leave Register** page appears as shown below:

The screenshot shows the 'Leave Register' configuration page. On the left is a sidebar with 'Report' and 'Configuration' options. The main area contains several form fields: 'Period' (Monthly), 'Month Year' (April 2023), 'Group By' (checked, Organization), 'File Name' (empty), 'Select Leave' (All), 'Select Users' (User Wise), 'User' (ID and Name fields), and 'Generate Export For' (All Users). An 'Export' button is at the bottom right.

*Before Exporting you can do “[Configuration](#)” for the Export parameters.*

**Period:** Specify the Period as Monthly or Yearly for which the leave records for user is to be exported.

**Month-Year:** Specify the **Month-Year** (for Monthly period) or **Year** (for Yearly period) for which the leave is to be exported.

**Group By:** Enable the Group By checkbox and select the Enterprise group to export data by grouping them with the Enterprise Group for which the leave is to be exported.

**File Name:** Enter the name of the file to be exported.

**Select Leave:** Select the desired option from the drop down list—**All** or **Selected**

If you select **All**, click on **Export**.

If you select **Selected**, click on the **Leave** picklist. The **Picklist For Leave Master** pop-up appears.

The dialog box titled "Picklist For Leave Masters" has a close button (X) in the top right corner. A green header bar displays "Total Selected: 0 Records". Below this is a search bar with the placeholder text "Search" and a magnifying glass icon, followed by a "Show Selected" link. A "Select All" checkbox is located below the search bar. The main area contains a table with two columns: "Leave Code" and "Name". The table lists five leave types: HR (Paid Leave), P1 (Maternity Leave), P2 (Casual Leave), PL (Sick Leave), and RH (Annual Leave). Each row has an unchecked checkbox in the "Leave Code" column. At the bottom are "OK" and "Cancel" buttons.

<input type="checkbox"/>	Leave Code ▲	Name
<input type="checkbox"/>	HR	Paid Leave
<input type="checkbox"/>	P1	Maternity Leave
<input type="checkbox"/>	P2	Casual Leave
<input type="checkbox"/>	PL	Sick Leave
<input type="checkbox"/>	RH	Annual Leave

You can either select particular leave type or can select all the leave types at once.

To select particular leave type, select the check box of the desired leave types.

The dialog box titled "Picklist For Leave Masters" has a close button (X) in the top right corner. A green header bar displays "Total Selected: 1 Records". Below this is a search bar with the placeholder text "Search" and a magnifying glass icon, followed by a "Show Selected" link. A "Select All" checkbox is located below the search bar. The main area contains a table with two columns: "Leave Code" and "Name". The table lists five leave types: HR (Paid Leave), P1 (Maternity Leave), P2 (Casual Leave), PL (Sick Leave), and RH (Annual Leave). The checkbox for HR is checked, while the others are unchecked. At the bottom are "OK" and "Cancel" buttons.

<input type="checkbox"/>	Leave Code ▲	Name
<input checked="" type="checkbox"/>	HR	Paid Leave
<input type="checkbox"/>	P1	Maternity Leave
<input type="checkbox"/>	P2	Casual Leave
<input type="checkbox"/>	PL	Sick Leave
<input type="checkbox"/>	RH	Annual Leave

OR

To select all the leave types at once, select the **Select All** check box. The leave types on all the pages will be selected.

Picklist For Leave Masters

Total Selected: 5 Records

Search  [Show Selected](#)

☒ Select All

<input checked="" type="checkbox"/>	Leave Code ▲	Name
<input checked="" type="checkbox"/>	HR	Paid Leave
<input checked="" type="checkbox"/>	P1	Maternity Leave
<input checked="" type="checkbox"/>	P2	Casual Leave
<input checked="" type="checkbox"/>	PL	Sick Leave
<input checked="" type="checkbox"/>	RH	Annual Leave

OK Cancel

Click **OK**.

Hover over the **Info** ⓘ icon. It displays the number of leave types selected.

**Select User:** Select the desired option — **User Wise**, **Group Wise**, or **All**.



If you select **User Wise**, click on User picklist. The **Picklist for All Users** pop-up appears.

Picklist For Users/Visitor Profiles

Total Selected: 0 Records

Search  Show Selected

<input type="checkbox"/>	User ID ▲	Name
<input type="checkbox"/>	1	SALIM ANSARI
<input type="checkbox"/>	10	RAJENDRA GOSWAMI
<input type="checkbox"/>	1001	ANKITKUMAR SOHLIYA
<input type="checkbox"/>	1002	MEGHA H SHUKLA
<input type="checkbox"/>	1003	UMESH M TALANPURI
<input type="checkbox"/>	1004	DARSHAK B PATEL
<input type="checkbox"/>	1007	DHAVAL I PATEL
<input type="checkbox"/>	1008	MAYANK K KORAT
<input type="checkbox"/>	1009	DIPTI K RATHWA
<input type="checkbox"/>	1010	RAHUL S SHAH

1 - 10 of 2489 records

« ‹ 1 2 3 ... 249 › »

OK Cancel

Select desired check box. Click **OK**.

The selected User appears in the grid.

Select Users

User Wise

User \* ID Name

Search

User ID ▲	Name	
1	SALIM ANSARI	
10	RAJENDRA GOSWAMI	
1001	ANKITKUMAR SOHLIYA	
1002	MEGHA H SHUKLA	

1 - 4 of 2489 records

« ‹ 1 2 3 ... 249 › »

You can also delete the desired User. Click on **Delete** of the respective user.

If you select **Group Wise** option, select the desired enterprise group from the drop-down list—Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1/2/3.

For each enterprise group — Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1/2/3, click the corresponding picklist to select the desired option/s.

If the desired check boxes is selected, it will appear in the grid.



## Configuration

In Configuration tab, select the check-boxes for the fields to be exported in Leave register. To export the Enterprise group details in export sheet, you must select the desired enterprise code and/ enterprise name checkboxes.

The screenshot shows the 'Leave Register' configuration window. On the left, there is a sidebar with two tabs: 'Export' and 'Configuration'. The 'Configuration' tab is active. The main area is titled 'Select Fields to Export' and contains a search bar. Below the search bar is a table with the following fields and checkboxes:

Fields	
User ID	<input checked="" type="checkbox"/>
User Name	<input checked="" type="checkbox"/>
Reference ID	<input type="checkbox"/>
Field 1	<input type="checkbox"/>
Field 2	<input type="checkbox"/>

Below the table, it says '1 - 5 of 37 records'. At the bottom right, there is a 'Save' button.

Click on **Save** to save the configuration. Now you can export the leave register from “Export” tab.

# Leave Reports

The *COSEC Leave Management* module allows you to create and view an assortment of detailed and focused reports related to the leave management system. These reports can be viewed on the screen or printed at any time. The following Leave Reports can be generated using the **Reports** section under the **Leave Management** module:

- “Leave”
- “Leave Group”
- “Leave Application”
- “Leave Encashment”
- “Leave Credit/Debit”
- “Leave Register”
- “C-OFF Register”
- “Monthly Leave Details”
- “Statutory Leave Reports”


## Leave

This report provides a detailed list of all leaves configured in the system.

### Sample Report

Leave

←

 MATRIX

MATRIX COMSEC PVT. LTD.

Page 1 of 1

Leave

Run by: System Admin

Date: 06/01/2023 21:27

LV Code	Name	Max LV	Min LV	Leave Type	LV Club Rule			Carry Forward		Bal Mgmt.		Encashment	Accumulation		Allowed PH					
					Allow with Other	Not Allow with	Bal Chk	Allow Max Chk	Max Bal Limit	Bal Deduct From	Ratio		Allow	Min Bal/Chk After	Max Acc Chk	Max Acc Bal	Single Sided	Both Sided	Single Sided	Both Sided
10	c10	99.00	0.00	T	No	No	No	No	No	No	No	0.0	No	0.00	No	0.00	Yes	Yes	Yes	Yes
11	c11	99.00	0.00	T	No	No	No	No	No	No	No	0.0	No	0.00	No	0.00	Yes	Yes	Yes	Yes
12	c12	99.00	0.00	T	No	No	No	No	No	No	No	0.0	No	0.00	No	0.00	Yes	Yes	Yes	Yes
13	c13	99.00	0.00	T	No	No	No	No	No	No	No	0.0	No	0.00	No	0.00	Yes	Yes	Yes	Yes
14	c14	99.00	0.00	T	No	No	No	No	No	No	No	0.0	No	0.00	No	0.00	Yes	Yes	Yes	Yes
CL	CASUAL LEAVE	99.00	0.00	P	Yes	Yes	No	No	No	No	No	0.0	Yes	0.00	No	0.00	Yes	Yes	Yes	Yes
CO	C-off	5.00	0.5	P	Yes	Yes	No	No	No	No	No	0.0	Yes	0.00	No	0.00	Yes	Yes	Yes	Yes
L1	Leave Type 1	99.00	0.00	P	No	Yes	No	No	No	No	No	0.0	No	0.00	No	0.00	Yes	Yes	Yes	Yes
L2	Leave Type 2	99.00	0.00	P	No	Yes	No	No	No	No	No	0.0	No	0.00	No	0.00	Yes	Yes	Yes	Yes
L3	Leave Type 3	99.00	0.00	P	No	Yes	No	No	No	No	No	0.0	No	0.00	No	0.00	Yes	Yes	Yes	Yes
L4	Leave Type 4	99.00	0.00	P	No	Yes	No	No	No	No	No	0.0	No	0.00	No	0.00	Yes	Yes	Yes	Yes
L5	Leave Type 5	99.00	0.00	P	No	Yes	No	No	No	No	No	0.0	No	0.00	No	0.00	Yes	Yes	Yes	Yes
L6	Leave Type 6	99.00	0.00	P	No	Yes	No	No	No	No	No	0.0	No	0.00	No	0.00	Yes	Yes	Yes	Yes
L7	Leave Type 7	99.00	0.00	P	No	Yes	No	No	No	No	No	0.0	No	0.00	No	0.00	Yes	Yes	Yes	Yes
L8	Leave Type 8	99.00	0.00	P	No	Yes	No	No	No	No	No	0.0	No	0.00	No	0.00	Yes	Yes	Yes	Yes
L9	Leave Type 9	99.00	0.00	P	No	Yes	No	No	No	No	No	0.0	No	0.00	No	0.00	Yes	Yes	Yes	Yes
LW	Leave Without Pay	99.00	0.00	A	Yes	No	No	No	No	No	No	0.0	No	0.00	No	0.00	Yes	Yes	Yes	Yes
ML	MATERNITY LEAVE	182.00	182.00	P	Yes	Yes	No	No	No	No	No	0.0	No	0.00	No	0.00	No	No	No	No
PL	PAID LEAVE	99.00	0.00	P	Yes	Yes	No	No	No	No	No	0.0	Yes	0.00	No	0.00	Yes	Yes	Yes	Yes
T1	t1	99.00	0.00	T	No	No	No	No	No	No	No	0.0	No	0.00	No	0.00	Yes	Yes	Yes	Yes
T2	t2	99.00	0.00	T	No	No	No	No	No	No	No	0.0	No	0.00	No	0.00	Yes	Yes	Yes	Yes
T3	t3	99.00	0.00	T	No	No	No	No	No	No	No	0.0	No	0.00	No	0.00	Yes	Yes	Yes	Yes
T4	t4	99.00	0.00	T	No	No	No	No	No	No	No	0.0	No	0.00	No	0.00	Yes	Yes	Yes	Yes
T5	t5	99.00	0.00	T	No	No	No	No	No	No	No	0.0	No	0.00	No	0.00	Yes	Yes	Yes	Yes
T6	t6	99.00	0.00	T	No	No	No	No	No	No	No	0.0	No	0.00	No	0.00	Yes	Yes	Yes	Yes
T7	t7	99.00	0.00	T	No	No	No	No	No	No	No	0.0	No	0.00	No	0.00	Yes	Yes	Yes	Yes
T8	t8	99.00	0.00	T	No	No	No	No	No	No	No	0.0	No	0.00	No	0.00	Yes	Yes	Yes	Yes
T9	t9	99.00	0.00	T	No	No	No	No	No	No	No	0.0	No	0.00	No	0.00	Yes	Yes	Yes	Yes
TR	TOUR	99.00	0.00	T	Yes	No	No	No	No	No	No	0.0	No	0.00	No	0.00	Yes	Yes	Yes	Yes

- **Max LV**- displays maximum allowed limit for leave and **Min LV** displays minimum allowed leave at a time.
- Leave Type displays the type of leave as **C** for C-Off, **P** for Paid leave, **L** for Lay-off, **A** for Unpaid leave, **R** for Restricted leave and **T** for Tour.
- **Bal Chk** displays whether the leave balance is checked (Y) or not (N) and **Allw with Other** displays whether the leave can be clubbed with other leave or not.
- **ENC Allw** displays the leave which can be encashed and **Min Bal Req Aft ENC** displays the minimum balance of leaves required after encashment.

- **Max Acc Bal** displays maximum available balance of the leave.

## Leave Group

This report provides a detailed list of all leave groups configured in the system and the leaves grouped under them.

Sample Report

Leave Group						
		<b>MATRIX COMSEC PVT. LTD.</b>		Page 1 of 1		
		<b>Leave Group</b>				
Run by: System Admin				Date: 06/01/2023 21:36		
Sr No	ID	Name	Leaves	Status	Default	
1	1	Default Leave Group	CL, CO, LW, ML, PL, TR	Active	No	
2	2	LeaveGroup2	PL	Active	Yes	

## Leave Application

This report generates a detailed list of leave applications made during the specified date range.

Set the report filters as per requirement.

Date
06/19/2023
06/19/2023

Optional Parameters

Group By: Organization
Application Type: All
Select:

- ☒ Pending
- ☐ Approved
- ☐ Rejected
- ☐ Cancellation-Pending
- ☐ Modification

Group By: Date
Select Leave/Tour: All
Organization Name in Header As Per: User Selection

User Selection

Select Users: User Wise
User: ID Name
Generate Report For: All Users

Generate Report

**Date:** Select the to and from date for which the report is to be generated.

### Optional Parameter

**Group By:** Select the desired enterprise group from the drop-down list — Organization, Branch, Department, Section, Category, Grade, Designation, Custom Group 1 (Association Maps), Custom 2/3.

**Application Type:** Select the desired option— **All**, **Leave Application** or **Tour Application**.

The screenshot shows a form with two dropdown menus and a list of checkboxes. The first dropdown, labeled 'Group By', is set to 'Organization'. The second dropdown, labeled 'Application Type', is set to 'Leave Application'. Below these, under the 'Select' label, is a list of five items with checkboxes: 'Pending' (checked), 'Approved' (checked), 'Rejected' (unchecked), 'Cancellation-Pending' (checked), and 'Modification-Pending' (checked).

**Select:** Select the desired check boxes to enable — **Pending**, **Approved**, **Rejected**, **Cancellation-Pending** and / or **Modification-Pending**

**Group By:** You can view and generate the report as per the option you select — **Date** or **User**.

**Select Leave/Tour:** Select the desired option— **All** or **Selected**.

- If you select **All**, to include all the Leave/Tour Types.
- If you select **Selected**, click the **Select Leave/Tour** picklist. The **Picklist For Leave Masters** pop-up appears.

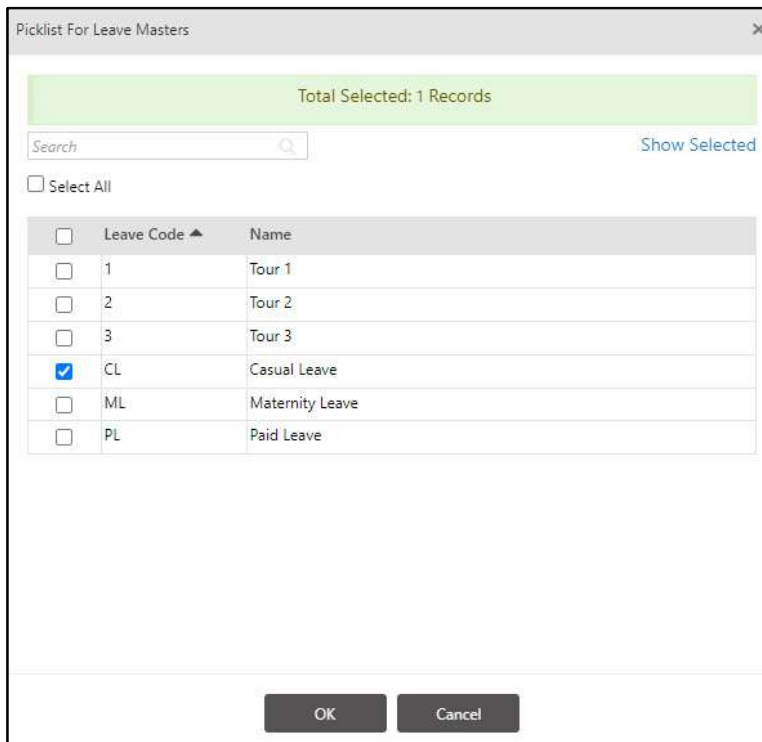
The screenshot shows a pop-up window titled 'Picklist For Leave Masters'. At the top, it says 'Total Selected: 0 Records'. Below this is a search bar with the placeholder text 'Search' and a magnifying glass icon, and a 'Show Selected' link. There is a 'Select All' checkbox. Below the search bar is a table with two columns: 'Leave Code' and 'Name'. The table contains six rows of data, each with an unchecked checkbox in the first column.

<input type="checkbox"/>	Leave Code ▲	Name
<input type="checkbox"/>	1	Tour 1
<input type="checkbox"/>	2	Tour 2
<input type="checkbox"/>	3	Tour 3
<input type="checkbox"/>	CL	Casual Leave
<input type="checkbox"/>	ML	Maternity Leave
<input type="checkbox"/>	PL	Paid Leave

At the bottom of the window are two buttons: 'OK' and 'Cancel'.

You can either select particular Leave/Tour Types or can select all the Leave/Tour Types at once.

To select particular Leave/Tour Types, select the check boxes of the desired Leave/Tour Types.

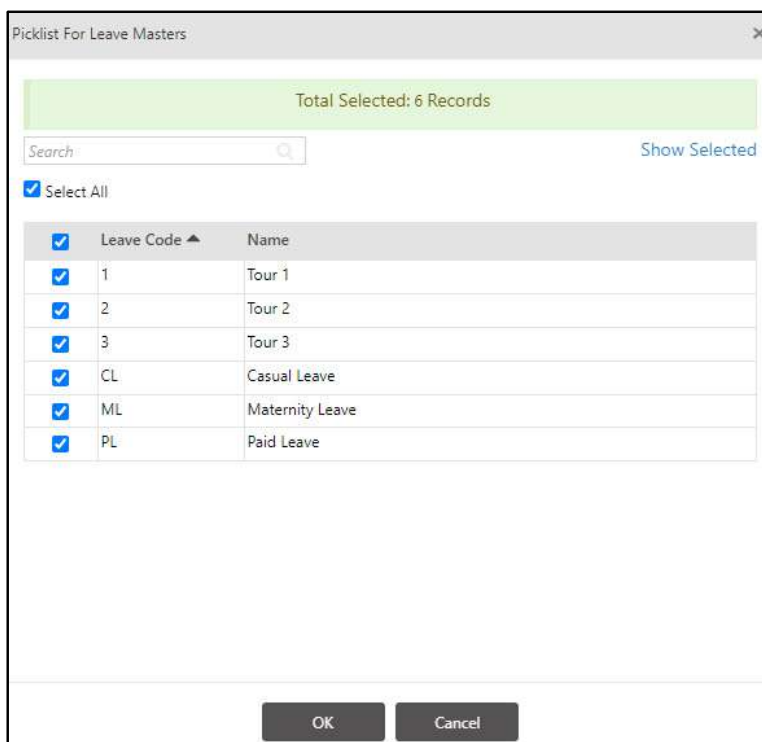


The screenshot shows a dialog box titled "Picklist For Leave Masters". At the top, a green bar indicates "Total Selected: 1 Records". Below this is a search bar with the text "Search" and a magnifying glass icon, and a "Show Selected" link. A "Select All" checkbox is present and is currently unchecked. The main area contains a table with columns "Leave Code" and "Name". The table lists six items: "1" (Tour 1), "2" (Tour 2), "3" (Tour 3), "CL" (Casual Leave), "ML" (Maternity Leave), and "PL" (Paid Leave). Only the checkbox for "CL" is checked. At the bottom are "OK" and "Cancel" buttons.

<input type="checkbox"/>	Leave Code ▲	Name
<input type="checkbox"/>	1	Tour 1
<input type="checkbox"/>	2	Tour 2
<input type="checkbox"/>	3	Tour 3
<input checked="" type="checkbox"/>	CL	Casual Leave
<input type="checkbox"/>	ML	Maternity Leave
<input type="checkbox"/>	PL	Paid Leave

**OR**

To select all the Leave/Tour Types at once, select the **Select All** check box. The Leave/Tour Types on all the pages will be selected.




The screenshot shows the same dialog box, but now the "Select All" checkbox is checked. The table shows all six items with their checkboxes checked. The green bar at the top now indicates "Total Selected: 6 Records".

<input checked="" type="checkbox"/>	Leave Code ▲	Name
<input checked="" type="checkbox"/>	1	Tour 1
<input checked="" type="checkbox"/>	2	Tour 2
<input checked="" type="checkbox"/>	3	Tour 3
<input checked="" type="checkbox"/>	CL	Casual Leave
<input checked="" type="checkbox"/>	ML	Maternity Leave
<input checked="" type="checkbox"/>	PL	Paid Leave

- Click **OK**.

The selected Leave/Tour Types appear in the grid.

You can also delete the desired Leave/Tour Types. To do so, click **Delete**  of the respective Leave/Tour Types.

**Organization Name in Header As Per:** Select the desired option — **User Selection** or **Customized Selection**.

If you select **Customized Selection**, click on Customize Report Header.

You can select the desired option from the drop-down list or can also add a new header according to your choice.

## User selection

**Select User:** Select the desired option — **User Wise**, **Group Wise**, or **All**.

- If you select **User Wise**, click on **User** picklist. The **Picklist for All Users** pop-up appears.

<input type="checkbox"/>	User ID	Name
<input type="checkbox"/>	1	SALIM ANSARI
<input type="checkbox"/>	10	RAJENDRA GOSWAMI
<input type="checkbox"/>	1001	ANKITKUMAR SOHLIYA
<input type="checkbox"/>	1002	MEGHA H SHUKLA
<input type="checkbox"/>	1003	UMESH M TALANPURI
<input type="checkbox"/>	1004	DARSHAK B PATEL
<input type="checkbox"/>	1007	DHAVAL I PATEL
<input type="checkbox"/>	1008	MAYANK K KORAT
<input type="checkbox"/>	1009	DIPTI K RATHWA
<input type="checkbox"/>	1010	RAHUL S SHAH

- Select check boxes of the desired users. Click **OK**.



- The selected Users appear in the grid.

Select Users User Wise ▼

User\* ID Name ≡

User ID ▲	Name	
1	SALIM ANSARI	
10	RAJENDRA GOSWAMI	
1001	ANKITKUMAR SOHLIYA	
1002	MEGHA H SHUKLA	

- You can also delete the desired User. Click **Delete** of the respective user.
- If you select **Group Wise** option, select the desired enterprise group from the drop-down list— Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1/2/3.

For each enterprise group — Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1/2/3, click the corresponding picklist to select the desired option/s.

The selected groups appear in the grid.

Select Users Group Wise ▼

Select Group Organization ▼

Organization\* ID Name ≡

ID	Name	Group ▲	
1	MATRIX COMSEC PVT. LTD.	Organization	
5	TECH SERVICES	Organization	
6	CONSULTANT	Organization	
7	CANTEEN	Organization	
8	APPRENTICE	Organization	

You can also delete particular group. Click **Delete** of the respective group.

- If you select **All** option, then All User will be selected.

**Generate Report For:** Select the desired option from the drop-down list— **All Users**, **Active Users** or **Inactive Users**.

Click **Generate Report**.

## Sample Report

Leave Application

Organization-Wise Leave Application From 27/04/2010 To 27/04/2023

Run by: System Admin Date: 27/04/2023 17:33

Sr No	User ID	Name	Reporting In-Charge	StartDate	EndDate	Leave	Applied Days/Duration	Posted Days/Duration	Reason	Status	Status Date	Remark
MATRIX COMSEC PVT. LTD.												
Application Date: 07/02/2019												
1	1282	HARSH JAYSHAL		01/02/2019	01/02/2019	TR	1.00	0.50	ACI Vendor Meeting Pending	Pending	07/02/2019	
MATRIX COMSEC PVT. LTD.												
Application Date: 31/03/2016												
1	1517	KARANMANG PATEL		28/03/2016	28/03/2016	TR	1.00	1.00		Pending	31/03/2016	
MATRIX COMSEC PVT. LTD.												
Application Date: 03/07/2017												
1	1591	Prashant Soonthia		30/06/2017	30/06/2017	PL	1.00	1.00	Personal work	Pending	03/07/2017	
MATRIX COMSEC PVT. LTD.												
Application Date: 27/05/2020												
1	1640	SIBETA PATIL	RAMESH JIVANI	23/05/2020	23/05/2020	PL	0.50	0.50	Personal	Pending	27/05/2020	
MATRIX COMSEC PVT. LTD.												
Application Date: 25/05/2020												
1	1697	Tapan Patel	RAMESH JIVANI	20/05/2020	20/05/2020	PL	1.00	1.00	Personal	Pending	25/05/2020	
MATRIX COMSEC PVT. LTD.												
Application Date: 01/05/2018												
1	1725	Jigar Vyas	Genesh Jivani	13/04/2018	13/04/2018	PL	0.50	0.50	Personal	Pending	01/05/2018	
2	1725	Jigar Vyas	Genesh Jivani	24/05/2018	25/05/2018	CO	2.00	2.00	Personal	Pending	01/05/2018	
3	1725	Jigar Vyas	Genesh Jivani	28/05/2018	01/06/2018	PL	5.00	5.00	Personal	Pending	01/05/2018	
MATRIX COMSEC PVT. LTD.												
Application Date: 27/05/2020												
1	1789	Vinod Amin		23/05/2020	23/05/2020	PL	0.50	0.50	Personal	Pending	27/05/2020	
2	1789	Vinod Amin		23/05/2020	23/05/2020	PL	0.50	0.50	Personal	Pending	27/05/2020	

## Leave Encashment

This report provides a detailed listing of group-wise leave encashment for users over the specified period.

Set the filter as per your requirement:

Leave Encashment

Period: Monthly

For Month-Year: June 2025

Optional Parameters

Group By: Organization

Organization Name in Header As Per: User Selection

User Selection

Select Users: User Wise

User: ID Name

Generate Report For: All Users

Generate Report

**Period:** Select the desired option — Monthly, Yearly.

**For Month-Year:** If you have selected the Period as **Monthly**, select the desired **Month** and **Year**.  
If you have selected the Period as **Yearly**, select the desired **Year**.

### Optional Parameter

**Group By:** Select the desired enterprise group from the drop-down list — Organization, Branch, Department, Section, Category, Grade, Designation, Custom 1/2/3.

**Organization Name in Header As Per:** Select the desired option — **User Selection** or **Customized Selection**.

- If you select **Customized Selection**, click on **Customize Report Header**.

- You can select the desired option from the drop-down list or can also add a new header according to your choice.

## User Selection

**Select User:** Select the desired option — **User Wise**, **Group Wise**, or **All**.

- If you select **User Wise**, click on **User** picklist. The **Picklist For All Users** pop-up appears.

Picklist For All Users

Total Selected: 0 Records

Search  Show Selected

<input type="checkbox"/>	User ID ▲	Name
<input type="checkbox"/>	1	SALIM ANSARI
<input type="checkbox"/>	10	RAJENDRA GOSWAMI
<input type="checkbox"/>	1001	ANKITKUMAR SOHLIYA
<input type="checkbox"/>	1002	MEGHA H SHUKLA
<input type="checkbox"/>	1003	UMESH M TALANPURI
<input type="checkbox"/>	1004	DARSHAK B PATEL
<input type="checkbox"/>	1007	DHAVAL I PATEL
<input type="checkbox"/>	1008	MAYANK K KORAT
<input type="checkbox"/>	1009	DIPTI K RATHWA
<input type="checkbox"/>	1010	RAHUL S SHAH

1 - 10 of 2469 records

« < 1 2 3 ... 247 > »

OK Cancel

- Select desired check boxes from the list. Click **OK**.
- The selected User appears in the grid.

Select Users

User Wise

User  ID  Name

Search

User ID ▲	Name	
1	SALIM ANSARI	
10	RAJENDRA GOSWAMI	
1001	ANKITKUMAR SOHLIYA	
1002	MEGHA H SHUKLA	

- You can also delete the desired User. Click **Delete** of the respective user.
- If you select **Group Wise** option, select the desired enterprise group from the drop-down list—Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1/2/3.

For each enterprise group — Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1/2/3, click the corresponding picklist to select the desired option/s.

The selected groups appear in the grid.

Select Users

Group Wise

Select Group

Organization


Organization \*

ID

Name

Search

ID	Name	Group	
1	MATRIX COMSEC PVT. LTD.	Organization	
5	TECH SERVICES	Organization	
6	CONSULTANT	Organization	
7	CANTEEN	Organization	
8	APPRENTICE	Organization	

- You can also delete particular group. Click **Delete**  of the respective group.
- If you select **All** option, then All User will be selected.

**Generate Report For:** Select the desired option from the drop down list— **All Users, Active Users** or **Inactive Users**.

Click **Generate Report**.

Sample Report

Leave Encashment

Back

1 of 14

100%

MATRIX

MATRIX COMSEC PVT. LTD.

Page 1 of 14

Organization-Wise Leave Encashment For 2013

Run by: System Admin

Date: 08/31/2023 20:38

Sr No User ID Name Enc Days Hours Entry Dt Remark

MATRIX COMSEC PVT. LTD.

Leave : CL

1 1 SALIM ANSARI 22.00 01/03/2014 Leave Encashment 2013

2 10 RAJENDRA GOSWAMI 18.00 01/03/2014 Leave Encashment 2013

3 1001 ANIKIKUMAR SOHLIYA 20.00 01/03/2014 Leave Encashment 2013

4 1002 MEGHA H SHUKLA 14.50 01/03/2014 Leave Encashment 2013

5 1003 UMESH N TALAMPURI 20.50 01/03/2014 Leave Encashment 2013

6 1004 DARSHAK B PATEL 18.00 01/03/2014 Leave Encashment 2013

7 1007 DHAVAL I PATEL 15.00 01/03/2014 Leave Encashment 2013

8 1008 MAYANK K KORAT 10.50 01/03/2014 Leave Encashment 2013

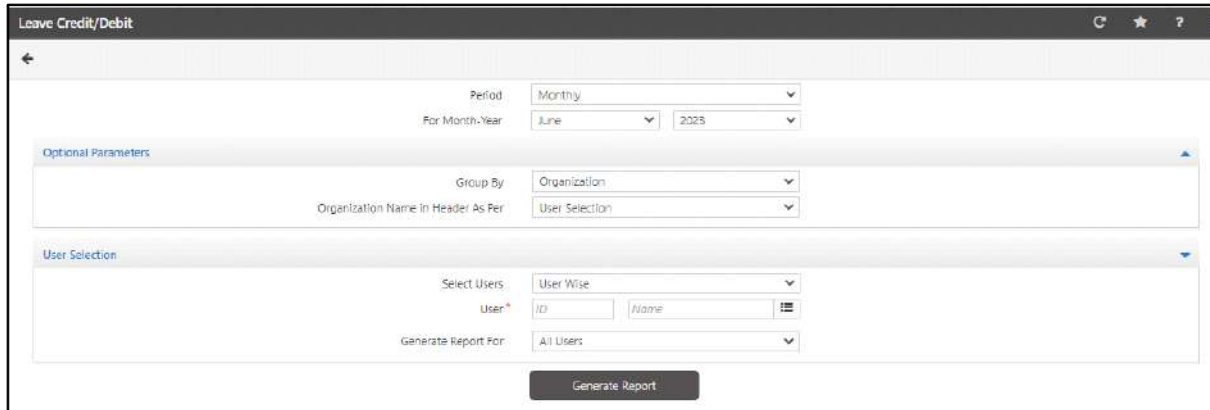
9 1009 DIPTI K RATHWA 2.50 01/03/2014 Leave Encashment 2013

10 1010 RAHUL S SHAH 7.50 01/03/2014 Leave Encashment 2013

## Leave Credit/Debit

This report provides a detailed group-wise listing of all leaves credited or debited from the leave balance of the employees.

Set the filter as per your requirement:



The screenshot shows the 'Leave Credit/Debit' report filter interface. It includes a title bar with a back arrow, a search icon, a star, and a help icon. The main form has the following sections:

- Period:** A dropdown menu set to 'Monthly'.
- For Month-Year:** Two dropdown menus set to 'June' and '2025'.
- Optional Parameters:** A section with two dropdown menus: 'Group By' set to 'Organization' and 'Organization Name in Header As Per' set to 'User Selection'.
- User Selection:** A section with a 'Select Users' dropdown set to 'User Wise', a 'User\*' field with 'ID' and 'Name' sub-fields, and a 'Generate Report For' dropdown set to 'All Users'.
- Generate Report:** A button at the bottom center.

**Period:** Select the desired option — Monthly, Yearly.

**For Month-Year:** If you have selected the Period as **Monthly**, select the desired **Month** and **Year**.  
If you have selected the Period as **Yearly**, select the desired **Year**.

### Optional Parameter

**Group By:** Select the desired enterprise group from the drop-down list — Organization, Branch, Department, Section, Category, Grade, Designation, Custom 1/2/3.

**Organization Name in Header As Per:** Select the desired option — **User Selection** or **Customized Selection**.  
If you select Customized Selection, click on Customize Report Header.

You can select the desired option from the drop down list or can also add a new header according to your choice.

### User Selection

**Select User:** Select the desired option — **User Wise**, **Group Wise**, or **All**.

- If you select **User Wise**, click on **User** picklist. The **Picklist for All Users** pop-up appears.

Picklist For All Users

Total Selected: 0 Records

Search  Show Selected

<input type="checkbox"/>	User ID ▲	Name
<input type="checkbox"/>	1	SALIM ANSARI
<input type="checkbox"/>	10	RAJENDRA GOSWAMI
<input type="checkbox"/>	1001	ANKITKUMAR SOHLIYA
<input type="checkbox"/>	1002	MEGHA H SHUKLA
<input type="checkbox"/>	1003	UMESH M TALANPURI
<input type="checkbox"/>	1004	DARSHAK B PATEL
<input type="checkbox"/>	1007	DHAVAL I PATEL
<input type="checkbox"/>	1008	MAYANK K KORAT
<input type="checkbox"/>	1009	DIPTI K RATHWA
<input type="checkbox"/>	1010	RAHUL S SHAH

1 - 10 of 2469 records

« < 1 2 3 ... 247 > »

OK Cancel

- Select desired check boxes from the list. Click **OK**.
- The selected User appears in the grid.

Select Users

User Wise

User \* ID Name

Search

User ID ▲	Name	
1	SALIM ANSARI	
10	RAJENDRA GOSWAMI	
1001	ANKITKUMAR SOHLIYA	
1002	MEGHA H SHUKLA	

OK Cancel

- You can also delete the desired User. Click **Delete** of the respective user.
- If you select **Group Wise** option, select the desired enterprise group from the drop-down list— Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1/2/3.

For each enterprise group — Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1/2/3, click the corresponding picklist to select the desired option/s.

The selected groups appear in the grid.

Select Users

Group Wise

Select Group

Organization


Organization \*

ID

Name

Search

ID	Name	Group	
1	MATRIX COMSEC PVT. LTD.	Organization	
5	TECH SERVICES	Organization	
6	CONSULTANT	Organization	
7	CANTEEN	Organization	
8	APPRENTICE	Organization	

- You can also delete particular group. Click **Delete**  of the respective group
- If you select **All** option, then All User will be selected.

**Generate Report For:** Select the desired option from the drop down list— **All Users, Active Users** or **Inactive Users**.

Click on **Generate Report**.

Sample Report

Leave Credit/Debit

Back

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100%

MATRIX

MATRIX COMSEC PVT. LTD.

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Organization-Wise Leave Credit/Debit For MARCH-2023

Run by: System Admin

Date: 06/19/2023 16:02

Sr No	User ID	Name	Entry Date	Credit	Debit Remark
MATRIX COMSEC PVT. LTD.					
PL - PAID LEAVE					
1	1	SALIM ANSARI	03/01/2023	1.75	0 From Scheduler
2	1008	MAYANK K KORAT	03/01/2023	1.75	0 From Scheduler
3	1016	BALAJI A.	03/01/2023	1.75	0 From Scheduler
4	1030	KEYUR BHALOOIYA	03/01/2023	1.75	0 From Scheduler
5	1041	SATISH JHA	03/01/2023	1.75	0 From Scheduler
6	105	Satish Raja	03/01/2023	1.75	0 From Scheduler
7	1062	MANISH SATEL	03/01/2023	1.75	0 From Scheduler
8	1076	VIJAYKUMAR PRAJAPATI	03/01/2023	1.75	0 From Scheduler
9	1077	ANIL TAILOR	03/01/2023	1.75	0 From Scheduler
10	1082	MANOJ DETROUA	03/01/2023	1.75	0 From Scheduler
11	1083	JAY K DOSHI	03/01/2023	1.75	0 From Scheduler
12	1085	KEYUR FATEL	03/01/2023	1.75	0 From Scheduler
13	1087	KALFESH DIYORA	03/01/2023	1.75	0 From Scheduler
14	109	DHIRENDR SIVLA	03/01/2023	1.75	0 From Scheduler
15	1090	SATHISHKUMAR CA	03/01/2023	1.75	0 From Scheduler
16	1094	RAVI KANSANGARA	03/01/2023	1.75	0 From Scheduler

## Leave Register

This report provides a user-wise listing of all leave details of employees for the specified date range.

Set the filter as per your requirement:

The screenshot shows the 'Leave Register' report configuration window. It includes a 'Period' dropdown set to 'Monthly', and 'For Month-Year' fields set to 'June' and '2023'. Below these are 'Optional Parameters' for 'Group By' (Organization), 'Select Leave' (All), and 'Organization Name in Header As Per' (User Selection). The 'User Selection' section has 'Select Users' set to 'User Wise', a table with 'ID' and 'Name' columns, and 'Generate Report For' set to 'All Users'. A 'Generate Report' button is at the bottom.

**Period:** Select the desired option from the drop down list— **Monthly** or **Yearly**

**For Month-Year:** If you have selected **Yearly** as the **Period**, select the **Year**.

If you have selected **Monthly** as the **Period**, select the **Start/End Month** and **Start/End Year**.

### Optional Parameter

**Group By:** Select the desired enterprise group from the drop-down list — Organization, Branch, Department, Section, Category, Grade, Designation, Custom Group1/2/3.

**Select Leave:** Select the desired option— **All** or **Selected**

- If you select **All**, all Leave types will be included.



- If you select **Selected**, click the Selected picklist. The **Picklist For Leave Masters** pop-up appears.

The dialog box titled "Picklist For Leave Masters" has a close button (X) in the top right corner. Below the title bar is a green header bar with the text "Total Selected: 0 Records". Underneath is a search bar with the placeholder text "Search" and a magnifying glass icon, followed by a blue link "Show Selected". Below the search bar is a checkbox labeled "Select All". The main area contains a table with the following columns: "Leave Code" (with a small upward arrow icon) and "Name". The table has six rows of data:

<input type="checkbox"/>	Leave Code ▲	Name
<input type="checkbox"/>	1	Tour 1
<input type="checkbox"/>	2	Tour 2
<input type="checkbox"/>	3	Tour 3
<input type="checkbox"/>	CL	Casual Leave
<input type="checkbox"/>	ML	Maternity Leave
<input type="checkbox"/>	PL	Paid Leave

At the bottom of the dialog box are two buttons: "OK" and "Cancel".

You can either select particular or can select all the leave types at once.

To select particular leave type, select the check boxes of the desired leave types.

The dialog box titled "Picklist For Leave Masters" has a close button (X) in the top right corner. Below the title bar is a green header bar with the text "Total Selected: 1 Records". Underneath is a search bar with the placeholder text "Search" and a magnifying glass icon, followed by a blue link "Show Selected". Below the search bar is a checkbox labeled "Select All". The main area contains a table with the following columns: "Leave Code" (with a small upward arrow icon) and "Name". The table has six rows of data:

<input type="checkbox"/>	Leave Code ▲	Name
<input type="checkbox"/>	1	Tour 1
<input type="checkbox"/>	2	Tour 2
<input type="checkbox"/>	3	Tour 3
<input checked="" type="checkbox"/>	CL	Casual Leave
<input type="checkbox"/>	ML	Maternity Leave
<input type="checkbox"/>	PL	Paid Leave

At the bottom of the dialog box are two buttons: "OK" and "Cancel".

**OR**

To select all the leave types at once, select the **Select All** check box. The leave types on all the pages will be selected.

Picklist For Leave Masters

Total Selected: 6 Records

Search:  [Show Selected](#)

☒ Select All

<input checked="" type="checkbox"/>	Leave Code ▲	Name
<input checked="" type="checkbox"/>	1	Tour 1
<input checked="" type="checkbox"/>	2	Tour 2
<input checked="" type="checkbox"/>	3	Tour 3
<input checked="" type="checkbox"/>	CL	Casual Leave
<input checked="" type="checkbox"/>	ML	Maternity Leave
<input checked="" type="checkbox"/>	PL	Paid Leave

OK Cancel

- Click **OK**.

The selected leaves appear in the grid.

Group By: Organization

Select Leave: Selected

Search:  [Show Selected](#)

Leave Code	Name	
CL	Casual Leave	
PL	Paid Leave	

Organization Name in Header As Per: User Selection

User Selection: [User Selection](#)

Select Users: User Wise

User:

Generate Report For: All Users

Generate Report

You can also delete the desired leave type. To do so, click **Delete** for the respective leave type.

**Organization Name in Header As Per:** Select the desired option — **User Selection** or **Customized Selection**. If you select **Customized Selection**, click on **Customize Report Header**. You can select the desired option from the drop-down list or can also add a new header according to your choice.

## User Selection

**Select User:** Select the desired option— **User Wise**, **Group Wise** or **All**

- If you select **User Wise**, click on user picklist. The **Picklist For All Users** pop-up appears.

Picklist For All Users

Total Selected: 0 Records

Search  Show Selected

<input type="checkbox"/>	User ID ▲	Name
<input type="checkbox"/>	1	SALIM ANSARI
<input type="checkbox"/>	10	RAJENDRA GOSWAMI
<input type="checkbox"/>	1001	ANKITKUMAR SOHLIYA
<input type="checkbox"/>	1002	MEGHA H SHUKLA
<input type="checkbox"/>	1003	UMESH M TALANPURI
<input type="checkbox"/>	1004	DARSHAK B PATEL
<input type="checkbox"/>	1007	DHAVAL I PATEL
<input type="checkbox"/>	1008	MAYANK K KORAT
<input type="checkbox"/>	1009	DIPTI K RATHWA
<input type="checkbox"/>	1010	RAHUL S SHAH

1 - 10 of 2469 records

« < 1 2 3 ... 247 > »

OK Cancel

- Select desired check boxes from the list. Click **OK**.
- The selected user appears in the grid.

Select Users

User Wise ▼

User ID  Name

Search

User ID ▲	Name	
1	SALIM ANSARI	
10	RAJENDRA GOSWAMI	
1001	ANKITKUMAR SOHLIYA	
1002	MEGHA H SHUKLA	

1 - 4 of 2469 records

- You can also delete the desired User. Click **Delete** of the respective user.
- If you select **Group Wise** option, select the desired enterprise group from the drop-down list—Organization, Branch, Department, Section, Category, Grade, Designation, Custom Group 1 (Association Maps) Custom Group1/2/3.

For each enterprise group — Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1/2/3, click the corresponding picklist to select the desired option/s.

The selected groups appear in the grid.

Select Users

Group Wise

Select Group

Organization


Organization \*

ID

Name

Search

ID	Name	Group	
1	MATRIX COMSEC PVT. LTD.	Organization	
5	TECH SERVICES	Organization	
6	CONSULTANT	Organization	
7	CANTEEN	Organization	
8	APPRENTICE	Organization	

- You can also delete the desired User. Click **Delete**  of the respective user.
- If you select **All** option, then **All User** will be selected.

**Generate Report For:** Select the desired option from the drop down list— **All Users, Active Users or Inactive Users**.

Click **Generate Report**.

Sample Report

Leave Register

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100%

ORG2							Page 1 of 1
Leave Register From APRIL-2017 To JULY-2017							
Run by: System Admin				Date: 09/04/2023 19:22			
Year	Month	Opening Bal	Credit	Debit	Encashed	Availed	Closing Bal
ORG2							
111-Moyanik							
PL-PL							
2017	APR	0.00	1.00	0.00	0.00	0.0	1.00
2017	MAY	1.00					1.00
2017	JUN	1.00					1.00
2017	JUL	1.00					1.00
1515-AMIT-BLJE							
PL-PL							
2017	APR	0.00	1.00	0.00	0.00	0.0	1.00
2017	MAY	1.00					1.00
2017	JUN	1.00					1.00
2017	JUL	1.00					1.00

## C-OFF Register

This report provides a user-wise list of all Complimentary-Off details of employees for the specified date range.

Set the filter as per your requirement

The screenshot shows the 'C-OFF Register' window. At the top, there are date pickers for 'Date' with values '06/19/2023' and '06/19/2023'. Below this is the 'Optional Parameters' section with a 'Group By' dropdown set to 'Organization'. The 'User Selection' section has a 'Select Users' dropdown set to 'User Wise', a 'User' picklist with 'ID' and 'Name' options, and a 'Generate Report For' dropdown set to 'All Users'. A 'Generate Report' button is at the bottom.

**Date:** Select the to and from date for which the report is to be generated.

### Optional Parameter

**Group By:** Select the desired enterprise group from the drop-down list — Organization, Branch, Department, Section, Category, Grade, Designation, Custom group 1 (Association Maps), Custom Group 2/3.

### User Selection

**Select User:** Select the desired option — **User Wise**, **Group Wise**, or **All**.

- If you select **User Wise**, click the **User** picklist. The **Picklist for All Users** pop-up appears.

The screenshot shows the 'Picklist For All Users' pop-up window. It has a search bar at the top with the text 'Search' and a magnifying glass icon. To the right of the search bar is a 'Show Selected' button. Below the search bar is a table with columns 'User ID' and 'Name'. The table contains 10 rows of data. At the bottom of the table, it says '1 - 10 of 2469 records'. Below this is a pagination bar with buttons for '<<', '<', '1', '2', '3', '...', '247', '>', and '>>'. At the bottom of the window are 'OK' and 'Cancel' buttons.

<input type="checkbox"/>	User ID	Name
<input type="checkbox"/>	1	SALIM ANSARI
<input type="checkbox"/>	10	RAJENDRA GOSWAMI
<input type="checkbox"/>	1001	ANKITKUMAR SOHLIYA
<input type="checkbox"/>	1002	MEGHA H SHUKLA
<input type="checkbox"/>	1003	UMESH M TALANPURI
<input type="checkbox"/>	1004	DARSHAK B PATEL
<input type="checkbox"/>	1007	DHAVAL I PATEL
<input type="checkbox"/>	1008	MAYANK K KORAT
<input type="checkbox"/>	1009	DIPTI K RATHWA
<input type="checkbox"/>	1010	RAHUL S SHAH

Select desired check boxes from the list. Click **OK**.

The selected Users appear in the grid.

Select Users

User Wise


User\*

ID

Name

Search

User ID ▲	Name	
1	SALIM ANSARI	
10	RAJENDRA GOSWAMI	
1001	ANKITKUMAR SOHLIYA	
1002	MEGHA H SHUKLA	

You can also delete the desired User. Click **Delete**  of the respective user.

- If you select **Group Wise** option, select the desired enterprise group from the drop-down list— Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1/2/3.

For each enterprise group — Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1/2/3, click the corresponding picklist to select the desired option/s.

The selected groups appear in the grid.

Select Users

Group Wise

Select Group

Organization


Organization\*

ID

Name

Search

ID	Name	Group ▲	
1	MATRIX COMSEC PVT. LTD.	Organization	
5	TECH SERVICES	Organization	
6	CONSULTANT	Organization	
7	CANTEEN	Organization	
8	APPRENTICE	Organization	

You can also delete particular group. Click the **Delete**  of the respective group.

- If you select **All** option, then All User will be selected.

**Generate Report For:** Select the desired option from the drop down list— **All Users, Active Users or Inactive Users.**

Click **Generate Report.**

## Monthly Leave Details

This report provides month and enterprise-group-wise details of dates on which approved leave applications exist for specified users and selected leave types or tours.

Set the filter as per your requirement:

The screenshot shows a web application window titled "Monthly Leave Details". At the top, there are navigation icons (back, refresh, star, help). Below the title bar, there are two dropdown menus for "For Month-Year", currently set to "June" and "2023". Under the "Optional Parameters" section, there is a "Group By" dropdown set to "Organization". Below that is a "Select Leave/Tour" section with a list of checkboxes: "Paid Leave" (checked), "Lay Off", "Unpaid Leave", "Restricted Holiday", and "Compensatory". The "User Selection" section includes a "Select Users" dropdown set to "User Wise", a "User" field with "ID" and "Name" sub-fields, and a "Generate Report For" dropdown set to "All Users". At the bottom center is a "Generate Report" button.

**For Month Year:** Select the month year to specify the time period for which the data is to be generated.

### Optional Parameter

**Group By:** Select the desired enterprise group from the drop-down list — Organization, Branch, Department, Section, Category, Grade, Designation, Custom group 1(Association Maps), Custom Group 2/3.

**Select Leave/Tour:** Click on the desired option —Paid Leave, Lay Off, Unpaid Leave, Restricted Holiday, Compensatory Off, Tour, Hourly Paid Leave, Hourly Unpaid Leave.

### User Selection

**Select User:** Select the desired option — **User Wise, Group Wise, or All.**

- If you select **User Wise**, click on **User** picklist. The **Picklist for All Users** pop-up appears.

Picklist For Users/Visitor Profiles: ✕

Total Selected: 0 Records

Search 🔍 Show Selected

<input type="checkbox"/>	User ID ▲	Name
<input type="checkbox"/>	1	SALIM ANSARI
<input type="checkbox"/>	10	RAJENDRA GOSWAMI
<input type="checkbox"/>	1001	ANKITKUMAR SOHLIYA
<input type="checkbox"/>	1002	MEGHA H SHUKLA
<input type="checkbox"/>	1003	UMESH M TALANPURI
<input type="checkbox"/>	1004	DARSHAK B PATEL
<input type="checkbox"/>	1007	DHAVAL I PATEL
<input type="checkbox"/>	1008	MAYANK K KORAT
<input type="checkbox"/>	1009	DIPTI K RATHWA
<input type="checkbox"/>	1010	RAHUL S SHAH

1 - 10 of 2489 records

« < 1 2 3 ... 249 > »

OK Cancel

Select desired check boxes from the list. Click **OK**.

The selected Users appear in the grid.

Select Users User Wise ▼

User\* ID Name ☰

Search 🔍

User ID ▲	Name	🗑
1	SALIM ANSARI	🗑
10	RAJENDRA GOSWAMI	🗑
1001	ANKITKUMAR SOHLIYA	🗑
1002	MEGHA H SHUKLA	🗑

You can also delete the desired user. Click **Delete**  of the respective user.

- If you select **Group Wise** option, select the desired enterprise group from the drop-down list—  
Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1/2/3.

For each enterprise group — Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1/2/3, click the corresponding picklist to select the desired option/s.



The selected groups appear in the grid.

Select Users

Group Wise

Select Group

Organization

Organization \*

ID

Name

Search

ID	Name	Group	
1	MATRIX COMSEC PVT. LTD.	Organization	
5	TECH SERVICES	Organization	
6	CONSULTANT	Organization	
7	CANTEEN	Organization	
8	APPRENTICE	Organization	

You can also delete particular group. Click **Delete**  of the respective group.

- If you select **All** option, then All User will be selected.

**Generate Report For:** Select the desired option from the drop down list— **All Users, Active Users or Inactive Users.**

Click **Generate Report.**

Sample Report

Monthly Leave Details

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100%

MATRIX

MATRIX COMSEC PVT. LTD.

Organization-Wise Monthly Leave Details For JANUARY-2013

Page 1 of 7

Rn by: System Admin

Date: 08/31/2023 21:02

Sr No	User ID	Name	Designation	Leave Dates	Total Days
MATRIX COMSEC PVT. LTD.					
1	1	SALIM ANSARI	Designation 1	25,27	2
2	10	RAJENDRA GOSWAMI	Designation 1	5,15h	1.5
3	1001	ANKITKUMAR SOHLIYA	Designation 1	4h	0.5
4	1002	MEERA H SHUKLA	Designation 1	17,28h,31h	2
5	1003	UMESH M TALANPURI	Designation 1	11h,25h	1
6	1004	DARSHAK B PATEL	Designation 1	21,22	2
7	1007	DRAVAL I PATEL	Designation 1	18,19,21	3
8	1008	MAYANK K KORAT	Designation 1	29	1
9	1009	DIPTI K RATHWA	Designation 1	17,18,19,19,28	5
10	1011	PARIKA S PANDEY	Designation 1	19,24,25	3
11	1015	SUMEDHA A GAWARIKAR	Designation 1	4,25h	1.5
12	1016	SALAJI A	Designation 1	15,16	2
13	1020	VAISHALI M THAKER	Designation 1	16h	0.5
14	1022	PANDORANG D CHAUHAN	Designation 1	29h	0.5
15	1030	KEYUR BHALODIYA	Designation 1	28,29,30h	2.5

## Statutory Leave Reports

This report provides annual leave transaction reports **Form B, Form 15** and **Form Q** as per statutory norms.

Set the filter as per your requirement:

## Form B

Configure the following parameters

The screenshot shows a web application interface titled "Form B". At the top, there is a "Year" dropdown menu set to "2023". Below this is a section titled "Optional Parameters". Inside this section, there is a "Filter By" dropdown menu set to "Casual Leaves". Below the filter, there are two input fields: "ID" and "Name". A "Search" button is located to the left of these fields. Below the search fields, there is a table with columns "Code" and "Name". The table is currently empty, and a "No Data" message is displayed below it. A "Save" button is located at the bottom of the "Optional Parameters" section. Below the "Optional Parameters" section is a section titled "User Selection". Inside this section, there is a "Select Users" dropdown menu set to "User Wise". Below this, there are two input fields: "ID" and "Name". A "Generate Report For" dropdown menu is set to "All Users". A "Generate Report" button is located at the bottom of the "User Selection" section.

**Year:** Select the year to specify the time period for which data is to be generated.

### Optional Parameter

**Filter By:** Select the desired option from the drop down list— **Casual Leave** or **Sick Leave**.

If you select Casual Leaves,

- If you select casual leave, then click the **Leave** picklist. The **Picklist For Leave Masters** pop-up appears.

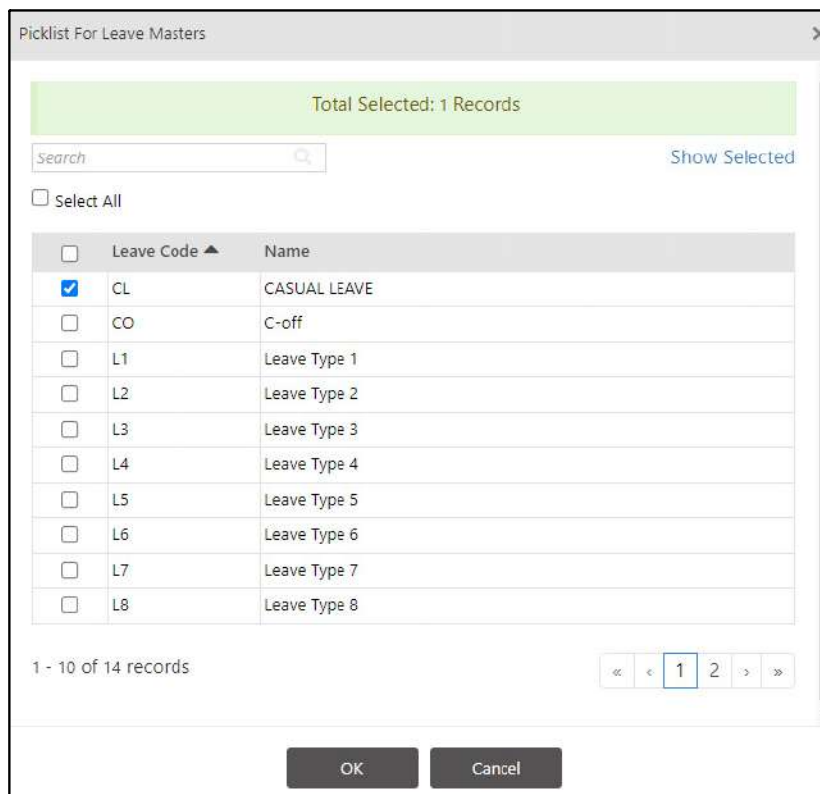
The screenshot shows a pop-up window titled "Picklist For Leave Masters". At the top, there is a green bar with the text "Total Selected: 0 Records". Below this is a search bar with the placeholder text "Search" and a "Show Selected" button. Below the search bar, there is a "Select All" checkbox. Below the checkbox, there is a table with columns "Leave Code" and "Name". The table contains 8 rows of data:

Leave Code	Name
CL	CASUAL LEAVE
CO	C-off
L1	Leave Type 1
L2	Leave Type 2
L3	Leave Type 3
L4	Leave Type 4
L5	Leave Type 5
L6	Leave Type 6
L7	Leave Type 7
L8	Leave Type 8

Below the table, there is a pagination bar showing "1 - 10 of 14 records". To the right of the pagination bar, there are navigation buttons: "<<", "<", "1", "2", ">", and ">>". At the bottom of the window, there are "OK" and "Cancel" buttons.

You can either select particular leave types or can select all leave types of leaves at once.

To select particular leave type select the check boxes of the desired leave types.



Picklist For Leave Masters

Total Selected: 1 Records

Search  Show Selected

☐ Select All

<input type="checkbox"/>	Leave Code ▲	Name
<input checked="" type="checkbox"/>	CL	CASUAL LEAVE
<input type="checkbox"/>	CO	C-off
<input type="checkbox"/>	L1	Leave Type 1
<input type="checkbox"/>	L2	Leave Type 2
<input type="checkbox"/>	L3	Leave Type 3
<input type="checkbox"/>	L4	Leave Type 4
<input type="checkbox"/>	L5	Leave Type 5
<input type="checkbox"/>	L6	Leave Type 6
<input type="checkbox"/>	L7	Leave Type 7
<input type="checkbox"/>	L8	Leave Type 8

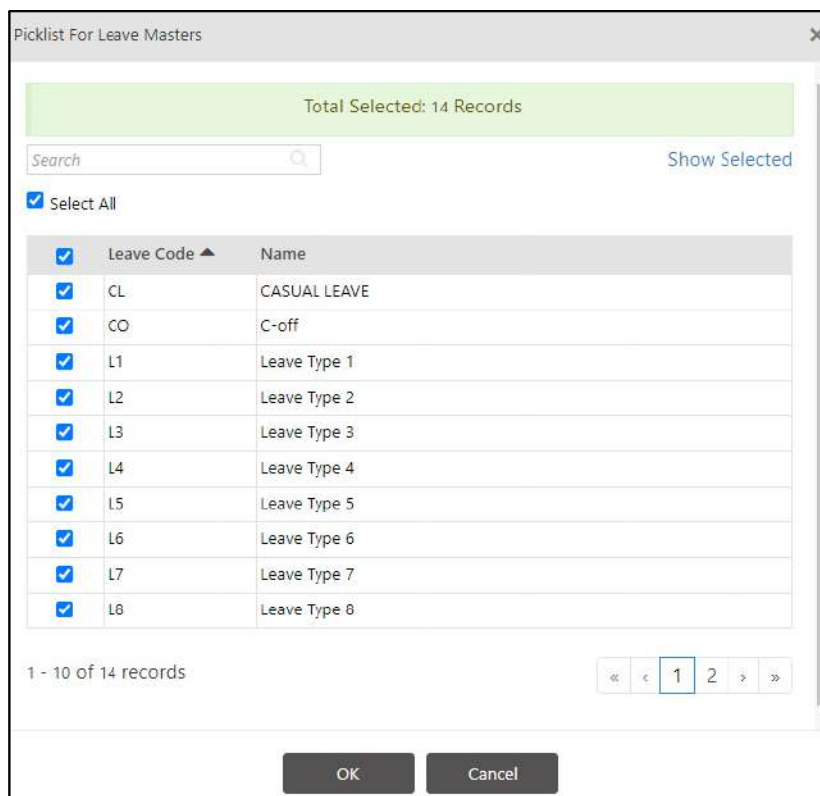
1 - 10 of 14 records

« < 1 2 > »

OK Cancel

OR

To select all leave types at once, select the **Select All** check box. The leave types on all the pages will be selected.



Picklist For Leave Masters

Total Selected: 14 Records

Search  Show Selected

☒ Select All

<input checked="" type="checkbox"/>	Leave Code ▲	Name
<input checked="" type="checkbox"/>	CL	CASUAL LEAVE
<input checked="" type="checkbox"/>	CO	C-off
<input checked="" type="checkbox"/>	L1	Leave Type 1
<input checked="" type="checkbox"/>	L2	Leave Type 2
<input checked="" type="checkbox"/>	L3	Leave Type 3
<input checked="" type="checkbox"/>	L4	Leave Type 4
<input checked="" type="checkbox"/>	L5	Leave Type 5
<input checked="" type="checkbox"/>	L6	Leave Type 6
<input checked="" type="checkbox"/>	L7	Leave Type 7
<input checked="" type="checkbox"/>	L8	Leave Type 8

1 - 10 of 14 records

« < 1 2 > »

OK Cancel

Click **OK**.

The selected leave types appears in the grid.




A screenshot of a web application interface for selecting leave types. At the top is a search bar with the placeholder text 'Search'. Below it is a table with two columns: 'Code' and 'Name'. The table contains five rows of data: CL (CASUAL LEAVE), CO (C-off), L1 (Leave Type 1), L2 (Leave Type 2), and L3 (Leave Type 3). Each row has a trash icon in the rightmost column. Below the table, it says '1 - 5 of 14 records'. To the right of this text is a pagination control with buttons for '<<', '<', '1', '2', '3', '>', and '>>'. The '1' button is highlighted. At the bottom center is a 'Save' button.

Code	Name
CL	CASUAL LEAVE
CO	C-off
L1	Leave Type 1
L2	Leave Type 2
L3	Leave Type 3

1 - 5 of 14 records

Save

You can also delete the desired leave. To do so, click **Delete**  of the respective leave.

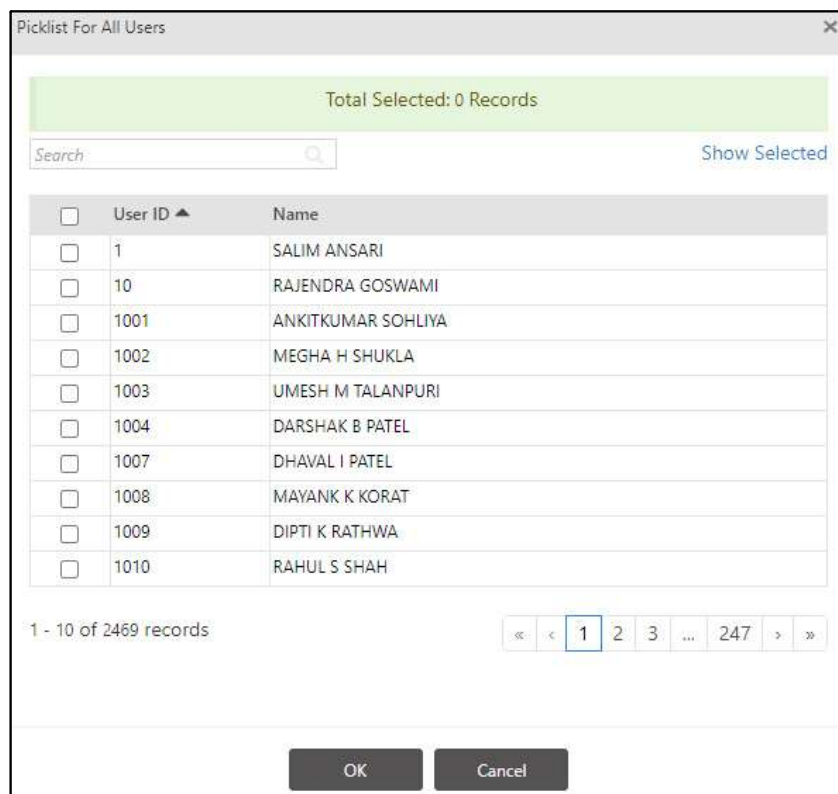
Click **Save**.

Similarly, for **Sick leave** follow the same steps as mentioned in **Casual Leave**.

## User Selection

**Select Worker:** Select the desired option— **User Wise**, **Group Wise** or **All**

- If you select **User Wise**, click on **User** picklist. The **Picklist For All Users** pop-up appears



A screenshot of a 'Picklist For All Users' pop-up window. At the top, it says 'Total Selected: 0 Records'. Below this is a search bar with the placeholder text 'Search' and a 'Show Selected' button. The main part of the window is a table with three columns: a checkbox, 'User ID', and 'Name'. The table contains ten rows of data, each with a checkbox, a User ID, and a Name. Below the table, it says '1 - 10 of 2469 records'. To the right of this text is a pagination control with buttons for '<<', '<', '1', '2', '3', '...', '247', '>', and '>>'. The '1' button is highlighted. At the bottom are 'OK' and 'Cancel' buttons.

<input type="checkbox"/>	User ID	Name
<input type="checkbox"/>	1	SALIM ANSARI
<input type="checkbox"/>	10	RAJENDRA GOSWAMI
<input type="checkbox"/>	1001	ANKITKUMAR SOHLIYA
<input type="checkbox"/>	1002	MEGHA H SHUKLA
<input type="checkbox"/>	1003	UMESH M TALANPURI
<input type="checkbox"/>	1004	DARSHAK B PATEL
<input type="checkbox"/>	1007	DHAVAL I PATEL
<input type="checkbox"/>	1008	MAYANK K KORAT
<input type="checkbox"/>	1009	DIPTI K RATHWA
<input type="checkbox"/>	1010	RAHUL S SHAH

1 - 10 of 2469 records

OK Cancel

.Select desired check boxes from the list. Click **OK**.

The selected users appear in the grid

The screenshot shows the 'Select Users' interface. At the top, there is a dropdown menu labeled 'Select Users' with 'User Wise' selected. Below it, there is a 'User\*' section with 'ID' and 'Name' input fields and a list icon. A search bar is located below the 'User\*' section. The main part of the interface is a table with the following data:

User ID ▲	Name	
1	SALIM ANSARI	
10	RAJENDRA GOSWAMI	

You can also delete the desired User. Click **Delete** of the respective user.

- If you select **Group Wise** option, select the desired enterprise group from the drop-down list— Organization, Branch, Department, Section, Category, Grade, Designation, Custom Group 1 (Association Maps) Custom Group1/2/3

For each enterprise group — Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1/2/3, click the corresponding picklist to select the desired option/s.

The selected groups appear in the grid.

The screenshot shows the 'Select Users' interface with 'Group Wise' selected in the 'Select Users' dropdown. Below it, there is a 'Select Group' dropdown with 'Organization' selected. Under 'Organization\*', there are 'ID' and 'Name' input fields and a list icon. A search bar is located below the 'Organization\*' section. The main part of the interface is a table with the following data:

ID	Name	Group ▲	
1	MATRIX COMSEC PVT. LTD.	Organization	
5	TECH SERVICES	Organization	
6	CONSULTANT	Organization	
7	CANTEEN	Organization	
8	APPRENTICE	Organization	

You can also delete the desired user. Click **Delete** of the respective user.

- If you select **All** option, then All User will be selected.

**Generate Report For:** Select the desired option from the drop down list— **All Users, Active Users or Inactive Users**.

Click **Generate Report**.

## Sample Report

Form B

Back

1 of 1

100%

Form B REGISTER OF National Festival Holidays, Casual & Sick Leave See Rule 7 (2)

[Under the Punjab Industrial Establishment (National, Festival, Casual & Sick Leave) Rules, 1995]

Name: SALIM ANSARI For The Year: 2023

Father/Spouse's Name: Whether Covered By The Employee's State Insurance Scheme - Yes/No

Date Of Joining Service: 01-Nov-1992

1	2			3			4	5
Serial No.	No. Of National Festival Holidays/Casual/Sick Leave Due At The Beginning Of The Year			Period For Which National Festival Holidays/Casual/Sick Leave Applied For			Whether Granted Or Refused	Remarks
	Festival	Casual	Sick	From	To	Kind Of Leave		
1	0.0	3.5	0.0					
	3.0	0.0	0.0	04/19/2023	04/19/2023	PL		
	2.0	0.0	0.0	04/27/2023	04/27/2023	PL		

## Form 15

Set the filter as per your requirement

Form 15

Year: 2023

Optional Parameters

Organization Name: Matrix Comsec

Save

User Selection

Select Users: User Wise

User: ID Name

Generate Report For: All Users

Generate Report

**Year:** Select the year to specify the time period for which data is to be generated.

### Optional Parameter

**Organization Name:** Configure the Organization's name. Click **Save**.

### User Selection

**Select Worker:** Select the desired option— **User Wise**, **Group Wise** or **All**

- If you select **User Wise**, click on **User** picklist. The **Picklist for All Users** pop-up appears.

Picklist For All Users

Total Selected: 0 Records

Search 🔍 [Show Selected](#)

<input type="checkbox"/>	User ID ▲	Name
<input type="checkbox"/>	1	SALIM ANSARI
<input type="checkbox"/>	10	RAJENDRA GOSWAMI
<input type="checkbox"/>	1001	ANKITKUMAR SOHLIYA
<input type="checkbox"/>	1002	MEGHA H SHUKLA
<input type="checkbox"/>	1003	UMESH M TALANPURI
<input type="checkbox"/>	1004	DARSHAK B PATEL
<input type="checkbox"/>	1007	DHAVAL I PATEL
<input type="checkbox"/>	1008	MAYANK K KORAT
<input type="checkbox"/>	1009	DIPTI K RATHWA
<input type="checkbox"/>	1010	RAHUL S SHAH

1 - 10 of 2469 records

« < 1 2 3 ... 247 > »

**OK** **Cancel**

Select desired check boxes from the list. Click **OK**.

The selected users appear in the grid.

Select Users

User Wise

User \* ID Name

Search 🔍

User ID ▲	Name	
1	SALIM ANSARI	
10	RAJENDRA GOSWAMI	
1001	ANKITKUMAR SOHLIYA	
1002	MEGHA H SHUKLA	

1 - 4 of 2469 records

You can also delete the desired user. Click **Delete** on the respective user.

- If you select **Group Wise** option, select the desired enterprise group from the drop-down list— Organization, Branch, Department, Section, Category, Grade, Designation, Custom Group 1 (Association Maps) Custom Group1/2/3

For each enterprise group — Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1/2/3, click the corresponding picklist to select the desired option/s.

The selected options appears in the grid.

Select Users Group Wise

Select Group Organization

Organization \* ID  Name

Search

ID	Name	Group	
1	MATRIX COMSEC PVT. LTD.	Organization	
2	SAMARTH	Organization	
3	AVDHOOT	Organization	
4	ELSENGARD	Organization	

You can also delete the desired Group. Click **Delete** of the respective Group.

- If you select **All** option, then All User will be selected.

**Generate Report For:** Select the desired option from the drop down list— **All Users, Active Users** or **Inactive Users**.

Click **Generate Report**.

Sample Report

Form No. 15

### Register Of Leave With Wages

Name Of Factory: Matrix Comsec

Serial No: 1

Name: SALIM ANSARI

Department: MANUFACTURING

Father/Spouse's Name:

Serial No In the Register: 1

Date Of Discharge:

Date Of Joining Service: 01-Nov-92

Date & Amount Of Pay Due:

Calendar Year Of Service	Wages during From... To....	Wages Earned During The Wages Period	No. of days worked during the calendar year					Leave to credit			Whether Leave In Accordance With Scheme Under Section 49 (B) Was Refused	Balance Of Leave To Credit	Normal Rate Of Wages	Cash Equivalent Of Advantage Occuring Through Concessional Sale Of Food Grain And Other	Rate Of Wages For The Leave Period (Total Of Cols 15 And 16)	Remarks	
			No. Of Days Work Performed	No. Of Days Of Lay Off	No. Of Days Of Maternity Leave	No. Of Days Of Leave Enjoyed	Total Of Cols 4 To 7	Balance Of Leave For Preceding Year	Leave Earned During The Year Mentioned In Col 1	Total Of Cols 9 To 10							
																	From
1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18
Jan-2023			0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0		-	0.0				
Feb-2023			0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0		-	0.0				
Mar-2023			0.0	0.0	0.0	0.0	0.0	0.0	1.8	1.8		-	1.8				
Apr-2023			0.0	0.0	0.0	1.5	1.5	0.0	0.0	1.8		04/19/2023-04/19/2023	0.3				
May-2023			0.0	0.0	0.0	0.0	0.0	0.0	1.8	2.0		04/27/2023-04/27/2023	2.0				
Jun-2023			0.0	0.0	0.0	0.0	0.0	0.0	0.0	2.0		-	0.0				
Jul-2023			0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0		-	0.0				
Aug-2023			0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0		-	0.0				
Sep-2023			0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0		-	0.0				
Oct-2023			0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0		-	0.0				
Nov-2023			0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0		-	0.0				
Dec-2023			0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0		-	0.0				
			0.00			1.50	1.50	0.00	3.50								



## Form Q

Set the filter as per your requirement.

The screenshot shows the 'Form Q' interface with the following sections:

- For Month-Year:** June, 2023
- Custom Attendance Period:** ☐
- Month Start-End Date:** 2, End Date
- Optional Parameters:**
  - Header Message:** FORM - Q REGISTER OF EMPLOYMENT FOR SHOPS AND ESTABLISHMENTS
  - Sub-Header Message:** See Sub Rule (1) of Rule 10 of the Tamil Nadu Shops and Est
  - Left Align Label:** 700 Chars
  - Footer Message:** 500 Chars
- Leave Configuration:**
  - Search:** [Text Box]
  - Leave Name:** [Table with columns: Leave Name, Leave Type, Leave Name to be displayed in Report]
  - Maternity Leave:** ☐ ID [Text Box] Name [Text Box]
  - Save:** [Button]
- User Selection:**
  - Select Users:** User Wise
  - User:** ID [Text Box] Name [Text Box]
  - Generate Report For:** All Users
  - Generate Report:** [Button]

**For Month-Year:** Select the desired **Month** and **Year** for which this report is to be generated.

**Custom Attendance Period:** If you wish to set a customized Attendance period, select this check box and configure the customized Month Start-End Date.

**Month Start-End Date:** If you have selected the **Custom Attendance Period** check box, configure the desired Month's Start and End date.

### Optional Parameters

**Header Message:** Configure the desired message.

**Sub-Header Message:** Configure the desired message.

**Left Align Label:** Configure the desired label.

**Footer Message:** Configure the desired message.

### Leave Configuration

The screenshot shows the 'Leave Configuration' section with the following details:

- Search:** [Text Box]
- Table:**

Leave Name	Leave Type	Leave Name to be displayed in Report
ID [Text Box] Name [Text Box]		
- Maternity Leave:** ☐ ID [Text Box] Name [Text Box]
- Save:** [Button]

Click **Add**  .

**Leave Name:** Select the desired Leave type using the picklist.

Click the picklist. The **Picklist For Leave Masters** pop-up appears.

Leave Code ▲	Name	Leave Type
1	Tour 1	Tour / On Duty
2	Tour 2	Tour / On Duty
3	Tour 3	Tour / On Duty
CL	Casual Leave	Paid Leave
ML	Maternity Leave	Paid Leave
PL	Paid Leave	Paid Leave

Select the desired Leave.

**Leave Name to be displayed in Report:** Specify the name that should be displayed in the report for the selected leave type.

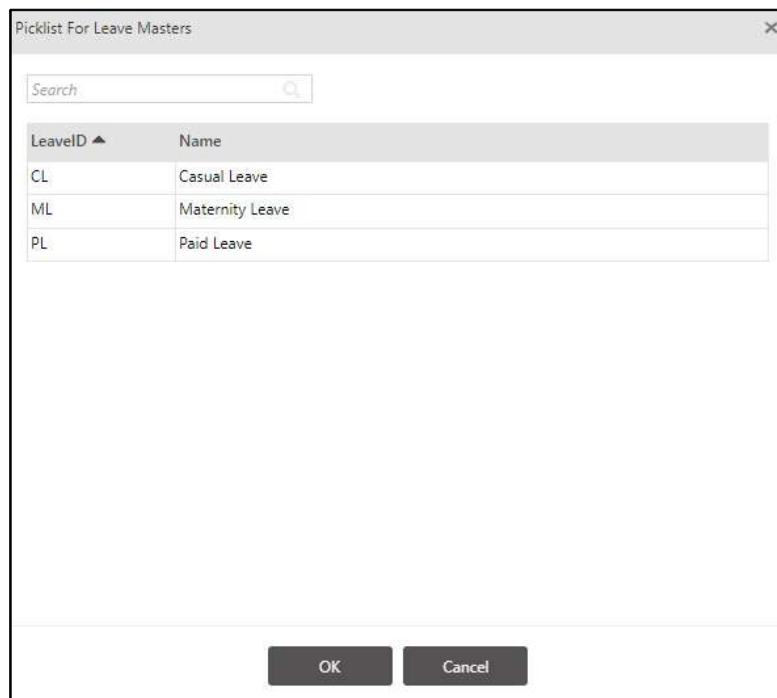
Click **Save**  to save the leave configuration. The **Leave Type** gets updated once the configuration is saved.

Leave Name	Leave Type	Leave Name to be displayed in Report
Maternity Leave	Paid Leave	ML

You can also delete the desired leave. Click **Delete**  on the respective leave.

**Maternity Leave:** Select the desired leave type using the picklist.

Click the picklist. The **Picklist For Leave Masters** pop-up appears.



The screenshot shows a window titled "Picklist For Leave Masters" with a close button (X) in the top right corner. Below the title bar is a search bar with the placeholder text "Search" and a magnifying glass icon. Underneath the search bar is a table with two columns: "LeaveID" and "Name". The table contains three rows of data:

LeaveID	Name
CL	Casual Leave
ML	Maternity Leave
PL	Paid Leave

At the bottom of the window, there are two buttons: "OK" and "Cancel".

Select the desired Leave. Click **OK**.

Click **Save** to save the Leave Configuration.

### User Selection

**Select User:** Select the desired option— **User Wise**, **Group Wise** or **All**

- If you select **User Wise**, click the **User** picklist. The **Picklist for All Users** pop-up appears.

Picklist For All Users

Total Selected: 0 Records

Search  Show Selected

<input type="checkbox"/>	User ID ▲	Name
<input type="checkbox"/>	1	SALIM ANSARI
<input type="checkbox"/>	10	RAJENDRA GOSWAMI
<input type="checkbox"/>	1001	ANKITKUMAR SOHLIYA
<input type="checkbox"/>	1002	MEGHA H SHUKLA
<input type="checkbox"/>	1003	UMESH M TALANPURI
<input type="checkbox"/>	1004	DARSHAK B PATEL
<input type="checkbox"/>	1007	DHAVAL I PATEL
<input type="checkbox"/>	1008	MAYANK K KORAT
<input type="checkbox"/>	1009	DIPTI K RATHWA
<input type="checkbox"/>	1010	RAHUL S SHAH

1 - 10 of 2469 records

« < 1 2 3 ... 247 > »

OK Cancel

Select the desired check boxes from the list. Click **OK**.

The selected users appear in the grid.

Select Users

User Wise

User  ID  Name

Search

User ID ▲	Name	
1	SALIM ANSARI	
10	RAJENDRA GOSWAMI	
1001	ANKITKUMAR SOHLIYA	
1002	MEGHA H SHUKLA	

1 - 4 of 2469 records

« < 1 2 3 ... 247 > »

OK Cancel

You can also delete the desired user. Click **Delete** of the respective user.

- If you select **Group Wise** option, select the desired enterprise group from the drop-down list—  
Organization, Branch, Department, Section, Category, Grade, Designation, Custom Group 1 (Association Maps) Custom Group1/2/3

For each enterprise group — Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1/2/3, click the corresponding picklist to select the desired option/s.

The selected groups appears in the grid.

Select Users

Group Wise

Select Group

Organization


Organization \*

ID

Name

Search

ID	Name	Group	
1	MATRIX COMSEC PVT. LTD.	Organization	
5	TECH SERVICES	Organization	
6	CONSULTANT	Organization	
7	CANTEEN	Organization	
8	APPRENTICE	Organization	

You can also delete the desired Group. Click **Delete**  of the respective group.

- If you select **All** option, then All User will be selected.

**Generate Report For:** Select the desired option from the drop down list— **All Users**, **Active Users** or **Inactive Users**.

Click **Generate Report**.

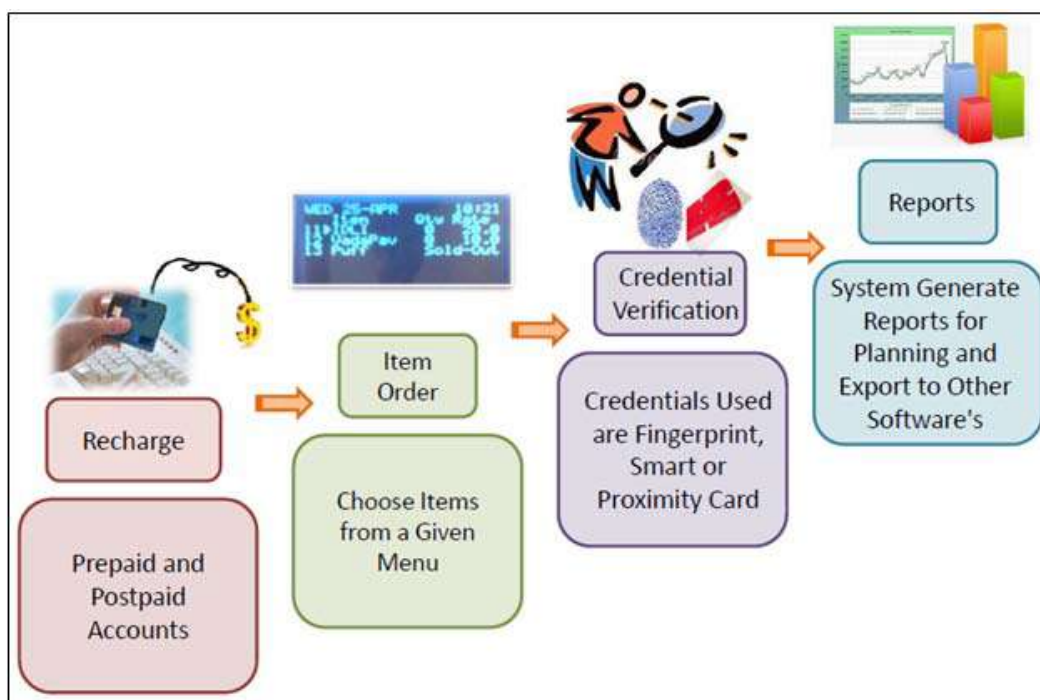
Sample Report

FORM - D RECEIPT OF DISPATCHED JOB ORDER AND SPECIALIZATION										Month: 2020		Year: 2020	
See Job Order 12 of Rule 18 of the Tamil Nadu Shops and Establishments Act, 1948													
Daily Work of Work Order (including overtime) (12 days)													

The COSEC Cafeteria is a Web based cafeteria management tool offering unparalleled ease of use in managing cafeteria operations for a large number of users or employees.



*This functionality is not available with the COSEC Application basic platform license.*



The following are the features of the Cafeteria module.

- Reduced waiting time at the cafeteria thus improving employee productivity
- Meal payment cycle completion within seconds
- Instant reconciliation of contractors invoice/monthly statement
- Easy tracking of usage of subsidized meal/snack programs
- Tracking cafeteria usage by outsiders/visitors
- Trouble free cash management

## Configuration Basics

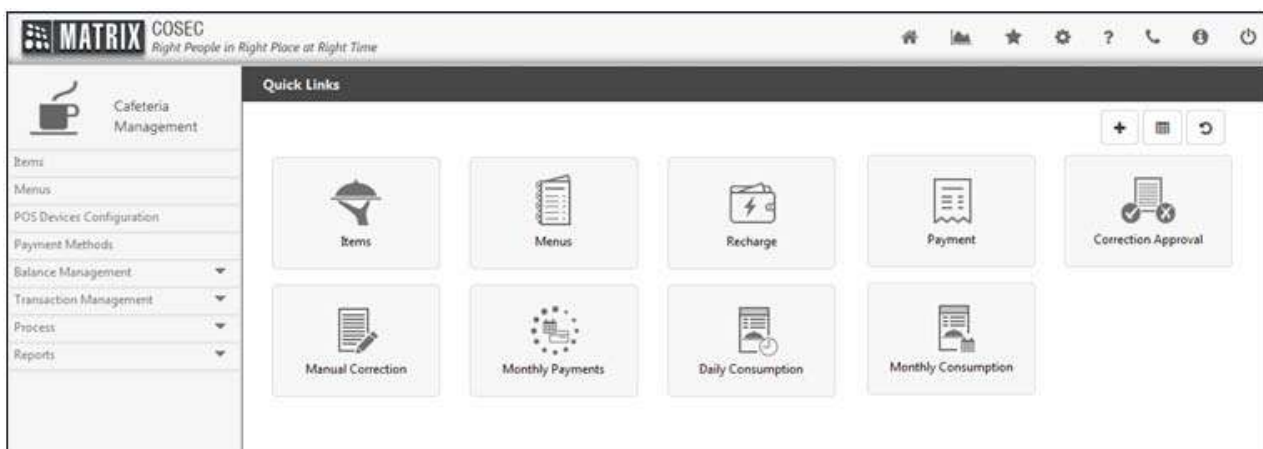
Configure your Cafeteria system in the order noted below:  
Refer to the specified module sections for configuration instructions.

1. Configure Cafeteria Devices from Device Configuration of **Devices** module.
2. Define items from **Items** option of Cafeteria
3. Define menus and assign items to each menu from **Menus** option.
4. Configure menu schedule for each cafe device from **POS (Point Of Sale) Device Configuration** option.
5. Configure parameters for pre-paid and post-paid accounts from the **Payment Methods** option.
6. Assign Cafeteria devices to users from the **User Configuration** option of **Users** module.




*The Monthly process must be run at the end of the month to generate proper cafeteria transactions.*

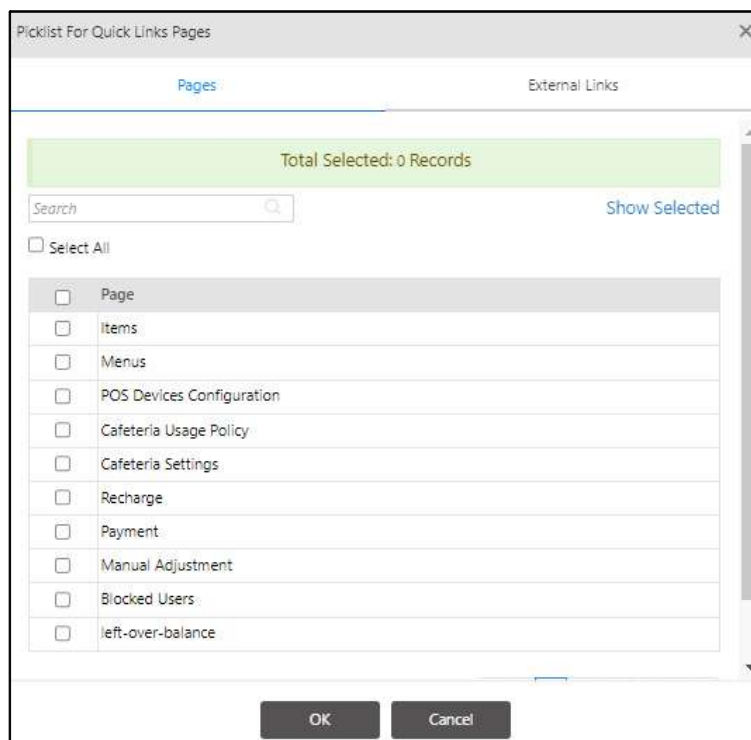
To use the Cafeteria functionality, click on **Cafeteria**  module and the following screen appears.



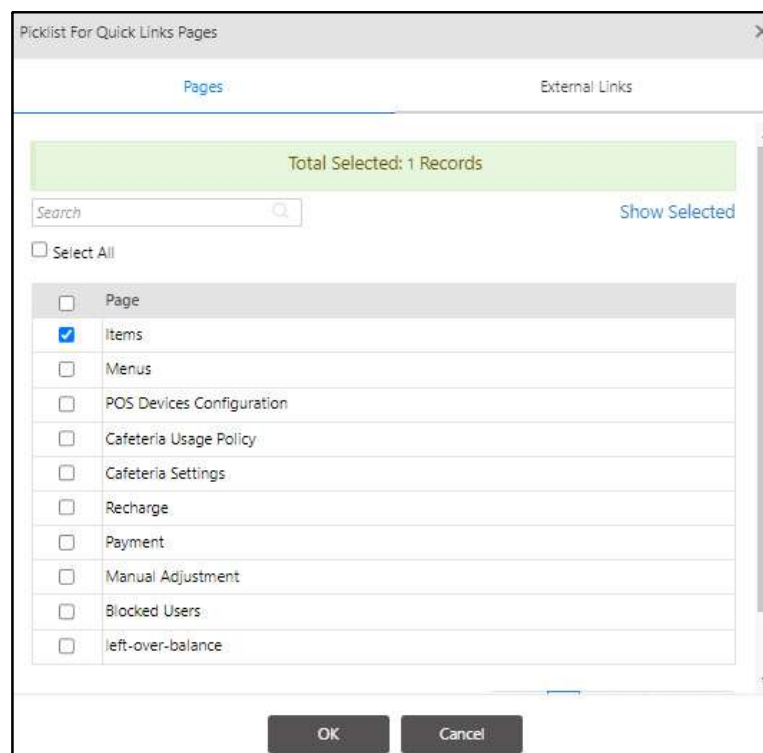
The page displays a menu and **Quick Links** to go to the required page in just one click. Quick Links are shortcuts to reach to a specific page easily. You can configure these options for Quick Links — **Add Quick Link**, **Select Layout** and **Reset to Default**.

### Add Quick Links

- Click **Add**  . The **Picklist For Quick Links Pages** pop-up appears.



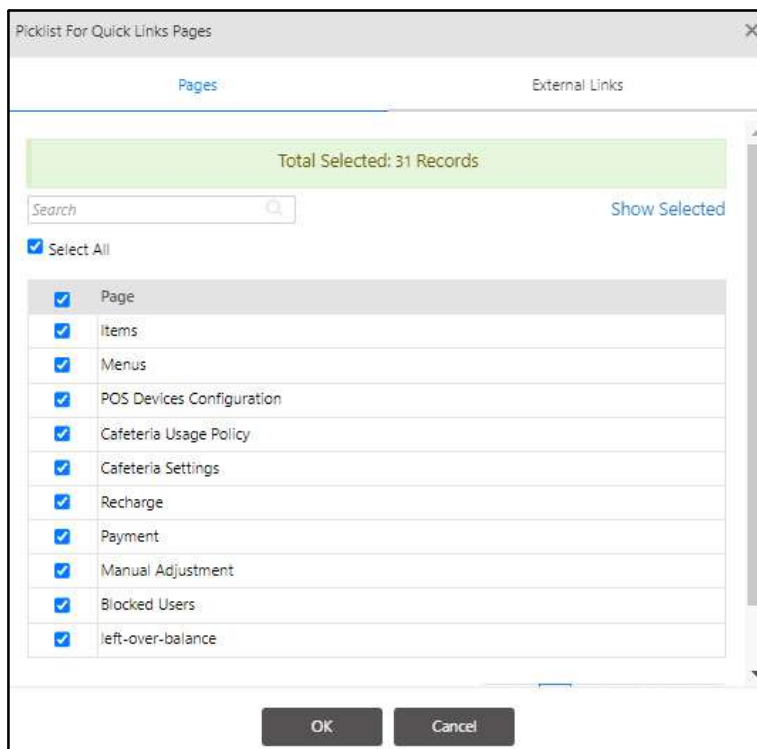
- You can either select particular page or can select all the pages at once. Maximum **20** quick links can be displayed.
- To select particular pages, select the check boxes of the desired pages.



OR






- To select all the pages at once, select the **Select All** check box. All the pages will be selected.




- Click **OK**.
- The Quick Links for selected pages appear on the Quick Link page.

### Adding External Links,


- Select **External Link** tab and click on  button to add new external link.
- Configure the **Title** and **URL** of the external link under the respective fields. Select the check box to display the Quick Link for the configured link.

- Click **Save**  to save the configuration.
- Once you have saved the configuration, you can edit it. Click **Edit**  to edit the saved configuration.
- Click **OK** to save the configuration of the external link. The Quick Link for the external link appears on the Quick Link page.

## Select Layout

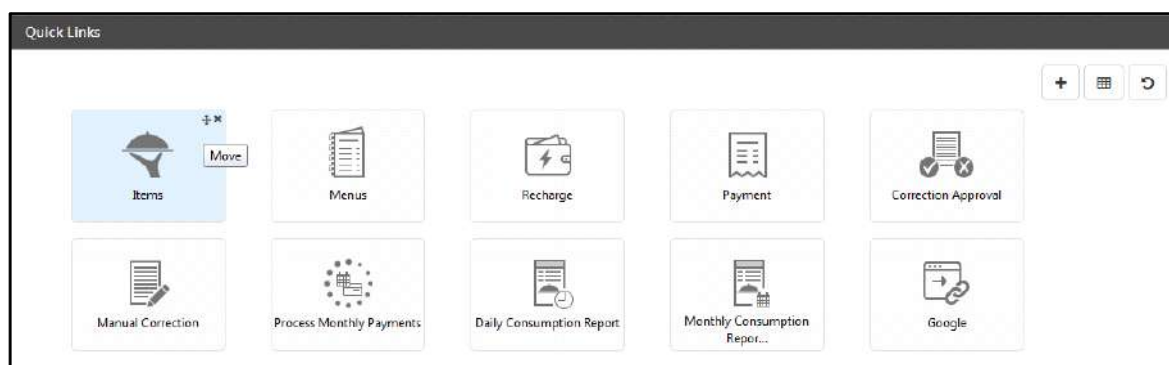
Click **Select Layout**  to select a layout for the quick links. You can select 5x4 or 4x5 layout to manage the quick links.

## Reset To Default

Click **Reset To Default**  to reset the quick links to the default quick links.

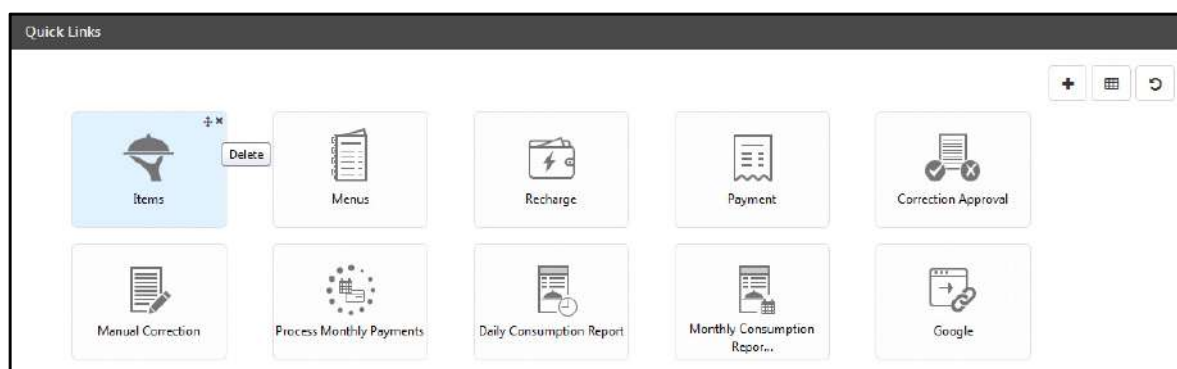
## Move the Link

To move the link from one place to another, hover on the link on top right corner and click **Move** icon as shown below. Then drag the quick link to the desired place. It will be placed at the desired location on the quick links page.




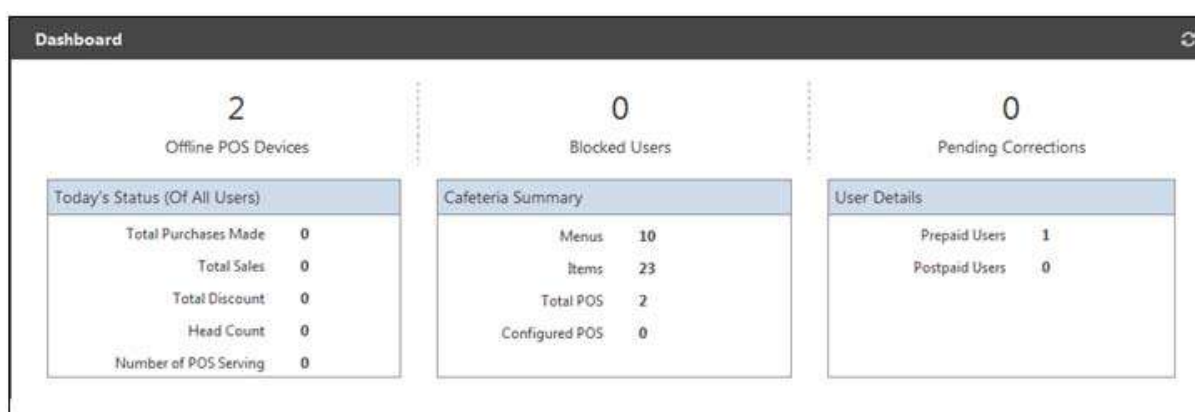
## Delete the Link

To delete a particular link, hover on the link on top right corner and click **Delete** icon as shown below.



## Cafeteria Dashboard

To view the **Cafeteria** Dashboard, click the Dashboard button  on the **Cafeteria** page and the following screen appears.



The Dashboard displays the basic information on Cafeteria module relating to the COSEC Software under the following groups:

- Offline POS Devices: Total no. of POS device which are offline.
- Blocked Users: Total no. of users who are blocked.

- Pending Corrections: Total no. of pending corrections on current day.

#### **Today's Status (Of All Users)**


- Total Purchases Made: Total no. of transactions that were recorded on current day.
- Total Sales: Sum of all the current day transactions amount.
- Total Discount: Sum of all the current day transactions discounts.
- Head Count: Total no. of unique user id found in all the current day transactions.
- Number of POS Serving: Total no. of configured POS with at least one of the menu which is scheduled for today.

#### **Cafeteria Summary**

- Menus: Total no. of menus created in the system.
- Items: Total no. of items configured in the system.
- Total POS: Total no. of devices configured for Cafeteria.
- Configured POS: Total no. of canteen devices to which at least 1 menu assigned to it and also at least one active menu scheduled.

#### **User Details**

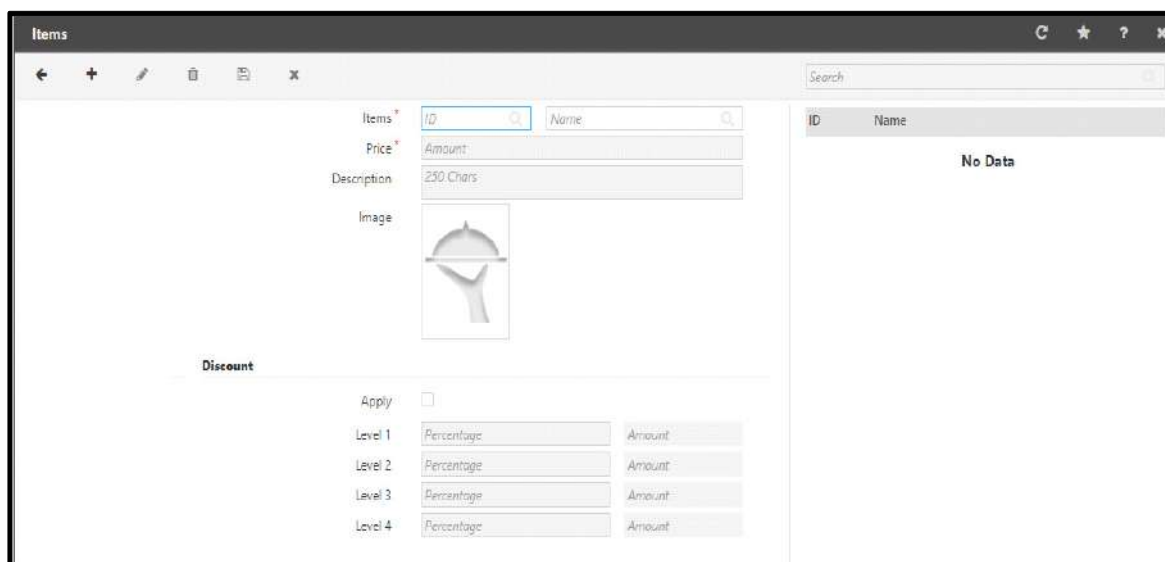
- Prepaid Users: Total no. of canteen users (active) with their account type as prepaid.
- Postpaid Users: Total no. of canteen users (active) with their account type as postpaid.

For more information on the above Dashboard options, click the respective information links on the Dashboard. The latest values on Dashboard are updated on clicking the Refresh  button.

# Items

The Cafeteria module enables to define a list of items that are to be served by the in-house cafeteria during the various menu schedules. You can create maximum **255** items. These items can then be assigned to various menus from the **Menu** option.

To define view items page, go to **Cafeteria Management > Items** and the following screen appears:



The page displays configurations and a list of items which are already defined in the right pane as shown above.

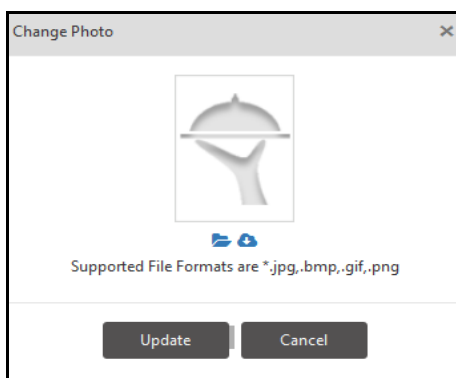
To create a new item click the **New** button and provide the following details:

**Items:** Enter a **Name** for the new item. The **ID** will be generated by the system while saving the item.

**Price:** Specify the cost of the item.

**Description:** Provide a brief description of the item.

**Image:** Click on the Image field to change/upload the photo of the item. A pop-up is generated as shown below. Click on **Browse** image button to select the image and click on **Update** to save the Image.



*Maximum allowed Size to upload the image is 10KB.*

## Discount

- **Apply:** In the event of a discount being applicable on the item, select the checkbox and specify the discount levels as a percentage of the item cost as shown below in the first textbox. The Discount Amount is automatically calculated and displayed in the second textbox based on the Percentage value specified. E.g.: For Level 1, if 50% discount is specified the calculated percentage for 20Rs i.e. 10Rs gets displayed in the second box.

Discount Levels can be assigned to different users. For eg: Discount level 2 with more discount can be given to workers and Discount level1 with less discount can be assigned to managers.

The screenshot shows a web application window titled 'Items'. At the top, a green notification bar says 'Saved Successfully'. The main form on the left has the following fields:

- Items:** A dropdown menu with '4' selected.
- Price:** A text input field containing '20'.
- Description:** A text input field containing '250 chars'.
- Image:** A preview of a samosa.
- Discount:** A section with an 'Apply' checkbox (checked) and four rows for discount levels:

Level	Percentage	Discount Amount
Level 1	50	10.00
Level 2	75	15.00
Level 3	0	0.00
Level 4	0	0.00

On the right side, there is a table listing existing items:

ID	Name
1	Rice
2	Dal
3	Wafers
4	Samosa

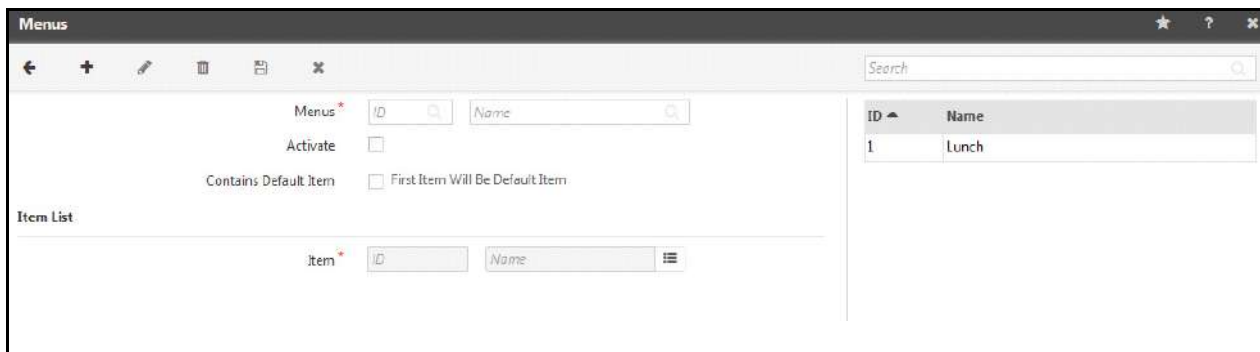
An arrow points to the 'Samosa' row (ID 4) in the table.

Click on **Save** to add the Item to the list. The newly added item gets displayed in the grid on the right side as shown above.

# Menus

This tab enables to define menus which may consist of the items defined from the “Items” page. You can create maximum **999** Menus. These menus can then be assigned to the various Cafeteria devices as per a configured time schedule from the **POS Device Configuration** option.

For defining the Menu, go to **Cafeteria Management > Menus** and the following page appears:



ID	Name
1	Lunch

The above page displays configurations and a grid on the right hand side shows a list of created menus.

To create a new menu, click on the **New** button and enter the following parameters:

- **Menu:** Enter a **Name** for the new menu. The **ID** will be generated by the system while saving the menu.
- **Activate:** Select the check box to enable the menu and set it as active.
- **Contains Default Item:** Enable to set the first assigned item as the default item. In the event of the user directly punching at the Cafeteria door without selecting any item, the system automatically takes the default item as the item ordered and processes the transaction.



*Useful for Canteens selling fixed Breakfast/ Lunch/Dinner.  
Most Selling item can be set as Default.*

## Item List

This section enables to assign items from the item list to the menu.



*Maximum 99 items can be added to a Menu.*

- Click the **Item** picklist. The **Picklist for All Items** pop-up appears.

The dialog box titled "Picklist for All Items" has a green header bar that says "Total Selected: 0 Records". Below this is a search bar with the placeholder text "Search" and a magnifying glass icon. To the right of the search bar is a blue link that says "Show Selected". Below the search bar is a checkbox labeled "Select All". Below this is a table with two columns: "Item Code" and "Item Name". The table contains four rows of data:

<input type="checkbox"/>	Item Code ▲	Item Name
<input type="checkbox"/>	1	Lunch HO
<input type="checkbox"/>	2	Breakfast
<input type="checkbox"/>	3	Lunch Fac
<input type="checkbox"/>	4	Tea HO

At the bottom of the dialog box are two buttons: "OK" and "Cancel".

You can either select particular items or can select all the items at once.

- To select particular items, select the check boxes of the desired items.

The dialog box titled "Picklist for All Items" has a green header bar that says "Total Selected: 1 Records". Below this is a search bar with the placeholder text "Search" and a magnifying glass icon. To the right of the search bar is a blue link that says "Show Selected". Below the search bar is a checkbox labeled "Select All". Below this is a table with two columns: "Item Code" and "Item Name". The table contains four rows of data:

<input type="checkbox"/>	Item Code ▲	Item Name
<input checked="" type="checkbox"/>	1	Lunch HO
<input type="checkbox"/>	2	Breakfast
<input type="checkbox"/>	3	Lunch Fac
<input type="checkbox"/>	4	Tea HO

At the bottom of the dialog box are two buttons: "OK" and "Cancel".

**OR**



- To select all the items at once, select the **Select All** check box. The items on all the pages will be selected.

Picklist for All Items

Total Selected: 4 Records

Search  [Show Selected](#)

☒ Select All

<input checked="" type="checkbox"/>	Item Code ▲	Item Name
<input checked="" type="checkbox"/>	1	Lunch HO
<input checked="" type="checkbox"/>	2	Breakfast
<input checked="" type="checkbox"/>	3	Lunch Fac
<input checked="" type="checkbox"/>	4	Tea HO

OK Cancel

- Click **OK**.

The selected items appears in the grid.

Item List

Item \*  ID  Name

ID	Name	Price	Level 1 Discount	Level 2 Discount	Level 3 Discount	Level 4 Discount	Up/Down	
1	Lunch HO	50	25	37.5	0	0	▼	
2	Breakfast	20	10	15	0	0	▲▼	
3	Lunch Fac	46	23	34.5	0	0	▲▼	
4	Tea HO	6	3	4.5	0	0	▲	

- You can delete the desired items. To do so, click **Delete** of the respective items.
- Click **Save** to save the Menu list.

Menus ✓ Saved Successfully

Menu \*  Lunch HO

Activate ☐

Contains Default Item ☐ (First Item will be Default Item)

Item List

Item \*  ID  Name

ID	Name	Price	Level 1 Discount	Level 2 Discount	Level 3 Discount	Level 4 Discount	Up/Down	
1	Lunch HO	50	25	37.5	0	0	▼	
2	Breakfast	20	10	15	0	0	▲▼	
3	Lunch Fac	46	23	34.5	0	0	▲▼	
4	Tea HO	6	3	4.5	0	0	▲	

# POS Devices Configuration

The POS Device Configuration functionality enables to assign the menus to devices and allows to schedule the Menu on defined Cafeteria devices for different time periods and days.

For assigning the Menu to device, go to **Cafeteria Management > POS Devices Configuration** tab and the following page appears as shown below:



ID	Name
5	Wireless Door 1st Floor

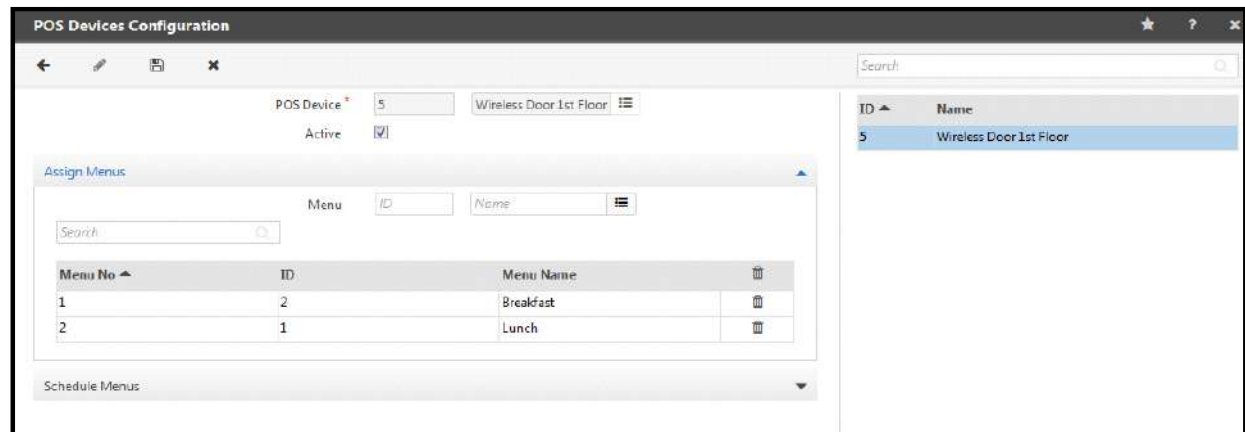
The page displays configurations and a grid on the right side containing devices configured for Cafeteria.

Select a device from the grid and the parameters get loaded in the respective fields

- **Active:** Select the checkbox to activate the selected device.

## Assign Menu

This section enables to assign menus to the selected device. Maximum 99 menus can be assigned to a single device.



Menu No	ID	Menu Name	
1	2	Breakfast	
2	1	Lunch	

- **Menu:** Select menu by clicking on the Picklist button. The selected menu gets displayed in the grid as shown above.

## Schedule Menus

After assigning a menu, schedule can be assigned during which the menu is to be displayed.

Click on **Add** button and the following screen appears.

POS Devices Configuration

POS Device: 5 Wireless Door 1st Floor

Active: ☒

Assign Menus

Schedule Menus

Search

Menu No	ID	Menu Name	Start Time	End Time	Schedule Days
1	2	Breakfast	08:45	09:00	_ Mo Tu We Th Fr _
2	1	Lunch	12:30	14:00	_ Mo Tu We Th Fr _

Search

ID	Name
5	Wireless Door 1st Floor

Enter the required details:

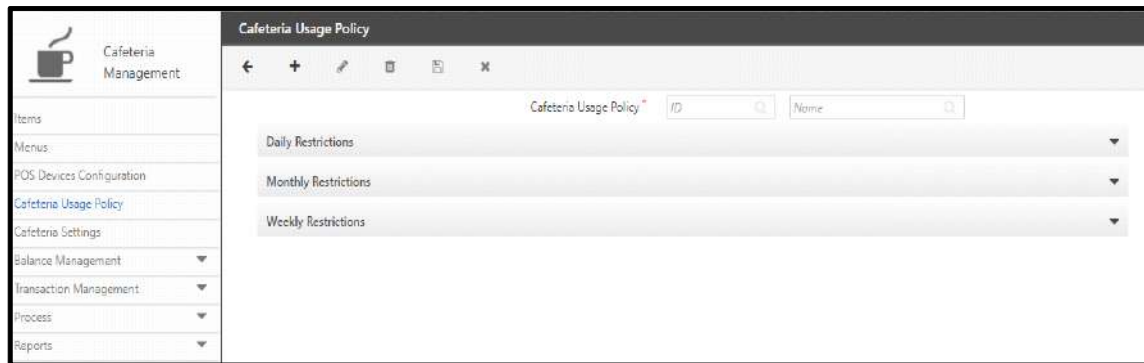
- **Menu Name:** Select the Menu using the picklist button.
- **Start Time/End Time:** Configure the time period by specifying the **Start Time** and the **End Time** during which the menu will be valid at the selected Cafeteria device.
- **Schedule Days:** Select the checkbox against the appropriate **days** on which the menu is to be considered as valid.
- Click on **OK** to add the selected menu to schedule on the device. Similarly, additional menu schedules can be configured for the selected Cafeteria device.

Click on **Save** once done.

# Cafeteria Usage Policy

The **Cafeteria Usage Policy** enables the administrator to configure cafeteria restrictions based on Item, Menu, Transaction and Shift Duration for Cafeteria Users. You can configure maximum **99** Cafeteria usage policy.

To configure this, go to **Cafeteria Management > Cafeteria Usage Policy** and the following page appears as shown below:



By configuring Cafeteria Usage Policy you can:

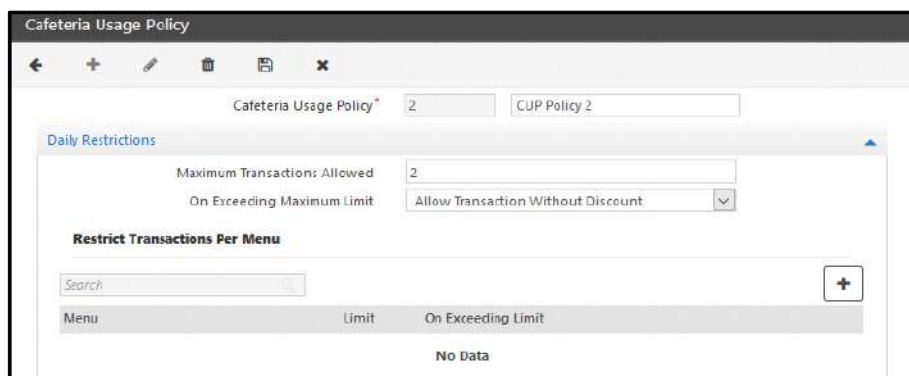
- configure maximum allowed transactions for cafeteria on **Daily**, **Monthly** and **Weekly** basis.
- restrict transaction per menu on daily and monthly basis.
- restrict quantity per items in a menu.
- restrict cafeteria user to access cafeteria out of shift duration & scheduled days.
- allow transactions without discount on exceeding maximum configured limit for all provided restrictions.
- assign defined “Cafeteria Usage Policy” to cafeteria user(s) & any enterprise structure.

To configure new policy, click on **New** button.

Enter the **Name** of policy. The ID will be auto-generated by the system when the policy is saved.

## Daily Restrictions

- **Maximum Transaction Allowed:** Enter the number of cafeteria transactions allowed in a day. The allowed Range is from 1 to 99.
- **On Exceeding Maximum Limit:** When the cafeteria transaction exceeds the maximum allowed limit; then further transaction can be denied by selecting the option Deny transaction or allowed without discount by selecting the option Allow transaction without discount.



## Restrict Transactions Per Menu

- To restrict the cafeteria transaction based on menu, Click on **Add** button. The new row will appear as shown below.

Restrict Transactions Per Menu				
Search				
Menu		Limit	On Exceeding Limit	Add
ID	Name			
		0-99	Deny Transaction	✓ ✕

- Menu:** Click the **Menu** picklist. The **Picklist for all Menus** pop-up appears.

Picklist for all Menus

Total Selected: 0 Records

Search

Show Selected

☐ Select All

<input type="checkbox"/>	Menu Code	Menu Name
<input type="checkbox"/>	1	Lunch HO
<input type="checkbox"/>	2	Breakfast HO
<input type="checkbox"/>	3	Lunch Factory
<input type="checkbox"/>	4	Menu4
<input type="checkbox"/>	5	Menu5
<input type="checkbox"/>	6	Menu 6
<input type="checkbox"/>	7	Menu7
<input type="checkbox"/>	8	Menu8
<input type="checkbox"/>	9	Menu9
<input type="checkbox"/>	10	Menu10

1 - 10 of 13 records

1 2

OK Cancel

- You can either select particular menus or can select all the menus at once.
- To select particular menus, select the check boxes of the desired menus.

Picklist for all Menus

Total Selected: 2 Records

Search  Show Selected

☐ Select All

<input type="checkbox"/>	Menu Code ▲	Menu Name
<input checked="" type="checkbox"/>	1	Lunch HO
<input checked="" type="checkbox"/>	2	Breakfast HO
<input type="checkbox"/>	3	Lunch Factory
<input type="checkbox"/>	4	Menu4
<input type="checkbox"/>	5	Menu5
<input type="checkbox"/>	6	Menu 6
<input type="checkbox"/>	7	Menu7
<input type="checkbox"/>	8	Menu8
<input type="checkbox"/>	9	Menu9
<input type="checkbox"/>	10	Menu10

1 - 10 of 13 records

« < 1 2 > »

OK Cancel

OR

- To select all the menus at once, select the **Select All** check box. The menus on all the pages will be selected.

Picklist for all Menus

Total Selected: 13 Records

Search  Show Selected

☒ Select All

<input checked="" type="checkbox"/>	Menu Code ▲	Menu Name
<input checked="" type="checkbox"/>	1	Lunch HO
<input checked="" type="checkbox"/>	2	Breakfast HO
<input checked="" type="checkbox"/>	3	Lunch Factory
<input checked="" type="checkbox"/>	4	Menu4
<input checked="" type="checkbox"/>	5	Menu5
<input checked="" type="checkbox"/>	6	Menu 6
<input checked="" type="checkbox"/>	7	Menu7
<input checked="" type="checkbox"/>	8	Menu8
<input checked="" type="checkbox"/>	9	Menu9
<input checked="" type="checkbox"/>	10	Menu10



1 - 10 of 13 records

« < 1 2 > »

OK Cancel

- Click **OK**.
- **Limit:** Enter the number of transactions allowed in a day for the selected menu. The allowed Range is from 0 to 99.
- **On Exceeding Limit:** When the cafeteria transaction for the selected menu exceeds the maximum allowed limit; then further transaction can be denied by selecting the option **Deny transaction** or allowed without discount by selecting the option **Allow transaction without discount**.
- Click **OK** to save the restrictions on menu. Similarly you can add another menu for applying the restriction on quantity.
- The selected option appears in the grid.

Search				
Item	Menu	Quantity	On Exceeding Maximum Quantity	
Tea HO	Menu5	10	Deny Transaction	
Lunch HO	Lunch HO	10	Deny Transaction	
Lunch HO	Breakfast HO	10	Deny Transaction	
Lunch HO	Lunch Factory	10	Deny Transaction	
Lunch HO	Menu4	10	Deny Transaction	

- You can edit or delete the desired menu. To do so, click **Delete**  or click **Edit**  of the desired menu.
- Click **Save** button to save the changes to the policy.

Cafeteria Usage Policy

✓ Saved Successfully

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Cafeteria Usage Policy\*

Daily Restrictions











Maximum Transactions Allowed

On Exceeding Maximum Limit

Restrict Transactions Per Menu

Search

+

Menu	Limit	On Exceeding Limit	
Lunch HO	99	Deny Transaction	 
Breakfast HO	99	Deny Transaction	 
Lunch Factory	99	Deny Transaction	 
menu4	99	Deny Transaction	 
menu5	99	Deny Transaction	 

1 - 5 of 13 records

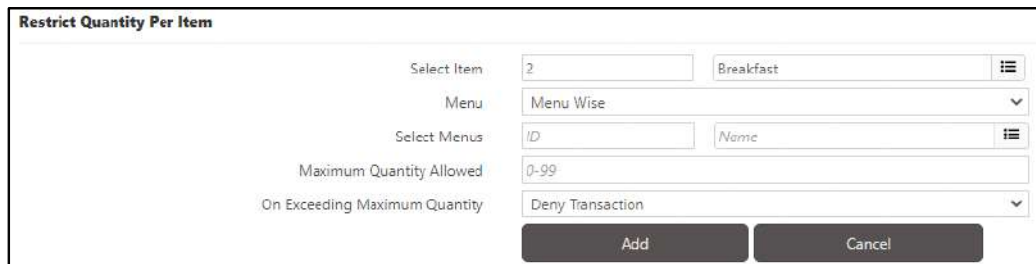
1

2

3

## Restrict Quantity Per Item

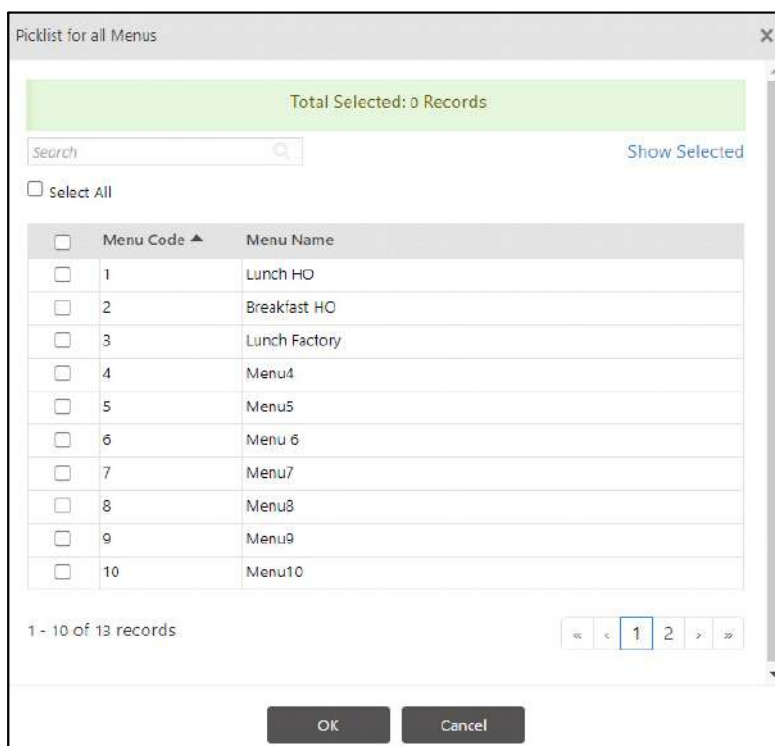
To restrict the cafeteria quantity based on item, Click on **Add** button. The new row will appear as shown below.



The 'Restrict Quantity Per Item' form contains the following fields and controls:

- Select Item:** A text input field containing the value '2'.
- Menu:** A dropdown menu currently set to 'Menu Wise'.
- Select Menus:** Two text input fields, 'ID' and 'Name', each with a list icon on the right.
- Maximum Quantity Allowed:** A text input field containing '0-99'.
- On Exceeding Maximum Quantity:** A dropdown menu set to 'Deny Transaction'.
- Buttons:** 'Add' and 'Cancel' buttons at the bottom right.

- **Select Item:** Click the picklist and select the Item for which restriction is to be made.
- **Menu:** Select the desired option — **Any Menu** or **Menu Wise**.
- If you select **Menu Wise**,
  - **Select Menus:** Click the **Select Menus** picklist. The **Picklist for all Menus** pop-up appears.



The 'Picklist for all Menus' dialog box displays a table of menu records. At the top, it shows 'Total Selected: 0 Records'. Below this is a search bar and a 'Show Selected' link. A 'Select All' checkbox is located above the table. The table has columns for 'Menu Code' and 'Menu Name'. At the bottom, it shows '1 - 10 of 13 records' and a pagination control with buttons for first, previous, 1, 2, next, and last. 'OK' and 'Cancel' buttons are at the bottom.

<input type="checkbox"/>	Menu Code ▲	Menu Name
<input type="checkbox"/>	1	Lunch HO
<input type="checkbox"/>	2	Breakfast HO
<input type="checkbox"/>	3	Lunch Factory
<input type="checkbox"/>	4	Menu4
<input type="checkbox"/>	5	Menu5
<input type="checkbox"/>	6	Menu 6
<input type="checkbox"/>	7	Menu7
<input type="checkbox"/>	8	Menu8
<input type="checkbox"/>	9	Menu9
<input type="checkbox"/>	10	Menu10

- You can either select particular menus or can select all the menus at once.



- To select particular menus, select the check boxes of the desired menus.

Picklist for all Menu

Total Selected: 2 Records

Search  Show Selected

☐ Select All

<input type="checkbox"/>	Menu Code ▲	Menu Name
<input checked="" type="checkbox"/>	1	Lunch HO
<input checked="" type="checkbox"/>	2	Breakfast HO
<input type="checkbox"/>	3	Lunch Factory
<input type="checkbox"/>	4	Menu4
<input type="checkbox"/>	5	Menu5
<input type="checkbox"/>	6	Menu 6
<input type="checkbox"/>	7	Menu7
<input type="checkbox"/>	8	Menu8
<input type="checkbox"/>	9	Menu9
<input type="checkbox"/>	10	Menu10

1 - 10 of 13 records

« < 1 2 > »

OK Cancel

OR

- To select all the menus at once, select the **Select All** check box. The menus on all the pages will be selected.

Picklist for all Menu

Total Selected: 13 Records

Search  Show Selected

☒ Select All

<input checked="" type="checkbox"/>	Menu Code ▲	Menu Name
<input checked="" type="checkbox"/>	1	Lunch HO
<input checked="" type="checkbox"/>	2	Breakfast HO
<input checked="" type="checkbox"/>	3	Lunch Factory
<input checked="" type="checkbox"/>	4	Menu4
<input checked="" type="checkbox"/>	5	Menu5
<input checked="" type="checkbox"/>	6	Menu 6
<input checked="" type="checkbox"/>	7	Menu7
<input checked="" type="checkbox"/>	8	Menu8
<input checked="" type="checkbox"/>	9	Menu9
<input checked="" type="checkbox"/>	10	Menu10

1 - 10 of 13 records

« < 1 2 > »

OK Cancel

- Click **OK**.

- **Maximum Quantity Allowed:** Enter the number of transactions allowed in a day for the selected item. The allowed Range is from 0 to 99.
- **On Exceeding Maximum Quantity:** When the cafeteria transaction for the selected item exceeds the maximum allowed quantity; then further transaction can be denied by selecting the option **Deny transaction** or allowed without discount by selecting the option **Allow transaction without discount**.
- Click **Add**.
- The selected menu appears in the grid.

Search <input type="text"/>				
Item	Menu	Quantity	On Exceeding Maximum Quantity	
Tea HO	Menu5	10	Deny Transaction	
Lunch HO	Lunch HO	10	Deny Transaction	
Lunch HO	Breakfast HO	10	Deny Transaction	
Lunch HO	Lunch Factory	10	Deny Transaction	
Lunch HO	Menu4	10	Deny Transaction	

- If you wish to **Update** any respective Item from the grid, then edit **Maximum Quantity Allowed** and **On Exceeding Max Quantity**.

- Click on **Update**.

**OR**

- You can also delete the desired menu. To do so, click **Delete** of the respective menu.
- Click **Add** to save the item on which restriction is done. Similarly you can add another item for applying the restriction on transaction.

### Restrict Quantity Per Item

Select Item

16

Idli Samb

Menu

Menu Wise

Select Menus

26

Breakfast1

Maximum Quantity Allowed

2

On Exceeding Max Quantity

Allow Transaction Without Discount

Update

Cancel

Search

Item	Menu	Quantity	On Exceeding Max. Quantity	
Poha	Any Menu	1	Deny Transaction	
Idli Samb	Breakfast1	2	Allow Transaction Without Discount	

## Shift/Day Restrictions

You can also restrict the cafeteria transaction based on Shift/Day.

The screenshot shows a window titled "Shift/Day Restrictions". It contains two main sections. The first section, "Restrict Out of Shift Timings", has a checked checkbox and a dropdown menu currently set to "Deny Transaction". The second section, "Restrict Usage on Day", has a row of checkboxes for the days of the week: Mon, Tue, Wed, Thu, Fri, Sat, Sun, WO, and PH. The checkboxes for Sat, Sun, WO, and PH are checked, while Mon, Tue, Wed, and Thu are unchecked.

- **Restrict Out of Shift Timings:** When the cafeteria transaction is done out of shift timings; then the transaction can be denied by selecting the option **Deny transaction** or allowed without discount by selecting the option **Allow transaction without discount**.
- **Restrict Usage on Day:** The transactions can be restricted on the particular days by selecting the respective check-box. For eg: Here Sat, Sun, WO and PH are restricted for cafeteria transaction. It will not check the configurations done in **Restrict Out of Shift Timings**.

## Pre-order Meal Restrictions

- You can also restrict the cafeteria transaction based on Pre-ordered meal. You can impose restriction on overflowing Pre-ordered quantity.

The screenshot shows a window titled "Pre-order Meal Restrictions". It has a section "Pre-order Based Restriction" with a checked checkbox and a dropdown menu. The dropdown menu is open, showing three options: "Allow Transaction Without Discount", "Deny Transaction", and "Allow Transaction Without Discount" (which is highlighted in blue). Below this, there is a section labeled "Monthly Restrictions" which is currently collapsed.

- Enable the **Pre-order Based Restriction** check box. Then you can select either of the options:
- **Allow Transaction without Discount-** If item's consumed quantity exceeds the pre-ordered quantity of the item in selected menu then it will allow the transaction without discount.
- **Deny Transaction** -If item's consumed quantity exceeds the pre-ordered quantity of the item in selected menu then it will deny the transaction.

## Monthly Restrictions

The screenshot shows a window titled "Cafeteria Usage Policy". It has a toolbar with icons for back, add, edit, delete, save, and close. Below the toolbar, there are two expandable sections: "Daily Restrictions" and "Monthly Restrictions". The "Monthly Restrictions" section is expanded, showing two fields: "Maximum Transactions Allowed" with a text input containing "100", and "On Exceeding Maximum Limit" with a dropdown menu set to "Deny Transaction".

- **Maximum Transaction Allowed:** Enter the number of cafeteria transactions allowed in a month. The allowed Range is from 1 to 9999.
- **On Exceeding Maximum Limit:** When the cafeteria transaction exceeds the maximum allowed limit; then further transaction can be denied by selecting the option Deny transaction or allowed without discount by selecting the option Allow transaction without discount.

### Restrict Transactions Per Menu

- To restrict the cafeteria transaction based on menu, click on **Add** button. The new row will appear as shown below.

Restrict Transactions Per Menu		
Search		
Menu	Limit	On Exceeding Limit
ID Name	0-9999	Deny Transaction

- **Menu:** Click the **Menu** picklist. The **Picklist for all Menus** pop-up appears.

Picklist for all Menus

Total Selected: 0 Records

Search

Show Selected

☐ Select All

<input type="checkbox"/>	Menu Code	Menu Name
<input type="checkbox"/>	1	Lunch HO
<input type="checkbox"/>	2	Breakfast HO
<input type="checkbox"/>	3	Lunch Factory
<input type="checkbox"/>	4	Menu4
<input type="checkbox"/>	5	Menu5
<input type="checkbox"/>	6	Menu 6
<input type="checkbox"/>	7	Menu7
<input type="checkbox"/>	8	Menu8
<input type="checkbox"/>	9	Menu9
<input type="checkbox"/>	10	Menu10

1 - 10 of 13 records

OK Cancel

- You can either select particular menus or can select all the menus at once.

- To select particular menus, select the check boxes of the desired menus.

The screenshot shows a dialog box titled "Picklist for all Menu". At the top, a green bar indicates "Total Selected: 2 Records". Below this is a search bar and a "Show Selected" button. A "Select All" checkbox is unchecked. The main area contains a table with 10 rows, each with a checkbox, a menu code, and a menu name. The first two rows are selected.

<input type="checkbox"/>	Menu Code ▲	Menu Name
<input checked="" type="checkbox"/>	1	Lunch HO
<input checked="" type="checkbox"/>	2	Breakfast HO
<input type="checkbox"/>	3	Lunch Factory
<input type="checkbox"/>	4	Menu4
<input type="checkbox"/>	5	Menu5
<input type="checkbox"/>	6	Menu 6
<input type="checkbox"/>	7	Menu7
<input type="checkbox"/>	8	Menu8
<input type="checkbox"/>	9	Menu9
<input type="checkbox"/>	10	Menu10

At the bottom, it shows "1 - 10 of 13 records" and a pagination control with "1" selected. "OK" and "Cancel" buttons are at the bottom.

**OR**

- To select all the menus at once, select the **Select All** check box. The menus on all the pages will be selected.

The screenshot shows the same dialog box, but now the "Select All" checkbox is checked. The table shows all 10 visible records selected. The green bar at the top now indicates "Total Selected: 13 Records".

<input checked="" type="checkbox"/>	Menu Code ▲	Menu Name
<input checked="" type="checkbox"/>	1	Lunch HO
<input checked="" type="checkbox"/>	2	Breakfast HO
<input checked="" type="checkbox"/>	3	Lunch Factory
<input checked="" type="checkbox"/>	4	Menu4
<input checked="" type="checkbox"/>	5	Menu5
<input checked="" type="checkbox"/>	6	Menu 6
<input checked="" type="checkbox"/>	7	Menu7
<input checked="" type="checkbox"/>	8	Menu8
<input checked="" type="checkbox"/>	9	Menu9
<input checked="" type="checkbox"/>	10	Menu10

The "Select All" checkbox is checked. The pagination control still shows "1" selected. "OK" and "Cancel" buttons are at the bottom.

- Click **OK**.

- **Limit:** Enter the number of transactions allowed in a month for the selected menu. The allowed Range is from 1 to 9999.
- **On Exceeding Limit:** When the cafeteria transaction for the selected menu exceeds the maximum allowed limit; then further transaction can be denied by selecting the option **Deny transaction** or allowed without discount by selecting the option **Allow transaction without discount**.
- Click **OK** to save the restrictions on menu. Similarly you can add another menu for applying the restriction on transaction.
- The selected menu appears in the grid.

Search <input type="text"/>				
Item	Menu	Quantity	On Exceeding Maximum Quantity	
Tea HO	Menu5	10	Deny Transaction	
Lunch HO	Lunch HO	10	Deny Transaction	
Lunch HO	Breakfast HO	10	Deny Transaction	
Lunch HO	Lunch Factory	10	Deny Transaction	
Lunch HO	Menu4	10	Deny Transaction	

- You can also edit or delete the desired menu. To do so, click **Delete** or click **Edit** of the respective menu.
- Click **Save** button to save the changes to the policy.

Cafeteria Usage Policy

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Cafeteria Usage Policy \*

2

CUP Policy 2

Daily Restrictions

Monthly Restrictions

Maximum Transactions Allowed

100

On Exceeding Maximum Limit

Deny Transaction

Restrict Transactions Per Menu

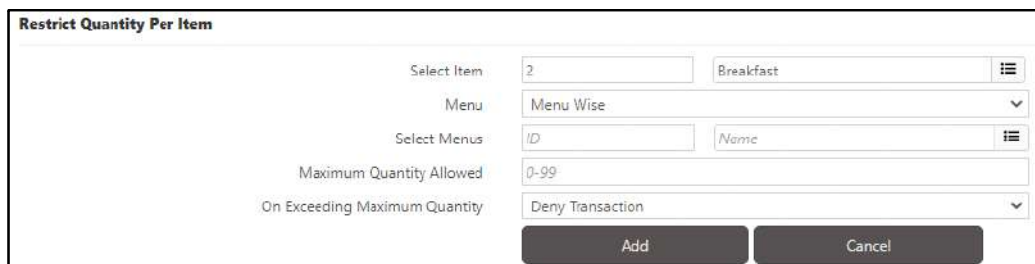
Search

+

Menu	Limit	On Exceeding Limit	
menu3	100	Allow Transaction Without Discount	

## Restrict Quantity Per Item

- To restrict the cafeteria quantity based on item, click on **Add** button. The new row will appear as shown below.



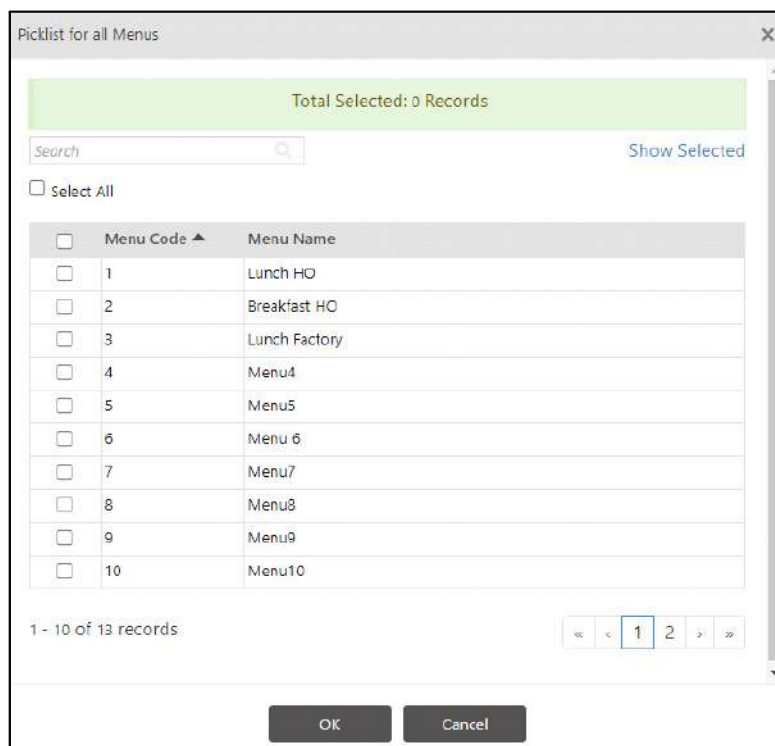
The form titled "Restrict Quantity Per Item" contains the following fields and controls:

- Select Item:** A text input field containing the value "2".
- Menu:** A dropdown menu currently set to "Menu Wise".
- Select Menus:** Two text input fields, "ID" and "Name", each with a picklist icon to its right.
- Maximum Quantity Allowed:** A text input field containing "0-99".
- On Exceeding Maximum Quantity:** A dropdown menu set to "Deny Transaction".
- Buttons:** "Add" and "Cancel" buttons at the bottom right.

- Select Item:** Click the picklist and select the Item for which restriction is to be applied.
- Menu:** Select the desired option —**Any Menu** or **Menu Wise**.

If you select **Menu Wise**,

- Select Menus:** Click the **Select Menus** picklist. The **Picklist for all Menus** pop-up appears.



The "Picklist for all Menus" pop-up window displays a table of menu records. At the top, it shows "Total Selected: 0 Records". Below this is a search bar and a "Show Selected" button. A "Select All" checkbox is located above the table. The table has two columns: "Menu Code" and "Menu Name". It lists 10 records, with the first 10 visible. At the bottom, it shows "1 - 10 of 13 records" and a pagination control with buttons for "1" and "2".

Menu Code	Menu Name
1	Lunch HO
2	Breakfast HO
3	Lunch Factory
4	Menu4
5	Menu5
6	Menu 6
7	Menu7
8	Menu8
9	Menu9
10	Menu10

- You can either select particular menus or can select all the menus at once.

- To select particular menus, select the check boxes of the desired menus.

Picklist for all Menu

Total Selected: 2 Records

Search  Show Selected

☐ Select All

<input type="checkbox"/>	Menu Code ▲	Menu Name
<input checked="" type="checkbox"/>	1	Lunch HO
<input checked="" type="checkbox"/>	2	Breakfast HO
<input type="checkbox"/>	3	Lunch Factory
<input type="checkbox"/>	4	Menu4
<input type="checkbox"/>	5	Menu5
<input type="checkbox"/>	6	Menu 6
<input type="checkbox"/>	7	Menu7
<input type="checkbox"/>	8	Menu8
<input type="checkbox"/>	9	Menu9
<input type="checkbox"/>	10	Menu10

1 - 10 of 13 records

« < 1 2 > »

OK Cancel

OR

- To select all the menus at once, select the **Select All** check box. The menus on all the pages will be selected.

Picklist for all Menu

Total Selected: 13 Records

Search  Show Selected

☒ Select All

<input checked="" type="checkbox"/>	Menu Code ▲	Menu Name
<input checked="" type="checkbox"/>	1	Lunch HO
<input checked="" type="checkbox"/>	2	Breakfast HO
<input checked="" type="checkbox"/>	3	Lunch Factory
<input checked="" type="checkbox"/>	4	Menu4
<input checked="" type="checkbox"/>	5	Menu5
<input checked="" type="checkbox"/>	6	Menu 6
<input checked="" type="checkbox"/>	7	Menu7
<input checked="" type="checkbox"/>	8	Menu8
<input checked="" type="checkbox"/>	9	Menu9
<input checked="" type="checkbox"/>	10	Menu10

1 - 10 of 13 records

« < 1 2 > »

OK Cancel

- Click **OK**.



- **Maximum Quantity Allowed:** Enter the number of transactions allowed in a month for the selected item. The allowed Range is from 1 to 9999.
- **On Exceeding Maximum Quantity:** When the cafeteria transaction for the selected item exceeds the maximum allowed quantity; then further transaction can be denied by selecting the option **Deny transaction** or allowed without discount by selecting the option **Allow transaction without discount**.
- Click **Add**.
- The selected menu appears in the grid.

Search <input type="text"/>				
Item	Menu	Quantity	On Exceeding Maximum Quantity	
Tea HO	Menu5	10	Deny Transaction	
Lunch HO	Lunch HO	10	Deny Transaction	
Lunch HO	Breakfast HO	10	Deny Transaction	
Lunch HO	Lunch Factory	10	Deny Transaction	
Lunch HO	Menu4	10	Deny Transaction	

- If you wish to **Update** any respective Item from the grid, then edit **Maximum Quantity Allowed** and **On Exceeding Max Quantity**.

- Click on **Update**.

**OR**

- You can also delete the desired menu. To do so, click **Delete** of the respective menu.
- Click **Add** to save the item on which restriction is done. Similarly you can add another item for applying the restriction on transaction.

### Restrict Quantity Per Item

Select Item

16

Idli Samb

Menu

Menu Wise

Select Menus

26

Breakfast1

Maximum Quantity Allowed

2

On Exceeding Max Quantity

Allow Transaction Without Discount

Update

Cancel

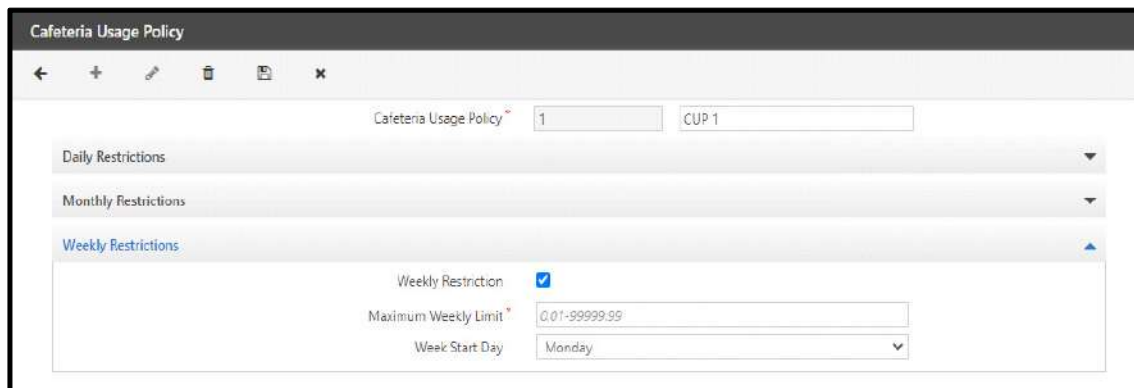
Search

Item	Menu	Quantity	On Exceeding Max. Quantity	
Poha	Any Menu	1	Deny Transaction	
Idli Samb	Breakfast1	2	Allow Transaction Without Discount	



*It is advised to configure Daily & Monthly Level limits properly to avoid false restrictions. Suppose Maximum Transactions / Item Limit / Menu Limit on Monthly Level is configured less than Daily Level, in such cases user will be restricted on reaching monthly allowed limit.*

## Weekly Restrictions



- **Weekly Restriction:** Select this check box if you wish to apply weekly restrictions on users based on transaction amount.
- **Maximum Weekly Limit:** Enter the maximum transaction amount that will be allowed to users. When the user's transactions exceed this amount, further transactions will be denied.
- **Week Start Day:** Select the desired day from the drop down list. This day will be considered as the starting day of the week for the user. For example, if you select Tuesday, the week for the user will begin on Tuesday - November 2 and end on Monday - November 8.
- If you want the week for the users to begin from the day they join, then 7 different policies for each day of the week need to be created. These can then be assigned as per the joining day of the users. For example, if you have set the Week Start Day as Monday, User1 joins on Tuesday and User2 joins on Wednesday. In this case, we need to create separate policies, wherein in Policy1 the Week Start day will be set as Monday, in Policy2 it will be Tuesday and in Policy3 it will be set as Wednesday. Now, you can assign Policy2 to User1 and Policy3 to User2.
- If you desire updating the **Week Start Day** for any existing Cafeteria Usage Policy assigned to users, it is recommended you update the day a day before the newly configured **Week Start Day**, to make sure the changes are applied effectively.
- For example, the **Week Start Day** is initially configured as Monday and later you wish to update it as Saturday, then you must update the **Week Start Day** on:
  - Friday after all the transactions for the day have been completed
  - OR
  - Saturday before any transaction for the day is to be encountered.
- Weekly Restrictions are applicable to ARGO, ARGO FACE and VEGA devices only. If you want to print the Current Balance/ Current Month Usage and Weekly Remaining Limit on the Cafeteria receipt, refer to ["Printer Settings"](#) in VEGA Door, ["Printer Settings"](#) in ARGO Door and ["Printer Settings"](#) in ARGO FACE.



*Weekly Restriction is applicable only if the device is connected to the server.*

*The unused weekly balance will not be carry-forwarded to the next week.*

*Pre-ordered meals will not be considered for Weekly Restriction*

# Cafeteria Settings

The **Cafeteria Settings** page enables the administrator to configure parameters for **prepaid** and **postpaid** accounts as per the site requirements.

To configure this, go to **Cafeteria Management > Cafeteria Settings** and the following page appears as shown below:

The screenshot shows the 'Cafeteria Settings' window with the 'Prepaid' tab selected. The settings are organized into sections: Prepaid, Monthly Limit, and Daily Limit. Each section contains several configuration options with checkboxes and input fields.

Section	Setting	Value
Prepaid	Limit Recharge Amount	<input checked="" type="checkbox"/>
	Maximum Recharge Amount *	500
	Balance Management	Server Based
	Device-Server Balance Check	<input checked="" type="checkbox"/>
Monthly Limit	Block User On Max Usage Limit	<input checked="" type="checkbox"/>
	Maximum Usage Limit Per Month *	50
Daily Limit	Block User On Max Usage Limit	<input checked="" type="checkbox"/>
	Maximum Usage Limit Per Day *	22.5
	Restore User On Date Change	<input checked="" type="checkbox"/>

There are three types of settings as described below:

- Prepaid
- Postpaid
- Other Settings

## Prepaid

Prepaid method provides the simple option of recharging the Smart Card to store balance information as and when needed. This eliminates the need of managing cash all the time.

This screenshot is identical to the one above, showing the 'Cafeteria Settings' window with the 'Prepaid' tab selected. It displays the same configuration options and values for the Prepaid, Monthly Limit, and Daily Limit sections.

Section	Setting	Value
Prepaid	Limit Recharge Amount	<input checked="" type="checkbox"/>
	Maximum Recharge Amount *	500
	Balance Management	Server Based
	Device-Server Balance Check	<input checked="" type="checkbox"/>
Monthly Limit	Block User On Max Usage Limit	<input checked="" type="checkbox"/>
	Maximum Usage Limit Per Month *	50
Daily Limit	Block User On Max Usage Limit	<input checked="" type="checkbox"/>
	Maximum Usage Limit Per Day *	22.5
	Restore User On Date Change	<input checked="" type="checkbox"/>

The parameters are:

**Limit Recharge Amount:** Select to enable a limitation to be set on maximum recharge amount for prepaid accounts.

**Maximum Recharge Amount:** Specify the maximum amount with which a prepaid account can be recharged.

**Balance Management:** Specify whether the balance management process for prepaid users should take place at the device side or server side. For Server Based balance management, user credentials supported are fingerprint, Read-Only card and Smart card. For Device Based balance management, however, only Smart Cards are supported.

**Device-Server Balance Check:** For Server Based balance management, You can enable Device-Server Balance Check to enable Device to check Server-side balance before allowing cafeteria transaction. For this, Device and Server must be connected.



*For server communication in the prepaid server based mode, the admin must set HTTP Server configuration on the device webpage for all configured Cafeteria devices.*

### **Monthly Limit**

This section enables to set a maximum monthly usage limit for a prepaid user.

**Block User on Max Usage Limit:** Enable to block a user whose usage has exceeded the monthly limit.

**Max Usage Limit Per Month:** Specify the maximum limit of usage per month.

### **Daily Limit**

This section enables to set a maximum daily usage limit for a prepaid user.

**Block User on Max Usage Limit:** Enable to block a user whose usage has exceeded the daily limit.

**Maximum Usage Limit Per Day:** Specify the maximum limit of usage per day.

**Restore User On Date Change:** Enable to allow a user to be blocked only for a single day and then restore the user at midnight.

## Postpaid

Postpaid method provides the choice of having the bill deducted directly from a user's payroll. Hence, there is no need for manual cash handling at any time.

The screenshot shows the 'Cafeteria Settings' window with the 'Postpaid' tab selected. The interface includes a sidebar with 'Prepaid', 'Postpaid', and 'Other Settings'. The main area contains the following settings:

- Account Reset Mode:** A dropdown menu set to 'Reset To Zero'.
- Allowed Usage Per Month:** A text input field containing '100'.
- Reset Account Automatically:** An unchecked checkbox.
- Monthly Limit:**
  - Block User On Max Usage Limit:** A checked checkbox.
  - Maximum Usage Limit Per Month:** A text input field containing '52'.
  - Accumulate Usage Limit:** A checked checkbox.
- Daily Limit:**
  - Block User On Max Usage Limit:** A checked checkbox.
  - Maximum Usage Limit Per Day:** A text input field containing '12.63'.
  - Restore User On Date Change:** A checked checkbox.

The parameters are:

**Account Reset Mode:** Select a mode from the dropdown list to reset the account. The two modes are:

- **Reset to Zero:** Select this option to reset the postpaid users' accounts to 0 at the start of the month.
- **Deduct User's Allowed Usage:** Select this option to reset the account by using one of the following methods based on the actual usage of postpaid user:

If the total amount (actual usage for the month + previous due) is less than the users allowed usage per month (see below), the account is reset to zero and the total amount is recorded as payment transaction.

If the total amount (actual usage for the month + previous due) is more than the users allowed usage per month, the account will be reset to zero and the balance due "total accumulated amount - allowed usage amount" will be added and stored in the users previous due record. In this case the user's allowed usage amount will be recorded as user's payment transaction.



*On running the Monthly Payments Process, a postpaid account will be reset based on the account reset mode specified by the admin. For more information, See ["Process-Monthly Payments"](#) on page 2492.*

**Allowed Usage Per Month:** Specify the amount for the allowed monthly usage for postpaid accounts. This amount is used specifically as a base for the calculation of a user's accumulated dues and account reset calculations as explained before.

**Reset Account Automatically:** Select the checkbox if the postpaid accounts are to be automatically reset everytime the month changes.



*The Alert Service must be running to function Reset Account automatically.*

### Monthly Limit

This section enables to specify the maximum usage limit amount for a month for a postpaid user. This is not to be confused with *Allowed Usage Per Month* which is used to determine a user's payment dues for a month.

**Block User on Max Usage Limit:** Select the checkbox if the users with postpaid accounts are to be blocked as and when the maximum usage limit is crossed for a month.

**Maximum Usage Limit Per Month:** Specify the maximum limit of usage per month.

**Accumulate Usage Limit:** Enable, if the user has not consumed the *Allowed Usage Per Month* limit for a selected month, and the balance is to be carried forward to the next month's allowed usage.

### Daily Limit

This section enables to specify the maximum usage limit amount for a day for a postpaid user.

**Block User on Max Usage Limit:** Enable to block a user whose usage has exceeded the daily limit.

**Maximum Usage Limit Per Day:** Specify the maximum limit of usage per day.

**Restore User On Date Change:** Enable to allow a user to be blocked only for a single day and then restore the user at midnight.



*The Cafeteria Settings will be the default settings applicable to all Cafeteria enabled users in the system. These settings can however, be overridden from the **User Configuration** page of the **Users** module.*

## Other Settings

From the Other Settings page one can enable the Pre-ordering feature.

The Cafeteria User can pre-order items beforehand from respective menus for the selected date. This helps Cafeteria Admin to have an estimate about the quantity of food to be prepared on given date.

**Enable:** Select to activate the Pre-ordering feature.

**Allowed in Advance(Days):** Specify the number of days before which the Cafeteria user can order the meals in advance. Eg: If 10 days is set. Then on 12th September, you can pre-order meals for upto 22 September.

**Restrict Before Menu Start:** Specify the number of **Days** or **Hours** before which the cafeteria user must finish the ordering of meals so that the food can be prepared for the required quantity.

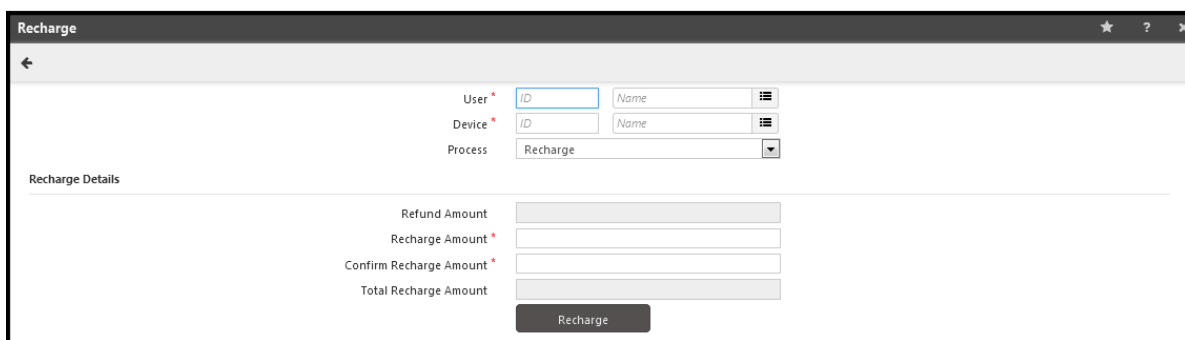
- **Days:** Select Days from the dropdown list and mention the number of days
  - **Hours:** Select the hours from the dropdown list and mention the number of hours.
- [See "Pre-ordered Meals" on page 2480.](#)

Finally, click on **Save** button to save the settings.

# Recharge

The Balance Management option of the Cafeteria module enables the user to recharge the **prepaid** user card from the Cafeteria device. The COSEC Web application sends the configured recharge command to the Cafeteria device from the COSEC Monitor application.

To view the recharge page, go to **Cafeteria Management > Balance Management > Recharge** option and the following page appears as shown below:



- **User:** Select a user from the Cafeteria Prepaid users picklist. The picklist contains users configured from the User module and who have been assigned the Prepaid account from the **Users > User Configuration > Cafeteria** page.
- **Device:** Select a device from the Cafeteria device picklist. The device for the Cafeteria application can be assigned from the *Application* parameter of **Devices module > Device Configuration > Profile** page.



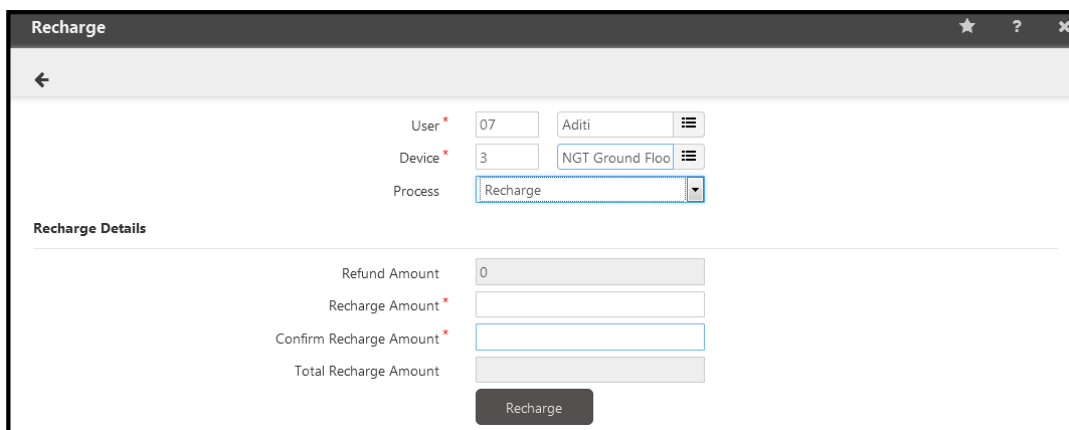
*Only those devices which are enabled for cafeteria are available for the selection.*

*The Device picklist will be enabled for those prepaid user for whom the Balance Management is set as Device based from the User configuration> Cafeteria> Settings.*

*For server based balance management, the device web page must be updated with the HTTP server address.*

- **Process:** Select the Process from the options of **Recharge** or **Reset**.

## Recharge Process



## Recharge Details

- **Refund Amount:** It displays the amount to be refunded to the user by the system. It is an auto generated field.  
**For e.g:** In Prepaid user case, when the user punches at the Cafeteria door the amount is deducted for the selected item. But when the user goes to take that item, if the item is not available at that time so the user is left without that item. In such case he has to be refunded for the item price.
- **Recharge Amount:** Enter the recharge amount by which the prepaid user can be recharged.
- **Confirm Recharge Amount:** Re-enter the recharge amount for confirmation.
- **Total Recharge Amount:** This is the auto generated total amount which includes the summation of Refund Amount and Recharge amount with which the user card will be recharged.

Click on **Recharge**. The system will send the recharge command to the Cafeteria device. The selected user will be prompted to display the card at the device for the recharge process to be completed.

## Reset Process

The screenshot shows a mobile application window titled "Recharge". It features a back arrow in the top left corner. Below the title bar, there are three input fields: "User" with the value "07" and a dropdown menu showing "Aditi"; "Device" with the value "3" and a dropdown menu showing "NGT Ground Floor"; and "Process" with a dropdown menu showing "Reset". Below these fields is a section titled "Recharge Details" which contains a "Reset Type" dropdown menu showing "Reset The Account To Zero (0)". At the bottom of this section is a "Reset" button.

- **Reset Type:** Select the Reset option from the dropdown list of Process field and select the Reset type from the below options:
  - **Reset the Account to Zero(0):** Select this option to reset the value on the prepaid card to 0.
  - **Reset the Account to Available Balance:** If this option is selected, **Reset Amount** field will display the last available balance of the user as found in the COSEC database based on the user's transaction to which the balance on the user card will be reset.

**For E.g.:** If the user has balance of Rs.100, he punches for a value of Rs.20, then available balance will be Rs.80 in user card and COSEC Database. If user punches next time for any value and if due to any reason the card gets garbage value. Then the card can be reset to the available balance in COSEC database i.e. Rs.80.

Click on the **Reset** button after selecting the appropriate option.



# Payment

The Balance Management option of the Cafeteria module enables to record payment transactions against dues for the **postpaid** users.

For making the Payment, go to **Cafeteria Management > Balance Management > Payment** and the following page appears as shown below:

The screenshot shows a web application window titled "Payment". It features a back arrow icon in the top left corner. The form contains the following fields and elements:

- User\***: A dropdown menu with the value "03" and a label "Arushi" next to it.
- Total Due**: A text field displaying "340.32".
- Payment**: A section header for the payment details.
- Amount\***: A text field with the value "300".
- Remark**: An empty text field.
- Process**: A dark button at the bottom right of the form.

- **User**: Select the user from the picklist. The picklist contains users configured from the User module and who have been assigned the Postpaid account from the **Users > User Configuration > Cafeteria** page.
- **Total Due**: It displays the total amount due for the selected user.

## Payment

- **Amount**: Enter the payment amount.
- **Remark**: The user can enter any remark during the payment process.

Click on the **Process** button to process the Payment.

After doing payment of say for Rs. 300, the left over due is shown in **Total Due** field and **Payment Successful** message is displayed as shown below.

The screenshot shows the same "Payment" form as before, but with a green banner at the top indicating a successful transaction. The form fields are now empty, and the "Total Due" field shows a new value.

- Payment Successful**: A green banner at the top of the form.
- User\***: A dropdown menu with the value "03" and a label "Arushi" next to it.
- Total Due**: A text field displaying "40.32".
- Payment**: A section header for the payment details.
- Amount\***: An empty text field.
- Remark**: An empty text field.
- Process**: A dark button at the bottom right of the form.

# Manual Adjustment

This option enables the administrator to perform manual adjustments to user accounts.

Suppose due to some reasons, if the user's punch is not detected, in that case, we can manually adjust the user's account by debiting the required amount manually.

For making the manual adjustment, go to **Cafeteria Management > Balance Management > Manual Adjustment**



*You can do Manual Adjustment for both the users— Prepaid and Postpaid.*

## Prepaid Users

For Prepaid users, following screen appears.

The screenshot shows the 'Manual Adjustment' interface. At the top, there's a search bar and a user selection area with 'User' dropdown set to '07' and 'Aditi' selected. Below this, the 'Account Details For Current Month' section displays several fields: 'Previous Balance' (0.00), 'Current Expense' (85.00), 'Correction Amount' (0.00), 'Total Recharge' (300.00), and 'Total Balance' (215.00). There's also an 'Adjustment' dropdown set to 'Debit', an 'Amount' field with '20', and a 'Remark' field with 'Punch not Detected'. A 'Process' button is at the bottom. On the right, a table lists users with columns 'ID' and 'Name'.

ID	Name
07	Aditi
1567	Sheetal
1678	Supriya
1782	Nidhi

The page displays the grid on the right hand side, containing a list of users (both Prepaid and Postpaid) who are enabled for canteen.


Enter the following parameters:

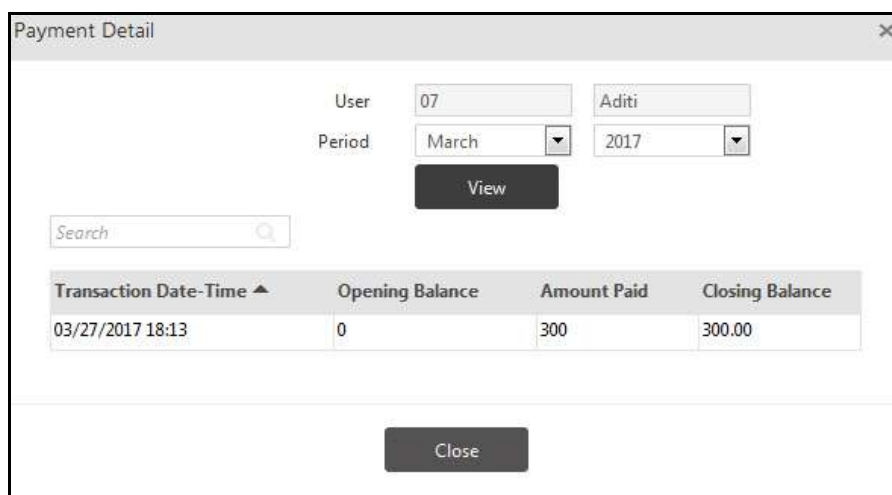
- **User:** Select user from the user picklist or from the grid on right for whom the manual adjustments are to be done.

### Account Details for Current Month

It displays the account details of the selected user as **Previous** and **Current Expense**, **Correction Amount**, **Total Recharge**, and **Total Balance**.

- **Previous Balance:** It displays the previous balance which is carry forwarded to next month for the pre-paid user.
- **Current Expense:** It displays the expense of the month for the pre-paid user.

- **Correction Amount:** It displays the Refund amount to be paid back to the user in case of transaction error. It is equal to the Adjustment Balance + Refund Balance - Reset Balance.
- **Total Recharge:** It displays the total amount of recharge done in current month. Click on  to view the Payment Detail of recharge done by the user for a particular month as shown below.



Payment Detail

User: 07 Aditi  
Period: March 2017  
View

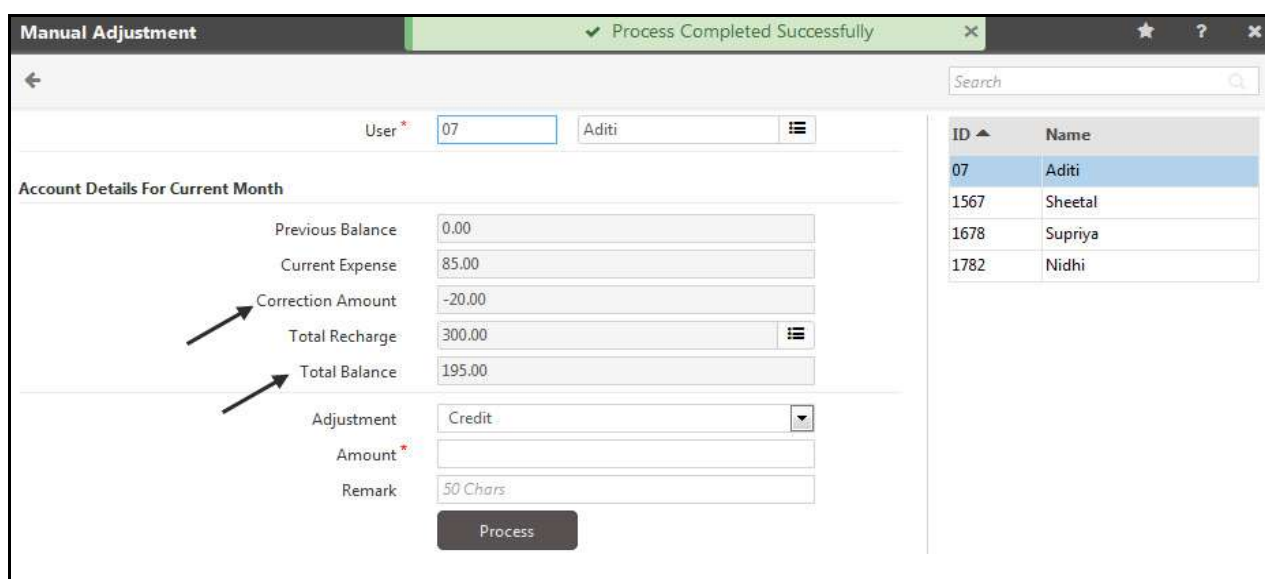
Search

Transaction Date-Time ▲	Opening Balance	Amount Paid	Closing Balance
03/27/2017 18:13	0	300	300.00

Close

- **Total Balance:** It is equal to the Previous balance+ Current balance- Correction amount- Total recharge
- **Adjustment:** Select the Process type from the options of **Credit** or **Debit**.
- **Amount:** Specify the amount to be credited or debited from the user account.
- **Remark:** Specify any remarks for the manual adjustment done.

Click on **Process** to process the manual adjustment and the following screen will appear.



Manual Adjustment

Process Completed Successfully

User: 07 Aditi

Account Details For Current Month

Previous Balance	0.00
Current Expense	85.00
Correction Amount	-20.00
Total Recharge	300.00
Total Balance	195.00

Adjustment: Credit

Amount:

Remark: 50 Chars

Process

ID ▲	Name
07	Aditi
1567	Sheetal
1678	Supriya
1782	Nidhi

Now since, Adjustment has been set to Debit and Amount has been set to 20 so, In the above screen shot, it is shown with the arrow that the **Correction Amount** has changed from 0 to 20 and also, 20 has been deducted from the **Total Due**.

## Postpaid Users

For Postpaid users, following screen appears.

ID	Name
07	Aditi
1567	Sheetal
1678	Supriya
1782	Nidhi


The page displays the grid on the right hand side, containing a list of users (both Prepaid and Postpaid) who are enabled for canteen.

Enter the following parameters:

- **User:** Select user from the user picklist or from the grid on right for whom the manual adjustments are to be done.

### Account Details for Current Month

It displays the account details of the selected user as **Previous** and **Current Due**, **Correction Amount**, **Total Payment**, and **Total Due**.

- **Previous Due:** It displays the previous due which is carry forwarded to next month for the post-paid user.
- **Current Due:** It displays the due of the month for the post-paid user.
- **Correction Amount:** It displays the Refund amount to be paid back to the user in case of transaction error. It is equal to the Adjustment Balance - Reset Balance + Refund Balance.
- **Total Payment:** It displays the total amount of payment done in current month. (Transactions can be done weekly or 4 times in a month). Click on  to view the Payment Detail of the user for a particular month as shown below.

Payment Detail

User: 1782 Nidhi

Period: March 2017

View

Search

Transaction Date-Time ▲	Opening Balance	Amount Paid	Closing Balance
03/28/2017 18:03	110	50	60.00

Close

- **Total Due:** It is equal to the Previous due+ Current due- Correction amount- Total payment
- **Adjustment:** Select the Process type from the options of **Credit** or **Debit**.
- **Amount:** Specify the amount to be credited or debited from the user account.
- **Remark:** Specify any remarks for the manual adjustment done.

Click on **Process** to process the manual adjustment and the following screen will appear.

Manual Adjustment

✓ Process Completed Successfully

User: 1782 Nidhi

Account Details For Current Month

Previous Due: 0.00

Current Due: 60.00

Correction Amount: 20.00

Total Payment: 70.00

Total Due: 40.00

Adjustment: Credit

Amount: \*

Remark: 50 Chars

Process

ID ▲	Name
07	Aditi
1567	Sheetal
1678	Supriya
1782	Nidhi

Now since, Adjustment has been set to Debit and Amount has been set to 20 so, In the above screen shot, it is shown with the arrow that the **Correction Amount** has changed from 0 to 20 and also, 20 has been deducted from the **Total Due**.

# Blocked Users

The COSEC Cafeteria module helps in monitoring Prepaid as well as Postpaid users and helps avoid treacherous usage by allowing users to be blocked on certain violations. Both Prepaid and Postpaid users can be blocked when their usage exceeds a fixed daily or monthly limit as configured for their Cafeteria accounts.

To view the blocked users, go to **Cafeteria Management > Balance Management > Blocked Users**.

The Blocked Users page of the Cafeteria module enables the administrator to view the list of blocked users as well as restore blocked users as and when required. The two ways to Reinstate a blocked user are

- Pay full or part of the Due Amount
- Increase the Usage Limit

The screenshot shows the 'Blocked User' interface. At the top, there's a search bar and a list of blocked users. The main section displays account details for user 'Palak' (ID 3). The details include:

Current Month Account Details	
Previous Due	0.00
Current Due	145.00
Total Payments	0
Total Due	145.00
Blocked On	09/11/2017

Max Usage Limit Per Month	140.00
Previous Month's Accumulated Limit	0
New Usage Limit Per Month	<input type="text"/>

At the bottom, there is an 'Unblock' button. Arrows in the original image point to the 'Current Due' and 'Max Usage Limit Per Month' fields.

The grid on the right displays a list of all the users who are currently blocked due to exceeding the maximum usage limit.

Example: Here the user Palak has purchased the items of price 145.00 which is more than the “Max Usage Limit Per month” of 140; so on next transaction on door; he will be blocked with reason Monthly consumption limited exceeded.

The transactions are shown below.

Transaction Summary

Date: 09/10/2017 09/11/2017

Filter User: Individual

User: 3 Palak

View

Purchase (6)

User ID	Name	Transaction Date-Time	POS Device	Item	Unit Price	Discount	Quantity	Payable
3	Palak	09/11/2017 10:50	NGT Direct Door-Device-2	Vadapav	40	20	1	20.00
3	Palak	09/11/2017 10:41	NGT Direct Door-Device-2	Vadapav	40	20	1	20.00
3	Palak	09/11/2017 10:40	NGT Direct Door-Device-2	Vadapav	40	20	1	20.00
3	Palak	09/11/2017 10:40	NGT Direct Door-Device-2	Puff	40	20	3	60.00
3	Palak	09/11/2017 11:32	NGT Direct Door-Device-2	Roti	20	10	1	10.00
3	Palak	09/11/2017 11:32	NGT Direct Door-Device-2	Sabji	30	15	1	15.00

Payment (0)

Recharge (0)

Reset (0)

Manual Credit/Debit (0)

Now you can unblock or restore the user by specifying the **New Usage Limit Per Month** for the selected user. Enter the New usage limit value as shown below.

Blocked User

User: 3 Palak

Department: Department-1

Designation: Designation-1

Current Month Account Details

Previous Due	0.00
Current Due	145.00
Total Payments	0
Total Due	145.00
Blocked On	09/11/2017
Max Usage Limit Per Month	140.00
Previous Month's Accumulated Limit	0
New Usage Limit Per Month	160

Unblock

ID	Name
3	Palak

Also the limit can be increased from User Configuration.

Click on **Unblock** to unblock the selected user. The user will be restored and he can purchase the item from cafeteria device.

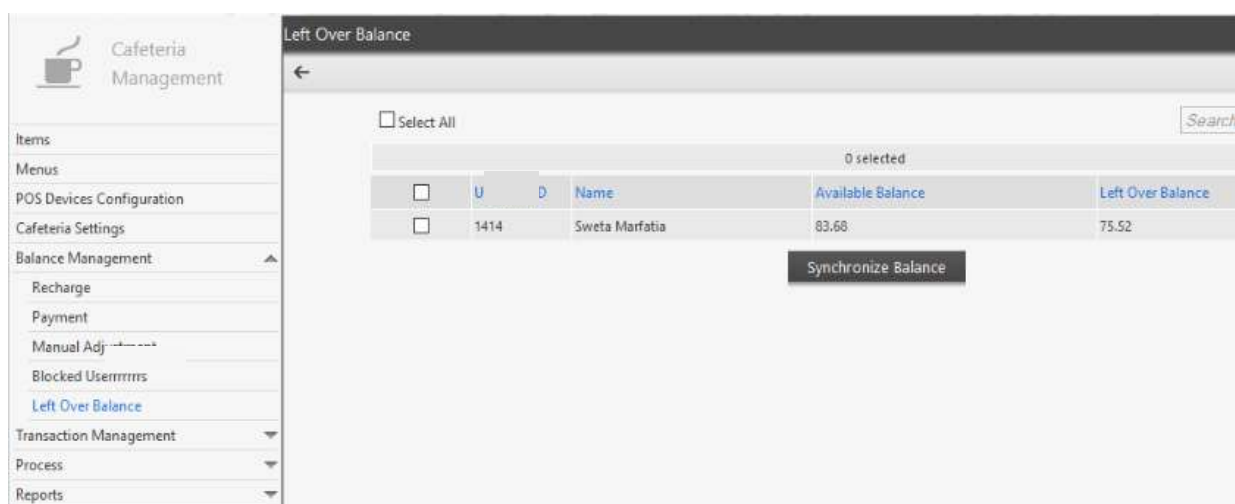




# Left Over Balance

Left Over Balance page will allows the Admin to view users whose Left Over Balance and Available Balance are out of sync. When due to some exceptional cases Left Over Balance is decremented and event is not received from Device or vice versa then Left Over Balance can be manually sync to Available Balance.

For Synchronizing, go to **Cafeteria Management > Balance Management > Left Over Balance** and the following screen appears as shown below:



The grid shows list of all active users (Prepaid Server Based + Device-Server Balance Check -Enabled) for whom Left Over Balance is not equal to Actual balance.

Select the users to be synchronized. You can select a particular user or can select all the users at once.

To select particular users, select the check boxes of the desired users.

**OR**

To select all the users, select the **Select All** check box. The users on all the pages will be selected.

Click **Synchronize Balance** for all selected users to make Left Over Balance = Actual balance for current month.

# Pre-ordered Meals

Pre-ordered Meals enable the Cafeteria Admin to view and have an estimation about the quantity of food to be prepared on the selected date.

Click **Cafeteria Management > Transaction Management > Pre-ordered Meals** from Cafeteria page. The page appears as shown below:

The screenshot shows the 'Pre-ordered Meals' interface. At the top, there's a title bar with a star and a question mark. Below it, a search bar is visible. The main section contains filters: 'Date' (05/05/2017), 'Filter User' (All), and 'Group/User' (ID and Name). A 'View' button is below the filters. Under 'Ordered Items', there's a search bar and a table with columns: Menu ID, Name, Item ID, Name, and Total Quantity. The table currently shows 'No Data'.

**Date:** Select the Date for which list of pre-ordered meals is to be viewed.

**User:** Select the user by filtering from the options of enterprise group or individual user.



*The Pre-ordering of items is done from the ESS account of Cafeteria enabled users.*

*The settings for pre-ordering of meals is done from Cafeteria Management module> Cafeteria Settings > Other Settings.*

Click on **View** button to view the ordered list. It shows the date wise list of items which is pre-ordered by the cafeteria users.

The screenshot shows the 'Pre-ordered Meals' interface with the 'View' button clicked. The table now displays one row of data:

Menu ID	Name	Item ID	Name	Total Quantity
3	Evening snack	5	Puff	4

# Correction Approval

The COSEC application allows the users to apply for corrections to existing transactions from the Cafeteria Transaction Correction page of COSEC ESS module. These applications can be authorized by the administrator from the Correction Approval page of the Cafeteria module.

The authorization is dependent on the number of Reporting In-charge in the Reporting Group, the Authorization Mode as well as the Approval Policy assigned by the system administrator. For details refer to [“Reporting In-Charge”](#), [“Approval Policy”](#) and [“Configuring Users”](#).

For giving correction approval, go to **Cafeteria Management > Transaction Management > Correction Approval** and the following page appears as shown below:



You can either:

- view all the pending applications for Correction Approval
- set the date filters to view the desired applications

## All Pending Applications

To view only Pending Applications,

- **Show All Pending Applications:** Select this option to enable the pending application filter.
- Click the **Pending** collapsible panel. All the applications in pending state appear.

To approve the application, select the **Approve** check box of the desired entry.

To reject the application, select the **Reject** check box of the desired entry.

To know more, refer to [“Pending Applications”](#)



*The population on this page depends on the server's database. It might take time to load all pending applications.*

## Applications according to Set Filters

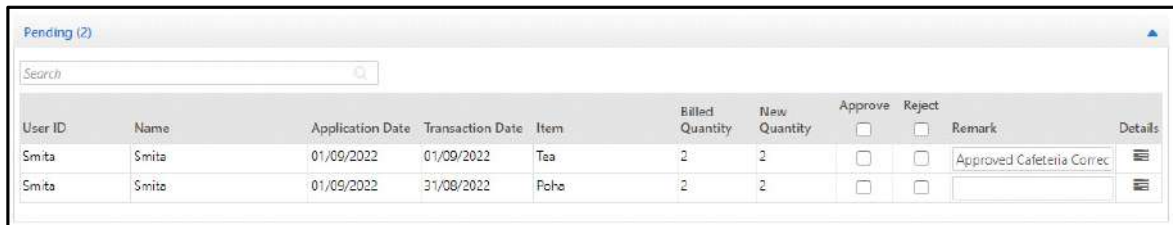
To Set the Filters,

- **Date:** Select this option to enable the date filter. Select the start and end dates by clicking the respective date selection buttons. This defines the period for which the applications are to be viewed.

Click the **View** button to view all the pending, approved and rejected applications.

## Pending Applications

Click the **Pending** collapsible panel. All the applications in pending state are displayed.




User ID	Name	Application Date	Transaction Date	Item	Billed Quantity	New Quantity	Approve	Reject	Remark	Details
Smita	Smita	01/09/2022	01/09/2022	Tea	2	2	<input type="checkbox"/>	<input type="checkbox"/>	Approved Cafeteria Correc	
Smita	Smita	01/09/2022	31/08/2022	Poha	2	2	<input type="checkbox"/>	<input type="checkbox"/>		

To approve the application, select the **Approve** check box of the desired entry.

To reject the application, select the **Reject** check box of the desired entry.

The application will be displayed under respective panel.

You also, click **Details**  of view the details of the transaction. The Transaction Correction Details page appears as shown below:

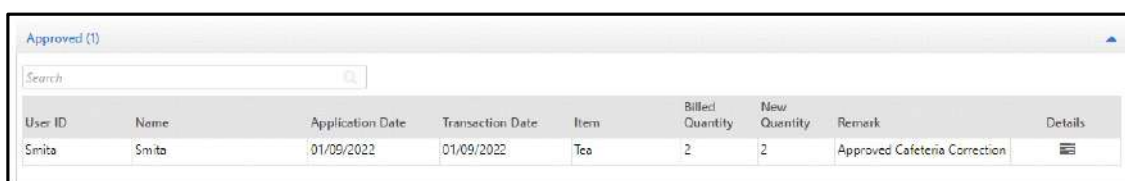


User	Smita	Smita
Transaction Date	01/09/2022	
POS Device	97	ARGO FACE-Device
Item	1	Tea
Price	10.00	
Discount	0	
User's Discount Level	0	
Billed Quantity	2	
Amount Payable	20	
Correction Application Date	01/09/2022	
New Quantity	2	
Payable	20	
Reason	Applied Cafeteria Correction	

Then click on **Save** button to save the authorization.

## Approved Applications

Click the **Approved** collapsible panel to view the approved applications and their details.



User ID	Name	Application Date	Transaction Date	Item	Billed Quantity	New Quantity	Remark	Details
Smita	Smita	01/09/2022	01/09/2022	Tea	2	2	Approved Cafeteria Correction	

Click **Details**  of view the details.

## Rejected Applications

Click the **Rejected** collapsible panel to view the rejected applications and their details.

Rejected (1)								
Search <input type="text"/>								
User ID	Name	Application Date	Transaction Date	Item	Billed Quantity	New Quantity	Remark	Details
Smita	Smita	01/09/2022	31/08/2022	Poha	2	2	Rejected Cafeteria Correction	

Click **Details**  of view the details.

# Manual Correction

Manual Correction page allows Cafeteria user to modify existing transactions as well as add new transactions.

The Correction can be made by:

- System Account User
- On Behalf System Account User
- Using the ESS Self Service Module (For more details refer COSEC Employee Self Service User Manual)

COSEC Web enables all System Account users with appropriate page rights to make Manual Correction using the Cafeteria module. All applications made by the System Account user are pre-approved by default.

COSEC Web also enables all On Behalf System Account User with appropriate page rights to make Manual Correction using the Cafeteria module. All applications made by the On Behalf System Account User are pre-approved by default. For creating and assigning the roles and rights to the On Behalf System Account User. Refer to [“On Behalf System Account User”](#).

For doing Manual Correction, go to **Cafeteria Management > Transaction Management > Manual Correction** and the following page appears as shown below:

The screenshot shows the 'Manual Correction' page. On the left, there are form fields for 'User' (with a dropdown), 'Transaction Date-Time' (with a calendar icon), 'POS Device' (ID and Name), 'Menu' (ID and Name), 'Item' (ID and Name), 'Application Date', 'Transaction Value' (Quantity and Payable), 'Correction' (New Quantity, Payable, Reason, and Application Status), and a 'Remark' field. On the right, there is a table with the following columns: Transaction Date-Time, Item, Quantity, New Quantity, Application Date, and Status. The table contains one entry: Transaction Date-Time: 15/11/2021 12:00:00, Item: Puff, Quantity: 10, New Quantity: 10, Application Date: 15/11/2021, Status: (green checkmark icon).

The page displays configurations on the left hand side and to the right is a grid containing a list of all user's device-based cafeteria transactions as well as transaction correction applications in pending, approved and rejected state.

**User:** Select a user from the picklist for whom the manual correction is to be made. The transactions of the user will be listed on the right grid.

Select the transaction from the right grid for which correction is to be done.

**Manual Correction**

User: 12 Geeta\_Prepaid user

Transaction Date-Time: 05/05/2017 11:35

POS Device: 7 INGT-34

Menu: 2 Breakfast

Item: 4 Samosa

Application Date: 05/05/2017

Transaction Value

Quantity: 1

Payable: 10.00

Correction

New Quantity: 2

Payable: 20.00

Reason: punch was not detected second time

Application Status:

Remark:

Transaction Date-Time	Item	Quantity	New Quantity	Application Date	Status
05/05/2017 11:35:11	Samosa	1			
05/05/2017 11:27:54	Wafers	1			
05/05/2017 11:25:14	Wafers	1			
05/05/2017 11:23:40	Wafers	1			
05/05/2017 11:23:30	Samosa	1			
05/05/2017 11:23:30	Wafers	1			
05/05/2017 11:23:12	Wafers	1			

**New Quantity:** Enter the value for updating the quantity of item.

**Reason:** Specify the reason for correction application.

Then Click **Save** button to save the manual correction.

**Manual Correction**

User: 12 Geeta\_Prepaid user

Transaction Date-Time: HH:MM

POS Device: ID Name

Menu: ID Name

Item: ID Name

Application Date:

Transaction Value

Quantity:

Payable:

Correction

New Quantity:

Payable:

Reason:

Application Status:

Remark:

Transaction Date-Time	Item	Quantity	New Quantity	Application Date	Status
05/05/2017 11:35:11	Samosa	1	2	05/05/2017	✓
05/05/2017 11:27:54	Wafers	1			
05/05/2017 11:25:14	Wafers	1			
05/05/2017 11:23:40	Wafers	1			
05/05/2017 11:23:30	Samosa	1			
05/05/2017 11:23:30	Wafers	1			
05/05/2017 11:23:12	Wafers	1			

The application will be saved and Status will be shown as above. The application will be approved if correction is done from System Administrator login.

To add a new transaction, select the user and click **New** button.

**Transaction Date-Time:** Select the date and enter the time on which transaction is to be entered.

**POS Device:** Select the device using the picklist. The picklist contains devices created from the Devices module and enabled for the Cafeteria application.

**Menu:** Select the menu from the picklist. The picklist contains menus created from the Menus tab.

**Item:** Select the item from the picklist. The picklist contains items created from the Items tab.

**Application Date:** It displays the date on which correction application is being done.

#### Transaction Value

- **Quantity:** It displays the current quantity.
- **Payable:** It displays the current payable amount calculated at the time of transaction.

#### Correction

It displays the fields to be corrected.

- **New Quantity:** Enter the new quantity value for the item. When 'Pre-order Based Restriction' is enabled and Deny Transaction is selected in cafeteria usage policy then entered new quantity should not exceed the pre-ordered quantity of selected item for selected menu.
- **Payable:** It displays the payable amount as per the new quantity specified.
- **Reason:** You can enter the reason for correction.
- **Application Status:** It displays the status of application.
- **Remark:** It displays the remark provided from the Transaction Correction Details window of the Correction Approval page.

Click on **Save** button to save the transaction to the grid. The transaction correction application is then sent for transaction approval.



Manual Correction
★ ? ✕

← + ↻ 📄 ✕

Search

🔍

User\*

11

Namrata\_Postpaid user

⋮

Transaction Date-Time\*

05/05/2017

📅

13:30

POS Device\*

7

NGT-34

⋮

Menu\*

2

Breakfast

⋮

Item\*

3

Wafers

⋮

Application Date:

05/05/2017

Transaction Value

Quantity

Payable

Correction

New Quantity\*

2

Payable

10.00

Reason

Punches were not detected

Application Status

Approved

Remark

Transaction

Date-Time

Item

Quantity

New Quantity

Application Date

Status

05/05/2017

13:30:00

Wafers

2

05/05/2017

✔

The application will be approved if correction is done from System Administrator login.

For other users, the Manual Correction Application can be approved by the Reporting In-charge of the user or the administrator. To know more about Correction Approval click on ["Correction Approval"](#).

# Transaction Summary

Transaction Summary helps the admin to track/analyze all the transactions in cafeteria management module.



*The Monthly process must be run at the end of the month to generate proper cafeteria transactions.*

For viewing Transaction Summary, go to **Cafeteria Management > Transaction Management > Transaction Summary** and the following page appears as shown below:

The screenshot shows a web application window titled "Transaction Summary". At the top, there are navigation icons (back, forward, search) and window controls (star, question mark, close). Below these, there are filters: "Date" with two date pickers (04/05/2017 and 05/05/2017), "Filter User" with a dropdown menu set to "All", and "Group/User" with a search box and a list icon. A "View" button is centered below the filters. At the bottom, there is a list of transaction categories, each with a count in parentheses and a dropdown arrow: "Purchase (0)", "Payment (0)", "Recharge (0)", "Reset (0)", and "Manual Credit/Debit (0)".

**Date:** Select the date range by using the Calendar button for which the transaction is to be viewed.

**Filter User:** Select the user based on Enterprise groups or Individual user or All.

**Group/User:** If you select the desired enterprise group—Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1/2/3.

For each enterprise group — Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1/2/3, click the corresponding picklist to select the desired option/s.

If you select Individual, then click the **User** picklist. Select the desired User/Worker/Visitor.

Click on **View** to view the transactions divided into **Purchase, Payments, Recharge, Reset** and **Manual Credit/Debit**.

The Purchase, Recharge and Manual Credit/ Debit transactions are shown below:

Transaction Summary

Date \*

04/05/2017

05/05/2017

Filter User

All

Group/User

ID

Name

View

Purchase (9)

Search

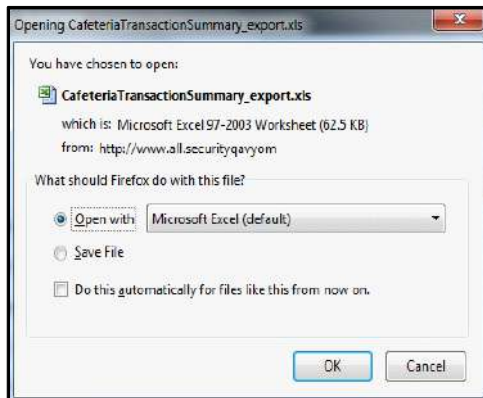
User ID	Name	Transaction Date-Time	POS Device	Item	Unit Price	Discount	Quantity	Payable
13	Dinesh_Pre server based	05/05/2017 13:45	NGT-34	Rice	10	0	1	10.00
11	Namrata_Postpaid user	05/05/2017 13:30	NGT-34	Wafers	5	0	2	10.00
12	Geeta_Prepaid user	05/05/2017 11:35	NGT-34	Samosa	20	10	2	20.00
12	Geeta_Prepaid user	05/05/2017 11:27	NGT-34	Wafers	0	0	1	
12	Geeta_Prepaid user	05/05/2017 11:25	NGT-34	Wafers	0	0	1	
12	Geeta_Prepaid user	05/05/2017 11:23	NGT-34	Wafers	0	0	1	
12	Geeta_Prepaid user	05/05/2017 11:23	NGT-34	Wafers	0	0	1	
12	Geeta_Prepaid user	05/05/2017 11:23	NGT-34	Samosa	0	0	1	
12	Geeta_Prepaid user	05/05/2017 11:23	NGT-34	Wafers	0	0	1	

Purchase (9)					
Payment (0)					
Recharge(3)					
Search					
User ID ▲	Name	Transaction Date-Time	Opening Balance	Recharge Amount	Closing Balance
13	Dinesh_Pre server based	05/05/2017 11:41	0	50	50
12	Geeta_Prepaid user	05/05/2017 11:22	0	10	10
12	Geeta_Prepaid user	05/05/2017 10:12	0	50	50
Reset (0)					
Manual Credit/Debit (2)					

Manual Credit/Debit (2)							
Search							
User ID ▲	Name	Transaction Date-Time	Adjustment Type	Opening Balance	Adjustment Amount	Closing Balance	Remark
11	Namrata_Postpaid user	05/05/2017 15:48	Debit	0	10	10	
13	Dinesh_Pre server based	05/05/2017 14:45	Debit	50	10	40	

## Export

Click on **Export** button. You can open or Save the exported file.



The Cafeteria Transaction Summary will be exported as shown below.

	A	B	C	D	E	F	G	H	I	J	K	L	M	N
	User ID	Name	Transaction Date-Time	POS Device ID	POS Device Name	Event No	Roll Over Count	Flash Count	Menu ID	Item ID	Item Name	Unit Price	Discount	Quantity
1	PreServer	Prepaid server based	2017/08/17 17:57:92		NGT Direct Door-Device-92 IP78	135	0	1	2	9	test-09	20	0	1
2	caf	caf inactive postpaid user	2017/08/17 17:31:92		NGT Direct Door-Device-92 IP78	127	0	1	2	9	test-09	20	0	3
3	post1	postpaid 1	2017/08/17 17:30:92		NGT Direct Door-Device-92 IP78	124	0	1	2	9	test-09	20	0	3
4	postpaid	postpaid	2017/08/17 17:03:92		NGT Direct Door-Device-92 IP78	118	0	1	2	8	8-item	10.63	0	1
5	postpaid	postpaid	2017/08/17 17:03:92		NGT Direct Door-Device-92 IP78	119	0	1	2	9	test-09	20	0	1
6	postpaid	postpaid	2017/08/17 17:03:92		NGT Direct Door-Device-92 IP78	120	0	1	2	10	item 10	10	0	1
7	postpaid	postpaid	2017/08/17 16:04:92		NGT Direct Door-Device-92 IP78	114	0	1	2	8	8-item	10.63	0	1
8	postpaid	postpaid	2017/08/17 16:04:92		NGT Direct Door-Device-92 IP78	115	0	1	2	10	item 10	10	0	1
9	postpaid	postpaid	2017/08/17 16:01:92		NGT Direct Door-Device-92 IP78	107	0	1	2	2	item2	12.52	0	1
10	postpaid	postpaid	2017/08/17 16:01:92		NGT Direct Door-Device-92 IP78	108	0	1	2	7	drfgdfg	786	0	0
11	postpaid	postpaid	2017/08/17 16:01:92		NGT Direct Door-Device-92 IP78	109	0	1	2	8	8-item	10.63	0	1
12	postpaid	postpaid	2017/08/17 16:01:92		NGT Direct Door-Device-92 IP78	110	0	1	2	9	test-09	20	0	1
13	postpaid	postpaid	2017/08/17 16:01:92		NGT Direct Door-Device-92 IP78	111	0	1	2	10	item 10	10	0	1
14	postpaid	postpaid	2017/08/17 16:00:92		NGT Direct Door-Device-92 IP78	104	0	1	2	2	item2	12.52	0	2
15	postpaid	postpaid	2017/08/17 16:00:92		NGT Direct Door-Device-92 IP78	105	0	1	2	8	8-item	10.63	0	1
16	postpaid	postpaid	2017/08/17 15:27:92		NGT Direct Door-Device-92 IP78	102	0	1	2	8	8-item	10.63	0	2
17	postpaid	postpaid	2017/08/17 15:09:92		NGT Direct Door-Device-92 IP78	99	0	1	2	2	item2	12.52	0	1
18	postpaid	postpaid	2017/08/17 15:09:92		NGT Direct Door-Device-92 IP78	100	0	1	2	9	test-09	20	0	1
19	postpaid	postpaid	2017/08/17 14:20:92		NGT Direct Door-Device-92 IP78	97	0	1	2	9	test-09	20	0	1
20	ca	caf user server	2017/08/17 12:36:22		ngt test fake				2	3	item3	15	0	2
21	post1	postpaid 1	2017/08/17 12:00:22		ngt test fake				1	3	item3	15	0	2
22	post1	postpaid 1	2017/08/17 11:17:92		NGT Direct Door-Device-92 IP78	89	0	1	2	8	8-item	10.63	0	2
23	post1	postpaid 1	2017/08/17 11:17:92		NGT Direct Door-Device-92 IP78	90	0	1	2	9	test-09	20	0	0
24	post1	postpaid 1	2017/08/16 18:03:92		NGT Direct Door-Device-92 IP78	87	0	1	2	9	test-09	20	0	0

## Import

Click on **Import** button for importing the Cafeteria transaction summary

Import Transaction Summary

Import Data For

Purchase

File Format

XLS

Import File

Browse...

No file selected.

Upload

Preview Data

Process

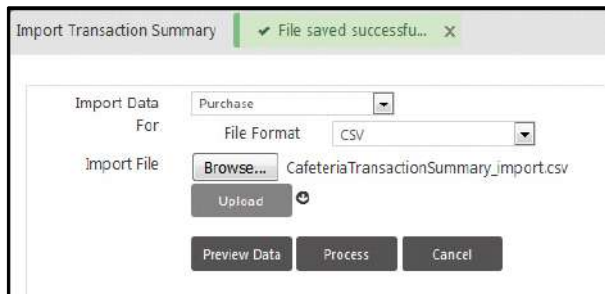
Cancel

**Import Data For:** The Data can be imported for Purchase, Payment, Recharge, Reset and Manual Credit/Debit. You can download the sample import file and enter the data for Cafeteria. Then the updated file can be imported here.

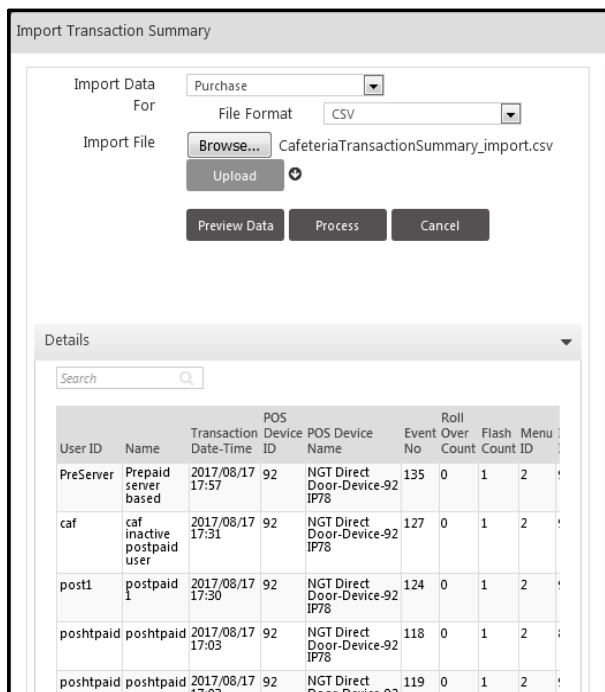
**File Format** - Select the format for the file to be imported. The options available are XLS or CSV.

**Import File** - Browse the path of the file and select the file from which the data is to be imported.

Click **Upload** button to save the file.



The **Preview Data** button enables the administrator to view the data in the respective worksheets to confirm that the data is in order prior to giving the process command.



User ID	Name	Transaction Date-Time	POS Device ID	POS Device Name	Event No	Roll Over Count	Flash Count	Menu ID
PreServer	Prepaid server based	2017/08/17 17:57	92	NGT Direct Door-Device-92 IP78	135	0	1	2
caf	caf inactive postpaid user	2017/08/17 17:31	92	NGT Direct Door-Device-92 IP78	127	0	1	2
post1	postpaid	2017/08/17 17:30	92	NGT Direct Door-Device-92 IP78	124	0	1	2
poshtpaid	poshtpaid	2017/08/17 17:03	92	NGT Direct Door-Device-92 IP78	118	0	1	2
poshtpaid	poshtpaid	2017/08/17 17:03	92	NGT Direct Door-Device-92	119	0	1	2

Now you can click on **Process** to process the import of data.



*The value specified in Name, Transaction Date-Time, Opening Balance & Closing Balance fields will be ignored on import. Hence the presence of these fields in imported sheet is optional.*

# Process-Monthly Payments

This option enables the administrator to manually run certain processes required for reconciliation of the postpaid user accounts. The following processes will run on selecting this option.

- Updation of users' account details by subtracting the users' allowed usage amount or reset to zero (as set from the Payment page) from the total due amount and recording transactions for the payments processed along with their details.
- If a user is blocked and if after the payment the user's new balance is less than the user's max usage limit, then the user should be unblocked and the change is to be updated to all the canteen devices.
- Perform the same process as that of automatic reset function.

To run the monthly payment process, go to **Cafeteria Management > Process > Monthly Payments** and the following page appears as shown below.

The screenshot shows a web application window titled "Process Monthly Payments". At the top, there is a navigation bar with a back arrow, a star icon, a question mark icon, and a close icon. Below the navigation bar, the "Attendance Period" is set to "February" and "2017". The "Select Users" section includes a "Select Users" dropdown menu set to "User Wise", a "User" label with a red asterisk, and input fields for "ID" and "Name". A search bar with the placeholder "Search" and a magnifying glass icon is also present. Below the search bar, a table displays user information:

User ID ▲	Name	
07	Aditi	

At the bottom of the form, there is a "Process" button.

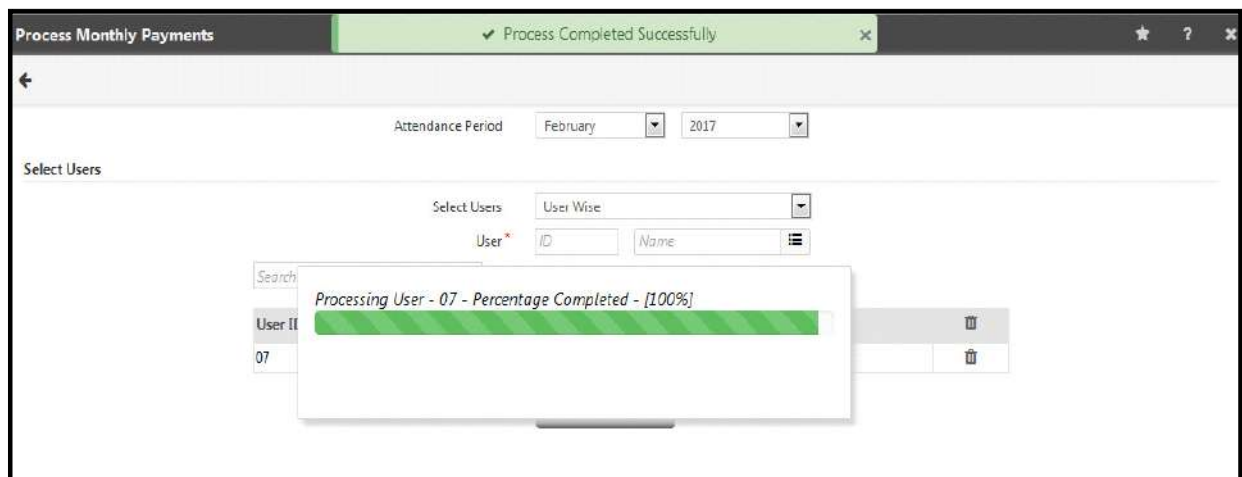
**Attendance Period:** Select the month and the year for which the monthly payment process is to be run.

The administrator can now select the group of users whose monthly payment is to be processed.

**Select Users:** The Multiple users can be selected based on the following filter options:

- **User Wise:** Enables administrator to select users from the User Picklist window.
- **Group Wise:** Enables the administrator to select all users belonging to a particular group.
- **All:** Enables administrator to select all active users in the database.

Once the users have been selected, click on the **Process** button to start the process as shown on the screen below.



*Cafeteria Monthly Payment Process can also be automated using the Task Scheduler.*

*Go to **Admin > System Utilities > Task Scheduler** and select "Cafeteria Payment Process" to automate the Monthly Payment.*

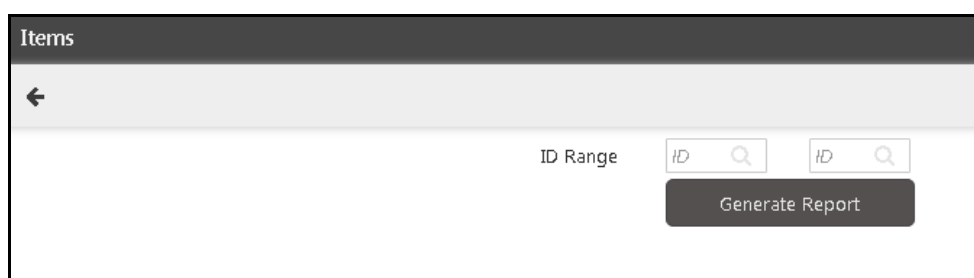
# Cafeteria Reports

These reports can be obtained using the **Reports** section under the **Cafeteria Management** add-on module. The Reports can be categorized as follows:

- “Item”
- “Menu”
- “Menu Schedule”
- “User Reports”
- “Cafeteria Reports”

## Item

This report displays the price and discount details of the selected items.

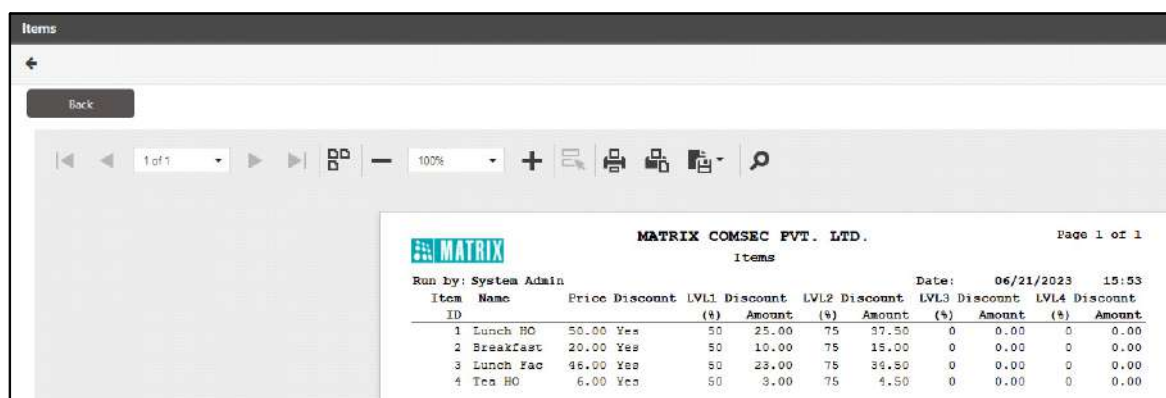


Configure the following parameter:

- **Range ID:** Specify the required ID Range of the items.

Click **Generate Report**.

Sample Report



MATRIX COMSEC PVT. LTD. Items										
Page 1 of 1										
Run by: System Admin Date: 06/21/2023 15:53										
Item ID	Name	Price	Discount	LVL1 Discount (%)	LVL1 Discount Amount	LVL2 Discount (%)	LVL2 Discount Amount	LVL3 Discount (%)	LVL3 Discount Amount	LVL4 Discount Amount
1	Lunch HQ	50.00	Yes	50	25.00	75	37.50	0	0.00	0 0.00
2	Breakfast	20.00	Yes	50	10.00	75	15.00	0	0.00	0 0.00
3	Lunch Fac	45.00	Yes	50	23.00	75	34.50	0	0.00	0 0.00
4	Tea HQ	6.00	Yes	50	3.00	75	4.50	0	0.00	0 0.00





Configure the following parameters:

### Door Selection

- **Select Doors:** Select the desired door option — **All** or **Door-Wise**.
  - If you select **All**, the report will be generated for all the doors.
  - If you select **Door-Wise**,
    - Click the **Door** picklist. The **Picklist For Door** pop-up appears.

Picklist For Door

Total Selected: 0 Records

Search  Show Selected

<input type="checkbox"/>	ID ▲	Name
<input type="checkbox"/>	1	NGT Direct Door-Device-1
<input type="checkbox"/>	2	Door V3-Device-2
<input type="checkbox"/>	3	PVR Door-Device-3
<input type="checkbox"/>	4	Door FMX-Device-4
<input type="checkbox"/>	5	Argo_Amit
<input type="checkbox"/>	7	ARGO-Device-7
<input type="checkbox"/>	8	Vega Controller-Device-8
<input type="checkbox"/>	9	Vega Controller-Device-9
<input type="checkbox"/>	10	Vega Controller-Device-10
<input type="checkbox"/>	11	Door V4-65

1 - 10 of 23 records

« < 1 2 3 > »

OK Cancel

- Select the desired check boxes of the desired doors. Click **OK**
- The selected doors appear in the grid.

Select Doors: Door-Wise

Door ID: Name:

Search

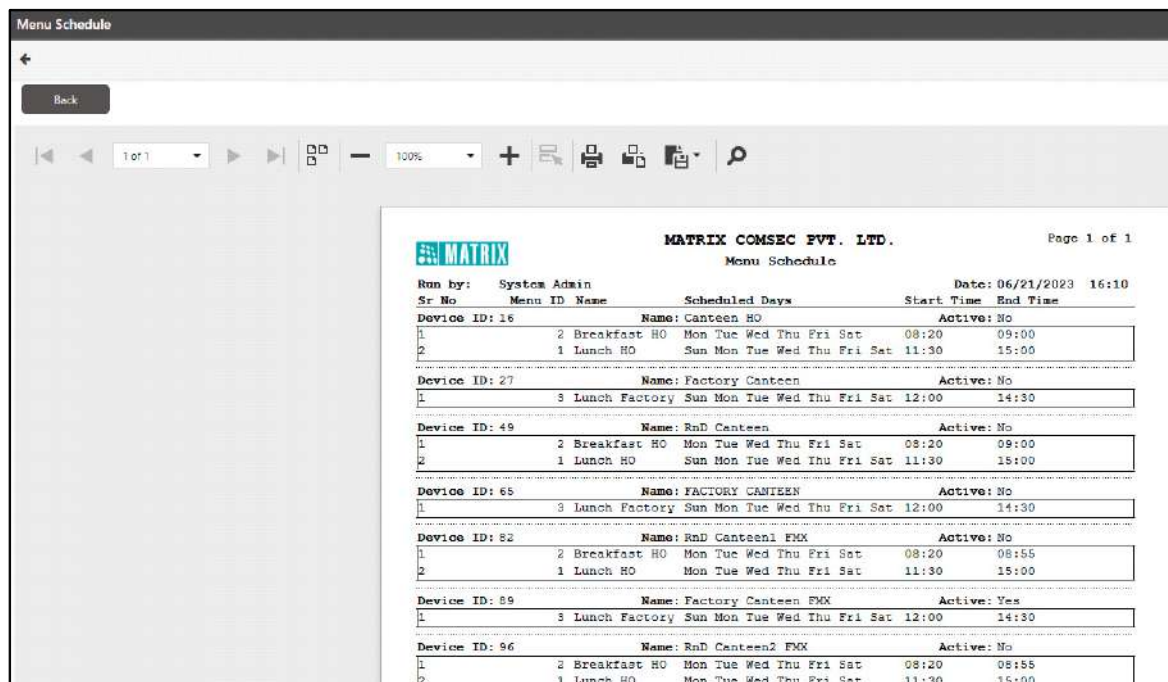
ID	Name	Group ▲	
800	VEGA_DD	Door	
1800	ARGO_DD	Door	

Generate Report

- You can also delete the desired door. To do so, click **Delete** of the respective door.

Click **Generate Report**.

Sample Report

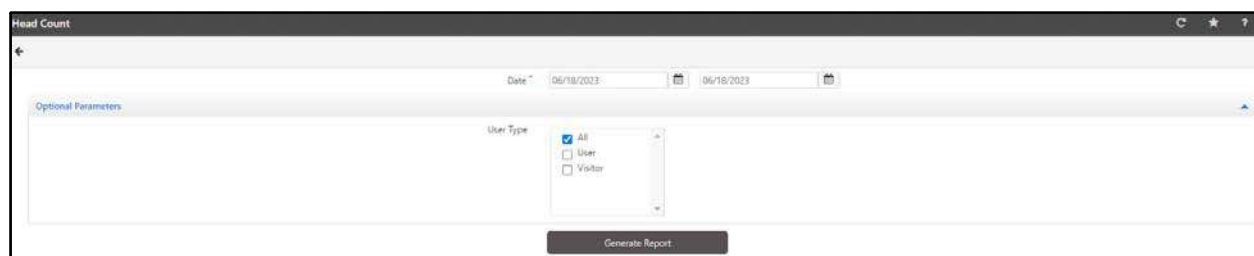


Sr No	Menu ID	Name	Scheduled Days	Start Time	End Time
<b>Device ID: 16</b> <b>Name: Canteen HO</b> <b>Active: No</b>					
1	2	Breakfast HO	Mon Tue Wed Thu Fri Sat	08:20	09:00
2	1	Lunch HO	Sun Mon Tue Wed Thu Fri Sat	11:30	15:00
<b>Device ID: 27</b> <b>Name: Factory Canteen</b> <b>Active: No</b>					
1	3	Lunch Factory	Sun Mon Tue Wed Thu Fri Sat	12:00	14:30
<b>Device ID: 49</b> <b>Name: RnD Canteen</b> <b>Active: No</b>					
1	2	Breakfast HO	Mon Tue Wed Thu Fri Sat	08:20	09:00
2	1	Lunch HO	Sun Mon Tue Wed Thu Fri Sat	11:30	15:00
<b>Device ID: 65</b> <b>Name: FACTORY Canteen</b> <b>Active: No</b>					
1	3	Lunch Factory	Sun Mon Tue Wed Thu Fri Sat	12:00	14:30
<b>Device ID: 82</b> <b>Name: RnD Canteen1 FMX</b> <b>Active: No</b>					
1	2	Breakfast HO	Mon Tue Wed Thu Fri Sat	08:20	08:55
2	1	Lunch HO	Mon Tue Wed Thu Fri Sat	11:30	15:00
<b>Device ID: 89</b> <b>Name: Factory Canteen FMX</b> <b>Active: Yes</b>					
1	3	Lunch Factory	Sun Mon Tue Wed Thu Fri Sat	12:00	14:30
<b>Device ID: 96</b> <b>Name: RnD Canteen2 FMX</b> <b>Active: No</b>					
1	2	Breakfast HO	Mon Tue Wed Thu Fri Sat	08:20	08:55
2	1	Lunch HO	Mon Tue Wed Thu Fri Sat	11:30	15:00

## User Reports

### Head Count

This report displays the details of the total number of users using the Cafeteria service on a given day.



Configure the following parameters:

- **Date:** Select the **To** and **From** date for which the report is to be generated.

#### Optional Parameters

- **User Type:** Select the desired check boxes — **All**, **User** or **Visitor**.

Click **Generate Report**.

## Sample Report

Rtn by: System Admin	Sr No.	Menu ID	Name	Device	Date: 06/21/2023	16:12	Head Count
<b>01/01/2013</b>							
	1	1	Lunch HO	Canteen HO			113
	2	2	Breakfast HO	Canteen HO			10
<b>01/02/2013</b>							
	1	1	Lunch HO	Canteen HO			126
	2	2	Breakfast HO	Canteen HO			15
	3	3	Lunch Factory	Factory Canteen			40
<b>01/03/2013</b>							
	1	2	Breakfast HO	Canteen HO			18
	2	3	Lunch Factory	Factory Canteen			41
	3	1	Lunch HO	Canteen HO			120
<b>01/04/2013</b>							
	1	2	Breakfast HO	Canteen HO			20
	2	3	Lunch Factory	Factory Canteen			48
	3	1	Lunch HO	Canteen HO			127
<b>01/05/2013</b>							
	1	2	Breakfast HO	Canteen HO			16
	2	3	Lunch Factory	Factory Canteen			44
	3	1	Lunch HO	Canteen HO			110

## User Transactions

This report displays the details of user-wise or device-wise list of transactions for the selected date range.

Date: 06/18/2023

Optional Parameters

Group By: User

Organization Name in Header As Per: User Selection

User Selection

Select Users: User Wise

User ID: Name

Generate Report For: All Users

Generate Report

Configure the following parameters:

- **Date:** Select the **To** and **From** date for which the report is to be generated.

### Optional Parameters

- **Group By:** Select the desired option — **User** or **Device**.
- **Organization Name in Header As Per:** Select the desired option — **User Selection** or **Customized Selection**.
- If you select **Customized Selection**, click **Customize Report Header**.

You can select the desired option from the drop-down list or can also add a new header as per your choice.

## User Selection

- **Select User:** Select the desired option — **User Wise**, **Group Wise** or **All**.
- If you select **User Wise**,
  - Click the **User** picklist. The **Picklist For Users/Visitor Profiles** pop-up appears.

Picklist For Users/Visitor Profiles

Total Selected: 0 Records

Search  [Show Selected](#)

<input type="checkbox"/>	User ID ▲	Name
<input type="checkbox"/>	1	SALIM ANSARI
<input type="checkbox"/>	10	RAJENDRA GOSWAMI
<input type="checkbox"/>	1001	ANKITKUMAR SOHLIYA
<input type="checkbox"/>	1002	MEGHA H SHUKLA
<input type="checkbox"/>	1003	UMESH M TALANPURI
<input type="checkbox"/>	1004	DARSHAK B PATEL
<input type="checkbox"/>	1007	DHAVAL I PATEL
<input type="checkbox"/>	1008	MAYANK K KORAT
<input type="checkbox"/>	1009	DIPTI K RATHWA
<input type="checkbox"/>	1010	RAHUL S SHAH

1 - 10 of 2489 records

« < 1 2 3 ... 249 > »

OK Cancel

- Select the desired check boxes of the desired profiles. Click **OK**.
- The selected profiles appears in the grid.

Select Users

User Wise

User

Search

User ID ▲	Name	
1	SALIM ANSARI	
10	RAJENDRA GOSWAMI	
1001	ANKITKUMAR SOHLIYA	
1002	MEGHA H SHUKLA	

- You can also delete the desired profile. To do so, click **Delete** of the respective profile.

- If you select **Group Wise** option,
- Select the desired enterprise group — Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1(Association Maps), Custom Group /2/3.

For each enterprise group — Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1/2/3, click the corresponding picklist to select the desired option/s.

The selected groups appear in the grid.

Select Users

Group Wise

Select Group

Organization


Organization\*

ID

Name

Search

ID	Name	Group	
1	MATRIX COMSEC PVT. LTD.	Organization	
5	TECH SERVICES	Organization	
6	CONSULTANT	Organization	
7	CANTEEN	Organization	
8	APPRENTICE	Organization	

- You can also delete particular group. To do so, click **Delete**  of the respective group.
- If you select **All** option, then all the profiles will be selected.
- **Generate Report For:** Select the desired option — **All Users**, **Active Users** or **Inactive Users**.

Click **Generate Report**.

Sample Report

User Transactions

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100%

MATRIX COMSEC PVT. LTD.						Page 1 of 257
User-Wise Transactions From 01/01/2000 To 06/21/2023						
Run By:	System Admin	Date:	06/21/2023 16:30	Previous Transaction Balance	Transaction Amount	
1-SALIM ANSARI						
1	01/01/2013 00:05	System	0.00	0.00	Payment	
2	03/01/2013 00:05	System	0.00	0.00	Payment	
3	04/01/2013 00:05	System	0.00	0.00	Payment	
4	05/01/2013 00:05	System	0.00	0.00	Payment	
5	06/01/2013 00:05	System	0.00	0.00	Payment	
6	07/01/2013 00:05	System	0.00	0.00	Payment	
7	08/01/2013 00:05	System	0.00	0.00	Payment	
8	09/01/2013 00:05	System	0.00	0.00	Payment	
9	10/01/2013 00:05	System	0.00	0.00	Payment	
10	11/01/2013 00:05	System	0.00	0.00	Payment	
11	12/01/2013 00:05	System	0.00	0.00	Payment	
12	01/01/2014 00:05	System	0.00	0.00	Payment	
13	02/01/2014 00:05	System	0.00	0.00	Payment	
14	03/01/2014 00:05	System	0.00	0.00	Payment	
15	04/01/2014 00:05	System	0.00	0.00	Payment	

## Users Account Details

This report displays a detailed list of user's account details, who have been assigned the Cafeteria facility.

The screenshot shows a web application window titled 'Users Account Details'. It contains two main sections: 'Optional Parameters' and 'User Selection'. In the 'Optional Parameters' section, there are two dropdown menus: 'Group By' (set to 'Organization') and 'Organization Name in Header As Per' (set to 'User Selection'). The 'User Selection' section has a 'Select Users' dropdown (set to 'User Wise'), a 'User' field with 'ID' and 'Name' sub-fields, and a 'Generate Report For' dropdown (set to 'All Users'). A 'Generate Report' button is located at the bottom right of the form.

Configure the following parameters:

### Optional Parameters

- **Group By:** Select the desired enterprise group from the drop-down list— Organization, Branch, Department, Section, Category, Grade, Designation, Custom group 1 (Association Maps), Custom Group 2/3.
- **Organization Name in Header As Per:** Select the desired option — **User Selection** or **Customized Selection**.
  - If you select **Customized Selection**, click **Customize Report Header**.

You can select the desired option from the drop-down list or can also add a new header as per your choice.

### User Selection

- **Select User:** Select the desired option — **User Wise**, **Group Wise** or **All**.
  - If you select **User Wise**,

- Click the **User** picklist. The **Picklist for Users/Visitor Profiles** pop-up appears.

Picklist For Users/Visitor Profiles

Total Selected: 0 Records

Search  Show Selected

<input type="checkbox"/>	User ID ▲	Name
<input type="checkbox"/>	1	SALIM ANSARI
<input type="checkbox"/>	10	RAJENDRA GOSWAMI
<input type="checkbox"/>	1001	ANKITKUMAR SOHLIYA
<input type="checkbox"/>	1002	MEGHA H SHUKLA
<input type="checkbox"/>	1003	UMESH M TALANPURI
<input type="checkbox"/>	1004	DARSHAK B PATEL
<input type="checkbox"/>	1007	DHAVAL I PATEL
<input type="checkbox"/>	1008	MAYANK K KORAT
<input type="checkbox"/>	1009	DIPTI K RATHWA
<input type="checkbox"/>	1010	RAHUL S SHAH

1 - 10 of 2489 records

« < 1 2 3 ... 249 > »

OK Cancel

- Select the desired check boxes of the desired profiles. Click **OK**.
- The selected profiles appear in the grid.

Select Users User Wise

User\* ID Name

Search

User ID ▲	Name	
1	SALIM ANSARI	
10	RAJENDRA GOSWAMI	
1001	ANKITKUMAR SOHLIYA	
1002	MEGHA H SHUKLA	

- You can also delete the desired profile. To do so, click **Delete** of the respective profile.
- If you select **Group Wise** option,
- Select the desired enterprise group —Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1/2/3.

For each enterprise group — Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1(Association Maps) 2/3, click the corresponding picklist to select the desired option/s.



The selected groups appear in the grid.

Select Users

Group Wise

Select Group

Organization


Organization\*

ID

Name

Search

ID	Name	Group	
1	MATRIX COMSEC PVT. LTD.	Organization	
5	TECH SERVICES	Organization	
6	CONSULTANT	Organization	
7	CANTEEN	Organization	
8	APPRENTICE	Organization	

- You can also delete particular group. To do so, click **Delete**  of the respective group.
- If you select **All** option, then all the profiles will be selected.
- Generate Report For:** Select the desired option — **All Users**, **Active Users** or **Inactive Users**.

Click **Generate Report**.

Sample Report

Users Account Details

Back

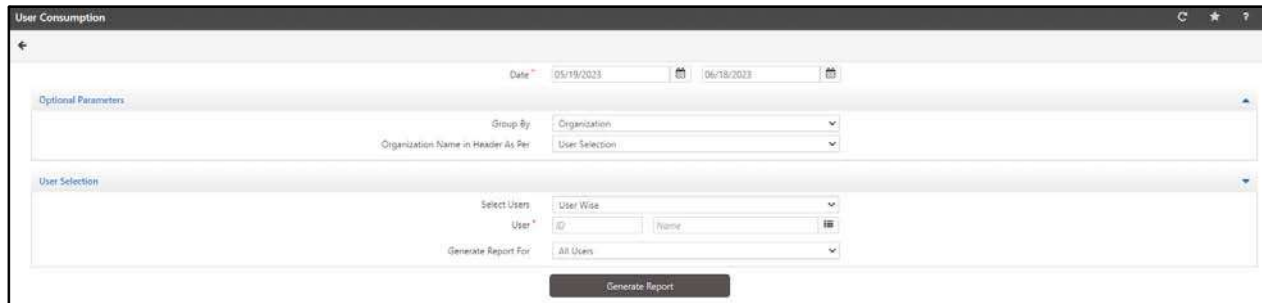
1 of 69

100%

MATRIX COMSEC PVT. LTD.				Page 1 of 69			
Organization-Wise Users Cafeteria Account Details				Date: 06/21/2023 16:07			
Sr No	User ID	Name	Account Type	Discount Level	Allowed Usage	Max Usage Limit Per Month	Max Usage Limit Per Day
MATRIX COMSEC PVT. LTD.							
1	1	SALIM ANSARI	Postpaid	Level 1	650.0	600.0	0.0
2	10	RAJENDRA GOSWAMI	Postpaid	Level 1	650.0	600.0	0.0
3	1001	ANKITKUMAR SOHLIYA	Postpaid	Level 1	650.0	600.0	0.0
4	1002	MEGHA B SHUKLA	Postpaid	Level 1	650.0	600.0	0.0
5	1003	UMESH M TALANPURI	Postpaid	Level 1	650.0	600.0	0.0
6	1004	DARSHAK B PATEL	Postpaid	Level 1	650.0	600.0	0.0
7	1007	DHAVAL I PATEL	Postpaid	Level 1	650.0	600.0	0.0
8	1008	MAYANK K KORAT	Postpaid	Level 1	650.0	600.0	0.0
9	1009	DIPTI K RATHWA	Postpaid	Level 1	650.0	600.0	0.0
10	1010	RAHUL S SHAM	Postpaid	Level 1	650.0	600.0	0.0
11	1011	PARIKA S PANDEY	Postpaid	Level 1	650.0	600.0	0.0
12	1012	PARIKSHIT DAS	Postpaid	Level 1	650.0	600.0	0.0
13	1015	SUMEDHA A GAWARIKAR	Postpaid	Level 1	650.0	600.0	0.0
14	1016	BALAJI A	Postpaid	Level 1	650.0	600.0	0.0
15	1020	VAISHALI M THAKUR	Postpaid	Level 1	650.0	600.0	0.0

## User Consumption

This report displays the consumption of the selected users during the selected date range.

The screenshot shows a web application window titled "User Consumption". At the top, there is a date range selector with "Date" from "05/19/2023" to "06/18/2023". Below this is a section titled "Optional Parameters" which contains two dropdown menus: "Group By" set to "Organization" and "Organization Name in Header As Per" set to "User Selection". Underneath is a section titled "User Selection" with a "Select Users" dropdown set to "User Wise", and two input fields for "User" (ID and Name). At the bottom, there is a "Generate Report For" dropdown set to "All Users" and a "Generate Report" button.

Configure the following parameters:

- **Date:** Select the **To** and **From** date for which the report is to be generated.

### Optional Parameters

- **Group By:** Select the desired enterprise group from the drop-down list— Organization, Branch, Department, Section, Category, Grade, Designation, Custom group 1 (Association Maps), Custom Group 2/3.
- **Organization Name in Header As Per:** Select the desired option — **User Selection** or **Customized Selection**.
  - If you select **Customized Selection**, click **Customize Report Header**.

You can select the desired option from the drop-down list or can also add a new header as per your choice.

### User Selection

- **Select User:** Select the desired option — **User Wise**, **Group Wise** or **All**.
  - If you select **User Wise**,

- Click the **User** picklist. The **Picklist For Users/Visitor Profiles** pop-up appears.

Picklist For Users/Visitor Profiles

Total Selected: 0 Records

Search  Show Selected

<input type="checkbox"/>	User ID ▲	Name
<input type="checkbox"/>	1	SALIM ANSARI
<input type="checkbox"/>	10	RAJENDRA GOSWAMI
<input type="checkbox"/>	1001	ANKITKUMAR SOHLIYA
<input type="checkbox"/>	1002	MEGHA H SHUKLA
<input type="checkbox"/>	1003	UMESH M TALANPURI
<input type="checkbox"/>	1004	DARSHAK B PATEL
<input type="checkbox"/>	1007	DHAVAL I PATEL
<input type="checkbox"/>	1008	MAYANK K KORAT
<input type="checkbox"/>	1009	DIPTI K RATHWA
<input type="checkbox"/>	1010	RAHUL S SHAH

1 - 10 of 2489 records

« < 1 2 3 ... 249 > »

OK Cancel

- Select the desired check boxes of the desired profiles. Click **OK**.
- The selected profiles appear in the grid.

Select Users User Wise

User \* ID Name

Search

User ID ▲	Name	
1	SALIM ANSARI	
10	RAJENDRA GOSWAMI	
1001	ANKITKUMAR SOHLIYA	
1002	MEGHA H SHUKLA	

- You can also delete the desired profiles. To do so, click **Delete** of the respective profile.
- If you select **Group Wise** option,
  - Select the desired enterprise group — Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1(Association Maps) Custom Group 2/3.

For each enterprise group — Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1/2/3, click the corresponding picklist to select the desired option/s.

The selected groups appears in the grid

Select Users

Group Wise

Select Group

Organization


Organization\*

ID

Name

Search

ID	Name	Group	
1	MATRIX COMSEC PVT. LTD.	Organization	
5	TECH SERVICES	Organization	
6	CONSULTANT	Organization	
7	CANTEEN	Organization	
8	APPRENTICE	Organization	

- You can also delete particular group. To do so, click **Delete**  of the respective group.
- If you select **All** option, then all the profiles will be selected.
- Generate Report For:** Select the desired option — **All Users**, **Active Users** or **Inactive Users**.

Click **Generate Report**.

Sample Report

User Consumption

Back

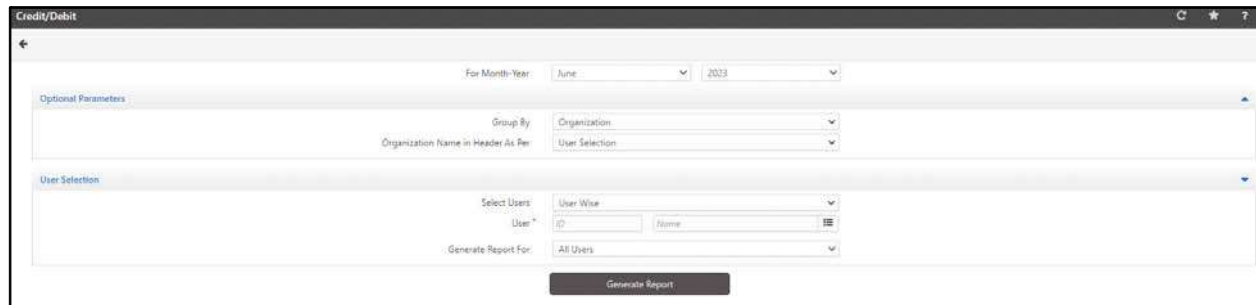
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100%

MATRIX COMSEC PVT. LTD.				Page 1 of 14	
Organization-Wise User Consumption From 12/03/2023 To 11/04/2023				Date: 11/04/2023 16:34	
Run by: System Admin	Sr No	User ID	Name	Total Amount	Total Discount
MATRIX COMSEC PVT. LTD.					
1	1		SALIM ANSARI	0.00	0.00
2	10		RAJENDRA GOSWAMI	0.00	0.00
3	1001		ANKITKUMAR SOHLIYA	0.00	0.00
4	1002		MEGHA H SHUKLA	0.00	0.00
5	1003		UMESH M TALANPURI	0.00	0.00
6	1004		DARSHAK B PATEL	0.00	0.00
7	1007		DHAVAL I PATEL	0.00	0.00
8	1008		MAYANK K KORAT	0.00	0.00
9	1009		DIPTI K RATHWA	0.00	0.00
10	1010		RAHUL S SHAH	0.00	0.00
11	1011		PARIKA S PANDEY	0.00	0.00
12	1012		PARIKSHIT DAS	0.00	0.00
13	1015		SUMEDHA A GAWARIKAR	0.00	0.00
14	1016		BALAJI A	0.00	0.00
15	1020		VAISHALI M THAKER	0.00	0.00

## Credit/Debit

This report displays the monthly credit due for the selected postpaid user.



The screenshot shows a web-based configuration interface for a 'Credit/Debit' report. At the top, there are dropdowns for 'For Month-Year' (set to 'June') and '2023'. Below this is a section titled 'Optional Parameters' which contains two dropdowns: 'Group By' (set to 'Organization') and 'Organization Name in Header As Per' (set to 'User Selection'). Underneath is a section titled 'User Selection' with a 'Select Users' dropdown (set to 'User Wise'), a 'User\*' field with sub-fields for 'ID' and 'Name', and a 'Generate Report For' dropdown (set to 'All Users'). A 'Generate Report' button is located at the bottom center.

Configure the following parameters:

- **For Month-Year:** Select the month and the year for which the report is to be generated.

### Optional Parameters

- **Group By:** Select the desired enterprise group from the drop-down list — Organization, Branch, Department, Section, Category, Grade, Designation, Custom group 1 (Association Maps), Custom Group 2/3.
- **Organization Name in Header As Per:** Select the desired option — **User Selection** or **Customized Selection**.
  - If you select **Customized Selection**, click on **Customize Report Header**.

You can select the desired option from the drop-down list or can also add a new header as per your choice.

### User Selection

- **Select User:** Select the desired option — **User Wise**, **Group Wise** or **All**.
  - If you select **User Wise**,

- Click the **User** picklist. The **Picklist for Users/Visitor Profiles** pop-up appears.

Picklist For Users/Visitor Profiles

Total Selected: 0 Records

Search  Show Selected

<input type="checkbox"/>	User ID ▲	Name
<input type="checkbox"/>	1	SALIM ANSARI
<input type="checkbox"/>	10	RAJENDRA GOSWAMI
<input type="checkbox"/>	1001	ANKITKUMAR SOHLIYA
<input type="checkbox"/>	1002	MEGHA H SHUKLA
<input type="checkbox"/>	1003	UMESH M TALANPURI
<input type="checkbox"/>	1004	DARSHAK B PATEL
<input type="checkbox"/>	1007	DHAVAL I PATEL
<input type="checkbox"/>	1008	MAYANK K KORAT
<input type="checkbox"/>	1009	DIPTI K RATHWA
<input type="checkbox"/>	1010	RAHUL S SHAH

1 - 10 of 2489 records

« < 1 2 3 ... 249 > »

OK Cancel

- Select the desired check boxes of the desired profiles. Click **OK**.
- The selected profiles appear in the grid.

Select Users

User Wise

User\* ID Name

Search

User ID ▲	Name	
1	SALIM ANSARI	
10	RAJENDRA GOSWAMI	
1001	ANKITKUMAR SOHLIYA	
1002	MEGHA H SHUKLA	

- You can also delete the desired profiles. To do so, click **Delete** of the respective profile.
- If you select **Group Wise** option,
- Select the desired enterprise group—Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1/2/3.

For each enterprise group — Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1/2/3, click the corresponding picklist to select the desired option/s.

The selected groups appear in the grid.


Select Users:
Group Wise

Select Group:
Organization

Organization \*
ID
Name

Search

ID	Name	Group	
1	MATRIX COMSEC PVT. LTD.	Organization	
5	TECH SERVICES	Organization	
6	CONSULTANT	Organization	
7	CANTEEN	Organization	
8	APPRENTICE	Organization	

- You can also delete particular group. To do so, click **Delete**  of the respective group.
- If you select **All** option, then all the profiles will be selected.
- Generate Report For:** Select the desired option — **All Users, Active Users or Inactive Users.**

Click on **Generate Report**.

Sample Report

Credit/Debit

Back

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100%

MATRIX

Run by: System Admin  
Sr No User ID Name

MATRIX COMSEC PVT. LTD.

1 1458 MAHANK SHAH

MATRIX COMSEC PVT. LTD.

Organization-Wise Credit/Debit For APRIL-2020

Date: 11/04/2023 16:46  
Payment Outstanding Due

	Carryover Due	Current Due	Payment	Outstanding Due
MATRIX COMSEC PVT. LTD.	-5.00	0.00	0.00	-5.00

## Blocked Users

This report displays the details of all the blocked Cafeteria users in the system.

Organization-1  
Blocked Users

Page 1 of 1

Run by: System Admin

Date: 25/10/2023 04:09

Sr No	User ID	Name	Current Acc Type	Discount Level	Max Usage Limit Per Month	Max Usage Limit Per Day	Blocked Due To	Monthly Usage	Blocked For	Blocked On
1	392	Smita Baria	Postpaid	None	0.00	10.00	Daily		25/10/2023	

## User Pre Order Details

This report displays the details of pre-orders of the selected users.

Date: 06/18/2023 To: 06/18/2023

Optional Parameters

Group By: User then Date

Filter Transaction: All

Organization Name in Header As Per: User Selection

User Selection

Select Users: User Wise

User ID: Name

Generate Report For: All Users

Generate Report

Configure the following parameters:

- **Date:** Select the **To** and **From** date for which the report is to be generated.

### Optional Parameters

- **Group By:** Select the desired option from the drop-down list— **User Then Date** or **Date Then User**.
- **Filter Transaction:** Select the desired option — **All**, **Ordered Greater Than Aailed** or **Aailed Greater Than Ordered**.
- **Organization Name in Header As Per:** Select the desired option — **User Selection** or **Customized Selection**.
  - If you select **Customized Selection**, click on **Customize Report Header**.

You can select the desired option from the drop-down list or can also add a new header according to your choice.



## User Selection

- **Select User:** Select the desired option — **User Wise, Group Wise, or All.**
- If you select **User Wise**,
  - Click the **User** picklist. The **Picklist For Users/Visitor Profiles** pop-up appears.

Picklist For Users/Visitor Profiles

Total Selected: 0 Records

Search  Show Selected

<input type="checkbox"/>	User ID ▲	Name
<input type="checkbox"/>	1	SALIM ANSARI
<input type="checkbox"/>	10	RAJENDRA GOSWAMI
<input type="checkbox"/>	1001	ANKITKUMAR SOHLIYA
<input type="checkbox"/>	1002	MEGHA H SHUKLA
<input type="checkbox"/>	1003	UMESH M TALANPURI
<input type="checkbox"/>	1004	DARSHAK B PATEL
<input type="checkbox"/>	1007	DHAVAL I PATEL
<input type="checkbox"/>	1008	MAYANK K KORAT
<input type="checkbox"/>	1009	DIPTI K RATHWA
<input type="checkbox"/>	1010	RAHUL S SHAH

1 - 10 of 2489 records

« < 1 2 3 ... 249 > »

OK Cancel

- Select the desired check boxes of the desired profiles. Click **OK**.
- The selected profiles appear in the grid.

Select Users User Wise ▼

User\* ID Name

Search

User ID ▲	Name	
1	SALIM ANSARI	
10	RAJENDRA GOSWAMI	
1001	ANKITKUMAR SOHLIYA	
1002	MEGHA H SHUKLA	

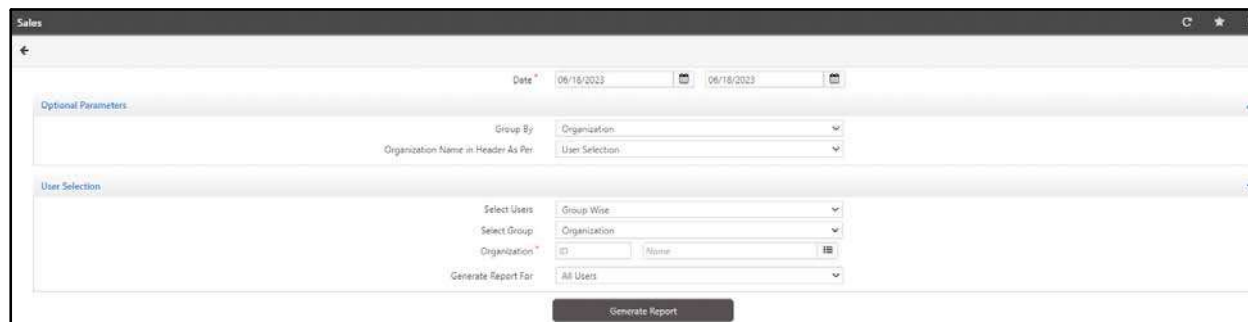
- You can also delete the desired profile. To do so, click **Delete** of the respective profile.
- If you select **Group Wise** option,



## Cafeteria Reports

### Sales

This report displays the total sales per menu on a day in the cafeteria.



Configure the following parameters:

- **Date:** Select the **To** and **From** date for which the report is to be generated.

#### Optional Parameters

- **Group By:** Select the desired enterprise group from the drop-down list — Organization, Branch, Department, Section, Category, Grade, Designation, Custom Group 1(Association Maps), Custom Group 2/3.
- **Organization Name in Header As Per:** Select the desired option — **User Selection** or **Customized Selection**.
- If you select **Customized Selection**, click on **Customize Report Header**.

You can select the desired option from the drop-down list or can also add a new header as per your choice.

#### User Selection

- **Select User:** Select the desired option — **All** or **Group Wise**
- If you select **Group Wise** option,
  - Select the desired enterprise group — Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group 1/2/3.


For each enterprise group — Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group 1/2/3, click the corresponding picklist to select the desired option/s.

The selected groups appear in the grid.

Select Users: Group Wise  
 Select Group: Branch  
 Branch: ID Name

Search

ID	Name	Group
1	ACCOUNTS & FINANCE	Department
2	ADMINISTRATION	Department
5	FIELD EMPLOYEE	Branch

- You can also delete particular group. To do so, click **Delete**  of the respective group.
- If you select **All** option, then all the profiles will be selected.
- Generate Report For:** Select the desired option — **All Users, Active Users** or **Inactive Users**.

Click **Generate Report**.

Sample Report

Sales

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MATRIX COMSEC PVT. LTD.  
 Sales From 11/04/2017 To 11/04/2023

Run by: System Admin  
 Date: 11/04/2017  
 Total Sales Amount: 7412.00  
 Total Discount: 3830.00

Sr No	Item Name	ID	Total Quantity	Unit Price	Total Sales	Discount #			
						Level 1	Level 2	Level 3	Level 4
1	1 Lunch NO	3	40.00	120.00	0.00	90.00	0.00	0.00	0.00
2	1 Lunch NO	153	40.00	6120.00	3040.00	0.00	0.00	0.00	0.00
3	1 Lunch NO	1	40.00	40.00	0.00	0.00	0.00	0.00	0.00
4	2 Breakfast	22	10.00	220.00	110.00	0.00	0.00	0.00	0.00
5	3 Lunch Fac	12	38.00	456.00	0.00	328.00	0.00	0.00	0.00
6	3 Lunch Fac	12	38.00	456.00	342.00	0.00	0.00	0.00	0.00
Total Amount:					7412.00	3512.00	318.00	0.00	0.00

Date: 12/04/2017  
 Total Sales Amount: 9212.00  
 Total Discount: 4693.00

Sr No	Item Name	ID	Total Quantity	Unit Price	Total Sales	Discount #			
						Level 1	Level 2	Level 3	Level 4
1	1 Lunch NO	1	40.00	40.00	0.00	0.00	0.00	0.00	0.00
2	1 Lunch NO	198	40.00	7960.00	3980.00	0.00	0.00	0.00	0.00
3	1 Lunch NO	5	40.00	200.00	0.00	150.00	0.00	0.00	0.00
4	2 Breakfast	29	10.00	290.00	145.00	0.00	0.00	0.00	0.00
5	3 Lunch Fac	13	38.00	494.00	0.00	247.00	0.00	0.00	0.00
6	3 Lunch Fac	4	38.00	152.00	171.00	0.00	0.00	0.00	0.00
Total Amount:					9212.00	4296.00	397.00	0.00	0.00

 For a Cafeteria Item, there will be multiple entries for each discount level (maximum entries as per the discount levels are 5 (Maximum Discount Level: Level 0, Level 1, Level 2, Level 3 and Level 4).

Duplicate entries in the report can be displayed in cases where transactions for an item with and without discount level are encountered, wherein the discount level is applied but the discount amount is set to 0.00.

## Device-Wise Consumption

This report displays the device-wise details of the items consumed for a selected date range for the selected cafeteria devices.

The screenshot shows a web application window titled "Device-Wise Consumption". It contains several input fields and a button. At the top, there are two date pickers labeled "Date" with values "06/11/2023" and "06/18/2023". Below this is a section labeled "Optional Parameters" containing a "Format Selection" dropdown menu set to "Daily Item Consumption". Underneath is a "Device Selection" section with a "Select Devices" dropdown menu set to "Door-Wise". Below this, there are two input fields: "Door" with the value "10" and "Name" with a search icon. At the bottom center is a "Generate Report" button.

Configure the following parameters:

- **Date:** Select the **To** and **From** date for which the report is to be generated.

### Optional Parameters

- **Format Selection:** Select the desired option — **Daily Item Consumption** or **Item Consumption Summary**.

### Device Selection

- **Select Device:** Select the desired option — **Door- Wise** or **All**.
- If you select **Door-Wise**,
  - Click the **Door** picklist. The **Picklist For Door** pop-up appears.

The screenshot shows a "Picklist For Door" pop-up window. At the top, it says "Total Selected: 0 Records". Below this is a search bar with the placeholder text "Search" and a "Show Selected" link. The main part of the window is a table with two columns: "ID" and "Name". The table contains 19 rows of data. At the bottom left, it says "1 - 10 of 19 records". At the bottom right, there are pagination controls showing "1" and "2". At the very bottom, there are "OK" and "Cancel" buttons.

ID	Name
1	ARGO_FACE
200	DoorV2_DD
300	DoorV3_DD
400	DoorV4_DD
600	WireLess_DD
700	NGT_DD
800	VEGA_DD
1100	FMX_DD
1800	ARGO_DD
1900	ARGO_FACE_DD

- Select the desired check boxes of the desired doors. Click **OK**.

Picklist For Door

Total Selected: 1 Records

Search  Show Selected

<input type="checkbox"/>	ID ▲	Name
<input checked="" type="checkbox"/>	1	ARGO_FACE
<input type="checkbox"/>	200	DoorV2_DD
<input type="checkbox"/>	300	DoorV3_DD
<input type="checkbox"/>	400	DoorV4_DD
<input type="checkbox"/>	600	WireLess_DD
<input type="checkbox"/>	700	NGT_DD
<input type="checkbox"/>	800	VEGA_DD
<input type="checkbox"/>	1100	FMX_DD
<input type="checkbox"/>	1800	ARGO_DD
<input type="checkbox"/>	1900	ARGO_FACE_DD

1 - 10 of 19 records

« < 1 2 > »

OK Cancel

- The selected doors appear in the grid.

Select Devices: Door-Wise

Door  ID  Name

Search

ID	Name	Group ▲	
1	ARGO_FACE	Door	

- You can also delete the desired door. To do so, click **Delete** of the respective door.

Click **Generate Report**.

## Sample Report

Device-Wise Consumption

Back

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MATRIX

Run by: System Admin  
Device Name  
ID

MATRIX COMSEC PVT. LTD.  
Device-Wise Consumption From 04/04/2017 To 11/04/2023

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Item ID	Item Name	Menu ID	Menu Name	Menu Consumption	Item ID	Item Name	Menu ID	Menu Name	Menu Consumption	Date: 11/04/2023 17:32	Item Payable Amount
04/04/2017											
49	RnD Canteen	1	Lunch NO	177	1	Lunch NO	177				5430.00
		2	Breakfast NO	32	2	Breakfast	32				147.50
65	FACTORY CANTEN	3	Lunch Factory	108	3	Lunch Fan	108				1273.00
					Totals:		317				4850.50
05/04/2017											
49	RnD Canteen	1	Lunch NO	211	1	Lunch NO	211				4110.00
		2	Breakfast NO	44	2	Breakfast	44				207.50
65	FACTORY CANTEN	3	Lunch Factory	88	3	Lunch Fan	88				1178.00
					Totals:		353				5495.50
06/04/2017											
49	RnD Canteen	1	Lunch NO	199	1	Lunch NO	199				3840.00
		2	Breakfast NO	37	2	Breakfast	37				175.00
65	FACTORY CANTEN	3	Lunch Factory	110	3	Lunch Fan	110				1292.50
					Totals:		346				5297.50
07/04/2017											
49	RnD Canteen	1	Lunch NO	220	1	Lunch NO	220				4260.00
		2	Breakfast NO	34	2	Breakfast	34				162.50
65	FACTORY CANTEN	3	Lunch Factory	108	3	Lunch Fan	108				1261.50
					Totals:		362				5686.00
08/04/2017											
65	FACTORY CANTEN	3	Lunch Factory	93	3	Lunch Fan	93				1094.50
					Totals:		93				1094.50
10/04/2017											
49	RnD Canteen	1	Lunch NO	206	1	Lunch NO	206				3950.00
		2	Breakfast NO	37	2	Breakfast	37				170.00
65	FACTORY CANTEN	3	Lunch Factory	122	3	Lunch Fan	122				1494.50
					Totals:		365				5594.50

### Item-Wise Consumption

This report displays the total number of items consumed on a given day in the cafeteria.

Item-Wise Consumption

←

Date \*

06/18/2023

06/18/2023

Optional Parameters

Group By

User Then Date

User Type

☒ All  
☐ User  
☐ Visitor

Organization Name in Header As Per:

User Selection

User Selection

Select Users

User Wise

User \*

ID

Name

Generate Report For

All Users

Generate Report

Configure the following parameters:

- **Date:** Select the **To** and **From** date for which the report is to be generated.

## Optional Parameters

- **Group By:** Select the desired option — **Date Then User** or **User Then Date**.
- **User Type:** Select the desired check boxes— **All**, **User** or **Visitor**.
- **Organization Name in Header As Per:** Select the desired option — **User Selection** or **Customized Selection**.
  - If you select **Customized Selection**, click on **Customize Report Header**.

You can select the desired option from the drop-down list or can also add a new header as per your choice.

## User Selection

- **Select User:** Select the desired option — **User Wise**, **Group Wise** or **All**.
- If you select **User Wise**,
  - Click the **User** picklist. The **Picklist for All Users/Visitor Profiles** pop-up appears.

Picklist For Users/Visitor Profiles

Total Selected: 0 Records

Search  [Show Selected](#)

<input type="checkbox"/>	User ID ▲	Name
<input type="checkbox"/>	1	SALIM ANSARI
<input type="checkbox"/>	10	RAJENDRA GOSWAMI
<input type="checkbox"/>	1001	ANKITKUMAR SOHLIYA
<input type="checkbox"/>	1002	MEGHA H SHUKLA
<input type="checkbox"/>	1003	UMESH M TALANPURI
<input type="checkbox"/>	1004	DARSHAK B PATEL
<input type="checkbox"/>	1007	DHAVAL I PATEL
<input type="checkbox"/>	1008	MAYANK K KORAT
<input type="checkbox"/>	1009	DIPTI K RATHWA
<input type="checkbox"/>	1010	RAHUL S SHAH

1 - 10 of 2499 records

« < 1 2 3 ... 249 > »

OK Cancel

- Select the desired check boxes of the desired profiles. Click **OK**.
- The selected profiles appears in the grid.

Select Users


User \*

Search

User ID ▲	Name	<input type="checkbox"/>
1	SALIM ANSARI	<input type="checkbox"/>
10	RAJENDRA GOSWAMI	<input type="checkbox"/>
1001	ANKITKUMAR SOHLIYA	<input type="checkbox"/>
1002	MEGHA H SHUKLA	<input type="checkbox"/>

1 - 4 of 2499 records

« < 1 2 3 ... 249 > »

- You can also delete the desired profiles. To do so, click **Delete**  of the respective profile.



- If you select **Group Wise** option,
- Select the desired enterprise group —Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1/2/3.

For each enterprise group — Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1/2/3, click the corresponding picklist to select the desired option/s.

The selected groups appear in the grid.

Select Users
Group Wise


Select Group
Organization

Organization \*

ID
Name

Search

ID	Name	Group	
1	MATRIX COMSEC PVT. LTD.	Organization	
2	SAMARTH	Organization	
3	AVDHOOT	Organization	
4	ELSENGARD	Organization	

- You can also delete particular group. To do so, click **Delete**  of the respective group.
- If you select **All** option, then all the profiles will be selected.
- **Generate Report For:** Select the desired option — **All Users**, **Active Users** or **Inactive Users**.

Click **Generate Report**.

Sample Report

Item-Wise Consumption

Back

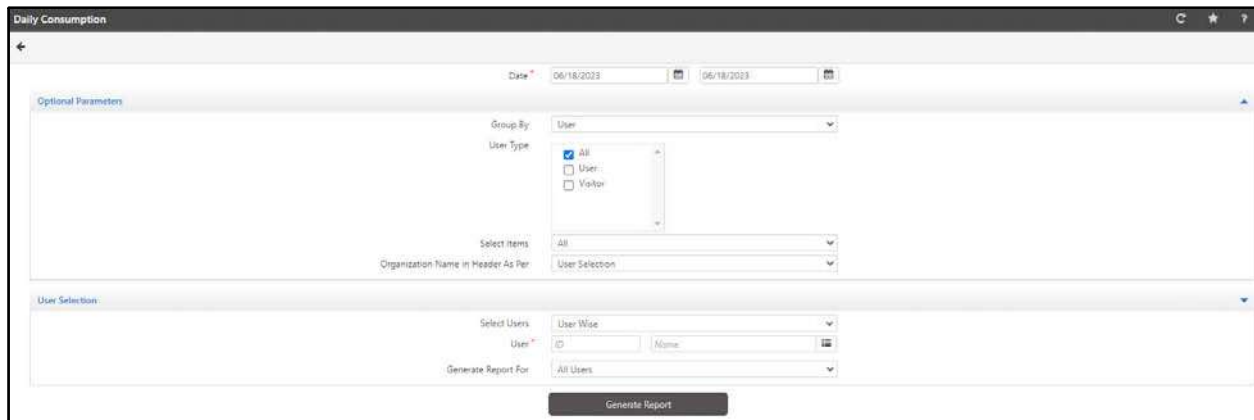
1 of 1513

100%

MATRIX COMSEC PVT. LTD.							
Item-Wise Consumption From 11/04/2019 To 11/04/2023							
Run by:	System Admin	Date:	11/04/2023	17:37			
Sr No	Item Name	ID	Quantity	Price/Item	Total Price	Total	Total Payable
						Discount	
1003-UMESH M TALANPURI							
16/04/2019							
1	1 Lunch HO	1	50.00	50.00	25.00	25.00	
Total					50.00	25.00	25.00
18/04/2019							
1	1 Lunch HO	1	50.00	50.00	25.00	25.00	
Total					50.00	25.00	25.00
22/04/2019							
1	1 Lunch HO	1	50.00	50.00	25.00	25.00	
Total					50.00	25.00	25.00
27/04/2019							
1	1 Lunch HO	1	50.00	50.00	25.00	25.00	
Total					50.00	25.00	25.00
01/05/2019							
1	1 Lunch HO	1	50.00	50.00	25.00	25.00	
Total					50.00	25.00	25.00
02/05/2019							
1	1 Lunch HO	1	50.00	50.00	25.00	25.00	
Total					50.00	25.00	25.00
08/05/2019							
1	1 Lunch HO	1	50.00	50.00	25.00	25.00	
Total					50.00	25.00	25.00
10/05/2019							
1	3 Lunch Fac	1	46.00	46.00	34.50	11.50	
Total					46.00	34.50	11.50

## Daily Consumption

This report displays the daily consumption for the selected month, user and item. The details can be viewed either item wise or user wise for the selected date range.



The screenshot shows the 'Daily Consumption' report configuration window. At the top, there are date pickers for 'Date' with values '06/18/2023' and '06/18/2023'. Below this is the 'Optional Parameters' section. It includes a 'Group By' dropdown set to 'User', a 'User Type' section with checkboxes for 'All' (checked), 'User', and 'Visitor', a 'Select Items' dropdown set to 'All', and an 'Organization Name in Header As Per' dropdown set to 'User Selection'. Below the 'Optional Parameters' is the 'User Selection' section, which includes a 'Select Users' dropdown set to 'User Wise', a 'User' field with 'ID' and 'Name' sub-fields, and a 'Generate Report For' dropdown set to 'All Users'. At the bottom center is a 'Generate Report' button.

Configure the following parameters:

- **Date:** Select the **To** and **From** date for which the report is to be generated.

### Optional Parameters

- **Group By:** Select the desired option — **User** or **Item**
- **User Type:** Select the desired check boxes— **All**, **User** or **Visitor**.
- **Select Items:** Select the desired option— **All** or **Selected**.
  - If you select **All**, all the items will be included in the report.
  - If you select **Selected**,

- Click the **Selected** picklist. The **Select Menu Items** pop-up appears.

The screenshot shows the 'Select Menu Items' window with a green header bar indicating 'Total Selected: 0 Records'. Below the header is a search bar and a 'Show Selected' link. A 'Select All' checkbox is present. The main table lists four items: Lunch HO (code 1), Breakfast (code 2), Lunch Fac (code 3), and Tea HO (code 4). All checkboxes in the table are unchecked. At the bottom are 'OK' and 'Cancel' buttons.

<input type="checkbox"/>	Item Code ▲	Item Name
<input type="checkbox"/>	1	Lunch HO
<input type="checkbox"/>	2	Breakfast
<input type="checkbox"/>	3	Lunch Fac
<input type="checkbox"/>	4	Tea HO

- You can either select particular menu items or can select all the menu items at once.
- To select particular menu item, select the check boxes of the desired menu items.

The screenshot shows the 'Select Menu Items' window with a green header bar indicating 'Total Selected: 2 Records'. Below the header is a search bar and a 'Show Selected' link. A 'Select All' checkbox is present. The main table lists four items: Lunch HO (code 1), Breakfast (code 2), Lunch Fac (code 3), and Tea HO (code 4). The checkboxes for 'Lunch HO' and 'Breakfast' are checked, while 'Lunch Fac' and 'Tea HO' are unchecked. At the bottom are 'OK' and 'Cancel' buttons.

<input type="checkbox"/>	Item Code ▲	Item Name
<input checked="" type="checkbox"/>	1	Lunch HO
<input checked="" type="checkbox"/>	2	Breakfast
<input type="checkbox"/>	3	Lunch Fac
<input type="checkbox"/>	4	Tea HO

**OR**

- To select all the menu items at once, select the **Select All** check box. The menu items on all the pages will be selected.

Select Menu Items

Total Selected: 4 Records

Search  [Show Selected](#)

☒ Select All

<input checked="" type="checkbox"/>	Item Code ▲	Item Name
<input checked="" type="checkbox"/>	1	Lunch HO
<input checked="" type="checkbox"/>	2	Breakfast
<input checked="" type="checkbox"/>	3	Lunch Fac
<input checked="" type="checkbox"/>	4	Tea HO

OK Cancel

- Click **OK**.
- The selected menu items appears in the grid

Select Items

Selected

ID  Name

Search

Item Code	Item Name	
1	Lunch HO	
2	Breakfast	
3	Lunch Fac	
4	Tea HO	

- You can also delete the desired item. To do so, click **Delete** of the respective item.
- Organization Name in Header As Per:** Select the desired option— **User Selection** or **Customized Selection**.
- If you select **Customized Selection**, click on **Customize Report Header**.

You can select the desired option from the drop-down list or can also add a new header as per your choice.

## User Selection

- **Select User:** Select the desired option — **User Wise**, **Group Wise** or **All**.
- If you select **User Wise**,
  - Click the **User** picklist. The **Picklist for All Users/Visitor Profiles** pop-up appears.

Picklist For Users/Visitor Profiles

Total Selected: 0 Records

Search  [Show Selected](#)

<input type="checkbox"/>	User ID ▲	Name
<input type="checkbox"/>	1	SALIM ANSARI
<input type="checkbox"/>	10	RAJENDRA GOSWAMI
<input type="checkbox"/>	1001	ANKITKUMAR SOHLIYA
<input type="checkbox"/>	1002	MEGHA H SHUKLA
<input type="checkbox"/>	1003	UMESH M TALANPURI
<input type="checkbox"/>	1004	DARSHAK B PATEL
<input type="checkbox"/>	1007	DHAVAL I PATEL
<input type="checkbox"/>	1008	MAYANK K KORAT
<input type="checkbox"/>	1009	DIPTI K RATHWA
<input type="checkbox"/>	1010	RAHUL S SHAH

1 - 10 of 2489 records

« < 1 2 3 ... 249 > »

OK Cancel

- Select the desired check boxes of the desired profiles. Click **OK**.
- The selected profiles appears in the grid.

Select Users  User Wise ▼

User  ID  Name

Search

User ID ▲	Name	
1	SALIM ANSARI	
10	RAJENDRA GOSWAMI	
1001	ANKITKUMAR SOHLIYA	
1002	MEGHA H SHUKLA	

- You can also delete the desired profile. To do so, click **Delete** of the respective profile.
- If you select **Group Wise** option,

- Select the desired enterprise group —Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1/2/3.

For each enterprise group — Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1/2/3, click the corresponding picklist to select the desired option/s.

The selected groups appear in the grid.

Select Users

Group Wise

Select Group

Organization


Organization \*

ID

Name

Search

ID	Name	Group	
1	MATRIX COMSEC PVT. LTD.	Organization	
5	TECH SERVICES	Organization	
6	CONSULTANT	Organization	
7	CANTEEN	Organization	
8	APPRENTICE	Organization	

- You can also delete particular group. To do so, click **Delete**  of the respective group.
- If you select **All** option, then all the profiles will be selected.
- **Generate Report For:** Select the desired option — **All Users, Active Users** or **Inactive Users**

Click **Generate Report**.

Sample Report

Daily Consumption

Back

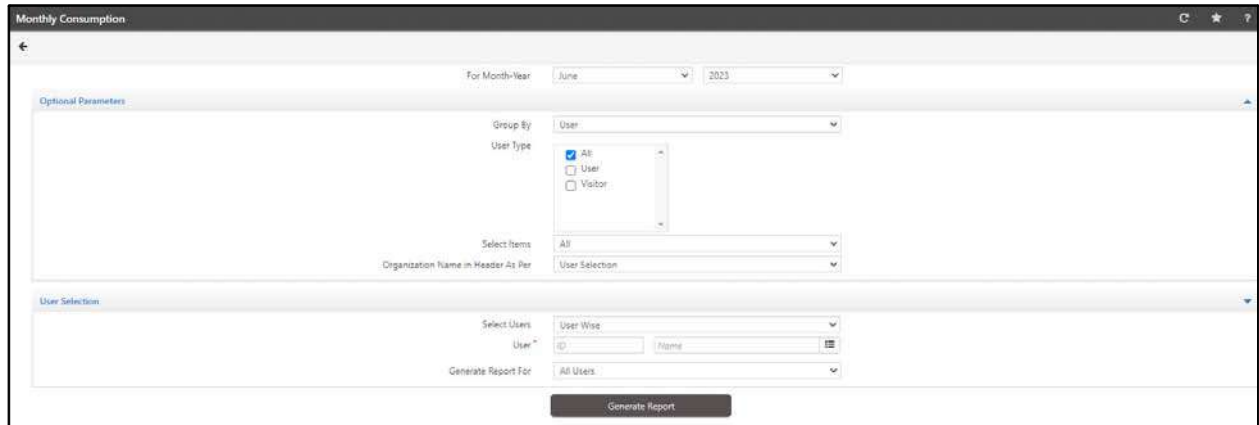
1 of 148

100%

MATRIX COMSEC PVT. LTD.									
User-Wise Daily Consumption From 11/04/2019 To 11/04/2023									
Run By: System Admin		Date: 11/04/2023		17:45					
Sr No	Date	Item ID	Name	Quantity	Price/Item	Total Price	Total Discount	Total Payable	
10	RAJENDRA GOSWAMI								
1	01/05/2019	3	Lunch Fac	1	46.00	46.00	23.00	23.00	
2	01/06/2019	3	Lunch Fac	1	46.00	46.00	23.00	23.00	
3	01/07/2019	3	Lunch Fac	1	46.00	46.00	23.00	23.00	
4	01/10/2019	3	Lunch Fac	1	46.00	46.00	23.00	23.00	
5	01/11/2019	3	Lunch Fac	1	46.00	46.00	23.00	23.00	
6	02/05/2019	3	Lunch Fac	1	46.00	46.00	23.00	23.00	
7	02/07/2019	3	Lunch Fac	1	46.00	46.00	23.00	23.00	
8	02/08/2019	3	Lunch Fac	1	46.00	46.00	23.00	23.00	
9	02/09/2019	3	Lunch Fac	1	46.00	46.00	23.00	23.00	
10	02/11/2019	3	Lunch Fac	1	46.00	46.00	23.00	23.00	
11	03/05/2019	3	Lunch Fac	1	46.00	46.00	23.00	23.00	
12	03/06/2019	3	Lunch Fac	1	46.00	46.00	23.00	23.00	
13	03/07/2019	3	Lunch Fac	1	46.00	46.00	23.00	23.00	
14	03/08/2019	3	Lunch Fac	1	46.00	46.00	23.00	23.00	
15	03/09/2019	3	Lunch Fac	1	46.00	46.00	23.00	23.00	
16	04/05/2019	3	Lunch Fac	1	46.00	46.00	23.00	23.00	
17	04/06/2019	3	Lunch Fac	1	46.00	46.00	23.00	23.00	
18	04/07/2019	3	Lunch Fac	1	46.00	46.00	23.00	23.00	
19	04/08/2019	3	Lunch Fac	1	46.00	46.00	23.00	23.00	
20	04/09/2019	3	Lunch Fac	1	46.00	46.00	23.00	23.00	

## Monthly Consumption

This report displays the monthly consumption for the selected month, user and item.



The screenshot shows the 'Monthly Consumption' report configuration window. At the top, there are dropdowns for 'For Month-Year' (set to June) and '2023'. Below this is the 'Optional Parameters' section, which includes a 'Group By' dropdown (set to User), a 'User Type' section with checkboxes for 'All' (checked), 'User', and 'Visitor', a 'Select Items' dropdown (set to All), and an 'Organization Name in Header As Per' dropdown (set to User Selection). The 'User Selection' section includes a 'Select Users' dropdown (set to User Wise), a 'User' field with 'ID' and 'Name' sub-fields, and a 'Generate Report For' dropdown (set to All Users). A 'Generate Report' button is located at the bottom center.

Configure the following parameters:

- **For Month-Year:** Select the month and the year for which report is to be generated.

### Optional Parameters

- **Group By:** Select the desired option — **User** or **Item**
- **User Type:** Select the desired check boxes— **All**, **User** or **Visitor**.
- **Select Item:** Select the desired option— **All** or **Selected**.
  - If you select **All**, all the items will be included in the report.
  - If you select **Selected**,

- Click the **Selected** picklist. The **Select Menu Items** pop-up appears.

The screenshot shows the 'Select Menu Items' window with a green header bar indicating 'Total Selected: 0 Records'. Below the header is a search bar with the placeholder text 'Search' and a magnifying glass icon. To the right of the search bar is a 'Show Selected' button. Below the search bar is a 'Select All' checkbox. The main area contains a table with the following data:

<input type="checkbox"/>	Item Code ▲	Item Name
<input type="checkbox"/>	1	Lunch HO
<input type="checkbox"/>	2	Breakfast
<input type="checkbox"/>	3	Lunch Fac
<input type="checkbox"/>	4	Tea HO

At the bottom of the window are 'OK' and 'Cancel' buttons.

- You can either select particular menu items or can select all the menu items at once.
- To select particular menu item, select the check boxes of the desired menu items.

The screenshot shows the 'Select Menu Items' window with a green header bar indicating 'Total Selected: 2 Records'. Below the header is a search bar with the placeholder text 'Search' and a magnifying glass icon. To the right of the search bar is a 'Show Selected' button. Below the search bar is a 'Select All' checkbox. The main area contains a table with the following data:

<input type="checkbox"/>	Item Code ▲	Item Name
<input checked="" type="checkbox"/>	1	Lunch HO
<input checked="" type="checkbox"/>	2	Breakfast
<input type="checkbox"/>	3	Lunch Fac
<input type="checkbox"/>	4	Tea HO

At the bottom of the window are 'OK' and 'Cancel' buttons.

**OR**



- To select all the menu items at once, select the **Select All** check box. The menu items on all the pages will be selected.

Select Menu Items

Total Selected: 4 Records

Search  [Show Selected](#)

☒ Select All

<input checked="" type="checkbox"/>	Item Code ▲	Item Name
<input checked="" type="checkbox"/>	1	Lunch HO
<input checked="" type="checkbox"/>	2	Breakfast
<input checked="" type="checkbox"/>	3	Lunch Fac
<input checked="" type="checkbox"/>	4	Tea HO

OK Cancel

- Click **OK**.
- The selected menu items appears in the grid.

Select Items

Selected  ▼

ID  Name

Search

Item Code	Item Name	
1	Lunch HO	
2	Breakfast	
3	Lunch Fac	
4	Tea HO	

- You can also delete the desired menu item. To do so, click **Delete** of the respective menu item.
- Organization Name in Header As Per:** Select the desired option — **User Selection** or **Customized Selection**.
- If you select **Customized Selection**, click **Customize Report Header**.

You can select the desired option from the drop-down list or can also add a new header as per your choice.

## User Selection

- **Select User:** Select the desired option — **User Wise, Group Wise, or All.**
- If you select **User Wise**,
  - Click the **User** picklist. The **Picklist for Users/Visitor Profiles** pop-up appears.

Picklist For Users/Visitor Profiles

Total Selected: 0 Records

Search  Show Selected

<input type="checkbox"/>	User ID ▲	Name
<input type="checkbox"/>	1	SALIM ANSARI
<input type="checkbox"/>	10	RAJENDRA GOSWAMI
<input type="checkbox"/>	1001	ANKITKUMAR SOHLIYA
<input type="checkbox"/>	1002	MEGHA H SHUKLA
<input type="checkbox"/>	1003	UMESH M TALANPURI
<input type="checkbox"/>	1004	DARSHAK B PATEL
<input type="checkbox"/>	1007	DHAVAL I PATEL
<input type="checkbox"/>	1008	MAYANK K KORAT
<input type="checkbox"/>	1009	DIPTI K RATHWA
<input type="checkbox"/>	1010	RAHUL S SHAH

1 - 10 of 2499 records

« < 1 2 3 ... 249 > »

OK Cancel

- Select the desired check boxes of the desired profiles. Click **OK**.
- The selected profiles appear in the grid.

Select Users: User Wise ▼

User\* ID Name

Search

User ID ▲	Name	
1	SALIM ANSARI	
10	RAJENDRA GOSWAMI	
1001	ANKITKUMAR SOHLIYA	
1002	MEGHA H SHUKLA	

- You can also delete the desired profile. To do so, click **Delete** of the respective profile.
- If you select **Group Wise** option,

- Select the desired enterprise group —Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1/2/3.

For each enterprise group — Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1/2/3, click the corresponding picklist to select the desired option/s.

The selected groups appear in the grid.

Select Users

Group Wise

Select Group

Organization


Organization \*

ID

Name

Search

ID	Name	Group	
1	MATRIX COMSEC PVT. LTD.	Organization	
2	SAMARTH	Organization	
3	AVDHOOT	Organization	
4	ELSENGARD	Organization	

- You can also delete particular group. To do so, click **Delete**  of the respective group.
- If you select **All** option, then all the profiles will be selected.
- **Generate Report For:** Select the desired option — **All Users**, **Active Users** or **Inactive Users**.

Click **Generate Report**.

Sample Report

Monthly Consumption

Back

1 of 40

100%

MATRIX

MATRIX COMSEC PVT. LTD.

User-Wise Monthly Consumption For APRIL-2019

Run by: System Admin

Date: 11/04/2023 17:52

Sr No	Item ID	Name	Quantity	Price/Item	Total Price	Total Discount	Total Payable
10	RAJENDRA GOSWAMI						
1	3	Lunch Fac	26	46.00	1196.00	598.00	598.00
		Total :	26	46.00	1196.00	598.00	598.00
1003	UNESH M TALANPURI						
1	1	Lunch HO	6	50.00	300.00	150.00	150.00
		Total :	6	50.00	300.00	150.00	150.00
1008	MAYANK K KORAT						
1	1	Lunch HO	1	50.00	50.00	25.00	25.00
		Total :	1	50.00	50.00	25.00	25.00
1009	DIPTI K RATHMA						
1	1	Lunch HO	21	50.00	1050.00	525.00	525.00
		Total :	21	50.00	1050.00	525.00	525.00
102	AKSHAY SHEKH						
1	1	Lunch HO	6	50.00	300.00	150.00	150.00
		Total :	6	50.00	300.00	150.00	150.00
1030	KETUR BHALODIYA						
1	1	Lunch HO	4	50.00	200.00	100.00	100.00
		Total :	4	50.00	200.00	100.00	100.00
1062	MANTHAN PATEL						
1	1	Lunch HO	4	50.00	200.00	100.00	100.00
2	2	Breakfast	3	20.00	60.00	30.00	30.00
		Total :	7	70.00	260.00	130.00	130.00
1076	VIJAYKUMAR PRAJAPATI						
1	3	Lunch Fac	17	46.00	782.00	391.00	391.00
		Total :	17	46.00	782.00	391.00	391.00

# Cafeteria Devices

This report displays the details of the Devices that are assigned the Cafeteria Mode.

Cafeteria Devices

1 of 1

MATRIX

MATRIX COMSEC PVT. LTD.

Page 1 of 1

Cafeteria Devices

Run by: System Admin

Date: 06/04/2023 16:14

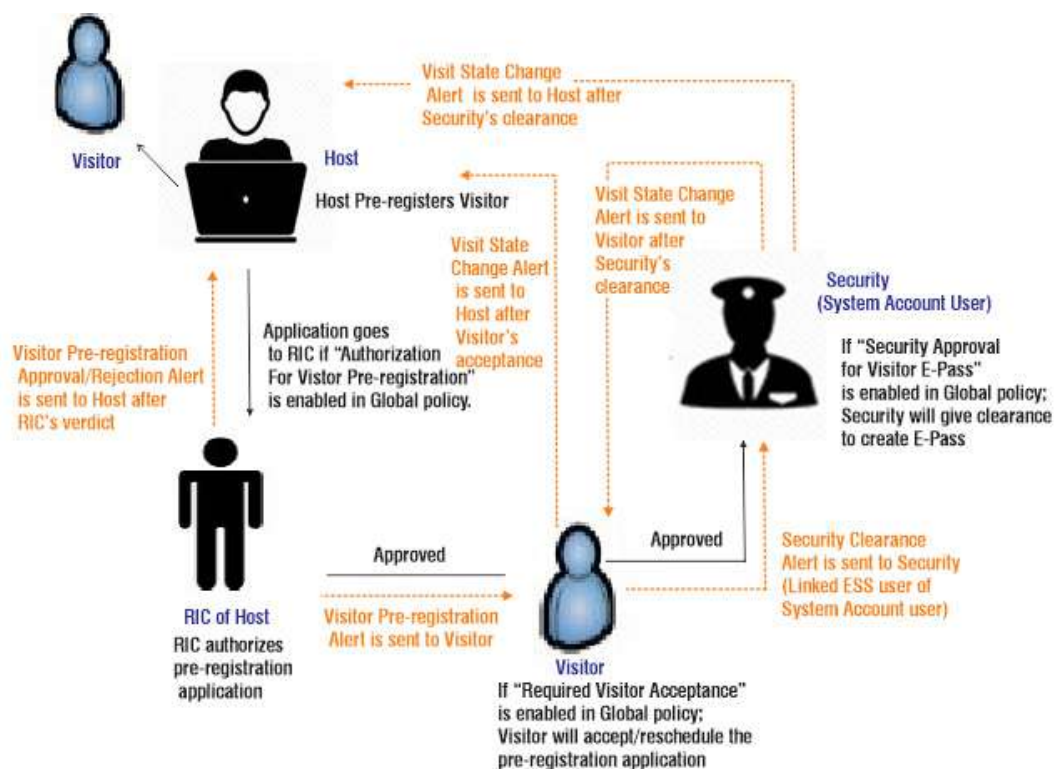
Device ID	Name	Printer	Printer Type	Band Rate	Company Name	Company Address	Punch Line
89	Factory Canteen PMX	EpsonTMS81V	USB	115200	Matrix ComSec Pvt. Ltd.		
136	RnD1 Canteen1 ARGO	None	RS232	115200			
139	RnD1 Canteen2 ARGO	None	RS232	115200			

The COSEC VMS tracks and manages visitors to the organization increasing overall security and enhancing productivity of security and reception personnel.

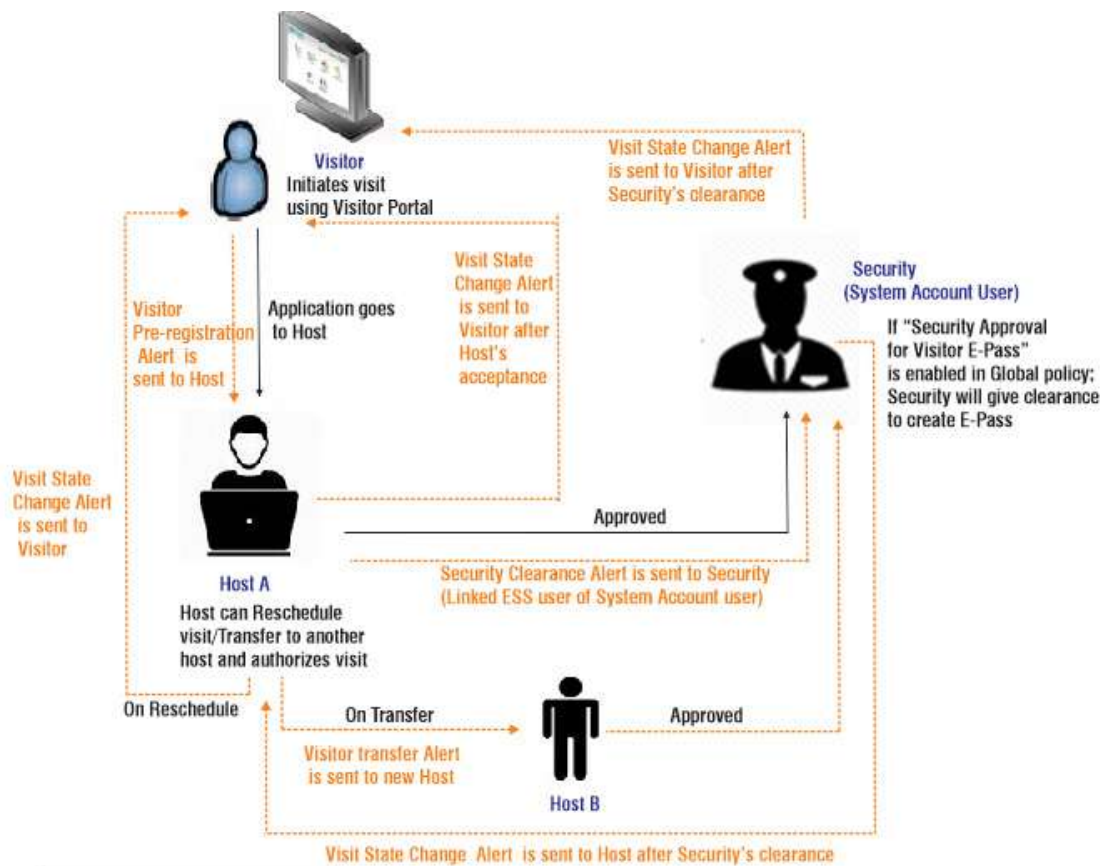



*This functionality is not available with the COSEC Application basic platform license.*

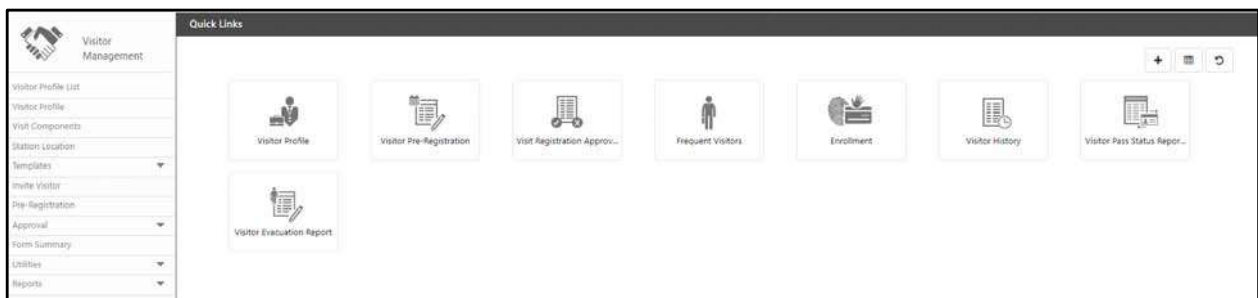
## Host Initiated Visit



## Visitor Initiated Visit



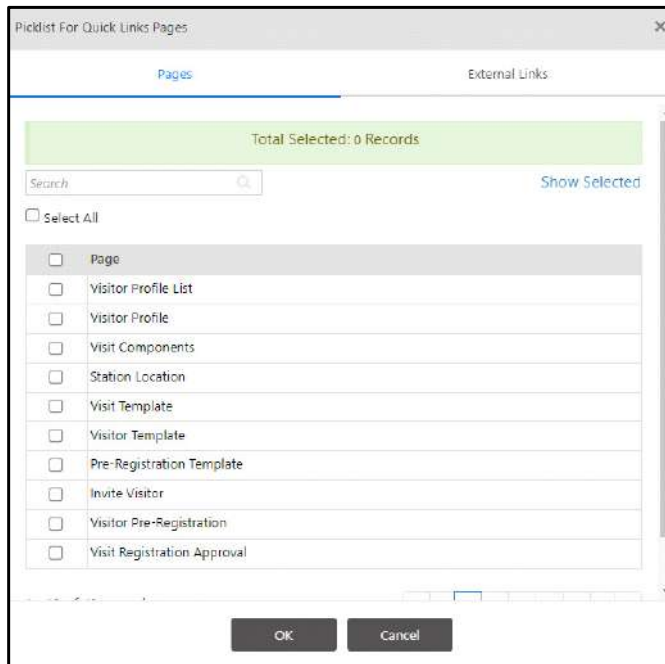
To use the Visitor Management functionality, Click on **Visitor Management**  Module. The Visitor Management Page will appear on your screen.



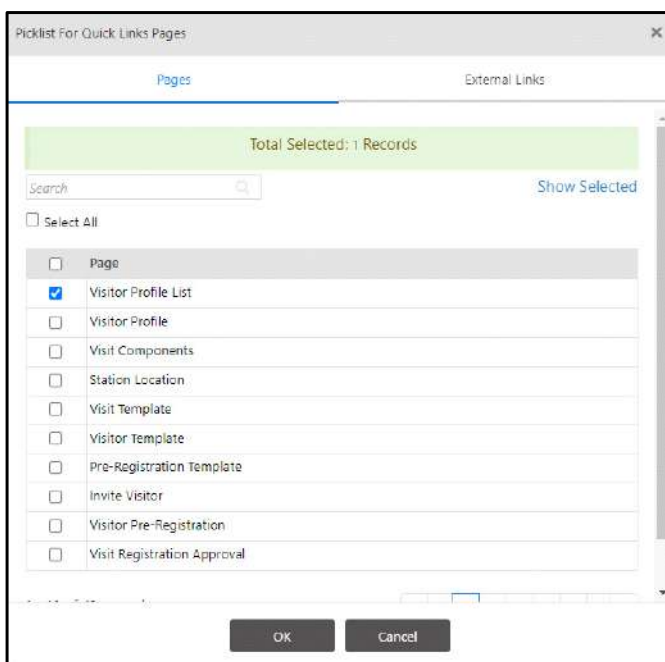
The page displays a menu and **Quick Links** to go to the required page in just one click. Quick Links are shortcuts to reach to a specific page easily. You can configure these options for Quick Links — **Add Quick Link**, **Select Layout** and **Reset to Default**.

### Add Quick Links

- Click **Add**  . The **Picklist For Quick Links Pages** pop-up appears.

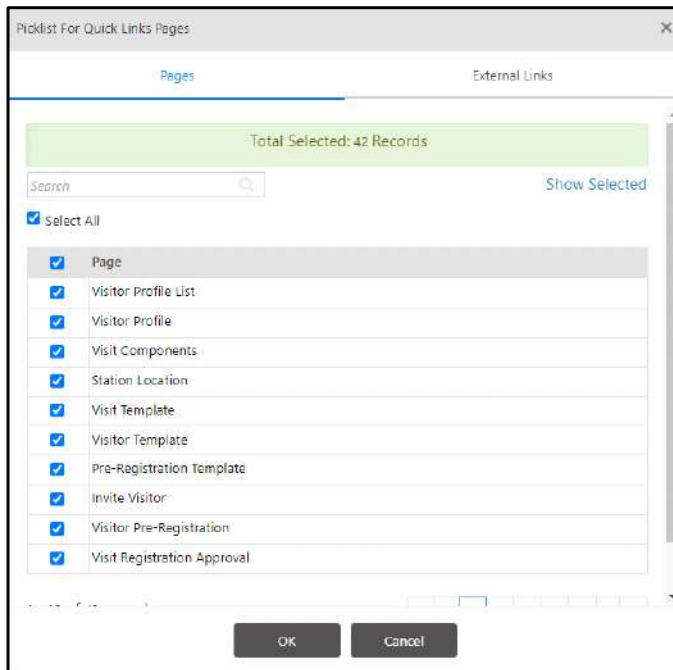


- You can either select particular page or can select all the pages at once. Maximum **20** quick links can be displayed.
- To select particular pages, select the check boxes of the desired pages.




**OR**

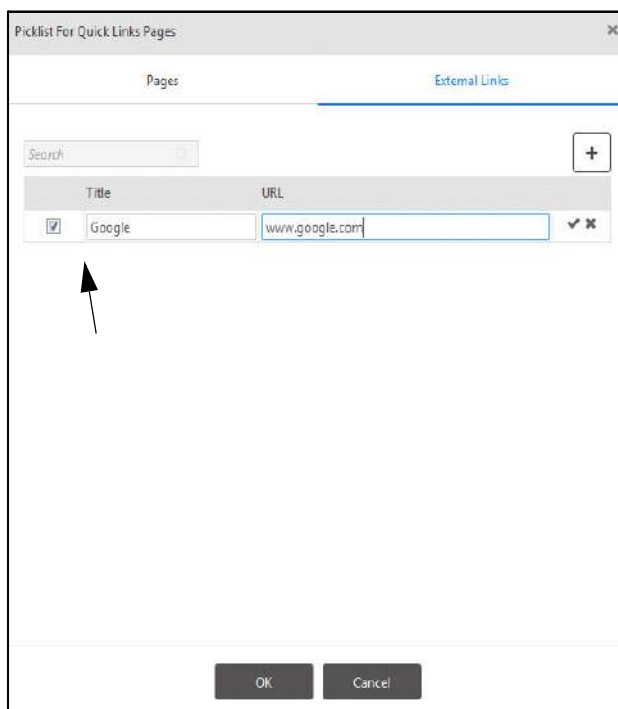
- To select all the pages at once, select the **Select All** check box. All the pages will be selected.





- Click **OK**.
- The Quick Links for selected pages appear on the Quick Link page.

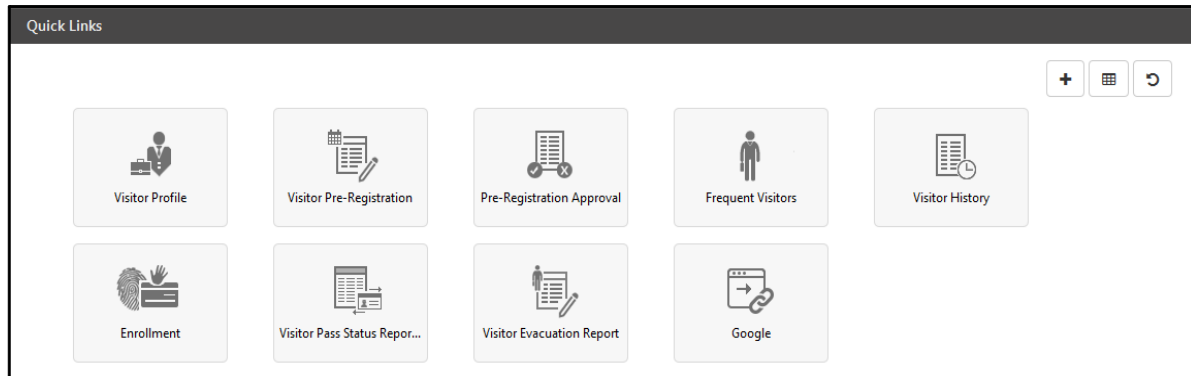
#### Adding External Links,

- Select **External Link** tab and click on  button to add new external link.
- Configure the **Title** and **URL** of the external link under the respective fields. Select the check box to display the Quick Link for the configured link.







- Click **Save**  to save the configuration.
- Once you have saved the configuration, you can edit it. Click **Edit**  to edit the saved configuration.
- Click **OK** to save the configuration of the external link. The Quick Link for the external link appears on the Quick Link page.



## Select Layout

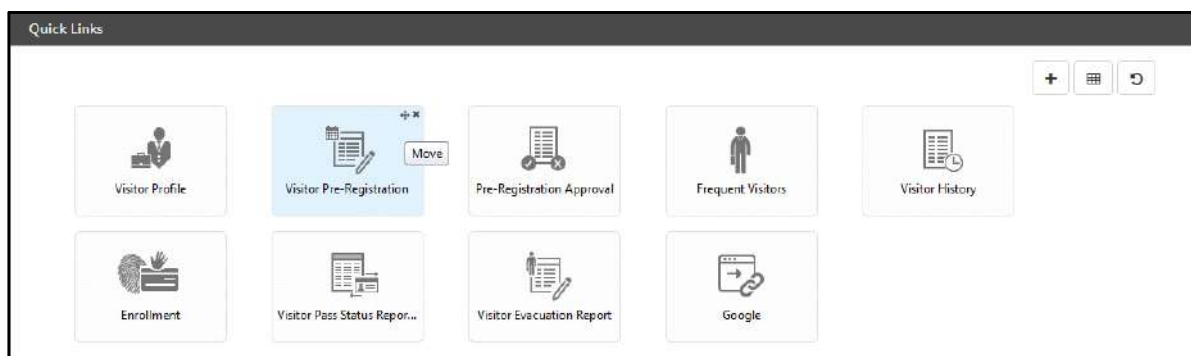
Click **Select Layout**  to select a layout for the quick links. You can select 5x4 or 4x5 layout to manage the quick links.

## Reset To Default

Click **Reset To Default**  to reset the quick links to the default quick links.

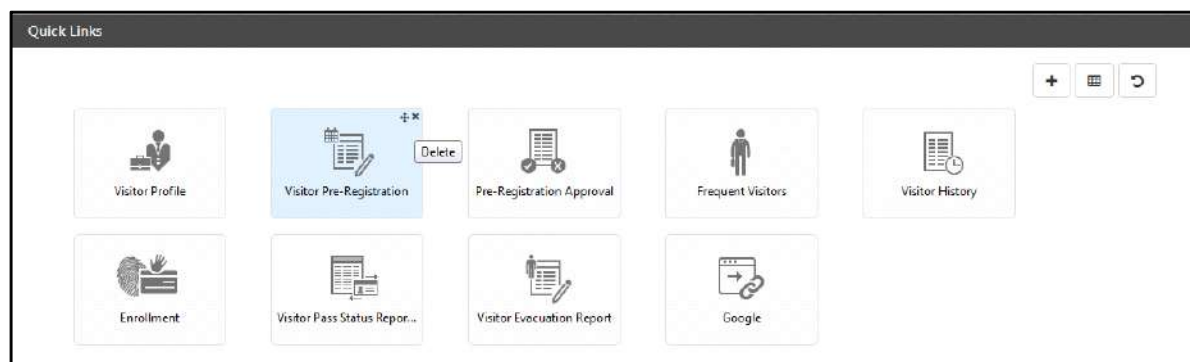
## Move the Link

To move the link from one place to another, hover on the link on top right corner and click **Move** icon as shown below. Then drag the quick link to the desired place. It will be placed at the desired location on the quick links page.




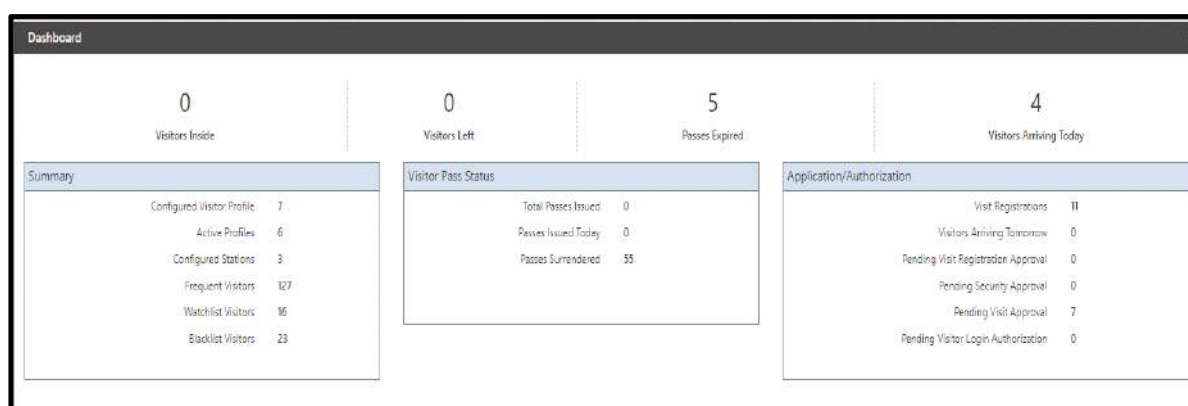
## Delete the Link

To delete a particular link, hover on the link on top right corner and click **Delete** icon as shown below.



## Visitor Management Dashboard

To view the **Visitor Management** Dashboard, click Dashboard  on the **Visitor Management** page and the following screen appears.



The Dashboard displays the basic information on VMS module relating to the COSEC Software under the following groups:

- **Visitors Inside**- Total number of visitors whose pass is created on the current day and Visit Start time has begun.
- **Visitors Left**- Total number of visitors whose passes have been surrendered.
- **Passes Expired**- Total number of the visitors whose Visit time has ended but passes have not been surrendered.
- **Visitors Arriving Today**- Total number of Pre-registrations of visitor who are arriving on current day.Count of only Approved visitors is displayed who belong to the Host users as per logged in System Account's User Rights.

**Example:** Suppose DN is system account user having rights of Organization R&D and AS is system account user having rights of Organization HO (Group-wise rights).

When DN logs into COSEC Web then VMS dashboard will show visitor registration details made by the host users belonging to R&D only. DN cannot view the details of visitors of HO.

### Summary

- **Configured Visitor Profile**- Total number of visitor profiles created in system.
- **Active Profiles**- Total number of visitor profiles which are currently Active.

- Configured Stations- Total number of Stations configured in the System.
- Frequent Visitors- Total number of visitors registered in the module.
- Watchlist Visitors- Total number of visitors added to the watchlist.
- Blacklist Visitors- Total number of visitors added to the Blacklist

#### Visitor Pass Status

- Total Passes Issued- Total number of passes created from all stations which have not yet been surrendered or expired.
- Passes Issued today- Total number of passes that are created today from all stations.
- Passes Surrendered- Total number of expired passes which have been surrendered.

#### Application/Authorization

- Visit Registrations- Total number of Pre-registrations of visitor whose arriving date is either current day or future date who belong to the Host users as per logged in System Account's User Rights.



*Along with current logic, only Host Initiated Visitor Pre-Registration applications will be considered for count.*

- Visitors Arriving Tomorrow- Total number of Pre-registrations of visitor whose arriving date is current date +1; who belong to the Host users as per logged in System Account's User Rights.
- Pending Authorization- Total number of Pre-registrations whose authorization is pending; who belongs to the Host users as per logged in System Account's User Rights.



*Along with current logic, Only Host Initiated Visitor Pre-Registration applications will be considered for count.*

- Pending Visit Registration Approval- It displays the number of visits initiated by Host or Visitor pending for approval by the RIC.
- Pending Security Approval- Total number of visit request for which security clearance is pending.
- Pending Visit Approval- It displays the number of visits initiated by the Visitor pending for approval by the Host.
- Pending Visitor Login Authorization- The number of pending authorizations when the visitor accesses the **Skip to Login** feature while logging in into the Visitor Web Portal.

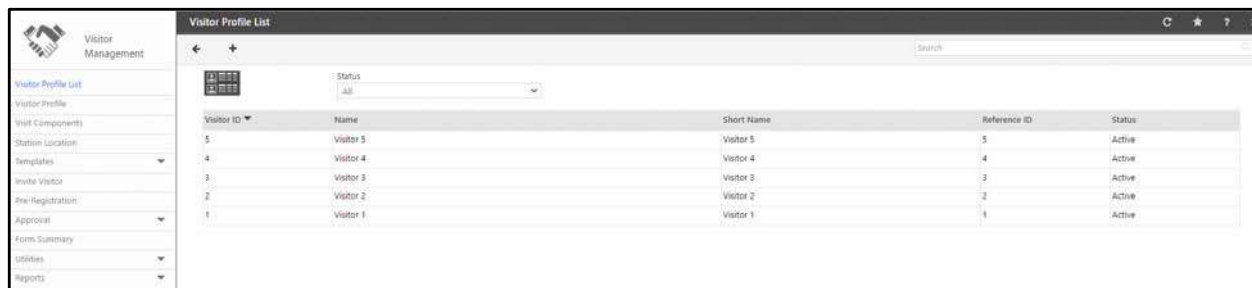
For more information on the above Dashboard options, click the respective information links on the Dashboard.

The latest values on Dashboard are updated on clicking the Refresh  button.

# Visitor Profile List

The Visitor Profile List displays all the visitor profiles configured in COSEC.

To view the existing visitors or to add a new visitor, click **Visitor Management module > Visitor Profile List**.



The screenshot shows the 'Visitor Profile List' window. On the left is a sidebar with navigation options: Visitor Management, Visitor Profile List (selected), Visitor Profile, Visit Components, Visitor Location, Templates, Invite Visitor, Pre-Registration, Approval, Form Summary, Updates, and Reports. The main area displays a table of visitor profiles. At the top of the table is a search bar and a status filter dropdown set to 'All'. The table has columns for Visitor ID, Name, Short Name, Reference ID, and Status.

Visitor ID	Name	Short Name	Reference ID	Status
5	Visitor 5	Visitor 5	5	Active
4	Visitor 4	Visitor 4	4	Active
3	Visitor 3	Visitor 3	3	Active
2	Visitor 2	Visitor 2	2	Active
1	Visitor 1	Visitor 1	1	Active

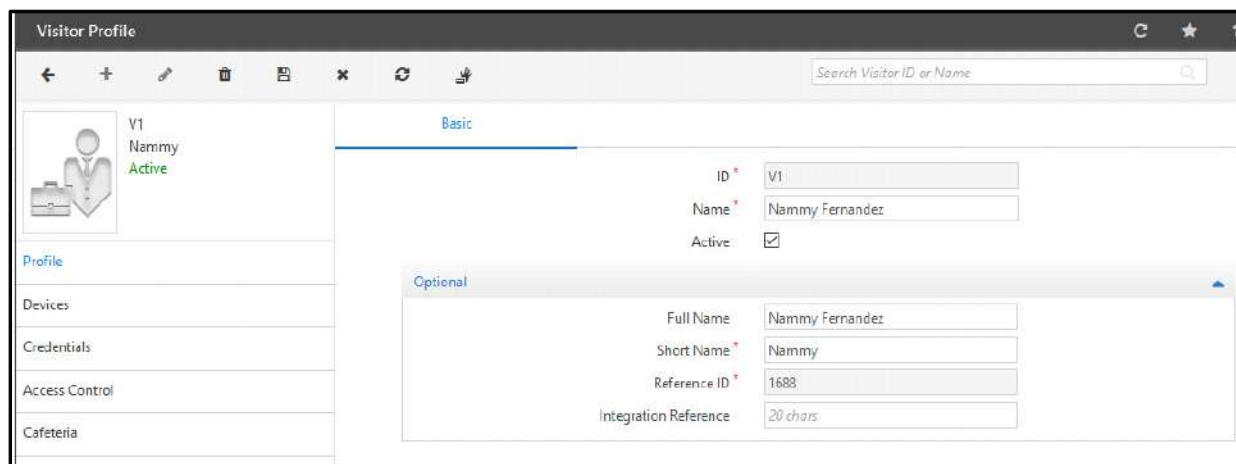
The Visitor Profile List will display only those profiles for which rights are assigned to the SA, that is as per the enterprise groups assigned to the visitor profile.

For example, if for Visitor Profile1 in Groups, Organization is ORG1 and if the rights for ORG1 are not assigned to the SA, then through the SA login the Visitor Profile List will not display Visitor Profile1.

For details, refer to [“Assigning Group-Wise Rights”](#) under [“System Accounts”](#) as well as [“Group”](#) under [“Visitor Profile”](#).

## Adding Visitor

To add a new visitor, click on **New** button. The Visitor Profile page will appear.




The screenshot shows the 'Visitor Profile' configuration page. On the left is a sidebar with options: Profile (selected), Devices, Credentials, Access Control, and Cafeteria. The main area is divided into 'Basic' and 'Optional' sections. The 'Basic' section contains fields for ID (V1), Name (Nammy Fernandez), and an Active checkbox (checked). The 'Optional' section contains fields for Full Name (Nammy Fernandez), Short Name (Nammy), Reference ID (1688), and Integration Reference (20 chars).

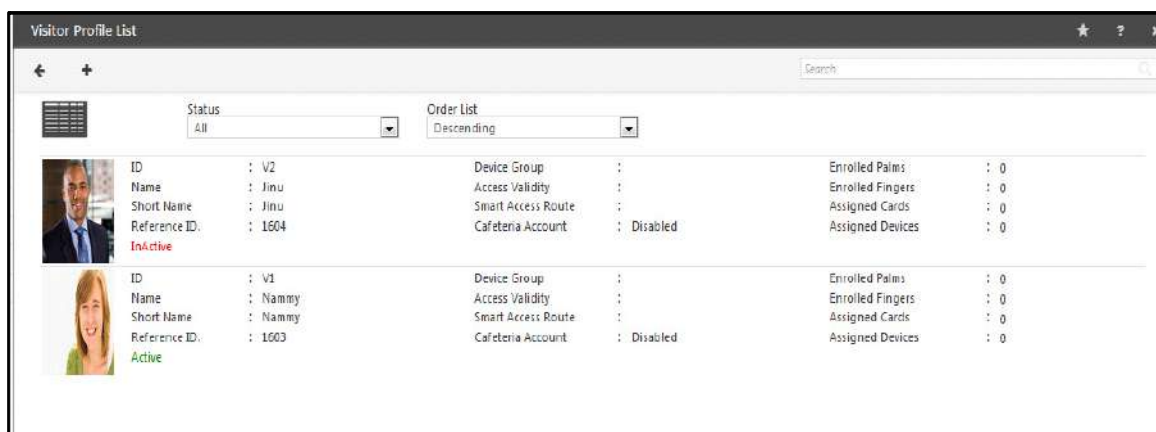
Enter the **ID** and **Name** of the visitor. Then save the details. The Visitor will be added to the list. For detailed configuration see **VMS module> Visitor Profile**.

## Viewing Visitor List

The user can view the visitor profiles based on **All/ Active/ Inactive** Status by selecting the desired filter.



Click on the **Photo View**  button on the left. The Visitor Profile information with the photograph is displayed as shown below.



# Visitor Profile

Visitor Profile page enables to add the visitor, assign devices to visitor, enroll the credentials and configure visitor for Cafeteria and Access Control policies.

- [“Profile”](#)
- [“Devices”](#)
- [“Credentials”](#)
- [“Group”](#)
- [“Enroll Credentials”](#)
- [“Access Control”](#)
- [“Cafeteria”](#)
- [“Face Recognition”](#)

To add and configure the Visitor, Click **Visitor Profile** in the Visitor Management module. The Page appears as shown below:

## Profile

Click on **New** to add new Visitor.

### Basic

Enter the **ID** and **Name** of the visitor. This is the Visitor ID which will appear in the Visitor ID picklist in the Visit Details section while creating a pass for the visitor from VMS Utility.

You can create an ID for a regular visitor (eg: Nammy) and assign to that visitor on arrival from the VMS Utility.

Also the generic visitor IDs can be created and assigned to the visitor. Eg: ID: 1, Name: VMS1 is given to visitor Rashmi. Once the pass of Rashmi is surrendered or expired, then VMS1 can be re-issued to another visitor.

Check the **Active** box to activate the visitor on the system.

### Optional

**Full Name-** You can also specify the Full name of the visitor with maximum 200 characters. The supported values are: **A-Z, a-z, 0-9, ( ) , [ ] \_ (underscore), - (Hyphen), . (full Stop), /, &, , (comma), @, ' (single quote), [space]**



A function name followed by ( bracket is invalid in full name. Eg: Thomas S/O Round (will be invalid.

The **Short Name** and **Reference ID** fields will be auto generated. You can change the “Short Name” anytime but the reference ID can be edited only before saving the visitor details.

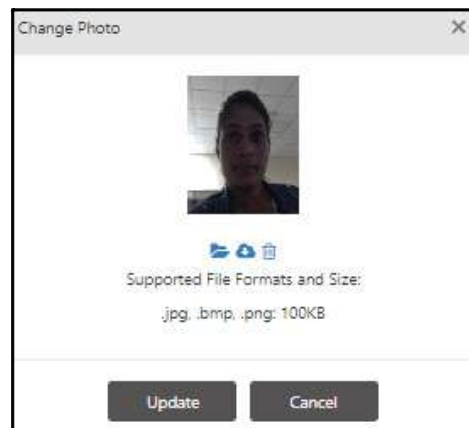
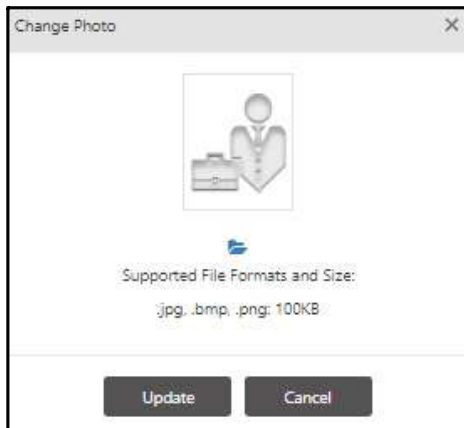


When Full name of visitor is entered and Name and Short name are blank then Name will be auto updated with 45 characters of full name excluding special characters and Short name will be updated with 15 characters of full name.

Specify the **Integration reference**. This field is provided for integration with third party software applications (eg: Payroll). In third party applications where the visitor ID has more number of characters (say alphanumeric up to 20 characters) and if it wants to integrate with COSEC Application then it can use Integration reference to map COSEC to third party software.

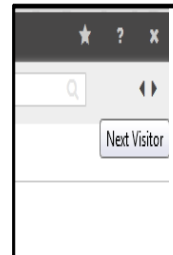
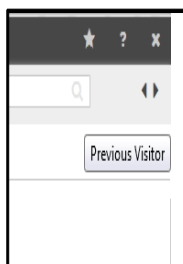
### Upload Photo

Click on the image on left side to upload or change the **Photo**. Browse the image and click on **Update** to upload the photo for the visitor.



Finally click on **Save** button from the toolbar to save the basic details of the visitor

To navigate to previous and next visitor in the list, click on the arrows as shown below.



During check-in by the visitor, the uploaded profile photo (if available) will be displayed for the assigned Visitor Profile. Else, the default profile photo for the assigned Visitor Profile will be displayed.

## Devices

To assign COSEC devices to visitor, click **Devices**. The page appears as shown below:

Visitor Profile

Search Visitor ID or Name

Assign

Configure

ID Name Active/Inactive

Profile

Devices

Credentials

Group

Access Control

Cafeteria

Face Recognition

Search

Device Group

ID Name

Device

Name

Search

DGID

Device Group Name

No Data

Search

Device Name

Type

Restrict Access

Action

No Data

Note: Device(s) will be automatically retained which are part of any Access Rule(s) assigned to the User. For more details Click here



*When **Auto Device Assignment** is enabled from Admin> System Configuration> Global Policy> Visitor Management, the devices assigned to the Host will now be assigned to the visitor. The **Devices** tab will not be configurable.*

*When any Visitor Profile is assigned to the visitor, then the device list from User Module > User Configuration > Visitor Management will be reflected here in read-only mode.*

## Assign

You can assign Device Group or Individual Devices to the visitor so that the visitor can access the assigned devices using the enrolled credential or visitor card.



To select a **Device Group**, click on the **Device Group** picklist. The **Picklist For Device Group** pop-up appears.

The screenshot shows a window titled "Picklist For Device Group". At the top, a green bar displays "Total Selected: 0 Records". Below this is a search bar with the placeholder text "Search" and a magnifying glass icon, followed by a "Show Selected" link. A "Select All" checkbox is located below the search bar. The main area contains a table with two columns: "DGID ▲" and "Name". The table lists 10 device groups, each with an unchecked checkbox in the first column. The records are: 1 ACTA Devices, 2 RnD1Visitor, 3 Device Group 3, 4 Device Group 4, 5 Device Group 5, 6 Device Group 6, 7 Device Group 7, 8 Device Group 8, 9 Device Group 9, and 10 Device Group 10. At the bottom left, it says "1 - 10 of 12 records". At the bottom right, there are pagination controls: "<< < 1 2 > >>". The "1" is highlighted with a blue border. At the very bottom are "OK" and "Cancel" buttons.

<input type="checkbox"/>	DGID ▲	Name
<input type="checkbox"/>	1	ACTA Devices
<input type="checkbox"/>	2	RnD1Visitor
<input type="checkbox"/>	3	Device Group 3
<input type="checkbox"/>	4	Device Group 4
<input type="checkbox"/>	5	Device Group 5
<input type="checkbox"/>	6	Device Group 6
<input type="checkbox"/>	7	Device Group 7
<input type="checkbox"/>	8	Device Group 8
<input type="checkbox"/>	9	Device Group 9
<input type="checkbox"/>	10	Device Group 10

You can either select particular device groups or can select all the device groups at once.

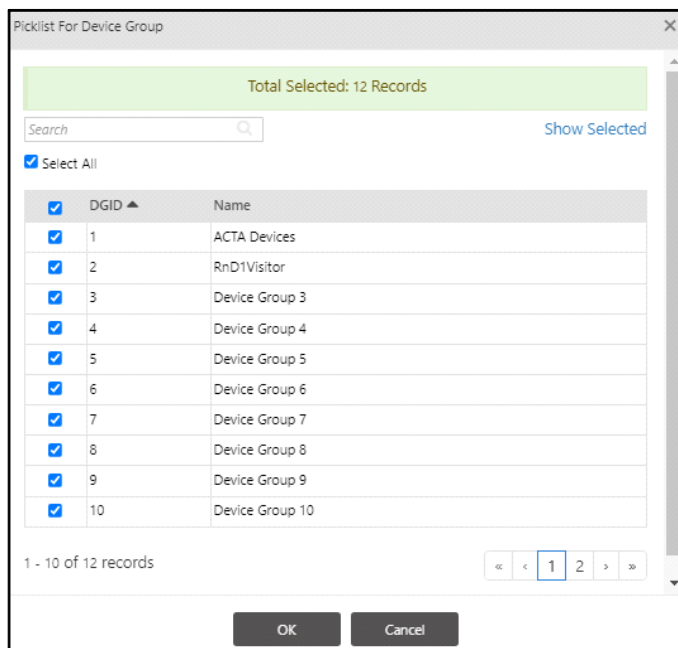
To select particular device groups, select the check boxes for the desired device groups.

This screenshot shows the same "Picklist For Device Group" window, but now three records are selected. The green bar at the top now says "Total Selected: 3 Records". The checkboxes for DGID 1 (ACTA Devices), DGID 2 (RnD1Visitor), and DGID 3 (Device Group 3) are now checked. The other checkboxes remain unchecked. All other UI elements, including the search bar, pagination controls, and buttons, are the same as in the previous screenshot.

<input type="checkbox"/>	DGID ▲	Name
<input checked="" type="checkbox"/>	1	ACTA Devices
<input checked="" type="checkbox"/>	2	RnD1Visitor
<input checked="" type="checkbox"/>	3	Device Group 3
<input type="checkbox"/>	4	Device Group 4
<input type="checkbox"/>	5	Device Group 5
<input type="checkbox"/>	6	Device Group 6
<input type="checkbox"/>	7	Device Group 7
<input type="checkbox"/>	8	Device Group 8
<input type="checkbox"/>	9	Device Group 9
<input type="checkbox"/>	10	Device Group 10

**OR**

To select all the device groups at once, select the **Select All** check box. The device groups on all the pages will be selected.



Click **OK**.

The selected device groups appears in the grid.



You can also delete the desired devices. To do so, click **Delete** of the respective device.

Then click **Save**. The devices belonging to the selected device group/s appear in the grid.

The screenshot shows the 'Assign' tab of the Matrix COSEC System Manual. It features a 'Device Group' section with a search bar and a table of device groups. Below it is a 'Device' section with a search bar and a table of devices. The 'Device' table has columns: Device Name, Type, Restrict Access, and Action. The 'Action' column contains green circular icons.

Device Name	Type	Restrict Access	Action
FACTORY ACCOUNT	Door V3	<input type="checkbox"/>	
Factory Admin FMX	Door FMX	<input type="checkbox"/>	
Factory Canteen FMX	Door FMX	<input type="checkbox"/>	
Factory Production1 ARGO	ARGO	<input type="checkbox"/>	
Factory QC ARGO	ARGO	<input type="checkbox"/>	
Factory QC FMX	Door FMX	<input type="checkbox"/>	
FACTORY STORE	Door V3	<input type="checkbox"/>	
Factory Vega Production-2	Vega Controller	<input type="checkbox"/>	
HO Access VEGA	Vega Controller	<input type="checkbox"/>	
HO TA ARGO	ARGO	<input type="checkbox"/>	

Click **Edit**. You can un-assign the particular device from the assigned Device Group by clicking on icon. Click on the icon to assign the device again.

The screenshot shows the 'Assign' tab of the Matrix COSEC System Manual. It features a 'Device Group' section with a search bar and a table of device groups. Below it is a 'Device' section with a search bar and a table of devices. The 'Device' table has columns: Device Name, Type, Restrict Access, and Action. The 'Action' column contains green circular icons. A tooltip 'Click to Assign' is visible over the 'Action' column of the 'Factory Canteen FMX' row.

Device Name	Type	Restrict Access	Action
FACTORY ACCOUNT	Door V3	<input type="checkbox"/>	
Factory Admin FMX	Door FMX	<input type="checkbox"/>	
Factory Canteen FMX	Door FMX	<input type="checkbox"/>	Click to Assign
Factory Production1 ARGO	ARGO	<input type="checkbox"/>	
Factory QC ARGO	ARGO	<input type="checkbox"/>	
Factory QC FMX	Door FMX	<input type="checkbox"/>	
FACTORY STORE	Door V3	<input type="checkbox"/>	
Factory Vega Production-2	Vega Controller	<input type="checkbox"/>	
HO Access VEGA	Vega Controller	<input type="checkbox"/>	
HO TA ARGO	ARGO	<input type="checkbox"/>	

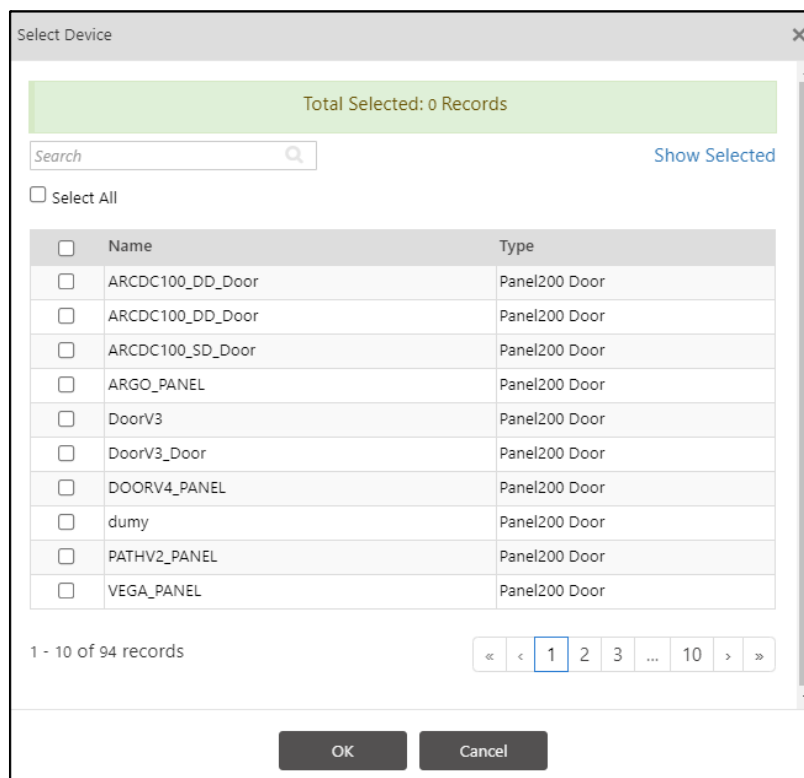


*If any device or a device belonging to any device group is un-assigned against any visitor or is selected for deletion but is a part of the Access Rule which is assigned to that visitor, then those door(s) will be retained against that visitor.*

Select the corresponding **Restrict Access** check boxes to enable these restrictions for the selected visitor on the selected device. If you select the **Restrict Access** check box, then visitor will be restricted for access on that Door. The device will only register the visitor punches for attendance and the door will not open for access.

Similarly, you can also assign devices to the visitor.

To assign a device to the visitor; click the **Device** picklist. The **Select Device** pop-up appears.

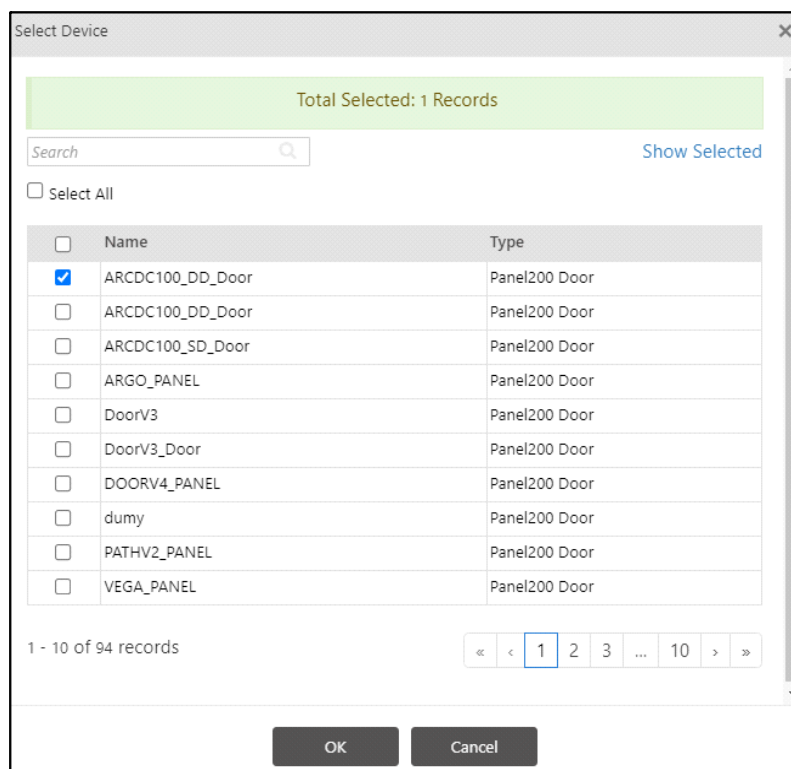


The 'Select Device' pop-up window displays a green header bar with the text 'Total Selected: 0 Records'. Below this is a search bar with the placeholder 'Search' and a magnifying glass icon, followed by a 'Show Selected' link. A 'Select All' checkbox is located below the search bar. The main area contains a table with two columns: 'Name' and 'Type'. The table lists 12 devices, all of which are 'Panel200 Door' type. The first device is 'ARCDC100\_DD\_Door'. Below the table, it shows '1 - 10 of 94 records' and a pagination control with buttons for '<<', '<', '1', '2', '3', '...', '10', '>', and '>>'. At the bottom are 'OK' and 'Cancel' buttons.

<input type="checkbox"/>	Name	Type
<input type="checkbox"/>	ARCDC100_DD_Door	Panel200 Door
<input type="checkbox"/>	ARCDC100_DD_Door	Panel200 Door
<input type="checkbox"/>	ARCDC100_SD_Door	Panel200 Door
<input type="checkbox"/>	ARGO_PANEL	Panel200 Door
<input type="checkbox"/>	DoorV3	Panel200 Door
<input type="checkbox"/>	DoorV3_Door	Panel200 Door
<input type="checkbox"/>	DOORV4_PANEL	Panel200 Door
<input type="checkbox"/>	dumy	Panel200 Door
<input type="checkbox"/>	PATHV2_PANEL	Panel200 Door
<input type="checkbox"/>	VEGA_PANEL	Panel200 Door

You can select particular devices or can select all the devices at once.

To select particular devices, select the check boxes of the desired devices.



The 'Select Device' pop-up window now shows 'Total Selected: 1 Records' in the green header bar. The search bar and 'Show Selected' link remain. The 'Select All' checkbox is still present. In the table, the first device, 'ARCDC100\_DD\_Door', now has its checkbox checked. The rest of the table and the pagination controls are the same as in the previous image. The 'OK' and 'Cancel' buttons are at the bottom.

<input type="checkbox"/>	Name	Type
<input checked="" type="checkbox"/>	ARCDC100_DD_Door	Panel200 Door
<input type="checkbox"/>	ARCDC100_DD_Door	Panel200 Door
<input type="checkbox"/>	ARCDC100_SD_Door	Panel200 Door
<input type="checkbox"/>	ARGO_PANEL	Panel200 Door
<input type="checkbox"/>	DoorV3	Panel200 Door
<input type="checkbox"/>	DoorV3_Door	Panel200 Door
<input type="checkbox"/>	DOORV4_PANEL	Panel200 Door
<input type="checkbox"/>	dumy	Panel200 Door
<input type="checkbox"/>	PATHV2_PANEL	Panel200 Door
<input type="checkbox"/>	VEGA_PANEL	Panel200 Door

OR

To select all the devices, select the **Select All** check box. The devices on all the pages will be selected.

Select Device

Total Selected: 94 Records

Search

Show Selected

☒ Select All

<input checked="" type="checkbox"/>	Name	Type
<input checked="" type="checkbox"/>	ARCDC100_DD_Door	Panel200 Door
<input checked="" type="checkbox"/>	ARCDC100_DD_Door	Panel200 Door
<input checked="" type="checkbox"/>	ARCDC100_SD_Door	Panel200 Door
<input checked="" type="checkbox"/>	ARGO_PANEL	Panel200 Door
<input checked="" type="checkbox"/>	DoorV3	Panel200 Door
<input checked="" type="checkbox"/>	DoorV3_Door	Panel200 Door
<input checked="" type="checkbox"/>	DOORV4_PANEL	Panel200 Door
<input checked="" type="checkbox"/>	dumy	Panel200 Door
<input checked="" type="checkbox"/>	PATHV2_PANEL	Panel200 Door
<input checked="" type="checkbox"/>	VEGA_PANEL	Panel200 Door

1 - 10 of 94 records

« < 1 2 3 ... 10 > »

OK Cancel

Click **OK**.

The device/s appear in the grid.

Device Name	Type	Restrict Access	Action
DoorV3	Panel200 Door	<input type="checkbox"/>	
NGT	NGT Direct Door	<input type="checkbox"/>	
Path controller:	Path Controller	<input type="checkbox"/>	
Path V2	Path V2	<input type="checkbox"/>	
Wireless Door:	Wireless Door	<input type="checkbox"/>	

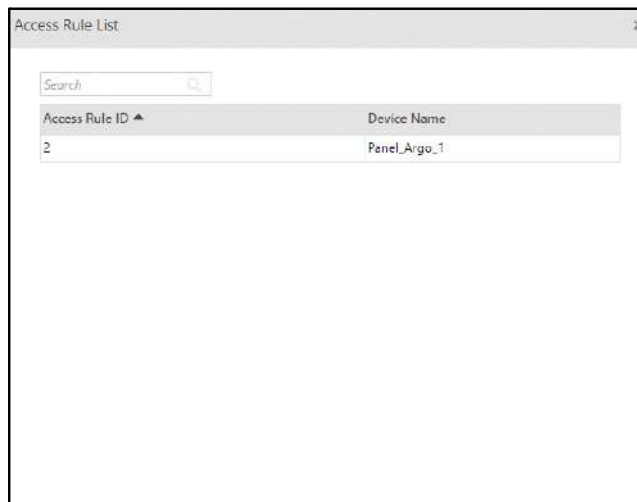
You can also delete the desired device/s. To do so, click **Delete** of the respective device.



*The device picklist will include Panel Doors and Direct Doors only.*

Select the corresponding **Restrict Access** check boxes to enable these restrictions for the selected visitor on the selected device. If you select the **Restrict Access** check box, then visitor will be restricted for access on that Door. The device will only register the visitor punches for attendance and the door will not open for access.

If you wish to check the devices assigned against any Access Rule, click the **Click here** link at the bottom of the page. The **Access Rule List** pop-up appears.



The image shows a pop-up window titled "Access Rule List". It contains a search bar at the top with a magnifying glass icon. Below the search bar is a table with two columns: "Access Rule ID" and "Device Name". The table has one row with the values "2" and "Panel\_Argo\_1".

Access Rule ID	Device Name
2	Panel_Argo_1

It displays the list of Devices along with the Access Rule ID against which they are assigned.

Click the **Save** button to save the device selection for assigning to the visitor.

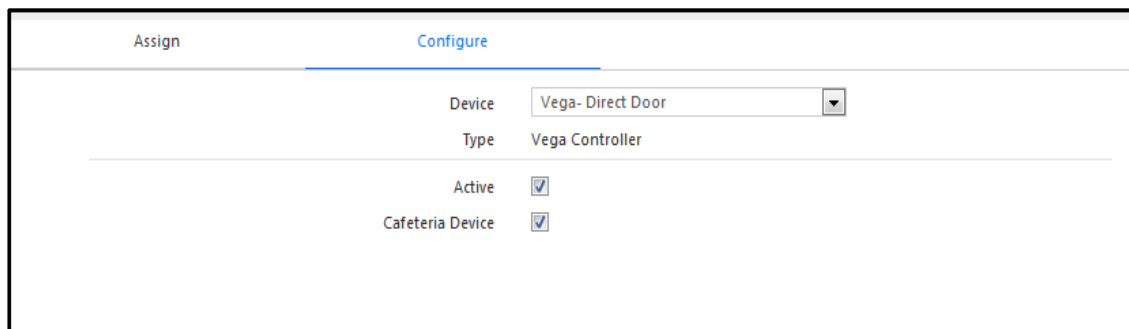
## Configure



*The parameters for "Configure" varies as per the Device selected.*

You can edit the settings on the individual Direct Doors as well as Panel (for Pane Doors) assigned to the visitor. The options displayed under the Configure tab differ as per the Direct Door/Panel selected.

This option is only available with the Access Control add on module.



The image shows the "Configure" tab of a configuration interface. It has two tabs: "Assign" and "Configure", with "Configure" being the active tab. The interface displays the following settings:

- Device:** Vega- Direct Door (selected from a drop-down menu)
- Type:** Vega Controller
- Active:** ☒
- Cafeteria Device:** ☒

**Device:** The list displays the devices assigned to the visitor. Select the desired door/panel from the drop-down list.

**Type:** Displays the type of door as per the selected Device option.

**Active:** The Active check box is selected by default to enable the visitor credentials on the selected device.

## Configuration of Panel200

Assign		Configure	
Device	Panel Lite V2-Device-1		
Type	Panel Lite V2		
Active	<input checked="" type="checkbox"/>		
VIP	<input type="checkbox"/>		
Absentee Rule	<input type="checkbox"/>		
Absent Day(s) Count	60		
Access Profile	Group-1		
Functional Group	Staff		
Home Zone	Zone-1		
Visit Zone	Select		
Access Route	Select		

**VIP:** Select this check box, if the visitor is to be given unrestricted access rights.

**Absentee Rule:** Select this box to enable Absentee Rule feature at visitor level for each Panel200 and Direct door. Make sure this option is enabled at the Panel200 and Direct door levels.

- **Absent Days Count:** Specify the days count ranging from 1 to 365 for which if the user remains absent, he will be marked inactive.

**Access Profile:** Select the Access Profile to be assigned to the user for the selected Panel200.

**Functional Group:** Select the Functional Group to be assigned to the user for the selected Panel200.

**Zone:** Select the user's **Home Zone** and the **Visit Zone** for the selected Panel200.

**Access Route:** The administrator can also assign a defined access route to the user. Select the access route from the drop down list if required.

Select another device and configure the access control options as applicable.




*This option is only available with the **Access Control** add on module.*

Click on **Save** button to save the visitor configuration.

## Credentials

To assign credentials to visitor, click the option **Credentials**. The page appears as shown below.

Visitor Profile	
 V3 Parshv Active	<b>Credentials</b>
Profile	PIN: 101
Devices	Biometric Group No.: 7
<b>Credentials</b>	Roaming User: <input type="checkbox"/>
Access Control	Access Card 1:
Cafeteria	Access Card 2:
Face Recognition	Enrolled Fingers(Suprema Proprietary): 0
	Enrolled Fingers(Suprema ISO): 0
	Enrolled Fingers(Lumidigm ISO): 0
	Enrolled Palm: 0
	Enrolled Face: 0

- **PIN:** Specify the PIN number for the visitor. The PIN number is used as a credential to punch on the door with which the visitor would be recognised by the device, irrespective of the fingerprints. Visitor PIN should be a numeric value consisting maximum of 15 digits. The value entered in this field will only be visible to the System Administrator (SA) user. For all other login users the value in this field will be masked.



*If Dynamic PIN On Pass Creation in Admin> System Configuration> Global Policy> Visitor Management is enabled, then **PIN** will not be configurable. You will be able to view PIN here only during the visit time i.e. when the visitor with the configured Visitor Profile checks-in.*

- **Biometric Group No.:** Specify the Biometric group number to be assigned to the visitor if applicable. It is a number allotted to a group of visitors assigned on a device. This enables the device to match a template against only those visitors who are part of the same Biometric Group thus reducing processing time.

This value is used for Palm/Face Identification of visitor on Identification Server in shorter time span considering visitor first specifies Group No and then punches on the device.

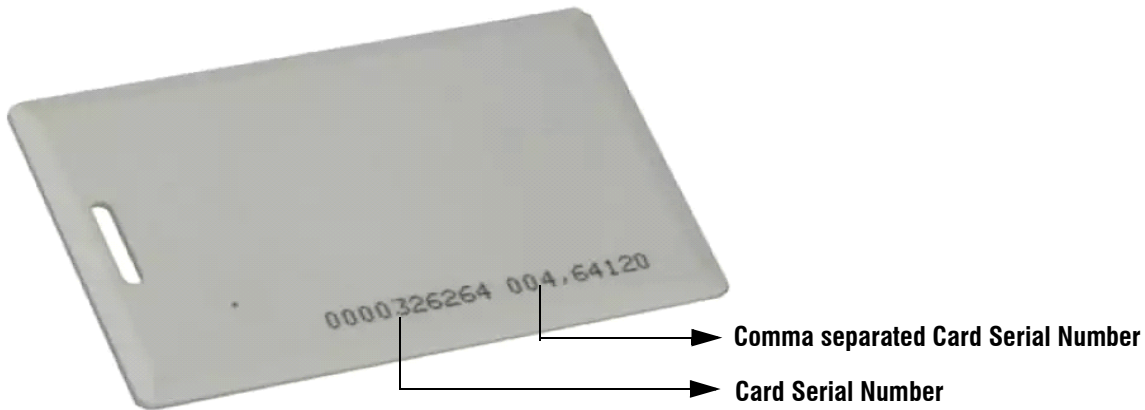
Identification Server will be allocating templates to its child threads on the basis of this field.

- **Access Card 1 & 2:** Enter the Card Serial Number or a Comma separated CSN which is to be assigned to the Visitor Profile.

Format:

- **Card Serial Number** = 1343933547.
- **Comma separated CSN** = 12,345789





The maximum character limit for Card Serial Number (CSN) is 20 digits. While the maximum character limit for Comma separated CSN is 21 digits.

To configure a comma separated card value, make sure you configure a 26-bit card format in the system and then assign the same to the device. To know more, refer "[Card Formats](#)".

This Access Card number will be synced with the devices to allow/deny access to visitors.

COSEC accepts up to two cards per visitor. So if available, the **Access Card 2** number will be displayed.



**If Access via QR** in Admin> System Configuration> Global Policy> Visitor Management is enabled, then Access Card 2 will not be configurable.

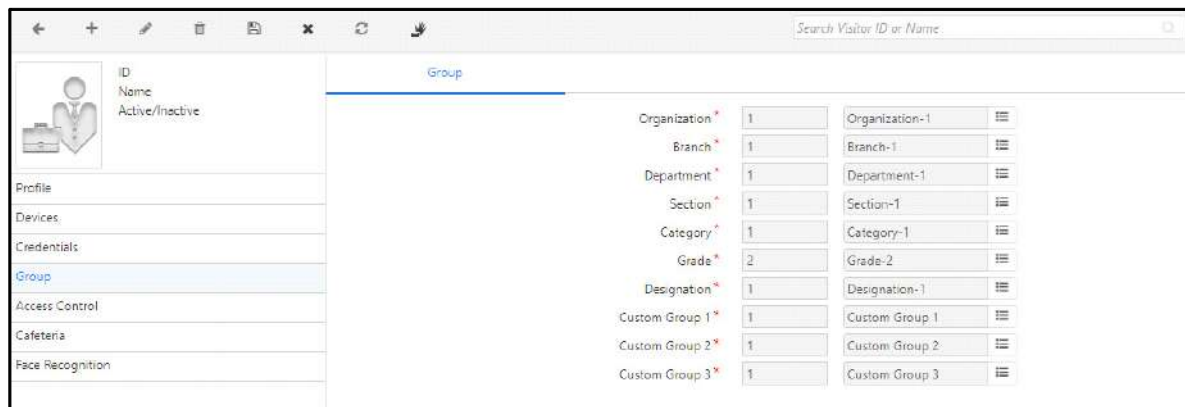
*Access Card 2 will display the value of the QR Code generated while Pass creation.*

Once you save the configurations, hover your mouse over the Comma separated CSN value of any Access Card, the system will display an encoded (converted) value of Comma separated CSN.

- **Enrolled Fingers:** It displays the number of fingerprint templates enrolled for the selected visitor.
- **Enrolled Palms:** It displays the number of palm vein templates enrolled for the selected visitor.
- **Enrolled Face:** It displays the number of Face templates enrolled against the selected visitor.

## Group

This option enables you to assign the Enterprise groups, Reporting group, Approval Policy, Leave group and Week off group to the Visitor.




The screenshot shows a web application interface for configuring a visitor's group. On the left is a sidebar with a list of configuration options: ID, Name, Active/Inactive, Profile, Devices, Credentials, **Group** (highlighted), Access Control, Cafeteria, and Face Recognition. The main area is titled 'Group' and contains a search bar at the top right labeled 'Search Visitor ID or Name'. Below the search bar is a table with two columns. The first column lists various group categories with a red asterisk, and the second column shows the selected value and a picklist button. The data is as follows:

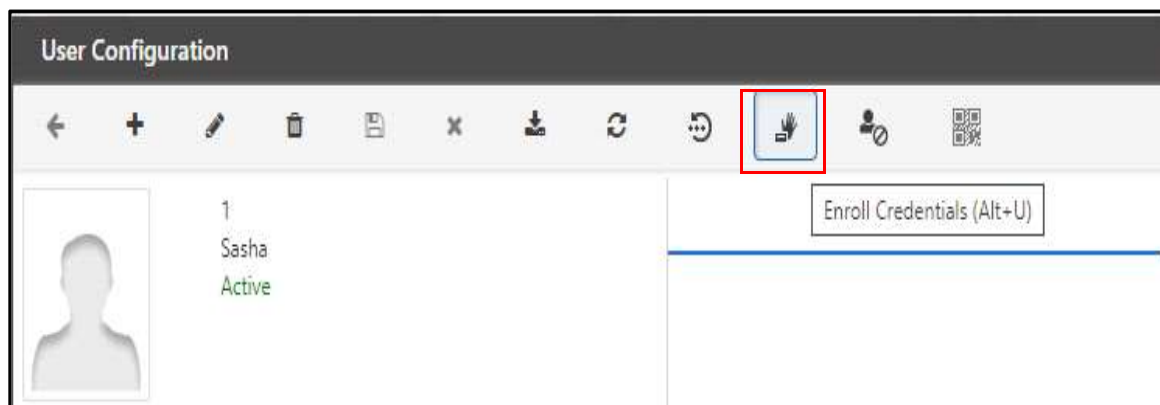
Category	Value	Picklist
Organization *	1	Organization-1
Branch *	1	Branch-1
Department *	1	Department-1
Section *	1	Section-1
Category *	1	Category-1
Grade *	2	Grade-2
Designation *	1	Designation-1
Custom Group 1 *	1	Custom Group 1
Custom Group 2 *	1	Custom Group 2
Custom Group 3 *	1	Custom Group 3

The default groups will be shown in the respective fields. Click on the picklist buttons and select the appropriate enterprise groups — Organization, Branch, Department, Section, Category, Grade, Designation, Custom Groups) to assign to the Visitor.

The picklist options that appear in each enterprise group will be as per the rights assigned to the SA. For details, refer to [“Assigning Group-Wise Rights”](#) under [“System Accounts”](#).

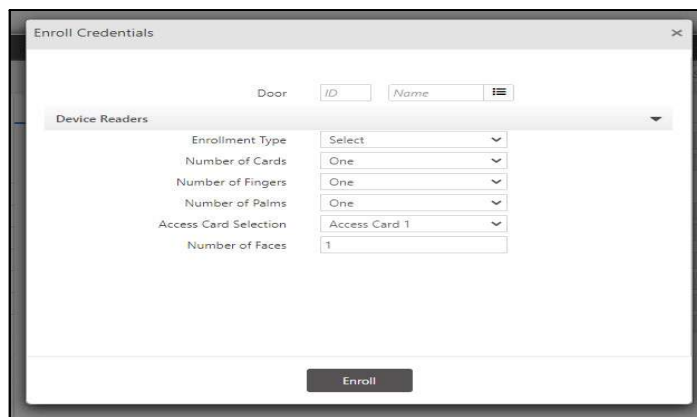
## Enroll Credentials

The Administrator can enroll credentials for the visitor by clicking **Enroll Credentials**  as shown below.



The screenshot shows the 'User Configuration' interface. At the top is a dark header with the title 'User Configuration'. Below the header is a toolbar with various icons. One icon, representing a hand, is highlighted with a red rectangle. To the right of this icon is a button labeled 'Enroll Credentials (Alt+U)'. Below the toolbar, the interface is divided into two main sections. The left section displays a user profile with a placeholder image, the name 'Sasha', and the status 'Active'. The right section is currently empty.

The **Enroll Credentials** window appears as shown below:



The screenshot shows the 'Enroll Credentials' window. At the top, there are fields for 'Door', 'ID', and 'Name'. Below these is a 'Device Readers' section with a dropdown arrow. The configuration options are as follows:

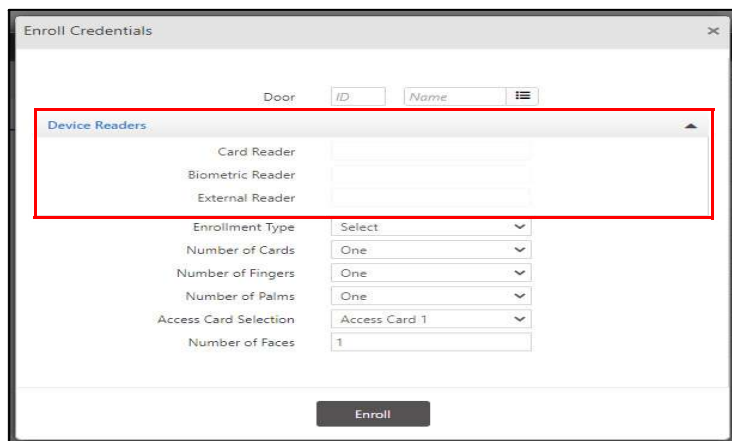
Configuration Option	Value
Enrollment Type	Select
Number of Cards	One
Number of Fingers	One
Number of Palms	One
Access Card Selection	Access Card 1
Number of Faces	1

An 'Enroll' button is located at the bottom center.

- **Door:** Select the desired door from the picklist on which the enrollment is to done.

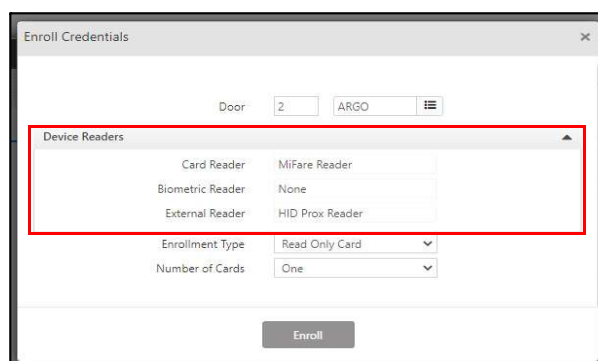
### Device Readers

Device Readers displays the information of the readers configured in the selected **Door**.



This screenshot shows the 'Device Readers' section highlighted with a red box. The section contains three input fields: 'Card Reader', 'Biometric Reader', and 'External Reader'. Below these fields are the same configuration options as in the previous screenshot.

Card Reader, Biometric Reader and External Reader information are displayed here.



This screenshot shows the 'Device Readers' section highlighted with a red box. The specific reader information is as follows:

Reader Type	Value
Card Reader	MiFare Reader
Biometric Reader	None
External Reader	HID Prox Reader

Below the reader information, the 'Enrollment Type' is set to 'Read Only Card' and 'Number of Cards' is set to 'One'. An 'Enroll' button is at the bottom.

- **Enrollment Type:** Select the desired enrollment type — Read Only Card, Smart Card, Biometrics, BiometricsThenCard, Face and Mobile — from the drop-down list.  
Based on the selection of the **Door** and **Enrollment Type**, below parameters will be displayed for configuration.



Below parameters also depend on the Readers configured in the Door. To configure the desired Reader, refer Readers section under Devices > Device Configuration (of the desired Door) > Profile > Readers.

1. **Enrollment Type** = Read Only Card

**Number of Cards:** Select the desired number of cards from the drop down list.

2. **Enrollment Type** = Smart Card

**Number of Cards:** Select the desired number of cards from the drop down list.

**Details on Smart Card**

Select the desired check boxes of the parameters — **Visitor ID**, **Facility Code (FC)**, **Additional Security Code (ASC)** — which are to be displayed on the Smart Card.

Select the desired number of **Finger Templates** from the drop down list.

If the **Door** is selected as PVR Door, **Palm Templates** parameter will be visible. Select the check box of this parameter if you wish to display it on the Smart Card.

To store palm templates, MiFare 4k reader must be configured in the PVR Door.



Door PVR must be set in the Adaptive mode (configure from Admin> System Configuration> Global Policy) for the palm templates to be saved into the Smart Card.

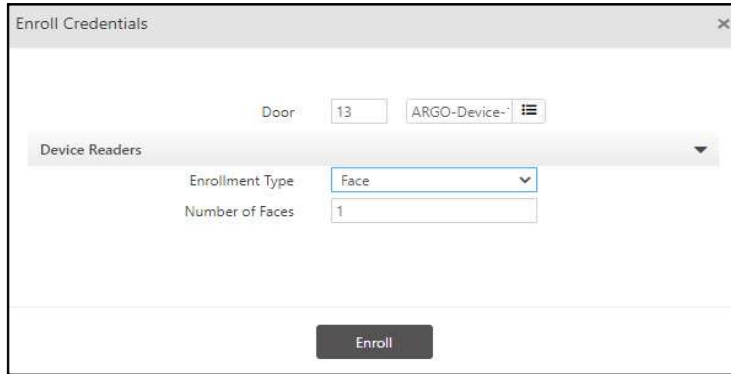
**Additional Details on Smart Card**

Other than the parameters mentioned in the Details on Smart Card, you can display additional details on Smart Card.

Select the **Short Name** check box to display it on the Smart Card.

### 3. Enrollment Type = Face

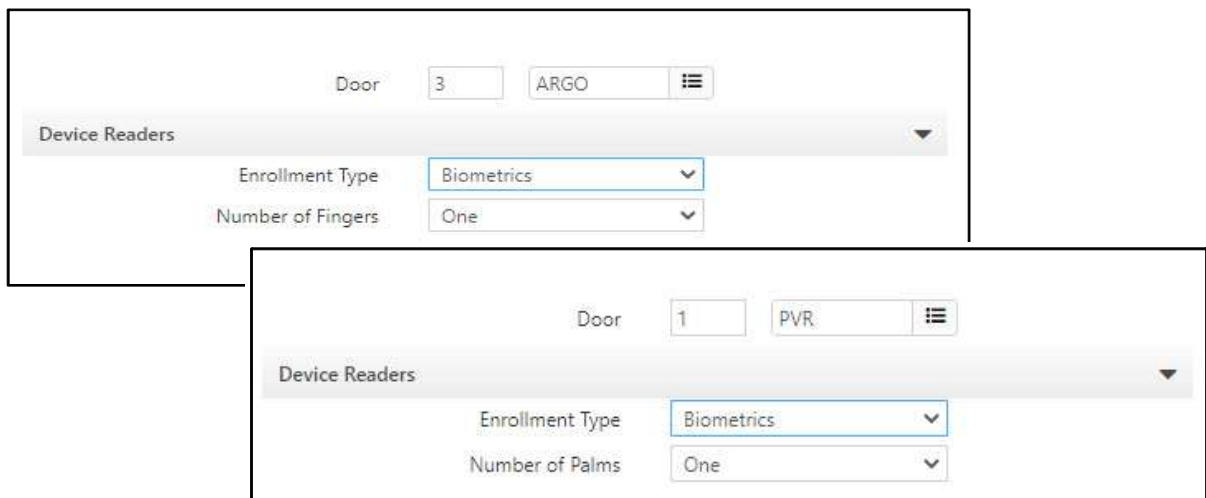
**Number of Faces:** Select the desired number of faces from the dropdown list.



The screenshot shows the 'Enroll Credentials' dialog box. At the top, there are fields for 'Door' (13) and 'ARGO-Device-'. Below these is a 'Device Readers' dropdown menu. Under the dropdown, 'Enrollment Type' is set to 'Face' and 'Number of Faces' is set to '1'. At the bottom, there is an 'Enroll' button.

### 4. Enrollment Type = Biometrics

**Number of Fingers/ Number of Palms:** Select the desired number of fingers or palms from the drop-down list.

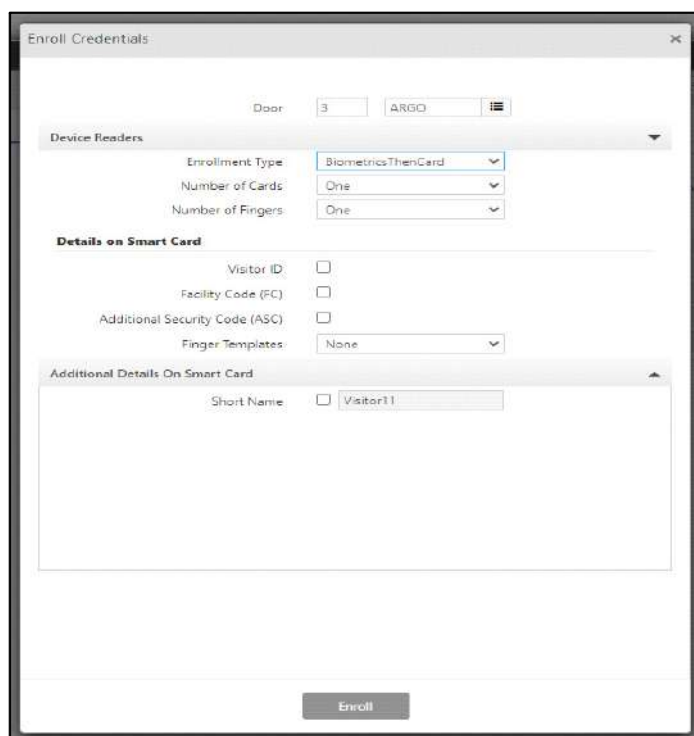


The first screenshot shows the 'Enroll Credentials' dialog box with 'Door' set to '3' and 'ARGO' selected. 'Enrollment Type' is 'Biometrics' and 'Number of Fingers' is 'One'. The second screenshot shows the same dialog box with 'Door' set to '1' and 'PVR' selected. 'Enrollment Type' is 'Biometrics' and 'Number of Palms' is 'One'.

### 5. Enrollment Type = BiometricsThenCard

**Number of Cards:** Select the desired number of cards from the drop-down list.

**Number of Fingers/ Number of Palms:** Select the desired number of fingers or palms from the drop-down list.



### **Details on Smart Card**

Select the desired check boxes of the parameters — **Visitor ID**, **Facility Code (FC)**, **Additional Security Code (ASC)** — which are to be displayed on the Smart Card.

Select the desired number of **Finger Templates** from the drop-down list.

If the **Door** is selected as PVR Door, **Palm Templates** parameter will be visible. Select the check box of this parameter if you wish to display it on the smart card.

To store palm templates, MiFare 4k reader must be configured in the PVR Door.



*Door PVR must be set in the Adaptive mode (configure from Admin> System Configuration> Global Policy) for the palm templates to be saved into the Smart Card.*

### **Additional Details on Smart Card**

Other than the parameters mentioned in the Details on Smart Card, you can display additional details on Smart Card.

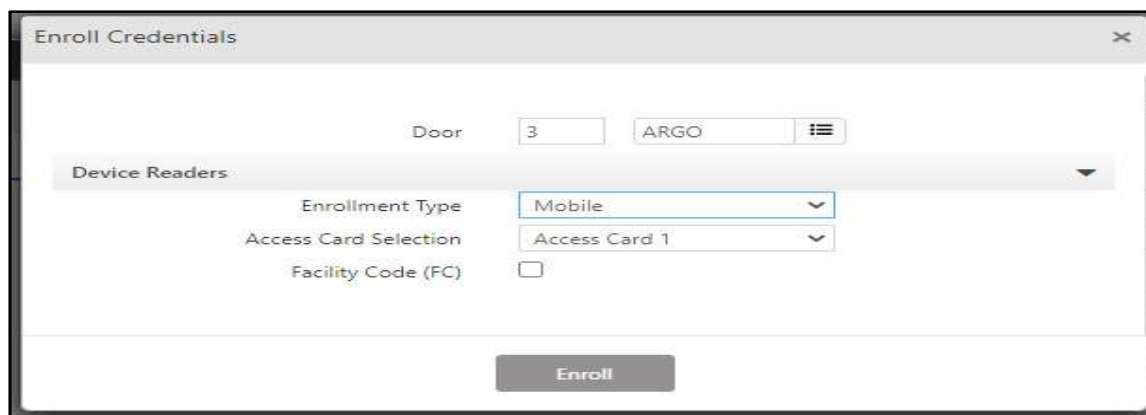
Select the **Short Name** check box to display it on the Smart Card.

## **6. Enrollment Type = Mobile**



*To select **Enrollment Type** as Mobile, the particular device must have BLE support and ensure Bluetooth is ON in the mobile.*

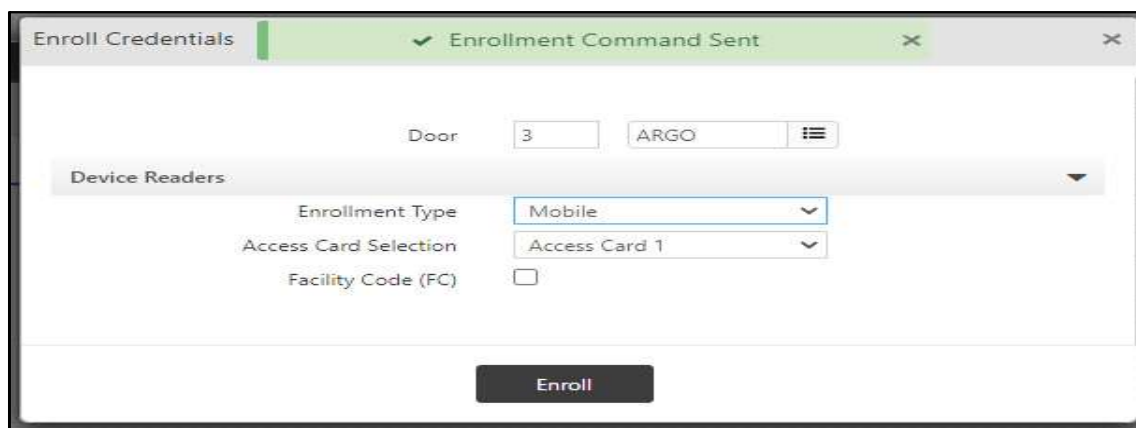
**Access Card Selection:** Select the desired Access Card from the drop down list.



The screenshot shows the 'Enroll Credentials' dialog box. At the top, there is a 'Door' field with the value '3' and a dropdown menu showing 'ARGO'. Below this is a 'Device Readers' section with a dropdown arrow. Underneath, there are three fields: 'Enrollment Type' with a dropdown menu showing 'Mobile', 'Access Card Selection' with a dropdown menu showing 'Access Card 1', and 'Facility Code (FC)' with an unchecked checkbox. At the bottom center is an 'Enroll' button.

**Facility Code (FC):** Select this check box to enroll the Facility Code (FC) against the visitor.

Click **Enroll** to initiate the enrollment process.



This screenshot shows the same 'Enroll Credentials' dialog box, but with a green status bar at the top indicating '✓ Enrollment Command Sent'. The fields and buttons remain the same as in the previous screenshot.

To know more about enrolling credentials of visitors, refer ["Enrollment"](#).

## Access Control

To configure Access Control feature for the visitor, click the option **Access Control**. The page appears as shown below.



*This option is only available with the Access Control add on module.*

### Basic

**ByPass Finger:** You can enable this check-box to bypass the identification of finger on device when the finger print image is not clear or when there is any problem in identifying the visitor.

If the device is set to Access mode as biometrics + card or biometrics+ PIN or any other combinations. Then visitor can access the door using PIN or card, thus bypassing the finger identification.

**ByPass Palm:** You can enable this checkbox to bypass the identification of Palm on device when the Palm Vein image is not clear or when there is any problem in identifying the visitor.

If the device is set to Access mode as biometrics + card or biometrics+ PIN or any other combinations. Then visitor can access the door using PIN or card, thus bypassing the Palm identification.

**Access Validity:** Enable this option if the visitor credential is to be activated for a predefined period.

**Access Validity Date:** Select the date from the calendar button on which the visitor validity will end.

**Access Level:** Select the Access Level to be assigned to the visitor in Smart Identification (SI) mode. If the Access level of visitor is greater than the Access level of device; only then the visitor can access the device.

**Holiday Schedule:** Select the Holiday schedule to be assigned to the visitor from the drop down list. The Holiday Schedule is configured from Shifts and Schedule module.



## Advance

The screenshot shows the 'Visitor Profile' window with the 'Advance' tab selected. The left sidebar contains a list of profile attributes: Profile, Devices, Credentials, Group, Access Control (highlighted), Cafeteria, and Face Recognition. The main area is divided into two sections. The top section contains settings for 'Enable Advance Access Control' (checked), 'Smart Access Route' (with ID and Name picklists), and 'Maximum Route Level' (set to 75). Below this is the 'Enable Elevator Access Control' (unchecked) section with an 'Elevator Floor Group' picklist. The bottom section is the 'Access Rule List', which includes a search bar and a table with two columns: ID and Name. The table contains two entries: ID 13 with Name 'test' and ID 15 with Name 'test2'.

ID	Name
13	test
15	test2

**Enable Advance Access Control:** Check this box to enable the advance access control feature.

**Smart Access Route:** Select the Smart Access Route to be assigned to the visitor from the Access Route picklist. The Smart Access Route is configured from **Access Control module> Smart Access> Smart Access Route**.

**Max Route Level:** Select the route level upto which the visitor is to be allowed access from the drop down list. Suppose if Max Route level of visitor is 5, then devices in the route with Access level greater than 5 will not be allowed to access by the visitor.

**Enable Elevator Access Control:** Check this box to enable the Elevator access control feature for the visitor.

**Elevator Floor Group:** Click the picklist and select the Elevator floor group to be assigned to the visitor. The visitor can access the floors of the Elevators included in Elevator Floor Group.

The Elevator Floor group is created from Access Control> Elevator Access Control> Elevator floor group.

**Access Rule List:** This table displays the list of Access Rule/s assigned to the visitor.

## Cafeteria

This option is only available with the Cafeteria add on module. On clicking the Cafeteria option the following page appears.

### Setting

The screenshot shows the 'Visitor Profile' settings interface. On the left, a sidebar lists various settings: Profile, Devices, Credentials, Group, Access Control, Cafeteria (highlighted), and Face Recognition. The main area is titled 'Settings' and contains the following configuration options:

- Enable Account:** A checkbox that is checked.
- Enable Offline Transaction:** A dropdown menu currently set to 'None'.
- Discount Level:** A dropdown menu currently set to 'None'.
- Account Type:** A dropdown menu currently set to 'Pre-Paid'.
- Balance Management:** A dropdown menu currently set to 'Device Based'.
- Device-Server Balance Check:** An unchecked checkbox.
- Cafeteria Usage Policy:** Two input fields, one labeled 'ID' and one labeled 'Name', with a menu icon to the right.

**Enable Account:** Check the box to enable the visitor to access the assigned Cafeteria devices.

**Enable Offline Transaction-** Select the desired option from the drop-down list for the visitor to perform the offline transaction.

- Select **None**, if you do not want to allow transactions to be made by the Visitor when the device is in offline mode.
- Select **Allow With Discount**, if you want to allow transactions with discount to be made by the Visitor, when the device is in offline mode.
- Select **Allow Without Discount**, if you want to allow transactions without discount to be made by the Visitor, when the device is in offline mode.

**Discount Level:** Select the appropriate Discount Level from the drop down list.

**Account Type:** Select the Account Type from the options of **Pre-Paid** and **Post-Paid**.

#### **Pre-paid Account**

- For **Pre-Paid** account type, specify whether the **Balance Management** should be **Device-based** or **Server-based**.
- When Balance Management is selected as **Server based**, then you can enable **Device-Server Balance Check**. This will allow Device to check Server-side balance before allowing transaction. For this, Device and Server must be connected.

### Post-paid Account

- For **Post-Paid** account type, enter the **Allowed Usage Per Month** based on which monthly dues for the user can be calculated.

Enable Account	<input checked="" type="checkbox"/>	
Enable Offline Transaction	None	
Discount Level	None	
Account Type	Post-Paid	
Allowed Usage Per Month *	0.00	
Cafeteria Usage Policy	ID	Name

**Cafeteria Usage Policy-** Select the cafeteria usage policy to assign to the user based on which cafeteria transaction restrictions will be applied to the Visitor.

### Face Recognition

In this feature, visitor can access the device or mark the attendance by verifying his Face as the credential. The Face Recognition tab appears as shown below:

The screenshot displays a software interface for managing visitor settings. On the left, a sidebar contains a user profile card with fields for ID, Name, and Active status, followed by a list of settings: Profile, Devices, Credentials, Group, Access Control, Cafeteria, and Face Recognition. The 'Face Recognition' option is highlighted. The main content area shows the 'Settings' tab for Face Recognition, which includes an 'Enable Face Recognition' checkbox.

**Enable Face Recognition:** Check this box to enable Face Recognition feature for access control of visitors.

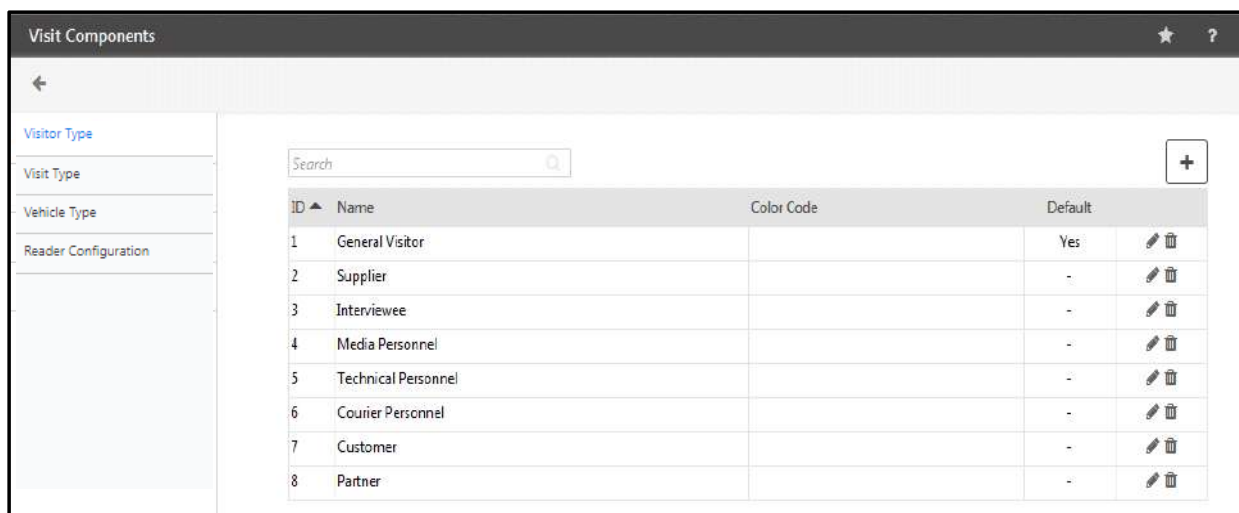
# Visit Components

















Visit Components display the Visitor Types, Visit Types, Vehicle Type and Station Location of Visitor.

To view and add the Visit Components, select **Visitor Management module > Visit Component**. The Page appears as shown below:

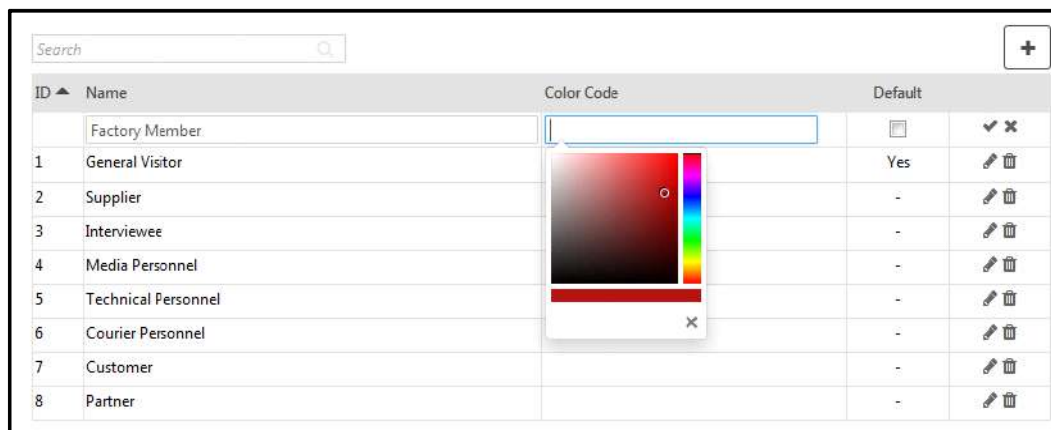
## Visitor Type




















The Visitor Type option enables the user to define various types of visitors as per the site requirements.



ID	Name	Color Code	Default	
1	General Visitor		Yes	 
2	Supplier		-	 
3	Interviewee		-	 
4	Media Personnel		-	 
5	Technical Personnel		-	 
6	Courier Personnel		-	 
7	Customer		-	 
8	Partner		-	 

To add a new visitor type click on **Add** button. The new row will appear where you can enter the details of visitor type.



ID	Name	Color Code	Default	
	Factory Member		<input type="checkbox"/>	 
1	General Visitor		Yes	 
2	Supplier		-	 
3	Interviewee		-	 
4	Media Personnel		-	 
5	Technical Personnel		-	 
6	Courier Personnel		-	 
7	Customer		-	 
8	Partner		-	 

Specify the **Name** of the Visitor type like Customer, Supplier, Interviewee etc.

Click on the **Color Code** box. Select the **Color** for the visitor type by dragging the mouse. The respective Color and the **Color Code** appears with the color selection as shown below.

ID ▲	Name	Color Code	Default	
	Factory Member	#c2191e	<input checked="" type="checkbox"/>	✓ ✕
1	General Visitor		Yes	✎ ✕
2	Supplier		-	✎ ✕
3	Interviewee		-	✎ ✕
4	Media Personnel		-	✎ ✕
5	Technical Personnel		-	✎ ✕
6	Courier Personnel		-	✎ ✕

Check the **Default** box to set this as the default visitor type.

Click on **OK** to save the visitor type. The **ID** will be automatically generated. The visitor type will be displayed in the grid as shown below. The details can be edited by clicking **Edit** button.

ID ▲	Name	Color Code	Default	
1	General Visitor		-	✎ ✕
2	Supplier		-	✎ ✕
3	Interviewee		-	✎ ✕
4	Media Personnel		-	✎ ✕
5	Technical Personnel		-	✎ ✕
6	Courier Personnel		-	✎ ✕
7	Customer		-	✎ ✕
8	Partner		-	✎ ✕
9	Factory Member	#c2191e	Yes	✎ ✕

## Visit Type

Visit Type option enables the user to define various types of visits as per the site requirements.

Visit Components

Visitor Type

Visit Type

Vehicle Type

Reader Configuration

Search

ID ▲

Name

Default

1

Personal

Yes

✎ ✕

2

Official

-

✎ ✕

+

To add a new visit type click on **Add** button. The new row will appear where you can enter the name of visit type.

Search

+

ID ▲

Name

Default

Technical

☐

✓ ✕

1

Personal

Yes

✎ ✕

2

Official

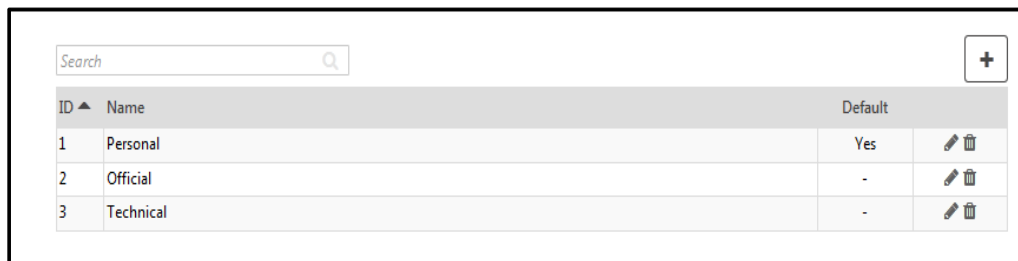
-







✎ ✕

Specify the **Name** of the Visit type.

Check the **Default** box to set this as the default visit type. You cannot delete the default visit type.

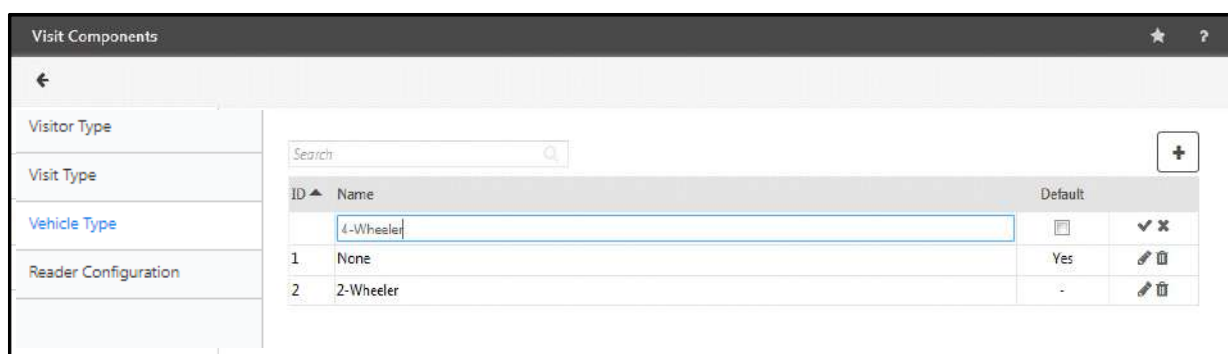
Click on **OK** to save the Visit type. The **ID** will be automatically generated. The visit type will be displayed in the grid as shown below. The details can be edited by clicking **Edit** button.









ID	Name	Default	
1	Personal	Yes	 
2	Official	-	 
3	Technical	-	 

## Vehicle Type

Vehicle Type option enables the user to define the types of vehicles carried by the visitors as per the site requirements.



ID	Name	Default	
	4-Wheeler	<input type="checkbox"/>	 
1	None	Yes	 
2	2-Wheeler	-	 

To add a new vehicle type click on **Add** button. The new row will appear where you can enter the name of vehicle type.

Specify the **Name** of the Vehicle type which the visitor would be carrying.

Check the **Default** box to set this as the default vehicle type. You cannot delete the default vehicle type.

Click on **OK** to save the Vehicle type. The **ID** will be automatically generated.

## Reader Configuration

In this section, System Account User can map VMS Utility field & Response tag. Click Add button.

Select the **VMS field names** which are VMS Utility fields from the drop down list.

Enter the **Response tag** for the selected VMS field names as shown below.

So, whenever a document (say Driving License, PAN Card, Passport etc) is scanned with Samsotech scanning device in VMS Utility, the visitor's detail will be received in response with its respective tag. Now, this received visitor's data will automatically appear in Visitor details section in VMS Utility.

The visitor details will appear according to the mapping done on 'Reader Configuration' page.

ID	VMS - Field Name	Response Tag
	Visitor Name	

For example: Visitor Name field is mapped with Response <firstName> as shown below.

ID	VMS - Field Name	Response Tag
	Mobile No	<personalNumber>
1	Visitor Name	<firstName>

The other fields are mapped with the respective tags as shown below.

ID	VMS - Field Name	Response Tag
1	Visitor Name	<firstName>
2	Mobile No	<personalNumber>
3	Organization	CompanyNameEnglish
4	D.O.B	<dateOfBirth>
5	Nationality	<nationality_fullname>
6	Gender	<gender>

# Visit Template



Make sure SA has the necessary rights to access Visit Template. Refer [“Roles and Rights Configuration”](#).

This page enables the Admin to create multiple customized Visit templates. Once you create the Visit template, you can assign any of these templates to a Station Location. For details refer to [“Station Location”](#).

To view and create a new Visit template, click **Visitor Management module > Templates > Visit Template**. The page appears as shown below:

Visit Template

Visit Template

ID

Name

Default

Visit

Field Name	Type	Mandatory	Active	
Visit Start Date	Date Picker	Yes	Yes	
Visit End Date	Date Picker	Yes	Yes	
Visit Start Time	Time Picker	Yes	Yes	
Visit End Time	Time Picker	Yes	Yes	
Host User	Search Textbox	Yes	Yes	
Repeat	Toggle Button	NA	Yes	
Visit Purpose	Textbox	No	Yes	
Escort User	Search Textbox	No	No	
Vehicle No.	Textbox	No	No	
Vehicle Description	Textbox	No	No	
Additional Visitor Count	Counter	NA	Yes	
Additional Visitor Detail	Input List	NA	No	
Material List 1	Textbox with Upload	No	Yes	
Material List 2	Textbox with Upload	No	No	
Material List 3	Textbox with Upload	No	No	
Material List 4	Textbox with Upload	No	No	
Material List 5	Textbox with Upload	No	No	
Visit Location	Drop Down	NA	No	

Field Name	Type	Selection	Active	
Location	Drop Down	0 Location(s) Selected	No	
Visit Type	Drop Down	0 Visit Type(s) Selected	No	
Visitor Type	Drop Down	0 Visitor Type(s) Selected	No	
Vehicle Type	Drop Down	0 Vehicle Type(s) Selected	No	

Additional Details

Field Name	Type	Mandatory	Active	
Field 1	Textbox with Upload	No	No	
Field 2	Textbox with Upload	No	No	
Field 3	Textbox with Upload	No	No	
Field 4	Textbox with Upload	No	No	
Field 5	Textbox with Upload	No	No	
Field 6	Textbox with Upload	No	No	
Field 7	Textbox with Upload	No	No	
Field 8	Textbox with Upload	No	No	
Field 9	Textbox with Upload	No	No	
Field 10	Textbox with Upload	No	No	

To create a new Visit template click on **Add** button and configure the following parameters:






- **ID:** This is an auto-generated field.
- **Visit Template:** Assign a name to the template.
- **Default:** Select this check box to set this template as the default Visit template.

To create a customized template, do the following:

- You can select the desired parameters from the list. In **Additional Details** section, active custom fields will be displayed.




*To configure custom fields, select Admin> System Configuration> Global Policy> Visitor Management.*

- You can edit only the parameters with the edit icon. Click on **Edit**  .
- Select Mandatory check box, if you want a particular parameter to be configured by the Visitor compulsorily.
- Select Active check box, if you want a particular parameter to be displayed in the template.
- To save the particular parameter details click **OK**  or click **Cancel**  to discard.

Once you configure all the parameters, click **Save**.

You can also create a duplicate template. To do so, select the desired template from the right pane. Click **Duplicate**

**Visit Template**  . A duplicate Template with the identical configuration will be created. Now you can save the new Visit Template with the desired name.

# Visitor Template



Make sure SA has the necessary rights to access Visitor Template. Refer [“Roles and Rights Configuration”](#).

This page enables the Admin to create multiple Visitor templates. Once you create the Visitor template, you can assign any of these templates to a Station Location. For details refer to [“Station Location”](#).

To view and create a new Visitor template, click **Visitor Management module > Templates > Visitor Template**. The page appears as shown below:

Visitor Template

←

+

Visitor Template \*

Default ☐

Basic

Field Name	Type	Mandatory	Active	
Visitor Photo	Upload	Yes	Yes	
Visitor Name	Textbox	Yes	Yes	
Mobile No.	Textbox	Yes	Yes	
Email ID	Textbox	No	Yes	
Organization	Textbox	Yes	Yes	

Personal

Field Name	Type	Mandatory	Active	
DOB	Date Picker	No	Yes	
Gender	Radio Button	NA	Yes	
Nationality	Textbox	No	Yes	

Details

Field Name	Type	Mandatory	Active	
ID Proof 1	Textbox with Upload	No	Yes	
ID Proof 2	Textbox with Upload	No	Yes	
Custom Field 1	Date Picker	No	No	
Custom Field 2	Date Picker with Upload	No	No	
Custom Field 3	Textbox	No	No	
Custom Field 4	Textbox with Upload	No	No	
Custom Field 5	Date Picker with Upload	No	No	

Address

Field Name	Type	Mandatory	Active	
Address	Textbox	No	Yes	
City	Textbox	No	Yes	
State	Textbox	No	Yes	
Country	Textbox	No	Yes	
PIN/ZIP Code	Textbox	No	Yes	

To create a new Visitor template click on **Add** button and configure the following parameters:




- **ID:** This is an auto-generated field.
- **Visitor Template:** Assign a name to the template.
- **Default:** Select this check box to set this template as the default Visitor template.

To create a customized template, do the following:

- You can select the desired parameters from the list — **Basic, Personal, Details, Address**, sections. In **Details** section, custom fields will be displayed.




*To configure custom fields, select Admin> System Configuration> Global Policy> Visit Management.*

- You can edit only the parameters with the edit icon. Click on **Edit** .
- Select Mandatory check box, if you want a particular parameter to be configured by the Visitor compulsorily.
- Select Active check box, if you want a particular parameter to be displayed in the template.
- To save the particular parameter details click **OK**  or click **Cancel**  to discard.

Once you configure all the parameters, click **Save**.

You can also create a duplicate template. To do so, select the desired template from the right pane. Click **Duplicate**

**Visitor Template** . A duplicate Template with the identical configuration will be created. Now you can save the new Visitor Template with the desired name.



# Pre-Registration Template



Make sure SA has the View and Edit rights for Pre-Registration Template page. Refer [“Roles and Rights Configuration”](#).

This page enables the Admin to customize the Pre-Registration template. You can pre-register a visitor once the Pre-Registration template is customized. The Pre-Registration page parameters will appear according to this template for both System Account User and Host Users.

To view and edit the Pre-Registration template, click **Visitor Management module > Templates > Pre-Registration Template**.

Field Name	Type	Mandatory	Active
Host User	Search Textbox	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Additional Hosts	Textbox with Picklist	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Field Name	Type	Mandatory	Active
Mobile No.	Textbox	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Visitor Name	Textbox	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Organization Name	Textbox	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Email	Textbox	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Date of Birth	Date Picker	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Designation Name	Textbox	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Address	Textbox	<input type="checkbox"/>	<input checked="" type="checkbox"/>
City	Textbox	<input type="checkbox"/>	<input checked="" type="checkbox"/>
State	Textbox	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Country	Textbox	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Pincode	Textbox	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Gender	Drop Down	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Nationality	Textbox	<input type="checkbox"/>	<input checked="" type="checkbox"/>
ID Proof 1	Textbox	<input type="checkbox"/>	<input checked="" type="checkbox"/>
ID Proof 2	Textbox	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Visitor Type	Drop Down	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Additional Visitors	Input List	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Only one Pre-Registration template appears by default. You can only edit the **Default** template.

To customize the template, do the following:

- The template is divided into the following sections — **Host Details, Visitor Details, Visit Details, Custom Fields** and **Vehicle Details**.

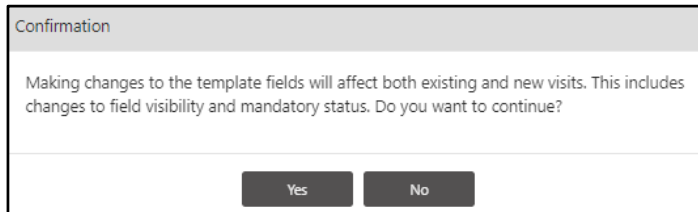


To configure custom fields, select Admin > System Configuration > Global Policy > Visit Management.

*Certain parameters like Visit Until Date, Visit Start Time and Visit End Time are Mandatory as per Visit Details in Pre-registration Template. But through COSEC Web API if these parameters are not passed in API but alternate parameters Visit Days, Visit Arrival Time and Visiting Hours per Day respectively are passed, then API will be successful even though mandatory parameters are not passed in API.*

- Each section has a set of parameters.
- Select the **Mandatory** check box of the desired parameters, if you wish to make the configuration of those parameters compulsory in the Pre-Registration page.
- Select the **Active** check box of the desired parameters, if you wish that these parameters should be displayed in the Pre-Registration page.

Once you configure all the parameters, click **Save**. The following pop-up appears.



- Click **Yes** to confirm. The parameters will appear accordingly on the [“Pre-Registration”](#) page. The parameters set as mandatory in the template will also be applicable while importing parameters from the Import sheet. For details, refer to [“Import Visitor and Visit”](#).

# Invite Visitor

The Invite Visitor option is used by Host to invite a registered/ non-registered Visitor through Link via Email/SMS.

The Link will be sent as SMS/Email as per the Alert Configurations done. Make sure you have selected Visitor Management as the Alert Filter and Invite Visitor as the Event. Now, under Additional Message Parameters, make sure you select the desired option — SMS or Email or both.

Here Host needs to initiate a link and send it to the Visitor, which results in registration of the Visitor on the application and passes the parameters which would automatically create a visit.

Restrictions will be imposed if configured in Visit Creation Restriction under *“Visitor Management Policy”*.

When a Visitor accepts the visit request without making any change, then that application will be sent to the host’s RIC for further approval.

When a Visitor makes some changes or updates any his/her information in the application, then it will be sent first to the Host for approval and then it will be sent to the RIC for approval/rejection.

To Invite a visitor, click **Visitor Management module > Invite Visitor**.

**Invite Visitor**

**Visitor Details**

Name

Mobile No.

Email ID

Organization Name

**Visit Details**

Host User: ID  Name

Visit Date: 29/07/2024

Visit Until Date: 29/07/2024

Repeat Mode: Daily

Repeat Days: Sun Mon Tue Wed Thu Fri Sat

Visit Start Time: 14:13

Visit End Time: 15:13

Purpose:

Additional Visitors:

Visit Station\*: ID  Station Name

Visit Location: Select

Click on the **Add** button to create a new visit invitation for a visitor.

## Visitor Details

Enter the basic details of a visitor for whom the invitation is being created.

- **Name:** Enter the name of the visitor.
- **Mobile No.:** Enter the valid 10 digit contact number of the respective visitor.
- **Email Id:** Enter the valid email id of the respective visitor.



*Make sure you configure atleast one — Mobile No. or Email ID, so that the Invite Link can be sent.*



*If you have selected SMS or WhatsApp in Alert Configuration, make sure you configure the Mobile No. and if you have selected Email, make sure you configure the Email ID. If there is a mis-match the Link will not be sent.*

*If you have selected SMS/ WhatsApp and Email in Alert Configuration, make sure you configure both the Mobile No. and Email ID.*

- **Organization Name:** Enter the name of an organization, the respective visitor belongs to.

## Visit Details

Enter the basic details of the Visit.

- **Host User:** Enter the name of the Host; who is inviting the respective Visitor or choose the name from the picklist.
- **Visit Date:** Enter the date of Visit of the Visitor.
- **Visit Until Date:** Enter the end date of the Visit of the Visitor.
- **Repeat Mode:** Select the Repeat Mode from the drop-down list options — Daily or Weekly.
- **Repeat Days:** If the Repeat Mode is selected as **Weekly**, select the Repeat Days on which the visit is to be repeated.
- **Visit Start Time:** Enter the start time of the visit in hh:mm format or click **Time Picker**  and set the time using the Up and Down arrow buttons.
- **Visit End Time:** Enter the end time of the visit in hh:mm format or **Time Picker**  and set the time using the Up and Down arrow buttons.



*While entering the time make sure that the Visit Time should be later than or equal to the current time i.e. the time when the host is creating the Invitation Link.*


- **Purpose:** Provide the purpose of this Visit. E.g. Interview, Official Meeting, Personal etc.
- **Additional Visitors:** Enter the number of additional Visitors who are going to visit along with the respective Visitor.
- **Visit Station:** Select the desired station where the Visitor will meet the Host from the picklist.
- **Visit Location:** Select the desired location from the drop-down list — Configured location or Custom Location.



If “Configured Location” is selected; then you can select the **location** from the picklist.

If “Custom Location” is selected; then you can select the **location** from Google Map. The latitude and longitude of location will appear accordingly.

After entering all the details about the visitor and the visit, click **Send Link**.


You can even copy the link and send it to the visitor. To do so, click on **Copy Link** .

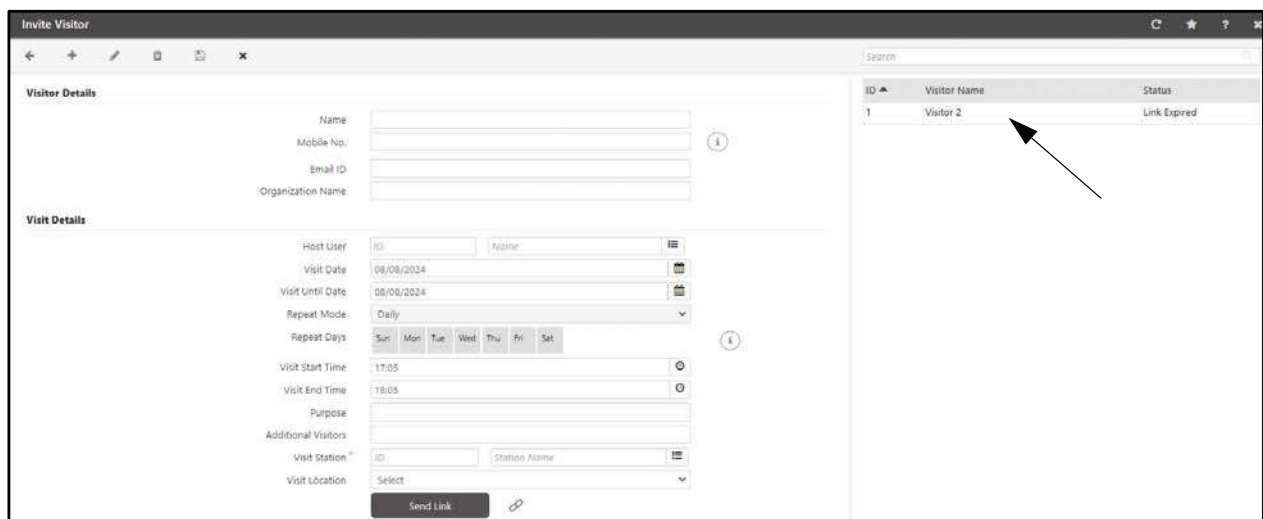
To edit any of the above details, click on the **Edit** button. After editing click on **Save** button.



*The Visit application will be sent to RIC only if 'Authorization For Visitor initiated Visit' parameter in Admin> System Configuration> Global Policy> Visitor Management is set to 'Always' or if the visit is outside the shift in global policy.*

## Link Expiry

The Invite Visitor Link will expire after its expiry date and the status of that link will be displayed on the right side grid. **Copy Link**  will no longer be accessible once the link is expired.



ID	Visitor Name	Status
1	Visitor 2	Link Expired

When any Invite Visitor Link is accessed by a visitor, the system will compare the current system date with the Expiry Date.

- If Current Date is before or same as the Expiry Date, then access to the Link will be allowed.
- If Current Date is after the Expiry Date, then access to Link will be restricted.

Let's understand this with the help of the following cases:

- **Case 1:** When a Visit Date is defined in the Invite, then the system considers Visit Date as an Expiry Date.

For example: Invite for Visitor is generated on 1st of March 2021, and Invite is generated with Visit Date as 10th March 2021, then Link Expiry Date will be 10th of March 2021.

- **Case 2:** When a Visit Date is not defined in the Invite, then the system considers Expiry Date = Request Date + 15 days.

For example: Invite for Visitor is generated on 1st of March 2021, then Link Expiry should be 16th of March 2021.



*Value of Expiry Date will not be updated whenever the application data is modified.*

# Pre-Registration

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Pre-Registration option is used by the host (i.e. an employee to whom the visitor is expected to meet) by providing the details of the visitor and expected date and time.

Pre-registration can be done from COSEC Web Application or COSEC ESS Application as well as by Visitors from the Visitor Portal.

The Pre-registration can be made by:

- System Account User
- On Behalf System Account User
- Using the ESS Self Service Module (For more details refer COSEC Employee Self Service User Manual)

COSEC Web enables all *System Account users* with appropriate page rights to make Pre-registration using the *Visitor Management* module. All applications made by the System Account user are *pre-approved* by default.

COSEC Web also enables all On Behalf System Account User with appropriate page rights to make Pre-registration using the *Visitor Management* module. All applications made by the On Behalf System Account User are *pre-approved* by default. For creating and assigning the roles and rights to the On Behalf System Account User. Refer to [“On Behalf System Account User”](#).

The Employee Self Service module enables users to login and enter details of their expected visitors. The pre-registration of the visitors is then sent for the approval to the Reporting In-charge.

The Visitor Portal enables the Visitors to initiate Visit Registration requests. The Registration requests of the visitors are sent for the approval to the Host and after their approval they are sent for approval to the Reporting In-charge.

Alerts can be configured, if required. For details refer to [“Visitor Pre-registration Requests and Approvals”](#).



*Both “Host Initiated” and “Visitor Initiated” pre-registration applications will be displayed on this Pre-Registration page.*

For more information refer, [“Visitor Management Policy”](#).

The parameters for Pre-Registration appear as per the [“Pre-Registration Template”](#). You need to edit the template as required before pre-registering the visitors.

For Pre-registering the visitors from COSEC Web Application, click **Visitor Management module> Pre-Registration**.

Visitor Pre-Registration

Appointment No. \*

Host Details

Host User \*

ID

Name

Additional Hosts

ID

Name

Visitor Details

Mobile No. \*

Visitor Name \*

Organization Name \*

Email

Date of Birth

Designation Name

Address

City

State

Country

Pincode

Gender

Nationality

ID Proof 1

ID Proof 2


Visitor Type














General Visitor

Additional Visitors

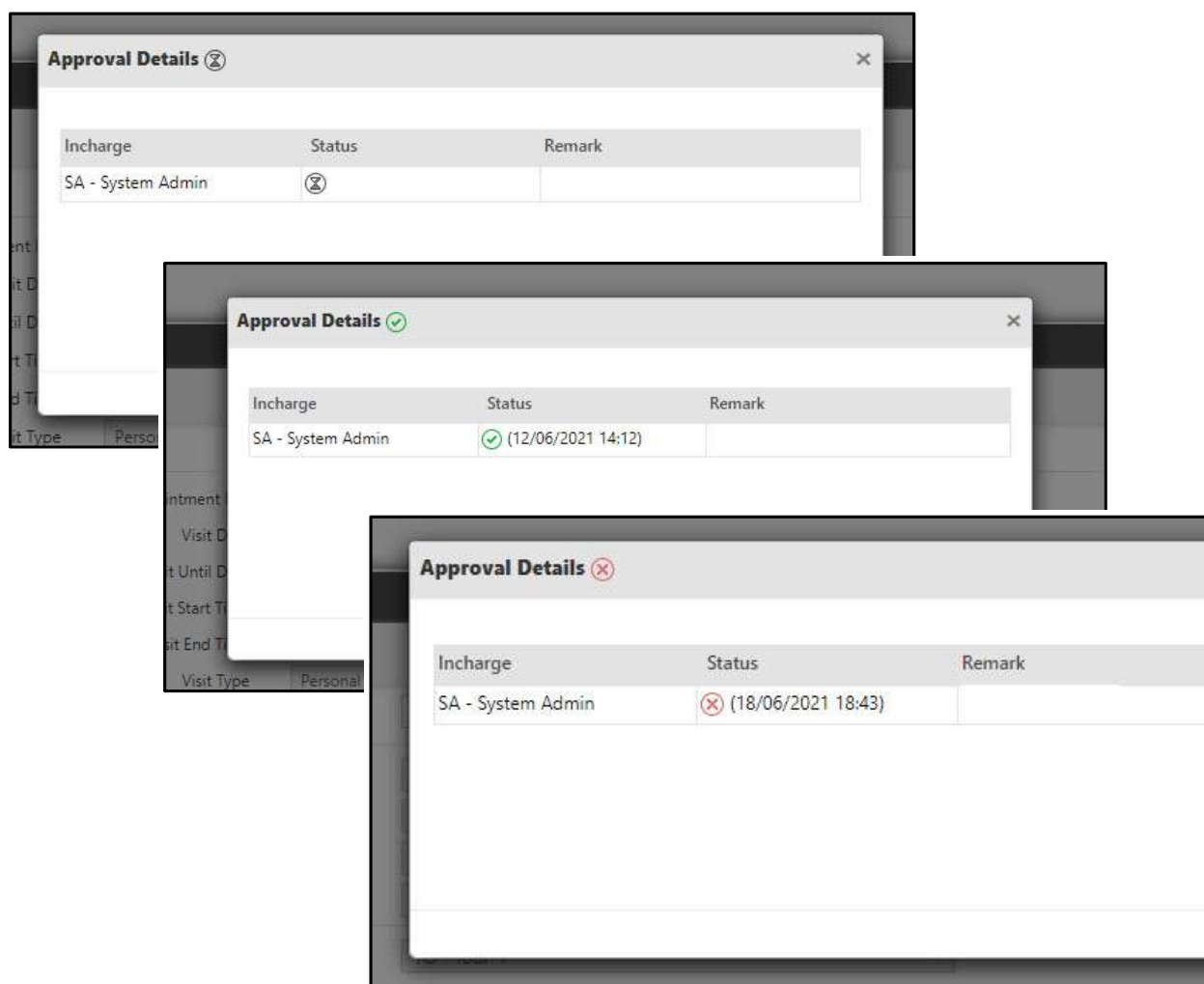
Search

Appointment No.	Visit Date	Visitor Name	Status	Approval Details
240729000002	28/07/2024	Visitor 2	Applied	
240729000001	29/07/2024	Visitor 1	Approved	

Click **Details**  icon from the grid on the right side of the page to view the Approval Details of the already applied applications.

Appointment No.	Visit Date ▲	Visitor Name	Status	Approval Details
210612000001	12/06/2021	1515	Applied	
210610000001	10/06/2021	visitor 1	Applied	
210610000002	10/06/2021	visitor 1	Applied	
210609000001	09/06/2021	visitor 1	Applied	
210609000002	09/06/2021	visitor 1	Applied	
210609000003	09/06/2021	visitor 1	Applied	
210609000004	09/06/2021	visitor 1	Applied	
210609000005	09/06/2021	visitor 1	Applied	
210609000006	09/06/2021	visitor 1	Applied	
210609000007	09/06/2021	visitor 1	Applied	
210609000008	09/06/2021	visitor 1	Applied	
210609000009	09/06/2021	visitor 1	Applied	
210609000010	09/06/2021	visitor 1	Applied	

**Approval Details** window appears.



It displays the status of the user's application under **Approval Details**, that is, whether it is — pending, approved or rejected.

The application's status is displayed in the **Status** column as Pending ⌚ , Approved ✓ or Rejected ✗ .

**Remark** displays the comments provided by the Admin/ RIC/ System.

System can auto approve / reject an application if the Reporting In-charge or SA fails to authorize it as per the Approval Policy assigned to the Reporting Groups. To know more about the Approval Policy, refer "[Approval Policy](#)". If the application is made by the "[On Behalf System Account User](#)", to make sure an alert is sent to the System Admin/"[On Behalf System Account User](#)" once the final verdict for such application is provided by the RIC, make sure you have configured the desired Mobile Number/Email ID in "[Optional](#)" as well as configure the Visit Request Approval/Rejection Alert parameters. For details refer to "[Configuring Alert Messages](#)".

Click **Add** to pre-register a visitor.

Appointment No. \*

**Host Details**

Host User \* ID Name

Additional Hosts ID Name

**Visitor Details**

Mobile No. \*

Visitor Name \*

Organization Name \*

Email \*

Date of Birth \*

Designation Name \*

Address \*

City \*

State \*

Country \*

Pincode \*

Gender NA

Nationality \*

ID Proof 1 \*

ID Proof 2 \*

Visitor Type General Visitor

Additional Visitors \*

**Visit Details**

Visit Date \* 29/07/2024

Visit Until Date \* 29/07/2024

Repeat Mode Daily

Repeat Days Sun Mon Tue Wed Thu Fri Sat

Visit Start Time \* 11:21

Visit End Time \* 12:21

Configure the following parameters:

**Appointment No.:** It is the auto generated number based on the registration date. The format is YYMMDD00000(N+1) where N is auto incremented number starting from 0, considering the visitor pre-registration date.

## Host Details

**Host Details**

Host User \* ID Name

Additional Hosts ID Name

**Host User:** Select the host from the picklist to whom the visitor will meet or who has called the visitor to meet him. The host user picklist shows the list of authorized host users. For details, refer to [“Authorized Host Users”](#).

**Additional Hosts:** Click the picklist and select the additional hosts for the visit. Maximum 99 hosts can be selected.

The selected hosts appear in a grid. You can also delete the hosts if required. To do so, click **Delete** of the respective host.

Host Details

Host User \*

1

User 1

Additional Hosts

ID

Name

Search

User ID ▲	Name	
2	User 2	
3	User 3	

## Visitor Details

Visitor Details

Mobile No. \*

Visitor Name \*

Organization Name \*

Email

Date of Birth

Designation Name

Address

City

State

Country

Pincode

Gender

NA

Nationality

ID Proof 1

ID Proof 2

Visitor Type

General Visitor

Additional Visitors

**Mobile No.:** Specify the mobile no. of the visitor. The alerts —SMS and WhatsApp are sent on the Mobile Number configured here.


**Visitor Name:** Specify the Name of the Visitor.

**Organization Name:** Specify the Visitor's company name.

**Email:** Specify the Email Address of the Visitor.

Enter the relevant Visitor details — Date of Birth, Designation Name, Address, Gender, Nationality, ID Proof 1 and 2.

**Visitor Type:** Select the appropriate visitor type from the drop-down list.

**Additional Visitors:** To add the Additional visitors click on  The Additional Visitor Details page appears. Add the visitor and click OK.

Additional Visitors Details

SRNO	Name	Gender	Mobile No.	
	Sathya Narayan	Male	9823456765	✓ ✕

## Visit Details

Visit Details

Visit Date \*

29/07/2024

Visit Until Date \*

29/07/2024

Repeat Mode

Daily

▼

Repeat Days

Sun

Mon

Tue

Wed

Thu

Fri

Sat

Visit Start Time \*

11:29

Visit End Time \*

12:29

Visit Type

Personal

▼

Visit Station \*

ID

Station Name

Visit Location

Select

▼

Purpose

Status

Field 1

Field 2

Field 3

Field 4

Field 5

Field 6

Field 7

Field 8

Field 9

Field 10

**Visit Date:** Enter the expected date of the visit in dd/mm/yyyy format or click **Calendar** and select the date.


**Visit Until Date:** Enter the date of the visit in dd/mm/yyyy format or click **Calendar** and select the date until the visit is expected to continue.


- If the visit is for single day then Repeat Mode will be disabled.
- If the visit is expected for multiple days; then select the Visit Until date accordingly. Select the Repeat Mode and set the repeat pattern for visit.



**Repeat Mode:** Select the Repeat Mode from the drop-down list options — Daily or Weekly.

**Repeat Days:** If the Repeat Mode is selected as **Weekly**, select the Repeat Days on which the visit is to be repeated.

**Visit Start Time:** Enter the expected start time of the visit in hh:mm format or click **Time Picker**  and set the time using the Up and Down arrow buttons.

**Visit End Time:** Enter the expected end time of the visit in hh:mm format or click **Time Picker**  and set the time using the Up and Down arrow buttons.

**Visit Type:** Select the visit type from the drop-down list options — Personal or Official.

**Visit Station:** Select the Visit Station from the picklist where the Visitor will meet the Host. The Visit Station picklist displays a list of all the Stations created from the Station Location page. For details, refer to [“Station Location”](#).

**Visit Location:** The location can be selected where visit is to be held from the options of Configured location or Custom Location.


- If “Configured Location” is selected; then you can select the **location** from the picklist.
- If “Custom Location” is selected; then you can select the **location** from Google Map. The latitude and longitude of location will appear accordingly.

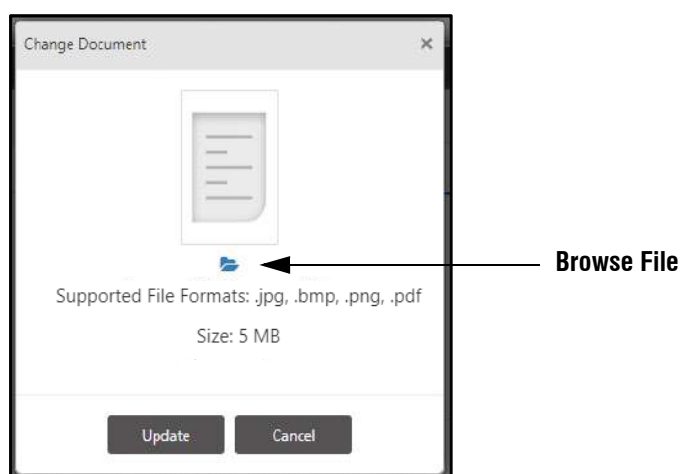
**Purpose:** Specify the purpose or the reason of the visit.

**Status:** It will show the status of application. If the pre-registration entry is done by a system account user (i.e. sa, se, so type users) then the entry will be auto approved with the login user’s id itself.

**Custom Fields:** There are 10 additional fields in which you can enter the desired details of the visitors as per your requirement.


These are visible only after they are configured in **Visit Custom Fields** from **Admin> System Configuration> Global Policy> Visitor Management**. For example Security Number, ID Proof, Nominee Name. To know how to configure custom fields, refer [“Visit Custom Fields”](#).


You can upload the documents in Custom Fields, by clicking **Upload**  button. Then **Change Document** pop-up appears as shown below.




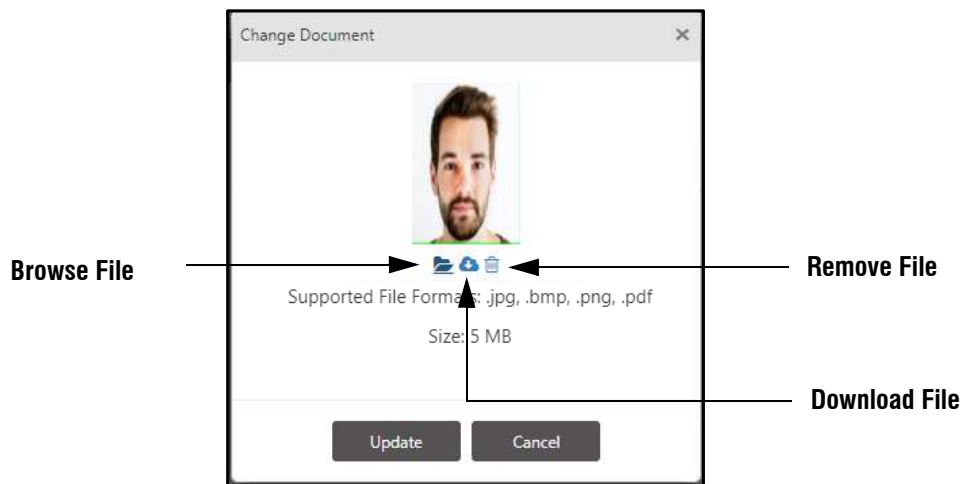
Click **Browse File**  .

Select the desired file as per the supported formats and size (.jpg, .bmp, .png, .pdf) from your local PC. After uploading the file, if you wish to upload a different file instead of the current uploaded file, click **Browse File**


 again and select the desired file from your local PC. The previously uploaded file will get replaced with the new file.

To download the uploaded file, click **Download File** .

To remove the uploaded file, click **Remove File** .



Then click **Update**.

The document will be uploaded and can be previewed by clicking on **Preview**  button.

## Vehicle Details

For pre-registration of a visitor's vehicle, enter the vehicle's registration no., vehicle type and description.

Vehicle Details	
Registration No.	<input type="text" value="15 Chars"/>
Vehicle Type	<input type="text" value="None"/>
Description	<input type="text" value="50 Chars"/>

Click on **Save** to save the visitor details for pre-registration.

The Pre-registered Visitor will be reflected in the COSEC VMS Application (desktop application) through which the security personnel or reception person can monitor the visitor and issue the pass.



*In order to receive an alert when Watchlist visitor creates a visit make sure you have configured an alert in Admin> System Configuration> Alert Message Configuration. Set the Alert Filter as Visitor Management and Event as Create Visit- Watchlist/Blacklist. For details refer to ["Configuring Alert Messages"](#).*

*The SA/Host will not be able to create a visit for a Blacklist visitor.*

## Visit Logs

This section is visible only when the application is in View or Edit mode.

Appointment No.	Visit Date	Visitor Name	Status	Approval Details
240729000001	29/07/2024	Visitor 1	Approved	

**Application Date Time:** It displays the date and time when visitor has successfully planned visit.

**RIC Approval:** This is visible only when 'Authorization for Visitor Pre-Registration' is set in global policy & final verdict is given for respective application.

**Host/Visitor Approval:** This is visible when host/Visitor has either Approved/Rejected any visit application. If the Pre-registration is done by system account user, then the date and time same as that of Application Date Time is displayed.

**Security Clearance:** If **Security Approval For Visitor E-Pass** is enabled in global policy, then the date and time of Security Clearance appears. If the Pre-registration is done by system account user, then Security Clearance is not required and the date and time same as that of Application Date Time is displayed.

**Visitor Checked IN:** This is Date & Time when visitor has checked-IN.

**Visit Started:** This is Date & Time when Host has started visit.

**Visit Stopped:** This is Date & Time when Host has stopped visit.

**Visitor-Checked-Out:** This is Date & Time when visitor has checked out.

## Reschedule/Cancel/Transfer Visit

You can reschedule, cancel or transfer the visit of a pre-registered visitor to another host.

To **Reschedule** the visit, select the desired pre-registered visitor from the right pane. The details will be displayed on the left side. You can modify the details as per your requirement.

To **Cancel** the visit, refer ["Cancel Visit"](#).

To **Transfer** the visit to another host, refer "[Transfer Visit](#)".



*Cancel Visit and Transfer Visit is not applicable for rejected applications.*

*Before the visitor has checked in, you can reschedule, cancel or transfer visit as per your requirement.*

## Cancel Visit

Select the desired pre-registered visitor from the right pane.

Click **Cancel Visit** collapsible panel and configure the following parameters.

**Cancel:** Select this check box, to enable Cancel Visit for a pre- registered visitor.

**Cancellation Reason:** Specify the reason for which you want to cancel the visit for a pre-registered visitor.

Click **Save**. The status of the visit is updated as Rejected in the right pane.

## Transfer Visit

Select the desired pre-registered visitor from the right pane.

Click **Transfer Visit** collapsible panel and configure the following parameters.

**Transfer:** Select this check box, to enable Transfer Visit for a pre-registered visitor to another host.

**Transferred Host:** Enter the ID and Name of the Host or select the Transferred Host from the picklist. The picklist displays the authorized host list.

Click **Save**. The visit is transferred to the new host.

# Visit Registration Approval

---

The Visit Registration requests of visitors can be approved/rejected by an Admin or the Host/RIC of the user.

If the visit registration entry is done by a system account user (i.e. SA, SE, SO users) then the entry will be auto approved with the login user's id itself.

SA can approve/reject Visit Registration applications initiated by both Visitor and Host.

To approve a Visitor Initiated Visit requests SA needs to:

1. Approve the request from Visit Approval Page. To know more about Visit Approval, refer [“Visit Approval”](#).
2. Approve the request from Visit Registration Approval page.

The approval is dependent on the number of Reporting In-charge in the Reporting Group, the Authorization Mode as well as the Approval Policy assigned by the system administrator. For details refer to [“Reporting In-Charge”](#), [“Approval Policy”](#) and [“Configuring Users”](#).

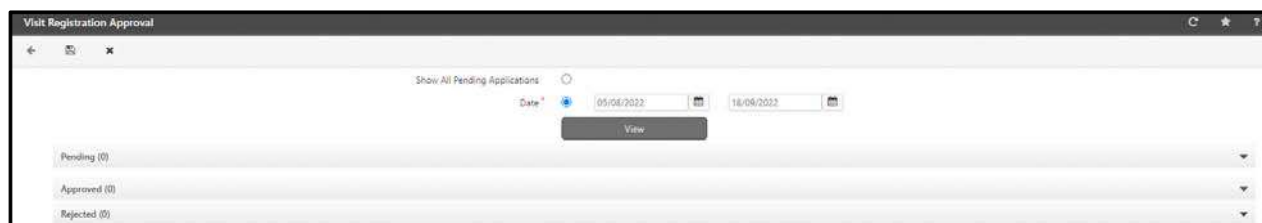
If the Visit Registration request is initiated by the Visitor then it will be sent to the Host for Approval. After the Host approves it, it will be sent to the RIC, if the Host is assigned an RIC.

If the Visit Registration request is initiated by the Host then it will be sent to the RIC, if the Host is assigned an RIC.

In both cases the RIC will receive Alerts if configured.

For details refer to [“Visitor Pre-registration Requests and Approvals”](#).

For the visit registration approval of visitors, click **Visitor Management module > Approval > Visit Registration Approval**.



You can either:

- view all the pending Visit Registration Applications
- set the date filter to view the desired applications

## All Pending Applications

To view only Pending Applications,

- **Show All Pending Applications:** Select this option to enable the pending application filter.
- Click the **Pending** collapsible panel. All the applications in pending state appear.

To approve the application, select the **Approve** check box of the desired entry.

To reject the application, select the **Reject** check box of the desired entry.

To know more, refer to [“Pending Application”](#).



*The population on this page depends on the server's database. It might take time to load all pending applications.*

## Applications according to Set Filters

To Set the Filters,

- **Date:** Select this option to enable the date filter. Select the start and end dates by clicking the respective date selection buttons for which authorization status is to be viewed for Visit Registration.

Click **View** to view the pending, approved and rejected status of all Visit Registration applications.

## Pending Application

When any application is in the Pending state it can be authorized by the Admin or RIC.

Click the **Pending** collapsible panel.

Visit Start	Visit End	Visit Time	Visitor Name	Host	Visit Type	Initiated By	Approve	Reject	Remark	Details
2022/08/05	2022/08/05	09:00 - 10:00	RE	mitali	Personal	Host	<input type="checkbox"/>	<input type="checkbox"/>		

- To approve/reject applications selectively, click the respective application check box against the user.
- To approve/reject all the applications simultaneously, click the Approve /Reject check box in the header column.

Once the Admin approves/ rejects the application, the record will be moved from the **Pending** section to the **Approved/ Rejected** section respectively.

The default **Remark** for the Approved and Rejected application will appear in the respective fields. You can enter any customized Remark while authorizing the application.

To view the details of the Visit registration for the pending application, click **Details** . The **Visit Registration Detail** window appears as shown below.

Visit Registration Detail

**Visit Details**

Appointment No. 240313000002  
Visit Date 14/03/2024  
Visit Until Date 14/03/2024  
Visit Start Time 10:00  
Visit End Time 16:00  
Visit Type Official  
Visit Station 1 Default Location  
Visit Location Select  
Purpose Site Tour

**Visitor Details**

Mobile No. 9871234856  
Email  
Visitor Name Visitor 2  
Organization Name ABB  
Designation Name  
Visitor Type General Visitor  
Additional Visitors 0

**Host Details**

Host User 2 Host User

**Additional Hosts**

Search  

Sr. No.	ID	Name
No Data		

**Vehicle Details**

Registration No. GJ06GD1865  
Vehicle Type 4-Wheeler  
Description

**Visit Logs**

Application Date Time 13/03/2024 11:32:40  
Security Clearance  
Visitor Checked-IN  
Visit Started  
Visit Stopped  
Visitor Checked-OUT

**Approval Details**

Incharge	Status	Remark
3 - Host User R/C		

**Visit Registration Detail** window displays the visitor's registration details.

It also displays the status of the user's application under **Approval Details**. The application's status is displayed in the **Status** column.

System can auto approve / reject an application if the Reporting In-charge or SA fails to authorize it as per the Approval Policy assigned to the Reporting Groups. To know more about the Approval Policy, refer [“Approval Policy”](#).

**Remark** displays the comments provided by the Admin/ RIC/ System.

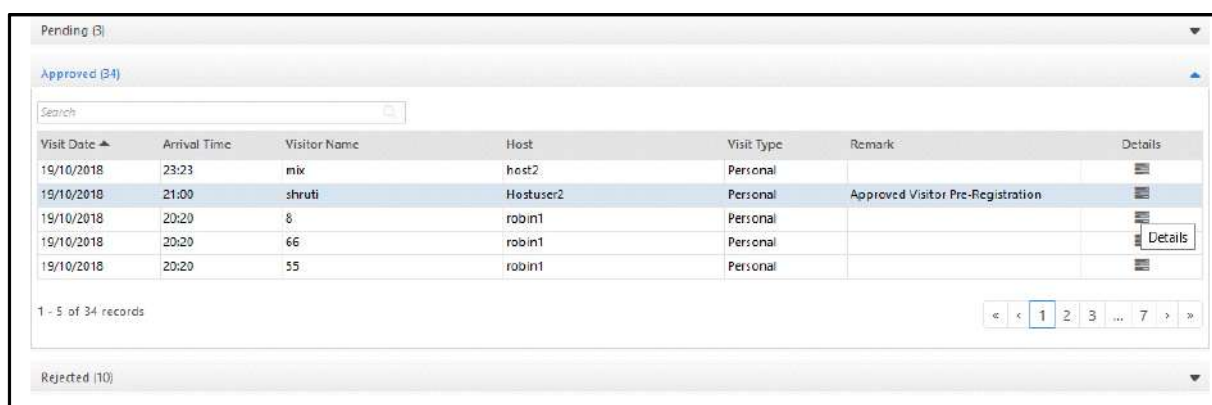
Click **Save** to save the authorization.

## Approved Applications

The **Approved** section displays all the applications that have been approved by the RIC or the System Administrator.

Click the **Approved** collapsible panel.


The following screen displays the **Approved** section with approved applications:



Visit Date ▲	Arrival Time	Visitor Name	Host	Visit Type	Remark	Details
19/10/2018	23:23	mik	host2	Personal		
19/10/2018	21:00	shruti	Hostuser2	Personal	Approved Visitor Pre-Registration	
19/10/2018	20:20	8	robin1	Personal		
19/10/2018	20:20	66	robin1	Personal		Details
19/10/2018	20:20	55	robin1	Personal		

1 - 5 of 34 records

< < 1 2 3 ... 7 > >

Click the **Details**  icon to view the visit registration details of the corresponding user.



Visit Registration Detail window appears as shown below:

Visit Registration Detail

**Visit Details**

Appointment No. 240312000001  
Visit Date 13/03/2024  
Visit Until Date 13/03/2024  
Visit Start Time 09:00  
Visit End Time 18:00  
Visit Type Official  
Visit Station 1 Default Location  
Visit Location Custom Location  
Location +22.2561,+073.1833  
Purpose Discussion for Virtual License

**Visitor Details**

Mobile No. 9669852142  
Email  
Visitor Name Visitor 1  
Organization Name Siemens  
Designation Name  
Visitor Type General Visitor  
Additional Visitors 0

**Host Details**

Host User 2 Host User

**Additional Hosts**

Search

Sr. No.	ID	Name
No Data		

**Vehicle Details**

Registration No. GJ06KD4587  
Vehicle Type 4-Wheeler  
Description

**Visit Logs**

Application Date Time 12/03/2024 16:47:41  
R/C Approval Approved - 12/03/2024 16:47:41  
Host/Visitor Approval Approved - 12/03/2024 16:47:41  
Security Clearance Approved - 12/03/2024 16:47:41  
Visitor Checked-IN  
Visit Started  
Visit Stopped  
Visitor Checked-OUT

**Approval Details**

Incharge	Status	Remark
SA - System Admin	✓ (12/03/2024 16:47)	

Visit Registration Detail window displays the visitor's registration details.

It also displays the status of the user's application under **Approval Details**. The application's status is displayed in the **Status** column.

System can auto approve / reject an application if the Reporting In-charge or SA fails to authorize it as per the Approval Policy assigned to the Reporting Groups. To know more about the Approval Policy, refer "[Approval Policy](#)".

**Remark** displays the comments provided by the Admin/ RIC/ System.

Click **Save** to save the authorization.

## Rejected Applications

Click the **Rejected** collapsible panel.

The **Rejected** section displays all the applications that have been rejected by the RIC or the System Administrator.

The following screen displays the **Rejected** section with rejected applications:

Pending (3)						
Approved (34)						
Rejected (10)						
Search						
Visit Date	Arrival Time	Visitor Name	Host	Visit Type	Remark	Details
19/10/2018	12:12	2312312	robin1	Personal	Rejected Visitor Pre-Registration	
19/10/2018	16:00	7774441111	Hostuser2	Personal	Rejected Visitor Pre-Registration	
19/10/2018	21:21	2	robin1	Personal	Rejected Visitor Pre-Registration	
19/10/2018	22:22	5	robin1	Personal	Rejected Visitor Pre-Registration	
19/10/2018	18:18	3333	robin1	Personal	Rejected Visitor Pre-Registration	
1 - 5 of 10 records						

Click the **Details** icon to view the visit registration details of the corresponding user.

**Visit Registration Detail** window appears as shown below:

Visit Registration Detail

Visit Details

Appointment No.

240312000002

Visit Date

14/03/2024

Visit Until Date

14/03/2024

Visit Start Time

09:00

Visit End Time

16:00

Visit Type

Official

Visit Station

1

Default Location

Visit Location

Select

Purpose

Discussion for BACnet

Visitor Details

Mobile No.

9869852142

Email

Visitor Name

Visitor 1

Organization Name

Siemens

Designation Name

Visitor Type

General Visitor

Additional Visitors

0

Host Details

Host User

2

Host User

Additional Hosts

Search

Sr. No.	ID	Name
No Data		

Vehicle Details

Registration No.

GJ06KD4587

Vehicle Type

4-Wheeler

Description

Visit Logs

Application Date Time

12/03/2024 17:14:26

RIC Approval

Rejected by System Admin - 13/03/2024 15:47

Security Clearance

Visitor Checked-IN

Visit Started

Visit Stopped

Visitor Checked-OUT

Approval Details

Incharge	Status	Remark
SA - System Admin	(13/03/2024 15:47)	Rejected Visitor Visit

**Visit Registration Detail** window displays the visitor's registration details.

It also displays the status of the user's application under **Approval Details**. The application's status is displayed in the **Status** column.

System can auto approve / reject an application if the Reporting In-charge or SA fails to authorize it as per the Approval Policy assigned to the Reporting Groups. To know more about the Approval Policy, refer "[Approval Policy](#)".

**Remarks** displays the comments provided by the Admin / RIC / System.

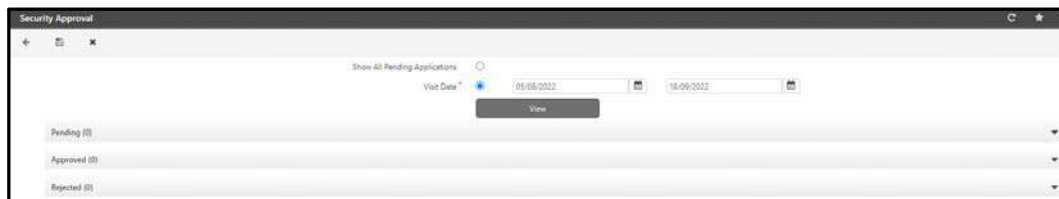
Click **Save** button to save the changes.

# Security Approval

A visit request generated either from VMS utility or Visitor Portal after approval of host user is displayed in **Security Approval** page. Hence, this page enables the Security User or System Admin User to give clearance for approved Visit request application, allowing visitors to generate E-pass and perform visit successfully.

The visit requests on this page will only be received when **Security Approval For Visitor E-Pass** = 'Checked' from **Global Policy > Visitor Management Policy**.

For the Security approval of visit request, click **Visitor Management module > Approval > Security Approval**.



You can either:

- view all the pending Security Approval Applications
- set the date filter to view the desired applications

## All Pending Applications

To view only Pending Applications,

- **Show All Pending Applications:** Select this option to enable the pending application filter.
- Click the **Pending** collapsible panel. All the applications in pending state appear.

To approve the application, select the **Approve** check box of the desired entry.

To reject the application, select the **Reject** check box of the desired entry.

To know more, refer to [“Pending Applications”](#).



*The population on this page depends on the server's database. It might take time to load all pending applications.*

## Applications according to Set Filters

To Set the Filters,

- **Visit Date:** Select this option to enable the visit date filter. Select the start and end dates by clicking respective date selection buttons for which security clearance is to be given.

Click the **View** button to view the **Pending**, **Approved** and **Rejected** status of all Visit applications.


## Pending Applications

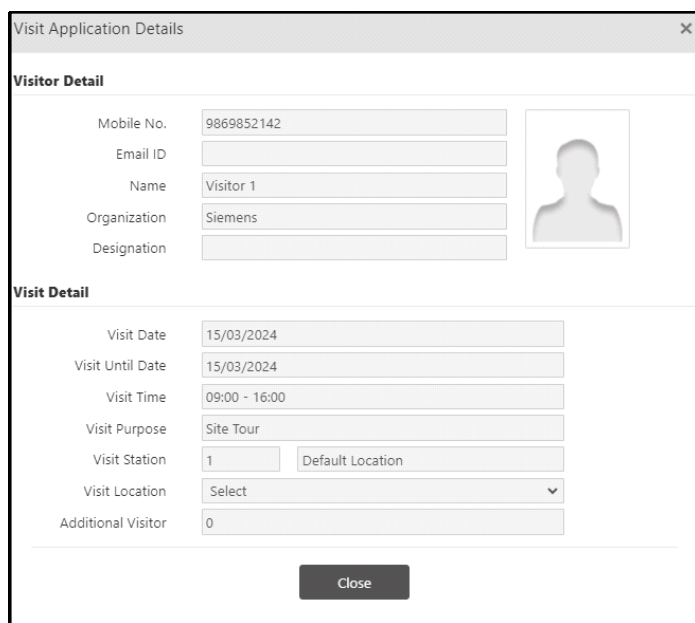
Click the **Pending** collapsible panel.



Search

Visit Start	Visit End	Visit Time	Host Name	Visitor Name	Visit Purpose	Approve	Reject	Remark	Details
15/10/2018	24/10/2018	11:00 - 11:15	host2	aaaaaa		<input type="checkbox"/>	<input type="checkbox"/>		
15/10/2018	30/10/2018	13:00 - 13:05	host2	abere	444444444	<input type="checkbox"/>	<input type="checkbox"/>		
13/10/2018	21/10/2018	20:00 - 21:00	Hostuser1	ppp		<input type="checkbox"/>	<input type="checkbox"/>		
23/10/2018	26/10/2018	10:00 - 11:00	Hostuser2	7774441111		<input type="checkbox"/>	<input type="checkbox"/>		

To view the visit request detail, click the corresponding Details  button. The Visit Application Details window appear as shown below.



Visit Application Details

**Visitor Detail**

Mobile No. 9869852142

Email ID

Name Visitor 1

Organization Siemens

Designation

**Visit Detail**

Visit Date 15/03/2024

Visit Until Date 15/03/2024

Visit Time 09:00 - 16:00

Visit Purpose Site Tour

Visit Station 1 Default Location

Visit Location Select

Additional Visitor 0

Close

To approve or reject a visit request application; select the Approve/Reject checkbox to authorize and mention the Remark.

Click the **Save** button. The selected entries will now be moved from the Pending section to the Approved or Rejected section as per the authorization.



Pending (4)

Approved (1)

Search

Visit Start	Visit End	Visit Time	Host Name	Visitor Name	Visit Purpose	Remark	Details
22/10/2018	22/10/2018	10:00 - 11:10	Hostuser1	Pallavi Joshi			

Rejected (0)

Visit State change Alert will be dispatched to Visitor and Host with Security Clearance state.

## Approved Application

Click the **Approved** collapsible panel.

The approved applications with their details are displayed.

## Rejected Application

Click the **Rejected** collapsible panel.

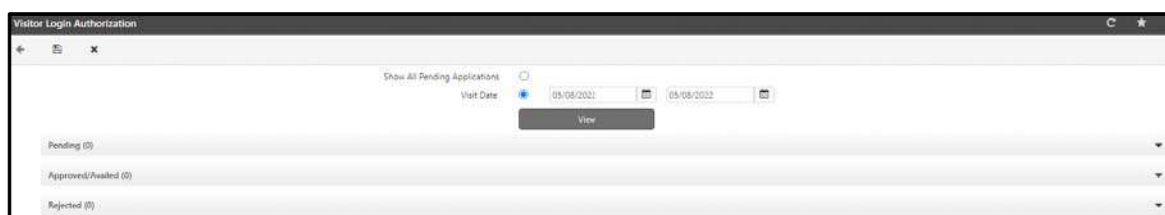
The rejected applications with their details are displayed.

# Visitor Login Authorization

To access Visitor Portal OTP is required. But when the visitor is not allowed to carry Mobile Phone, in that case visitor won't be able to login via SMS or Email. Hence visitor can click on "Skip to Login" to login into Visitor Portal. Such visitors will be verified and given verdict by Security User or System Admin User using **Visitor Login Authorization** page.

The authorization is dependent on the number of Reporting In-charge in the Reporting Group, the Authorization Mode as well as the Approval Policy assigned by the system administrator. For details refer to "[Reporting In-Charge](#)", "[Approval Policy](#)" and "[Configuring Users](#)".

For the approval of visitor login, click **Visitor Management module > Approval > Visitor Login Authorization**.



You can either:

- view all the pending Visitor Login Authorizations
- set the date filter to view the desired applications

## All Pending Applications

To view only Pending Applications,

- **Show All Pending Applications:** Select this option to enable the pending application filter.
- Click the **Pending** collapsible panel. All the applications in pending state appear.

To approve the application, select the **Approve** check box of the desired entry.

To reject the application, select the **Reject** check box of the desired entry.

To know more, refer to "[Pending Login Requests](#)".



*The population on this page depends on the server's database. It might take time to load all pending applications.*

## Applications according to Set Filters

To Set the Filters,

- **Visit Date:** Select this option to enable the visit date filter. Select the start and end dates by clicking respective date selection buttons for which login requests are to be fetched.

Once the visitor enters details in Basic, Personal, Document and Address section of Visitor Portal then the login request will be generated and can be fetched by the Security User or System Admin User to give the verdict.



These requests can be seen under **Pending** collapsible panel of Visitor Login Authorization Page.

Request submitted successfully. Try to login after some time

English (United States)

Welcome to Matrix Comsec

MOBILE / EMAIL \*

11

SEND OTP

SKIP TO LOGIN

Click the **View** button to view the **Pending**, **Approved** and **Rejected** status of all Visit Login Authorization Requests.

## Pending Login Requests

Click the **Pending** collapsible panel.

Visitor Name ▲	Mobile No.	Email ID	Organization Name	Application Date Time	Approve	Reject	Remark	Details
Nishit	9563245216		Samsung	07/03/2019 12:00	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Allow login without OTP	

Approved/Availed (1)

Rejected (0)

To view the visitor details, click the corresponding Details  button. The Details window appear as shown below.

Details

Visitor Detail

Mobile No. 9563245216

Email ID

Name Nishit

Organization Samsung

Date Of Birth

Gender NA

Address Borivli Mumbai

City

State

Country India

Pincode

Nationality

ID Proof 1

ID Proof 2

Previous Visits Detail

To give verdict to a visitor login application, select the Approve or Reject checkbox and click on **Save**.

The screenshot shows a web interface titled "Pending (1)". It features a search bar at the top. Below it is a table with the following columns: Visitor Name, Mobile No., Email ID, Organization Name, Application Date Time, Approve, Reject, Remark, and Details. A single row is displayed for a visitor named "Nishit" with Mobile No. "9683245216" and Organization Name "Samsung". The Application Date Time is "07/03/2019 12:00". The Approve checkbox is checked, and the Reject checkbox is unchecked. The Remark field contains the text "Allow login without OTP". Below the table, there are two collapsible panels: "Approved/Availed (1)" and "Rejected (0)".

Depending on the given verdict, the request will now be visible either under Approved/Availed panel.

## Approved/Availed Login Requests

Click the **Approved/Availed** collapsible panel.

The screenshot shows a web interface titled "Approved/Availed (619)". It features a search bar at the top. Below it is a table with the following columns: Visitor Name, Mobile No., Email ID, Organization Name, Application Date Time, Remark, Approved By, and Details. The table displays five rows of data:

Visitor Name	Mobile No.	Email ID	Organization Name	Application Date Time	Remark	Approved By	Details
FIVE	5			2021/01/22 08:49	System Auto Approved	System	
HIR	81407	hir@sasdas		2021/03/24 09:35	System Auto Approved	System	
HIR	814	hir@sasdas		2021/03/24 09:41	System Auto Approved	System	
HIRAL	814	hiral@sasdas	MATRIX	2021/03/24 09:33	System Auto Approved	System	
Kratika	789			2021/01/19 14:26	Allow login without OTP	SA	

At the bottom of the table, it says "506 - 510 of 619 records". There is a pagination control at the bottom right showing "102" as the current page, with arrows and other page numbers.

All the approved requests with their details are displayed.

All auto approved visitor login request entries will be also be displayed in Approved/Availed panel, where Approved By displays System. To know how to auto authorize a visitor's login, refer **Auto Authorize Visitor Login** in ["Station Location"](#).

The screenshot shows a web interface titled "Approved/Availed (3)". It features a search bar at the top. Below it is a table with the same columns as the previous screenshot. The table displays three rows of data:

Visitor Name	Mobile No.	Email ID	Organization Name	Application Date Time	Remark	Approved By	Details
HIR	81407	hir@sasdas		2021/03/24 09:35	System Auto Approved	System	
HIR	814	hir@sasdas		2021/03/24 09:41	System Auto Approved	System	
HIRAL	814	hiral@sasdas	MATRIX	2021/03/24 09:33	System Auto Approved	System	

## Rejected Login Requests

Click the **Rejected** collapsible panel.

All the rejected requests with their details are displayed.

Rejected (1)							
<input type="text" value="Search"/>							
Visitor Name ▲	Mobile No.	Email ID	Organization Name	Application Date Time	Remark	Rejected By	Details
3	3		3	2020/12/30 11:52	Restrict to login without OTP	SA	

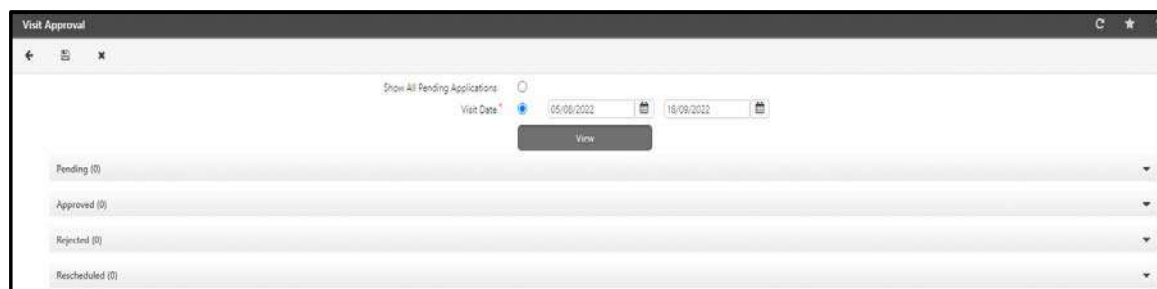
# Visit Approval

---

The System Account User can give verdict on any visit request initiated/rescheduled by a visitor.

The authorization is dependent on the number of Reporting In-charge in the Reporting Group, the Authorization Mode as well as the Approval Policy assigned by the system administrator. For details refer to [“Reporting In-Charge”](#), [“Approval Policy”](#) and [“Configuring Users”](#).

For giving verdict (approve, reject, reschedule & transfer) on visit request, click **Visitor Management module > Approval > Visit Approval**.



You can either:

- view all the pending Visit Approvals
- set the date filter to view the desired applications

## All Pending Applications

To view only Pending Applications,

- **Show All Pending Applications:** Select this option to enable the pending application filter.
- Click the **Pending** collapsible panel. All the applications in pending state appear.

To approve the application, select the **Approve** check box of the desired entry.

To reject the application, select the **Reject** check box of the desired entry.

To reschedule the application, select the **Reschedule** check box of the desired entry.

To transfer the application, select the **Transfer** check box of the desired entry.

To know more, refer to [“Pending Visit Approvals”](#).



*The population on this page depends on the server's database. It might take time to load all pending applications.*

## Applications according to Set Filters

To Set the Filters,

- **Visit Date:** Select this option to enable the visit date filter. Select the start and end dates by clicking respective date selection buttons for which visit approval to visitor is to be given.

Click **View** to view the pending, approved, rejected and rescheduled status of all Visit requests.

There are four collapsible panels — Pending, Approved, Rejected and Rescheduled.

You can approve, reject, reschedule or transfer the visit request by selecting the respective check box. Click the desired collapsible panel to perform the desired action.

### Pending Visit Approvals

Click the **Pending** collapsible panel.

The Pending Requests with Visit Date, Visit Time, Visitor Name, Host Name, Visit Purpose and Application Current Status are displayed as shown below:




Visit Date	Visit Time	Visitor Name	Host Name	Visit Purpose	Application Current Status	Approve	Reject	Reschedule	Transfer	Details
2022/07/24	11:26 - 12:26	33	visitorhost		Transferred by System Admin	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

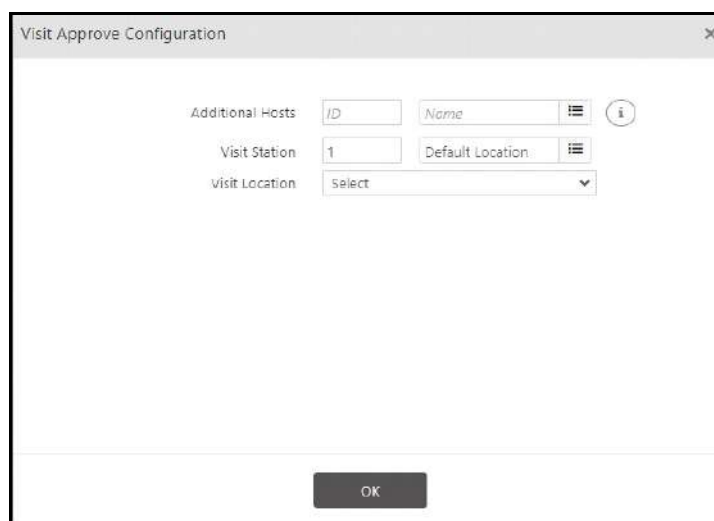
You can perform the following actions:

- “Approve a Visit”
- “Reject a Visit”
- “Reschedule a Visit”
- “Transfer a Visit”



### Approve a Visit


Select the check box if you wish to approve the visit request application.


Click  . The Visit Approve Configuration pop-up appears from where the verdict can be configured.




Visit Approve Configuration

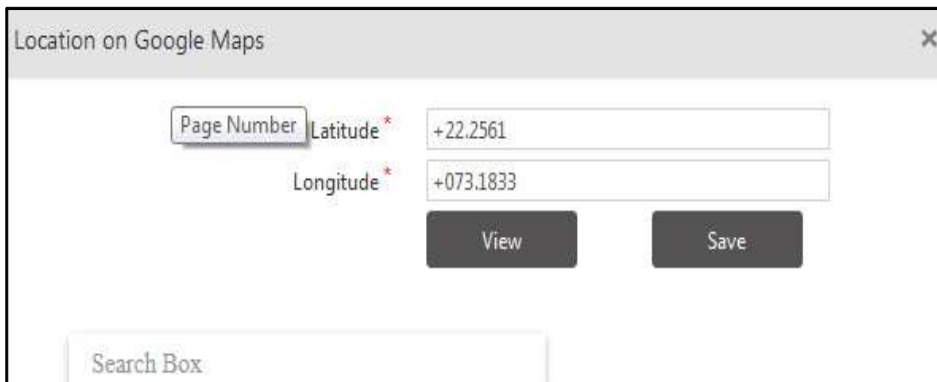
Additional Hosts:    

Visit Station:  Default Location: 

Visit Location:  

## Visit Approve Configuration

- **Additional Hosts:** Enter the Additional Hosts ID and Name manually or select the same from the picklist.
- **Visit Station:** Select the station of the Visit from the picklist. All the stations displays a list of all the Stations created from the Station Location page. For details, refer to [“Station Location”](#).
- **Visit Location:** Select the location of the Visit from the drop down list — Configured Location or Custom Location.
  - If you select **Configured Location**, then configure the Location Code and Name. You can either enter the Location Code and Name manually or you can select the same from the picklist.
  - If you select **Custom Location**, then click  , to select the location from the Google Map. The Location on Google Maps pop-up appears as shown below.



The image shows a pop-up window titled "Location on Google Maps" with a close button (X) in the top right corner. Inside the window, there are two input fields: "Latitude" with a red asterisk and a value of "+22.2561", and "Longitude" with a red asterisk and a value of "+073.1833". Below these fields are two buttons: "View" and "Save". At the bottom of the window, there is a "Search Box" with a magnifying glass icon.

- **Location on Google Maps**

**Latitude:** Specify the Latitude of the location on Google Maps.

**Longitude:** Specify the Longitude of the location on Google Maps.

Click **View**, to view the location.


Click **Save**, to save the location.

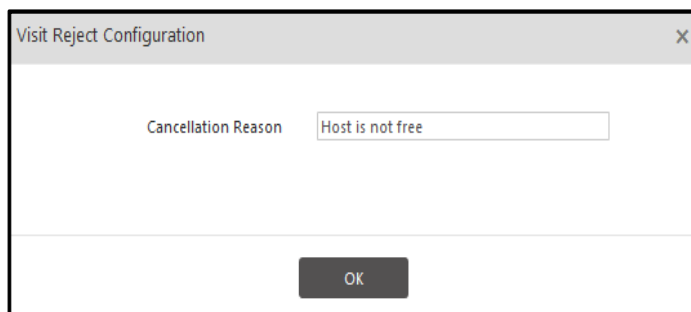
Click **OK** to save the Visit Approve Configuration.

Click **Save**  , to save the changes. The application will now appear in the Approved panel.

## Reject a Visit

Select the check box if you wish to reject the visit request application.

Click  . The Visit Reject Configuration pop-up appears as shown below.



Visit Reject Configuration


Cancellation Reason: Host is not free

OK

## Visit Reject Configuration


- **Cancellation Reason:** Specify the reason for which you want to cancel the visit of the visitor.

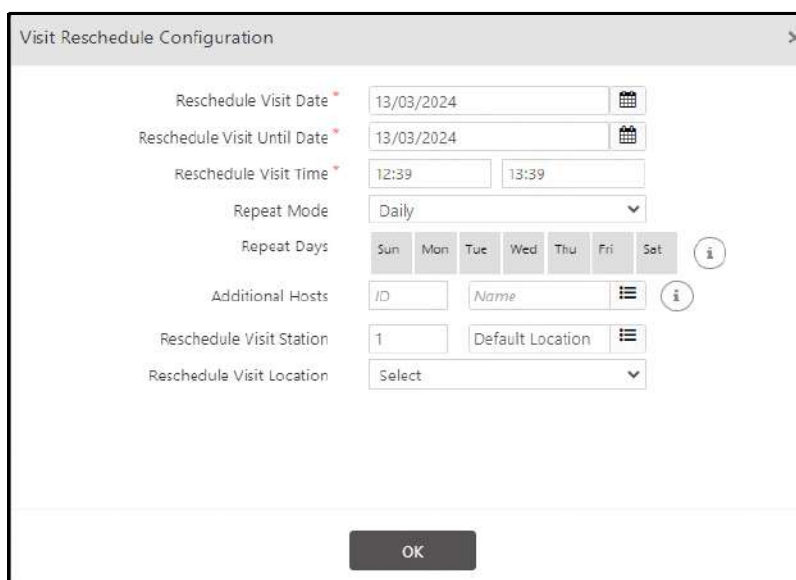
Click **OK** to save the Visit Reject Configuration.

Click **Save**  to save the changes. The application will now appear in the Rejected panel.

## Reschedule a Visit

Select the check box if you wish to reschedule a visit for the visitor. Restrictions will be imposed if configured in Visit Creation Restriction under *“Visitor Management Policy”*.

Click . The Visit Reschedule Configuration pop-up appears as shown below.



Visit Reschedule Configuration

Reschedule Visit Date: 13/03/2024

Reschedule Visit Until Date: 13/03/2024

Reschedule Visit Time: 12:39 13:39

Repeat Mode: Daily

Repeat Days: Sun Mon Tue Wed Thu Fri Sat

Additional Hosts: ID Name

Reschedule Visit Station: 1 Default Location

Reschedule Visit Location: Select

OK

## Visit Reschedule Configuration

- **Reschedule Visit Date:** Select the desired date on which the visit needs to be rescheduled.
- **Reschedule Visit Until Date:** Select the desired date until which the visit needs to be rescheduled.
- **Reschedule Visit Time:** Specify the new visit time on which the visit needs to be rescheduled.

- **Repeat Mode and Repeat Days:** Select the Repeat Mode from the drop down list—weekly or daily, if you wish to repeat the Visit. Select the days for which you wish to repeat the Visit.
- **Additional Hosts:** Enter the Additional Hosts ID and Name manually or select the same from the picklist.
- **Reschedule Visit Station:** Select the station for the Visit from the picklist. The picklist displays a list of all the Stations created from the Station Location page. For details, refer to [“Station Location”](#).
- **Reschedule Visit Location:** Select the location of the Visit from the drop down list—Configured Location or Custom Location. For details, refer [“Visit Approve Configuration”](#).


Click **OK** to save the Visit Reschedule Configuration.

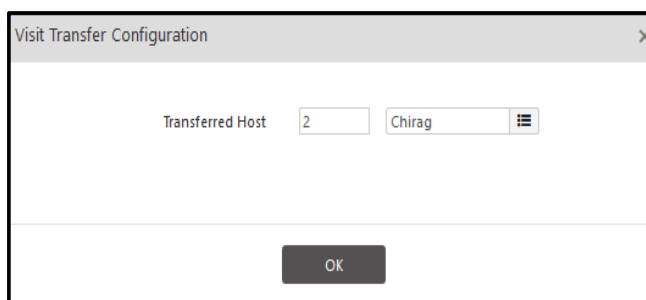
Click **Save**  to save the changes. The application will now appear in the Rescheduled panel.

## Transfer a Visit

The visit can be transferred to another host user by selecting the host from the pick list.

For transferring the visit of a visitor to another host, select the check box.

Click . The Visit Transfer Configuration pop-up appears as shown below.




The image shows a 'Visit Transfer Configuration' dialog box. It has a title bar with a close button (X). Inside, there is a label 'Transferred Host' followed by a text input field containing the number '2' and a picklist button. The picklist is open, showing the name 'Chirag'. At the bottom of the dialog is an 'OK' button.

## Visit Transfer Configuration

- **Transferred Host:** Enter the ID and Name of the Host manually or select the Transferred Host from the pick list.

Click **OK** to save the Visit Transfer Configuration.

Click **Save**  to save the changes. The application will now appear in the Pending panel with the updates.

If “Security Clearance for Visitor E-Pass” is enabled in Global policy then the approved application will go to the Security (Linked ESS user with System Account) for Security Clearance. Then 'Visit Transfer Alert' will be sent to Visitor.




*Make sure you have configured an alert for Visit Transfer. To do so:*

*Click Admin Module >System Configuration > Alert Message Configuration.*

*In the **Alert Filter** select Visitor Management from the drop-down list and select the **Event** as Visit Transfer from the drop down list. To know more, refer [“Configuring Alert Messages”](#)*



## Details

Click the corresponding **Details**  to view the visit application details. It displays the parameters of Visitor Detail, Visit Detail and Visit Logs. The Visit Application Details pop-up appears as shown below.

Visit Application Details

Visitor Detail

Mobile No.

123

Email ID

151@gmail.com

Name

VISITOR 2


Organization

ABB

Designation

ID Proof 1

ID Proof 2



Visit Detail

Visit Date

13/03/2024

Visit Until Date

13/03/2024

Visit Time

12:39

-

13:39

Visit Purpose

Additional Visitor

0

Visit Station

1

Default Location

Visit Logs

Application Date Time

13/03/2024 12:39

## Approved Visit Approvals

Click **Approved** collapsible panel.

The Approved applications with Visit Date, Visit Time, Visitor Name, Host Name, Visit Purpose and Application Current Status are displayed as shown below:

Approved (2)							
Search							
Visit Date ▲	Visit Time	Visitor Name	Host Name	Visit Purpose	Application Current Status	Reject	Reschedule
2022/07/14	10:33 - 11:33	33	mitali		Security Clearance - Pending	<input type="checkbox"/>	<input type="checkbox"/>
2022/07/14	17:33 - 18:30	TEST	visitorhost		Pending by RIC	<input type="checkbox"/>	<input type="checkbox"/>
						Transfer	Details
						<input type="checkbox"/>	<input type="checkbox"/>

Select the respective check box, if you wish to reject, reschedule or transfer the visit request.

To reject the visit request, refer [“Reject a Visit”](#).

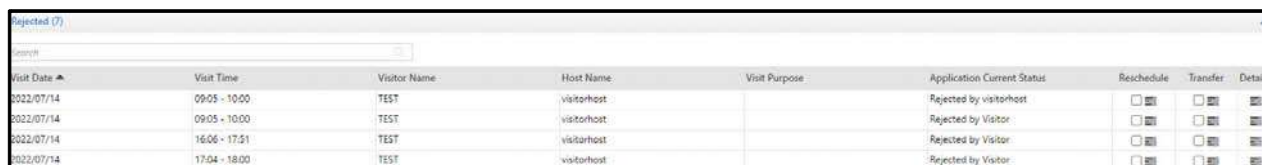
To reschedule the visit request, refer [“Reschedule a Visit”](#).

To transfer the visit request, refer [“Transfer a Visit”](#).

## Rejected Visit Approvals

Click **Rejected** collapsible panel.

The Rejected applications with Visit Date, Visit Time, Visitor Name, Host Name, Visit Purpose and Application Current Status are displayed as shown below:



Visit Date	Visit Time	Visitor Name	Host Name	Visit Purpose	Application Current Status	Reschedule	Transfer	Details
2022/07/14	09:05 - 10:00	TEST	visitorhost		Rejected by visitorhost	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2022/07/14	09:05 - 10:00	TEST	visitorhost		Rejected by Visitor	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2022/07/14	16:06 - 17:51	TEST	visitorhost		Rejected by Visitor	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2022/07/14	17:04 - 18:00	TEST	visitorhost		Rejected by Visitor	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Select the respective check box, if you wish to reschedule or transfer the visit request.

To reschedule the visit request, refer [“Reschedule a Visit”](#).

To transfer the visit request, refer [“Transfer a Visit”](#).

## Rescheduled Visit Approvals

Click **Rescheduled** collapsible panel.

The Rescheduled applications with Visit Date, Visit Time, Visitor Name, Host Name, Visit Purpose and Application Current Status are displayed as shown below:



Visit Date	Visit Time	Visitor Name	Host Name	Visit Purpose	Application Current Status	Reject	Reschedule	Transfer	Details
2022/07/19	10:35 - 11:38	SS	mitali		Rescheduled by System Admin - Pending	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2022/07/21	11:00 - 12:00	SS	mitali		Rescheduled by System Admin - Pending	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Select the respective check box, if you wish to reject, reschedule or transfer the visit request.

To reject the visit request, refer [“Reject a Visit”](#).

To reschedule the visit request, refer [“Reschedule a Visit”](#).

To transfer the visit request, refer [“Transfer a Visit”](#).

# Form Summary

After the Forms are submitted by the Visitors, the details are displayed in the Form Summary. Form Summary displays the complete form response submitted by the Visitor along with its score summary.

To view Form Summary,

- Click **Visitor Management> Form Summary**.
- The **Form Summary** page appears. You can filter the records by settings various filter as per your requirement.

The screenshot shows the 'Form Summary' page with the following filter fields: Station (with a dropdown arrow), Name (with a dropdown arrow), Visitor (with a dropdown arrow), Mobile No (with a dropdown arrow), Name (with a dropdown arrow), Date (with a date range selector), and Form Type (with a dropdown arrow). Below these fields is a 'Preview' button. Below the button is a table with the following columns: Sr. No., Date/Time, Form, Attempt, Final Score, Assessment Criteria(%), Agreement, and Status. The table is currently empty, with 'No Data' displayed below it.

- **Station:** You can enter the Station ID or Name manually or you can click the picklist to select the same. This is the Station from where the response Form was submitted.
- **Visitor:** You can enter the desired Visitor's Mobile Number or Name manually or you can click the picklist to select the same.
- **Date:** Enter the desired From and To dates. This is the range during which the response Form was submitted by the Visitor.
- **Form Type:** Select the desired Form Type— Login, Check-In, Check-Out from the drop down list.

Click **Preview**. The records are displayed in the Response Table as per the set filters.

Sr. No.	Date/Time	Form	Attempt	Final Score	Assessment Criteria(%)	Agreement	Status
1	05/07/2022 00:42:14	Editedform1	13	0	NA	Accepted	Pass
2	04/07/2022 17:11:11	Editedform1	12	0	NA	Accepted	Pass
3	04/07/2022 16:09:43	Editedform1	11	0	NA	Accepted	Pass
4	04/07/2022 16:07:38	Editedform1	10	0	NA	Accepted	Pass
5	04/07/2022 15:50:29	Editedform1	9	0	NA	Accepted	Pass

1 - 5 of 13 records

**Response Table:** The Response Table displays the records with the following details:

- **Sr. No.:** It displays numerical sequence of the Form.
- **Date/Time:** It displays the date and time when the particular Form was submitted.
- **Form:** It displays the Form name.
- **Attempt:** It displays the number of attempts made by the Visitor for filling the Form.
- **Final Score:** It displays the score achieved by the Visitor along with the maximum achievable score.



*This is applicable only for Single-Choice and Multi-Choice questions.*

- **Assessment Criteria:** It displays the assessment criteria applied to the form. This parameter depends on the configuration done in **Admin Module > Form Builder**. For more details, refer to [“Form Builder”](#).
- **Agreement:** It displays whether the Agreement is accepted, declined or not provided with the Form.
- **Status:** It displays the status of the Visitor’s Form as Pass or Fail.

Click the Form whose details you wish to view.

The **Form** collapsible panel appears.

The screenshot shows a web interface titled 'Form' with a tab labeled 'Section 1'. It contains three question entries, each with a question number, the question text, the marks obtained, the provided answer, and the correct answer.

Question	Marks Obtained	Provided Answer	Correct Answer
(1) What is the actual name of company	1	Matrix Comsec Pvt. Ltd.	Matrix Comsec Pvt. Ltd.
(2) Which is logical Address?	0	MAC Address	IP Address
(3) Which are the products of matrix cosec company	0	PBX	PBX Access Control System

Click the **Form** collapsible panel.

The complete Form response submitted by the Visitor along with the details — section, question number, question, provided answer, correct answer and marks obtained is displayed.



*The marks obtained is applicable only for Single-Choice and Multi-Choice questions.*

# Set and Sync Credentials

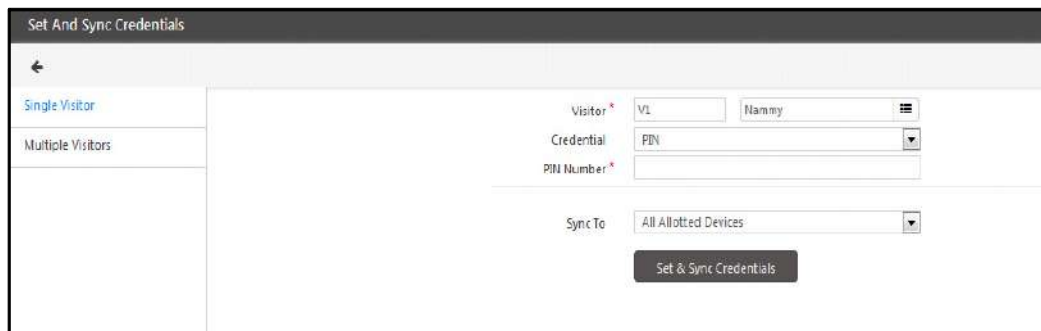
The **Set and Sync Credential** option provides a simple method of setting visitor credentials to devices. However the administrator needs to ensure that the visitors have been created in the system. And the visitor credentials are enrolled from Visitor Profile.

The COSEC system has six major types of visitor credentials which can be assigned to visitors:

- PIN
- Cards (Read only and Smart Cards)
- Fingerprint Templates
- Palm Templates
- Visitor Photo
- Face Template

To access this functionality, select the **Visitor Management module > Utilities > Set and Sync Credentials**.

The **Set and Sync Credentials** page appears as shown below.



## Single Visitor

**Visitor** - Select a visitor from the visitor picklist whose credentials are to be set to the device.

**Credential** - Select the specific credential of the visitor which is to be set. The options are —

- PIN
- Cards
- FP Template
- Palm Template
- User Photo
- Face Template

Depending on the credential configure the values of the same.



*If **Dynamic PIN On Pass Creation** in Admin> System Configuration> Global Policy> Visitor Management is enabled, then PIN will not be configurable. You will be able to view PIN here only during the visit time i.e. when the visitor with the configured Visitor Profile checks-in.*

*If **Access via QR** in Admin> System Configuration> Global Policy> Visitor Management is enabled, then Card 2 will not be configurable.*

Visitor\* V3 Parshv  
 Credential PIN  
 PIN Number\* 501  
 Sync To All Allotted Devices  
 Set & Sync Credentials

Visitor\* V1 Nammy  
 Credential Cards  
 Card 1 1942906695  
 Card 2  
 Sync To All Allotted Devices  
 Set & Sync Credentials

**Set And Sync Credentials**

Single Visitor

Multiple Visitors

Visitor\* 1000 Parth

Credential FP Template

FP Templates (Suprema Proprietary) 0

FP Templates (Suprema ISO) 0

FP Templates (Lumidigm ISO) 0

FP Templates (Lumidigm Proprietary) 1

**Sync To Device**

Search

☒ Select All

<input checked="" type="checkbox"/>	ID	Name	Type
<input checked="" type="checkbox"/>	3	82_fmz_parth1	Door FMX
<input checked="" type="checkbox"/>	4	Vega Dimple_85	Vega Controller

Set And Sync Credentials

Visitor\* V3 Parshv  
 Credential Palm Template  
 Number Of Palm Templates 1  
 Sync To Device  
 Search  
☒ Select All

<input checked="" type="checkbox"/>	ID	Name	Type
<input checked="" type="checkbox"/>	1	PVR direct door	PVR Door
<input checked="" type="checkbox"/>	1	Panel Lite V2	Panel Lite V2
<input checked="" type="checkbox"/>	2	Panel Lite	Panel Lite

Set And Sync Credentials

Visitor\* V3 Parshv

Credential User Photo

**Sync To Device**

Search

☒ Select All

<input checked="" type="checkbox"/>	ID ▲	Name	Type
<input checked="" type="checkbox"/>	1	Panel Lite V2	Panel Lite V2
<input checked="" type="checkbox"/>	3	Vega Door	Vega Controller
<input checked="" type="checkbox"/>	4	Door FMX	Door FMX
<input checked="" type="checkbox"/>	6	MODE Device1	MODE

Set And Sync Credentials

Visitor\* V3 Parshv

Credential Face Template

Enrolled Faces 1

**Sync To Device**

Search

☒ Select All

<input checked="" type="checkbox"/>	ID ▲	Name	Type
<input checked="" type="checkbox"/>	3	Vega Door	Vega Controller
<input checked="" type="checkbox"/>	4	Door FMX	Door FMX
<input checked="" type="checkbox"/>	6	MODE Device1	MODE

Set And Sync Credentials

Select the devices where the specified credentials are to be set for the selected visitor.



*The Visitor Photo can be set on allotted NGT and Vega devices only.*

Click **Set and Sync Credentials** to set the visitor credential on the selected devices.

Set Credential command sent successfully

Visitor\* 1225 Shalini

Credential FP Template

Number Of FP Templates 1

**Sync To Device**

Search

☒ All Devices

<input checked="" type="checkbox"/>	ID ▲	Name	Type
<input checked="" type="checkbox"/>	17	NGT Direct Door-Device-17 -140	NGT Direct Door
<input checked="" type="checkbox"/>	20	Door V3-Device-20 185	Door V3

Set & Sync Credentials

## Multiple Visitors

**Credential** - Select the credential to be set for multiple visitors. The credential options are —

- FP Template
- Palm Template
- User Photo
- Face Template

**Select Visitor**- You can select the individual visitors by selecting **Visitor Wise** option or all the visitors by selecting option **All**. For **Visitor Wise** option select the individual visitors from the picklist.

The screenshot shows the 'Set And Sync Credentials' window. On the left, there is a sidebar with 'Single Visitor' and 'Multiple Visitors' (selected). The main area has a 'Credential' dropdown set to 'Palm Template'. Below it, 'Select Visitor' is set to 'Visitor Wise'. A 'Visitor' section contains a search bar and a table with two rows: 'V1' with name 'Nanmy' and 'V3' with name 'Pershv'. At the bottom, 'Sync To' is set to 'All Allotted PVR Devices' and a 'Set & Sync Credentials' button is visible.

The screenshot shows the 'Set And Sync Credentials' window. On the left, there is a sidebar with 'Single Visitor' and 'Multiple Visitors' (selected). The main area has a 'Credential' dropdown set to 'Palm Template'. Below it, 'Select Visitor' is set to 'All'. At the bottom, 'Sync To' is set to 'All Allotted PVR Devices' and a 'Set & Sync Credentials' button is visible.

**Sync To** - Select the Devices where the selected credentials are to be set for the multiple visitor. The options for Sync will depend on the credential selected.

- **All Allotted Devices** - This option appears for FP Template only. Select this to set credentials on all allotted devices.
- **All Allotted PVR Devices** - This option appears for Palm Template only. Select this to set credentials on all allotted PVR devices.
- **All Allotted NGT & Vega Controllers** - This option appears for Visitor Photo only. Select this to set credentials on all allotted NGT and Vega controllers.
- **All Allotted MODE, Vega and FMX Devices**- This option appears for Face Template only. Select this to set face credential on all MODE, Vega and FMX devices.

Click the **Set & Sync Credentials** button to set the multiple visitors credential on the selected devices.

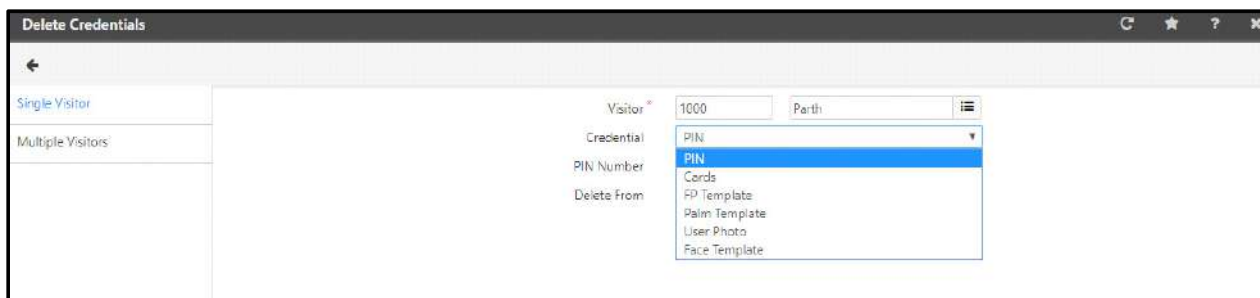


# Delete Credentials

The **Delete Credential** option provides a simple method of Deleting visitor credentials from devices.

To access this functionality, Select the **Visitor Management module > Utilities > Delete Credentials**.

The **Delete Credentials** page appears as shown below.



Some parameter will change according to the selected option in “**Credential**”.



*If you select “**Palm Template**” from the Credential list then a parameter “**Number Of Palm Template**” will be added below. Thus, same will happen with other options.*

## Single Visitor



**Visitor** - Select a visitor from the visitor pick-list whose credentials are to be deleted from the device.

**Credential** - Select the specific credential of the visitor which is to be deleted The options are —

- PIN
- Cards
- FP Template
- Palm Template
- User Photo
- Face Template

Depending on the credential selected, the available PIN number/Card number (CSN)/ FP template number/ Palm template/ Face Template number will be displayed.

Visitor \* V3 Parshv

Credential PIN

PIN Number \* 501

Delete From Entire System

Delete

Visitor \* V3 Parshv

Credential Cards

Card 1 1131112263

Card 2

Delete From Entire System

Delete

Visitor \* 1000 Parth

Credential FP Template

FP Template Type Lumidigm Proprietary

FP Templates (Suprema Proprietary) 0

FP Templates (Suprema ISO) 0

FP Templates (Lumidigm ISO) 0

FP Templates (Lumidigm Proprietary) 1

Delete From Entire System

Delete

- **FP Template Type-** If Credential is selected as FP Template; then you can select the Type of FP Template which is to be deleted. The options of template are Suprema Proprietary, Suprema ISO, Lumidigm ISO, Lumidigm Proprietary. You can also choose all the templates by selecting “All” option.

Visitor \* V3 Parshv

Credential Palm Template

Number Of Palm Templates 1

Delete From Entire System

**Enrolled Faces-** If Credential is selected as Face Template; then the number of enrolled face templates for the selected visitor will be displayed.

**Delete From-** Select the option as **Entire System** or **Randomly Selected Devices** from where the specified credentials are to be deleted for the selected visitor.

Click **Delete** to delete the visitor credential from the selected devices.

## Multiple Visitors

Select the **Multiple Visitors** tab.

**Credential** - Select the credential to be deleted for multiple visitors. The credential options are —

- PIN
- Cards
- FP Template

- Palm Template
- User Photo
- Face Template

**FP Template Type** - If Credential is selected as FP Template; then you can select the Type of FP Template which is to be deleted. The options of template are Suprema Proprietary, Suprema ISO, Lumidigm ISO, Lumidigm Proprietary. You can also choose all the templates by selecting “All” option.

**Select Visitor**- You can select the individual visitors by selecting **Visitor Wise** option or all the visitors by selecting option **All**. For **Visitor Wise** option select the individual visitors from the picklist.

Single Visitor

Multiple Visitors

Credential: Palm Template

Select Visitor: Visitor Wise

Visitor\*

ID: Name:

Search

User ID	Name	
V1	Nammy	
V2	Jinu	
V3	Parshv	

Delete From: Entire System

Delete

Single Visitor

Multiple Visitors

Credential: FP Template

FP Template Type: All

Select Visitor: All

Delete Credentials For: Active Visitors

Delete From: Entire System

Delete

**Delete From** - Select the Devices from where the selected credentials are to be deleted for the multiple visitor. The options for Delete will depend on the credential selected.

- **All Allotted Devices** - This option appears for FP Template only. Select this to delete credentials on all allotted devices.
- **All Allotted PVR Devices** - This option appears for Palm Template only. Select this to delete credentials on all allotted PVR devices.
- **All Allotted NGT & Vega Controllers** - This option appears for Visitor Photo only. Select this to delete credentials on all allotted NGT and Vega controllers.

Click the **Delete** button to delete the multiple visitors credential on the selected devices.

# Sync From Device

This feature enables the COSEC system to synchronize visitor credentials between the COSEC database and the devices as well as to other compatible devices. This is useful in case of discrepancies or loss of credential data which might occur in case of system errors or data handling issues.

This functionality enables:

- the system to sync the selected credential from the selected Device
- these credentials fetched from the selected devices will also be synchronized with other compatible devices connected with the server.



**Sync From Device** is applicable for devices with FR Mode as **Local**.

For Panel200, **Sync From Device** is applicable for Face Sync in Panel Door mode as **Via Panel**.

To ensure smooth functioning of this feature, make sure the Server and the devices are upgraded to the same and latest version. Face Images as Credential is supported from Software Version V20R06 and later.

Make sure the **Enable Face Recognition** check box is selected for the visitor whose Face Images are to be synced.

- Click **Visitor Management module > Utilities > Sync From Device**.

The screenshot shows the 'Sync From Device' interface with the 'Single Visitor' tab selected. The interface has a left sidebar with 'Single Visitor' and 'Multiple Visitors' tabs. The main area contains a 'Sync From Device' section with the following fields: 'Device' (with sub-fields 'ID' and 'Name'), 'Credential' (a dropdown menu showing 'Cards'), and 'Visitor' (with sub-fields 'ID' and 'Name'). A 'Sync' button is located at the bottom right of the main area.

The Sync From Device page consists of two tabs — “Single Visitor” and “Multiple Visitors”.

## Single Visitor

This tab enables you to sync the credentials of a single visitor from the device.

This screenshot shows the 'Sync From Device' interface with the 'Single Visitor' tab selected. The 'Device' field is pre-filled with '3' and 'ARGO Direct Door'. The 'Credential' dropdown is set to 'Cards'. The 'Visitor' field is pre-filled with '101' and 'Visitor 1'. The 'Sync' button is visible at the bottom right.

Configure the following parameters:

- **Device:** Click the **Device** picklist. The **Picklist For Panel Doors and Direct Doors** appears.

MID	Name	Type	Status
1	PVR Device_Direct Door	PVR Door	Enable
1	PVR Panel Door	Panel200 Door	Enable
1	ARGO Panel Door	Panel200 Door	Enable
2	ARGO FACE_Direct Door	ARGO FACE	Enable
3	ARGO Direct Door	ARGO	Enable
4	VEGA Direct Door	Vega Controller	Enable

- Select the desired device.
- **Credential:** Select the relevant visitor credential from the drop-down list according to the selected device. The following credentials are supported:
  - Cards
  - FP Templates
  - Palm Templates
  - Face Images

## Sync From Device

- **Visitor:** Click the **Visitor** picklist. The **Picklist For Visitors** pop-up appears.

Visitor ID	Name	ShortName
101	Visitor 1	Visitor 1
102	Visitor 2	Visitor 2
103	Visitor 3	Visitor 3

- Select the desired visitor whose credentials are to be synchronized.
- Click **Sync**. The credentials of the selected visitor will sync to the COSEC database from the selected device and then the same credentials will be synchronized to the other compatible devices.

## Multiple Visitors

This tab enables you to sync the credentials of multiple visitors from the device.

The screenshot shows the 'Sync From Device' window. On the left, there's a sidebar with 'Single Visitor' and 'Multiple Visitors' (highlighted in blue). The main content area has a 'Sync From Device' section. It includes a 'Device' field with a value of '3' and a picklist showing 'ARGO Direct Door'. Below it is a 'Credential' dropdown menu set to 'Cards'. Further down, there's a 'Select Visitor' dropdown set to 'Visitor Wise' and a 'Visitor' section with 'ID' and 'Name' input fields. A 'Sync' button is located at the bottom right of the main area.

Configure the following parameters:

- **Device:** Click the **Device** picklist. The **Picklist For Panel Doors and Direct Doors** appears.

The screenshot shows the 'Picklist For Panel Doors and Direct Doors' dialog. It has a search bar at the top. Below it is a table with the following data:

MID	Name	Type	Status
1	PVR Device_Direct Door	PVR Door	Enable
1	PVR Panel Door	Panel200 Door	Enable
1	ARGO Panel Door	Panel200 Door	Enable
2	ARGO FACE_Direct Door	ARGO FACE	Enable
3	ARGO Direct Door	ARGO	Enable
4	VEGA Direct Door	Vega Controller	Enable

A 'Cancel' button is located at the bottom center of the dialog.

- Select the desired device.
- **Credential:** Select the relevant visitor credential from the drop-down list according to the selected device. The following credentials are supported:
  - Cards
  - FP Templates
  - Palm Templates

- Face Images

## Sync From Device

- **Select Visitor:** Select the desired option — **Visitor Wise** or **All**.
- If you select **Visitor Wise**, click the **Visitor** picklist. The **Picklist for Visitors** pop-up appears.

Picklist For Visitors

Total Selected: 0 Records

Search  [Show Selected](#)

<input type="checkbox"/>	Visitor ID ▲	Name	ShortName
<input type="checkbox"/>	101	Visitor 1	Visitor 1
<input type="checkbox"/>	102	Visitor 2	Visitor 2
<input type="checkbox"/>	103	Visitor 3	Visitor 3

OK Cancel

- Select the check boxes of the desired Visitors. Click **OK**.
- The selected Visitors appear in the grid.

Search

Visitor ID ▲	Name	
101	Visitor 1	

Sync

- You can also delete the desired Visitors. To do so, click **Delete** of the respective Visitor.
- If you select **All**, then all the visitors will be selected.
- Click **Sync**. The credentials of the selected visitors will sync to the COSEC database from the selected device and then the same credentials will be synchronized to the other compatible devices.

# Visitor Events

---

The **Visitor Events** page enables the Admin to view the information regarding the events of the Visitors and track their real time location.

Admin can view visitor's events that is check-in/check-out, auto punch, device punch events etc.

The possible sources from which visitor events can be marked are — Station (VMS Web Portal / VMS Utility), VMS Application, Email and Device.

## Types of Visitor Events

### Check-In/ Check-Out Events

- The visitor check-in and check-out events can be marked via — Station (VMS Web Portal/VMS Utility), Application, Email and Device.
- The visitor check-out event can be marked by the System as well when the visitor surrenders the visitor-pass.

### Auto Punch Events

- When a visitor checks-in for a visit, a Visitor Profile ID is assigned to the visitor for that visit duration. To know more about the Visitor Profile, refer "[Visitor Profile](#)".
- Any events that are received during the visit duration against the Visitor Profile ID, such events will be stored by the system and will be displayed here. Once, the visitor checks-out, only check-in/check-out events will be stored against that Visitor Profile ID.

### Offline Punch Events (Application/ Device)

- Offline punches are those punches that are stored locally by the application/device, when the connectivity to the server is lost.
- When the application/device regains the connectivity to the server, offline punches will be sent to the server.
- When the server receives any offline punches, then the sever will first check the visit-state corresponding to the Visitor Profile.

There can be two possible visit-states:

1. Visit-state= check-in
2. Visit-state= check-out

#### **Case 1:** Visit-state= check-in

In this case, server will accept all offline punches that are sent by the application/device.

#### **Case 2:** Visit-state= check-out

In this case, server will check the time of each offline punch. If the offline punch time is before the check-out punch time, then the server will accept the offline punch.



If the offline punch time is after the check-out punch time, server will discard that punch.

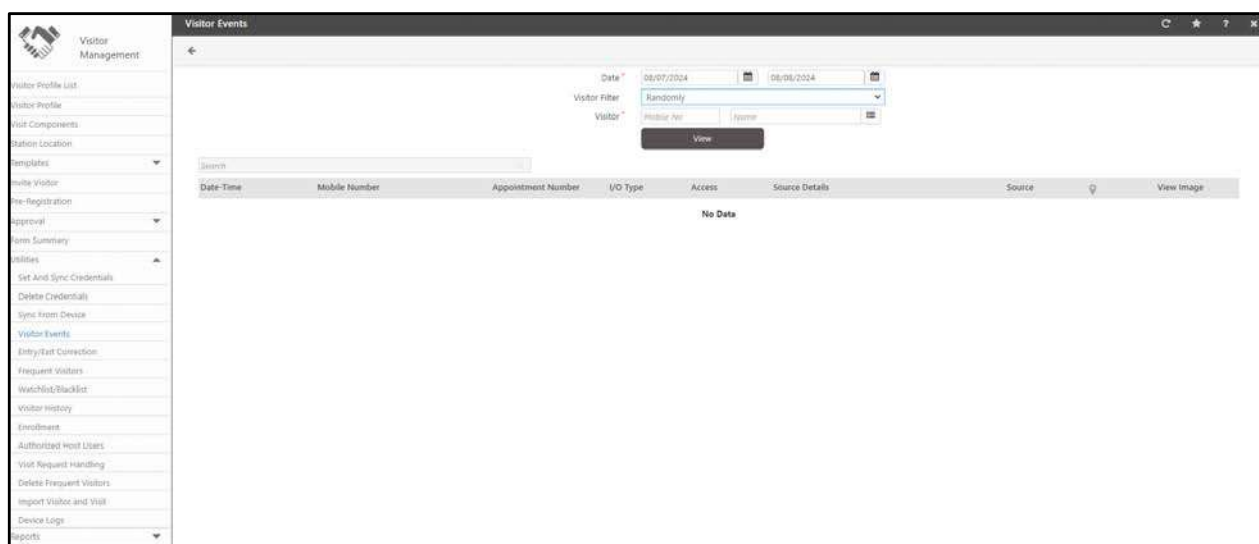
Hence, offline punches that are obtained before the check-out time will only be accepted by the server.

## Device Punch Events

- Visitor punches via Device are stored against the Visitor Profile ID assigned to that Visitor.
- A Visitor Profile can be assigned to multiple Visitors with different Appointment Numbers and when different visitors punch via device, the events generated for these punches will be stored against the Visitor Profile along with the Appointment Numbers.

So when the Admin checks these events, s/he can view which punches were marked by which Visitors on the basis of Appointment Number.

To access this functionality, select the **Visitor Management module > Utilities > Visitor Events** and the page appears as shown below.



Configure the following parameters to view events:

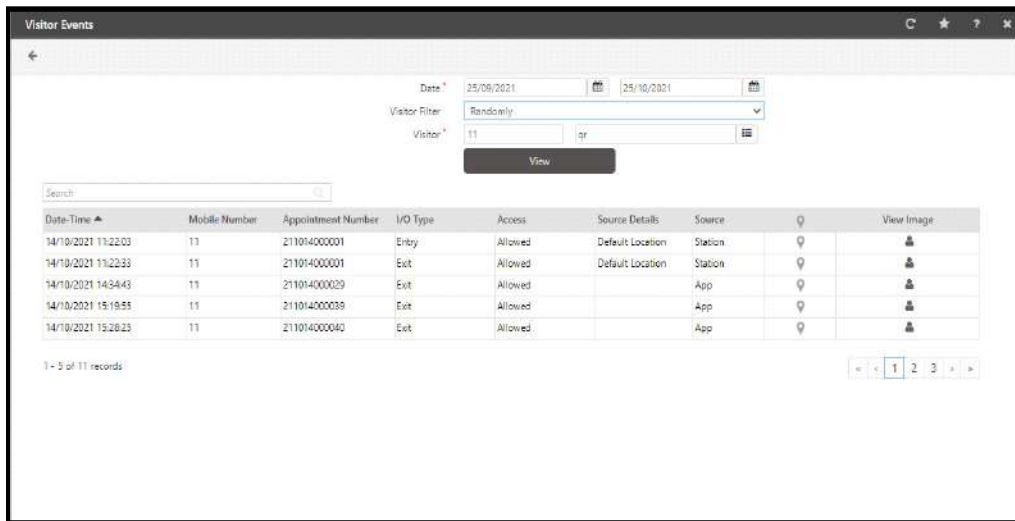
**Date:** Select the desired date range for which the events are to be viewed.

**Visitor Filter:** Select the desired filter from the drop down list.

- **All:** To view events of all the visitors.
- **Randomly:** To view events of the selected visitor. Select the desired **Visitor** from the pick list.

**Visitor:** Enter the **Mobile No.** of the visitor whose events are to be viewed. You can even select the desired visitor from the picklist.

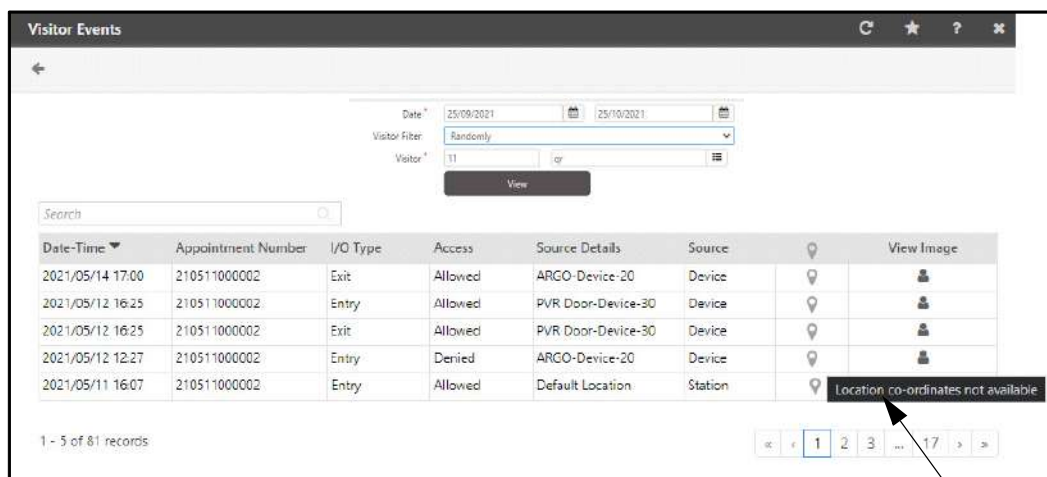
Click **View** and the visitor events will be displayed as shown below:



Visitor Events Details like — Date-Time, Appointment Number, I/O Type, Access, Source Details, Source, Location, View Image — are displayed.

When any event is marked through VMS Application, you will be able to view the Visitor's Location. To view the location details, click on **Location** 📍 icon.

**Case 1:** In case, the Location details are unavailable, on hovering your mouse over **Location** 📍 icon, a message will be displayed saying 'Location Co-ordinates not available' as shown below:




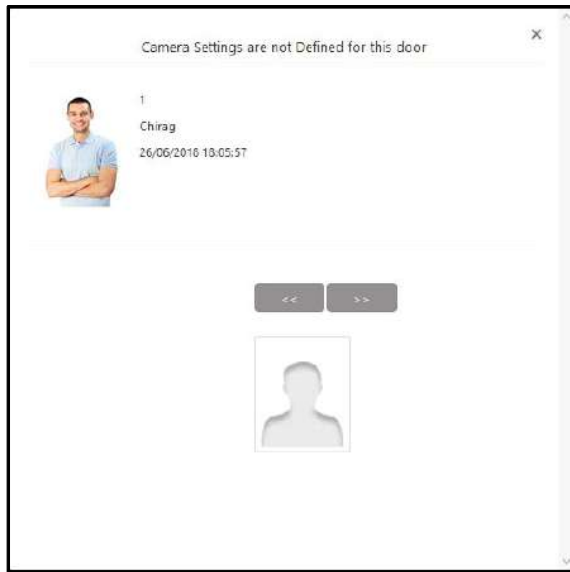
**Case 2:** If you have an Internet access and the Location details are available, click on **Location** 📍 icon and you will be directed to the Google Maps page.

**Case 3:** If you do not have an Internet access but the Location details are available, click on **Location** 📍 icon and a pop-up appears displaying the details of Location in terms of Latitude and Longitude.



*If Map is not loaded; check the network connection of your PC or check the value of Google API Key from Admin Module > System Configuration > Global Policy > Basic tab.*

Click on **View Image**  to view the captured image of the visitor as shown below. If no image is captured, then this icon will be inactive.



## Entry/Exit Correction

This option enables the application user to manually edit the entry and exit time of the Visitor. In case where the system is unable to recognize the credential of visitor or if the visitor pass is paper pass then the entry or exit of the visitor can be recorded manually.

To do the Entry/ Exit Correction, select **Visitor Management module > Utilities > Entry/ Exit Correction**. The Page appears as shown below:

The screenshot shows the 'Entry/Exit Correction' window. It features a search bar at the top right. Below it, there are input fields for 'Pass Issue Date' and 'Pass Number'. A 'Search' button is located below these fields. A table with columns 'Visit Date', 'Punch Time - In', 'Punch Time - Out', and 'Duration' is displayed, showing 'No Data'. On the right side, there is a list of visitors with columns 'Pass Issue Date', 'Pass Number', and 'Name'.

Pass Issue Date	Pass Number	Name
04/12/2017	170412000003	Dinesh
04/12/2017	170412000002	Jinu Sam
04/12/2017	170412000001	Jinu Sam

The grid on the right displays the Visitors with Pass issue date and Pass number.

Select a visitor from the grid whose Entry/Exit correction is to be done. The visitor Pass and In/Out details will be generated in the respective fields.

The screenshot shows the 'Entry/Exit Correction' window with a visitor selected. The 'Pass Issue Date' field is now populated with '04/12/2017' and the 'Pass Number' field is populated with '170412000003'. The 'Visit Date' field is also populated with '04/12/2017' and the 'Punch Time - In' field is populated with '16:38'. The 'Punch Time - Out' and 'Duration' fields are empty. The visitor list on the right is still visible, with the first entry highlighted.

Visit Date	Punch Time - In	Punch Time - Out	Duration
04/12/2017	16:38		

To do the correction, Click the Edit button in the grid. Enter or edit the **IN-OUT Punch** fields with Entry and Exit time falling within the Visit Hours as shown in Visitor History section.

Then click OK to save the changes. The Duration will be automatically calculated based on entry-exit timings.

Visit Date ▲	Punch Time - In	Punch Time - Out	Duration	
04/12/2017	16:38	17:20		✓ ✕

Entry/Exit Correction

✓ Saved Successfully ✕

★

←

Pass Issue Date

04/12/2017

Pass Number

170412000003

Search

Q

Visit Date ▲	Punch Time - In	Punch Time - Out	Duration	
04/12/2017	16:38	17:20	00:42	

Search

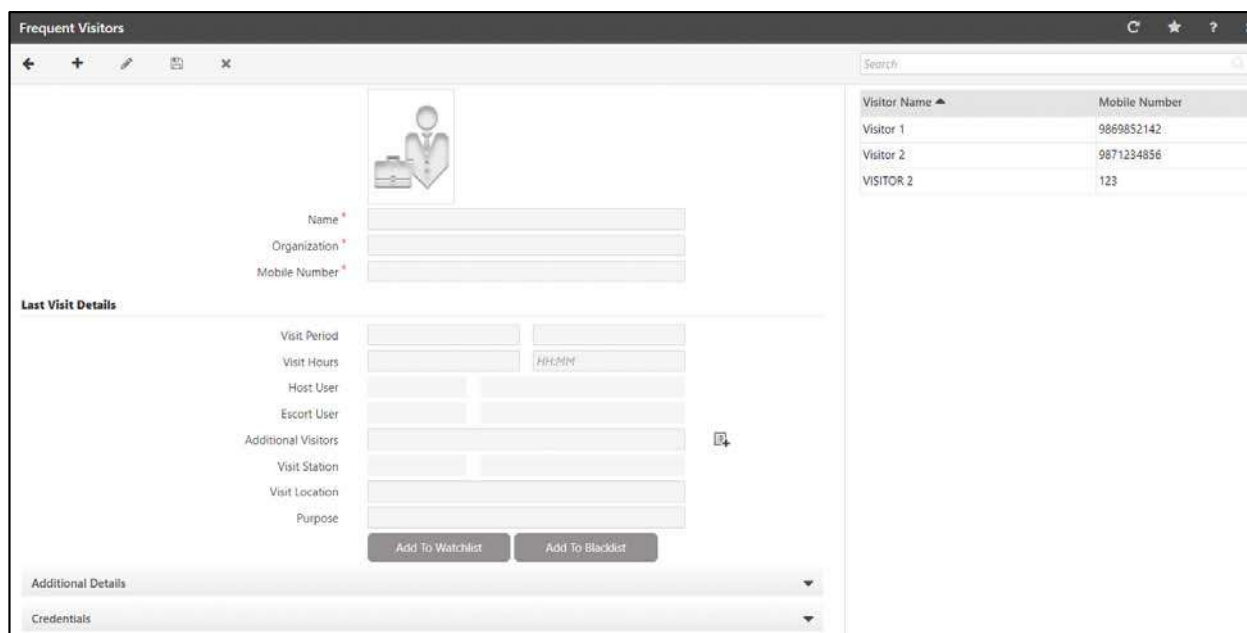
Pass Issue Date ▼	Pass Number	Name
04/12/2017	170412000003	Dinesh
04/12/2017	170412000002	Jinu Sam
04/12/2017	170412000001	Jinu Sam

# Frequent Visitors

This option displays the list of Frequent Visitors who visits frequently to the company. It enables to add the frequent visitor either to watchlist or blacklist.

The watchlist visitor can be monitored and a blacklist visitor can be restricted for any further visit.

To add or view the frequent visitors, click on **Visitor Management module > Utilities > Frequent Visitors**. The Page appears as shown below:



Visitor Name	Mobile Number
Visitor 1	9869852142
Visitor 2	9871234856
VISITOR 2	123


Click on the **New** button to add a new frequent visitor.

Enter the basic details like **Name, Organization, Mobile number, Last Visit Details** and the required **Additional Details**.

## Additional Details




1. Enrolled fingers is the read only field.
2. The ID Proof 1, ID Proof 2 and Custom fields will appear as entered in Global Policy> Visitor Management.


Under **Additional Details**, you can upload the documents in Custom Fields, by clicking **Upload**  button. Then **Change Document** pop-up appears as shown below.


**Browse File**

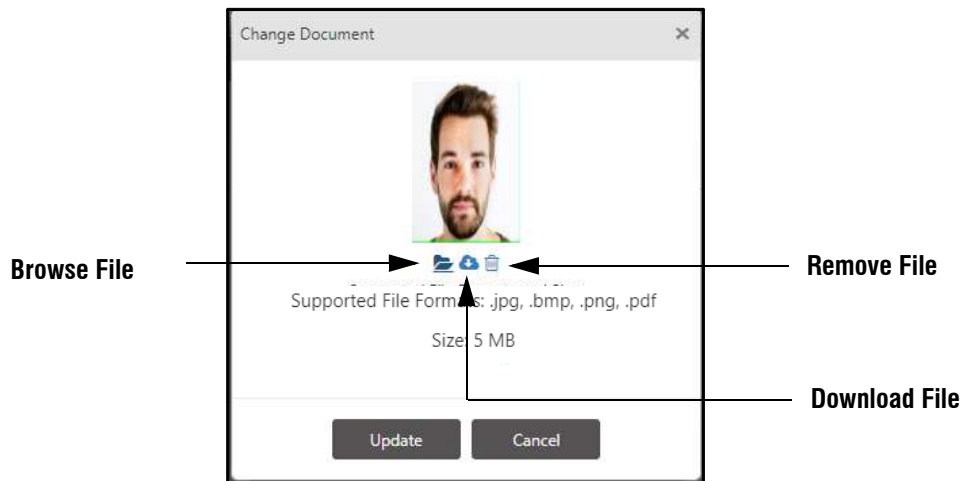
Click **Browse File**  .

To upload, select the desired file as per the supported formats and size (.jpg, .bmp, .png, .pdf) from your local PC.


After uploading the file, if you wish to upload a different file instead of the current uploaded file, click **Browse File**  again and select the desired file from your local PC. The previously uploaded file will get replaced with the new file.

To download the uploaded file, click **Download File**  .

To remove the uploaded file, click **Remove File**  .



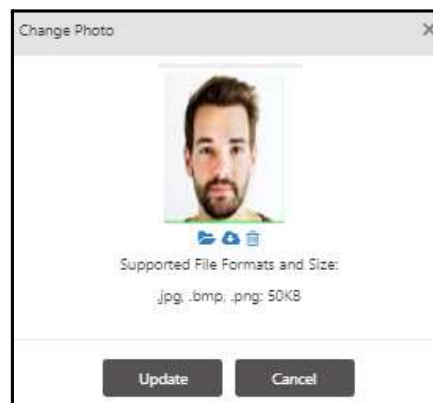
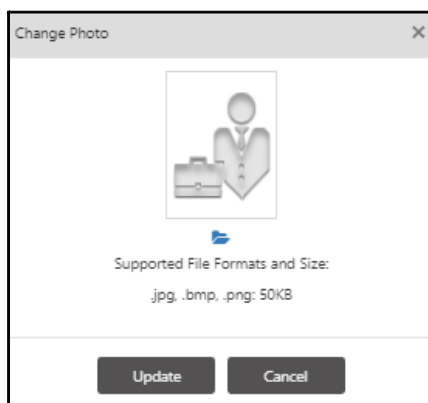
Then click **Update**.

The document will be uploaded and can be previewed by clicking on **Preview**  button.

Click **Save** to save the frequent visitor. The grid on the right displays the Visitors with their mobile numbers.

### Frequent Visitor Photo

You can also upload the Visitor photo in Edit mode. Click on the Photo icon, browse the image and click the Update button. Then click Save button to save the visitor photo.



The Last Visit details of the frequent visitor will be displayed here as per the details specified in the VMS Utility.



**Frequent Visitors**

Name \* Visitor 2

Organization \* Siemens

Mobile Number \* 9875648724

**Last Visit Details**

Visit Period 14/03/2024 14/03/2024

Visit Hours 11:30 12:30

Host User 2 Host User

Escort User

Additional Visitors 0

Visit Station 1 Default Location

Visit Location

Purpose Site Tour

Add To Watchlist Add To Blacklist

Additional Details

Credentials

## Adding Frequent Visitors to the Watchlist

To add an existing frequent visitor to the Watchlist, click the desired visitor from the right pane and click Save or Cancel button. The **Add To Watchlist** button will get enabled.

**Frequent Visitors**

Name \* Visitor 2

Organization \* Siemens

Mobile Number \* 9875648724

**Last Visit Details**

Visit Period 14/03/2024 14/03/2024

Visit Hours 11:30 12:30

Host User 2 Host User

Escort User

Additional Visitors 0

Visit Station 1 Default Location

Visit Location

Purpose Site Tour

Add To Watchlist Add To Blacklist

Additional Details

Credentials

Search

Visitor Name	Mobile Number
Visitor 1	9869852142
Visitor 2	9871234856
VISITOR 2	123
Visitor 2	9875648724

Now click **Add to Watchlist** button. The selected Visitor will be removed from the Frequent Visitors list and will be added to the Watchlist. For details refer "[Watchlist/Blacklist](#)".

Visitor Name	Mobile Number
Visitor 2	9875648724



The frequent visitor can be moved to Watchlist from VMS Utility also.

## Adding Frequent Visitor to the Blacklist

To add an existing frequent visitor to Blacklist, click the desired visitor from the right pane and click Save or Cancel button. The **Add to Blacklist** button will get enabled.

Visitor Name	Mobile Number
Visitor 1	9869852142
Visitor 2	9871234856
VISITOR 2	123
Visitor 2	9875648724

Now click **Add to Blacklist** button. The selected Visitor will be removed from the Frequent Visitors list and will be added to the Blacklist. For details refer [“Watchlist/Blacklist”](#).

The screenshot shows the 'Watchlist/Blacklist' interface. On the left, there's a form for 'Visitor 2' with fields for Name, Organization (Siemens), and Mobile Number (9875648724). Below this is the 'Last Visit Details' section with fields for Visit Period, Visit Hours, Host User, Escort User, Additional Visitors, Visit Station, Visit Location, Purpose, and Black Listed On. On the right, there's a table with counts for Total (1), Watchlist (0), and Blacklist (1). Below the table is a list of visitors, with 'Visitor 2' highlighted and an arrow pointing to it.

Visitor Name	Mobile Number
Visitor 2	9875648724



The frequent visitor can be moved to Blacklist from VMS Utility also.



In order to receive an alert when a frequent visitor is added to Watchlist/Blacklist make sure you have configured the alert in Admin> System Configuration> Alert Message Configuration. Set the Alert Filter as Visitor Management and Event as Visitor Added - Watchlist/Blacklist. For details refer to [“Configuring Alert Messages”](#).

## Credentials

Configure the following parameters:

The screenshot shows the 'Credentials' configuration window. It has a list of fields for different types of credentials: Enrolled Fingers (Suprema Proprietary), Enrolled Fingers (Suprema ISO), Enrolled Fingers (Lumidigm ISO), Enrolled Fingers (Lumidigm Proprietary), Enrolled Palms, and Enrolled Faces. Each field has a corresponding input box.

**Enrolled Fingers:** It displays the number of fingerprint templates enrolled against the selected visitor. Types of fingerprint templates are — Suprema Proprietary, Suprema ISO, Lumidigm ISO, Lumidigm Proprietary.

**Enrolled Palms:** It displays the number of palm vein templates enrolled against the selected visitor.

**Enrolled Faces:** It displays the number of face templates enrolled against the selected visitor.

# Watchlist/Blacklist

This page displays the list of visitors under watchlist and blacklist. It enables to monitor the visitors creating problems and to restrict their entry into the organisation.

The SA can:

- view the details of the Watchlist/Blacklist visitor.
- edit the details of the Watchlist/Blacklist visitor.
- restore the visitor to frequent visitor from Watchlist/Blacklist.

Select **Visitor Management module > Utilities > Watchlist/Blacklist**. The page appears as shown below:

The screenshot shows the 'Watchlist/Blacklist' page. On the left, there is a form for adding or editing a visitor. The form includes fields for Name, Organization, Mobile Number, Visit Period, Visit Hours, Host User, Escort User, Additional Visitors, Visit Station, Visit Location, Purpose, and Watch Listed On. A 'Restore Visitor' button is at the bottom. On the right, there is a summary table with columns for Total, Watchlist, and Blacklist. Below the table is a list of visitors with their names and mobile numbers.

Total	Watchlist	Blacklist
4	2	2

Visitor Name	Mobile Number
Visitor 1	9869852142
Visitor 2	9871234856
VISITOR 2	123
Visitor 2	9875648724

The screenshot shows the 'Additional Details' section of the form. It includes fields for Address, City, State, Country, PIN/ZIP Code, Email ID, Gender, Date of Birth, Nationality, Enrolled Fingers, ID Proof 1, ID Proof 2, and Custom Fields 1 through 5. A bracket labeled 'Custom Fields' groups the Custom Fields 1 through 5.

**Custom Fields**

- Custom Field 1
- Custom Field 2
- Custom Field 3
- Custom Field 4
- Custom Field 5

The grid in the right pane displays — **Total** visitors, **Watchlist** visitors and **Blacklist** visitors.

Total	Watchlist	Blacklist
4	2	2

Visitor Name ▲	Mobile Number
Visitor 1	9869852142
Visitor 2	9871234856
VISITOR 2	123
Visitor 2	9875648724

- **Total:** Displays all the Visitors including Watchlist and Blacklist.
- **Watchlist:** Displays only Watchlist Visitors.
- **Blacklist:** Displays only Blacklist Visitors.

Click the desired tab — Total, Watchlist, Blacklist as per your requirement.

The list appears as per the option selected.

Click on the desired entry and the visitor details will be displayed in the left pane.

The basic details like Name, Organisation, Mobile number and all **Additional Details** except Enrolled fingers can be edited.

After editing click on **Save** button. The **Restore Visitor** button will be enabled.

Click on **Restore Visitor** button to restore the visitor from Watchlist/Blacklist to Frequent Visitors list.

Watchlist/Blacklist

Name \*

Visitor 2

Organization \*

Siemens

Mobile Number \*

9875648724

Last Visit Details

Visit Period

14/03/2024

14/03/2024

Visit Hours

11:30

12:30

Host User

2

Host User

Escort User

Additional Visitors

0

Visit Station

1

Default Location

Visit Location

Purpose

Site Tour

Black Listed On

14/03/2024 12:57:21

Restore Visitor



The frequent visitor can be moved to Watchlist/Blacklist from VMS Utility also.

## Additional Details

Additional Details

Address

City

State

Country

PIN/ZIP Code

Email ID

Gender

NA

Date of Birth

Nationality

Enrolled Fingers

ID Proof 1

ID Proof 2

Custom Field 1

Custom Field 2

Custom Field 3

Custom Field 4


Custom Field 5

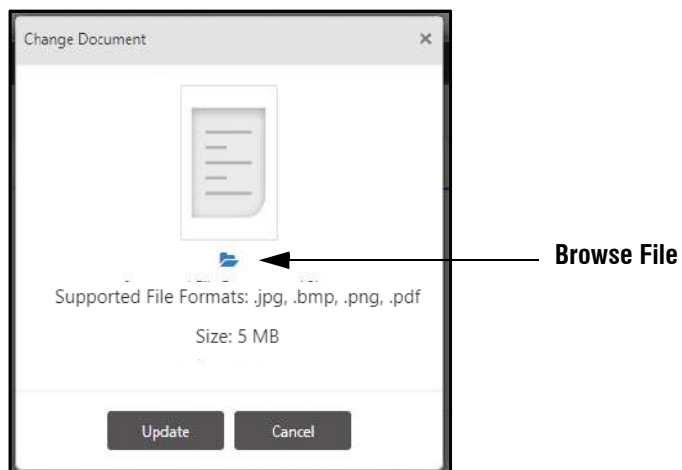
Custom Fields



1. Enrolled fingers is the read only field.


2. The ID Proof 1, ID Proof 2 and Custom fields will appear as entered in Global Policy > Visitor Management.


Under **Additional Details**, you can upload the documents in Custom Fields, by clicking **Upload**  button. Then **Change Document** pop-up appears as shown below.




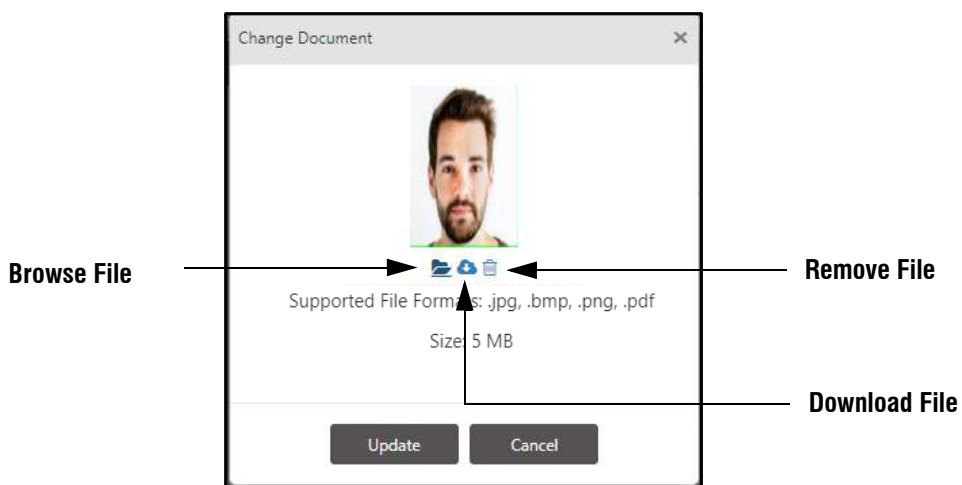
Click **Browse File**  .

Select the desired file as per the supported formats and size (.jpg, .bmp, .png, pdf) from your local PC.


After uploading the file, if you wish to upload a different file instead of the current uploaded file, click **Browse File**  again and select the desired file from your local PC. The previously uploaded file will get replaced with the new file.

To download the uploaded file, click **Download File**  .

To remove the uploaded file, click **Remove File**  .




Then click **Update**.

The document will be uploaded and can be previewed by clicking on **Preview**  button.

The **Last Visit Details** will be displayed as entered in VMS Utility.

Similarly, if required you can click on the Profile photo to change the same.





Visitor Name

Organization

Mobile Number

Pass Issue Date

Pass No.

Status

Visitor Profile

Visit Period

Visit Hours

Host User

Escort User

Visitor Type

Visit Type

Visit Station

Visit Location

Additional Visitors

Purpose

Field 1

Field 2

Field 3

Field 4

Field 5

Field 6

Field 7

Field 8

Field 9

Field 10

ID Proof 1

ID Proof 2

Vehicle Details

Material List

Scanned Documents

Visitor Events

Search

Appointment No.	Issue Date	Pass Number	Visitor Name
240314000001	14/03/2024	240314000001	Visitor 2
240314000006	14/03/2024	240314000002	Visitor 4

Custom Fields

The other details like **Vehicle Details**, **Material List**, **Scanned Documents** and **Visitor Events** are displayed in the fields as configured from the VMS Utility.



The screenshot shows a web-based form titled "Vehicle Details". It contains three input fields: "Vehicle Type" with a dropdown menu showing "2-Wheeler", "Vehicle Number" with the text "GJ067890", and "Description" which is empty. Below these fields are three expandable sections: "Material List", "Scanned Documents", and "Visitor Events", each with a downward-pointing arrow.

**Vehicle Details** display the information of the visitor's vehicle.

**Material List** describes the material carried by the visitor.

**Scanned Document** gives the list of visitor's document scanned during pass creation.

**Visitor Events** display the events that are recorded from the pass issue date-time to the surrender date-time.

# Enrollment

To enroll a visitor on the desired device, select the **Visitor Management module > Utilities > Enrollment**.

The **Enrollment** page appears as shown below:

The screenshot shows the 'Enrollment' page with a header bar containing a back arrow, the title 'Enrollment', and icons for refresh, star, and help. Below the header, there are two sections: 'Door' and 'Visitor'. Each section has a red asterisk next to its label and input fields for 'ID' and 'Name'. The 'Device Readers' section is expanded, showing a list of readers. Below this, the 'Visitor Enrollment Status' section is expanded, showing a list of status options. At the bottom, there is an 'Enroll' button.

Door	ID	Name

Device Readers

Visitor	ID	Name

Visitor Enrollment Status

Enrollment Type	Number of Cards	Number of Fingers	Number of Palms	Access Card Selection	Number of Faces
Select	One	One	Two	Access Card 1	1

Enroll

- **Door:** Select the desired door from the picklist on which the enrollment is to be done.

## Device Readers

Device Readers displays the information of the readers configured in the selected **Door**.

The screenshot shows the 'Device Readers' section with a header bar containing a back arrow, the title 'Device Readers', and icons for refresh, star, and help. Below the header, there are two sections: 'Door' and 'Visitor'. Each section has a red asterisk next to its label and input fields for 'ID' and 'Name'. The 'Device Readers' section is expanded, showing a list of readers. Below this, the 'Visitor Enrollment Status' section is expanded, showing a list of status options. At the bottom, there is an 'Enroll' button.

Door	ID	Name
3		ARGO

Device Readers

Card Reader	Biometric Reader	External Reader
MiFare Reader	None	MiFare-U Reader

Card Reader, Biometric Reader and External Reader information are displayed here.

- **Visitor:** Select the desired visitor from the picklist for whom the enrollment is to be done.

Visitor Enrollment Status	
Enrolled Fingers (Suprema Proprietary)	0
Enrolled Fingers (Suprema ISO)	0
Enrolled Fingers (Lumidigm ISO)	0
Enrolled Fingers (Lumidigm Proprietary)	0
Enrolled Palms	0
Enrolled Card 1	
Enrolled Card 2	
Enrolled Faces	0

### Visitor Enrollment Status

Visitor Enrollment Status displays the information related to the number of already enrolled credentials of the visitor like fingers, palms, cards and faces.

Details like — **Enrolled Fingers (Suprema Proprietary)**, **Enrolled Fingers (Suprema ISO)**, **Enrolled Fingers (Lumidigm ISO)**, **Enrolled Fingers (Lumidigm Proprietary)**, **Enrolled Palms**, **Enrolled Card 1**, **Enrolled Card 2** and **Enrolled Faces** — are displayed here.

- **Enrollment Type:** Select the desired enrollment type — Read Only Card, Smart Card, Face, Biometrics, BiometricsThenCard and Mobile — from the drop down list.

Based on the selection of the **Door** and **Enrollment Type**, below parameters will be displayed for configuration.



*Below parameters also depend on the Readers configured in the Door. To configure the desired Reader, refer Readers section under Devices > Device Configuration (of the desired Door) > Profile > Readers.*

#### 1. Enrollment Type = Read Only Card

**Number of Cards:** Select the desired number of cards from the drop-down list.

Enrollment Type	Read Only Card ▼
Number of Cards	One ▼

#### 2. Enrollment Type = Smart Card

**Number of Cards:** Select the desired number of cards from the drop-down list.

### **Details on Smart Card**

Select the desired check boxes of the parameters — **Visitor ID**, **Facility Code (FC)**, **Additional Security Code (ASC)** — which are to be displayed on the Smart Card.

Select the desired number of **Finger Templates** from the drop down list.

If **Door** is selected as PVR Door, then **Palm Templates** parameter will be visible. Select the check box of this parameter if you wish to display it on the Smart Card.

To store the palm templates, MiFare 4k reader must be configured in the PVR Door.



*Door PVR must be set in the Adaptive mode (configure from Admin> System Configuration> Global Policy) for the palm templates to be saved into the Smart Card.*

### **Additional Details on Smart Card**

Other than the parameters mentioned in the Details on Smart Card, you can display additional details on Smart Card.

Select the **Short Name** check box to display it on the Smart Card.

### **3. Enrollment Type = Face**

**Number of Faces:** Select the desired number of face from the dropdown list.

### **4. Enrollment Type = Biometrics**

**Number of Fingers/ Number of Palms:** Select the desired number of fingers or palms from the drop down list.

Enrollment Type: Biometrics  
Number of Fingers: One

Enrollment Type: Biometrics  
Number of Palms: One

##### 5. Enrollment Type = BiometricsThenCard

**Number of Cards:** Select the desired number of cards from the drop down list.

**Number of Fingers/ Number of Palms:** Select the desired number of fingers or palms from the drop down list.

Enrollment Type: BiometricsThenCard  
Number of Cards: One  
Number of Fingers: One

**Details on Smart Card**

Visitor ID: ☐  
Facility Code (FC): ☐  
Additional Security Code (ASC): ☐  
Finger Templates: None

**Additional Details On Smart Card**

Short Name: ☐ Visitor11

Enroll

##### **Details on Smart Card**

Select the desired check boxes of the parameters — **Visitor ID**, **Facility Code (FC)**, **Additional Security Code (ASC)** — which are to be displayed on the Smart Card.

Select the desired number of **Finger Templates** from the drop down list.

If the **Door** is selected as PVR Door, **Palm Templates** parameter will be visible. Select the check box of this parameter if you wish to display it on the Smart Card.

To store palm templates, MiFare 4k reader must be configured in the PVR Door.



*Door PVR must be set in the Adaptive mode (configure from Admin> System Configuration> Global Policy) for the palm templates to be saved into the Smart Card.*

##### **Additional Details on Smart Card**

Other than the parameters mentioned in the Details on Smart Card, you can display additional details on Smart Card.

Select the **Short Name** check box to display it on the Smart Card.

## 6. Enrollment Type = Mobile



To select **Enrollment Type** as *Mobile*, the particular device must have BLE support and ensure Bluetooth is ON in the mobile.

**Access Card Selection:** Select the desired Access Card from the drop down list.

Enrollment Type	Mobile
Access Card Selection	Access Card 1
Facility Code (FC)	<input type="checkbox"/>

**Facility Code (FC):** Select this check box to enroll the Facility Code (FC) against the visitor.

After the enrollment process, the visitor must tap on **Tap to Register > Matrix Device** from the ACS Application installed on respective mobile phone and select the same configured Door from **Available Doors**. Thereafter, that visitor can access the device through ACS application for Access Control purpose.

The value in Access Card selected will be consider as Access ID of the visitor. If Access Card selected has no value i.e blank, then after the enrollment process, the system will auto-generate 18 digits number as visitor Access ID and store the same value.

Click **Enroll** to initiate the enrollment process and the enrollment command is sent to the Door.

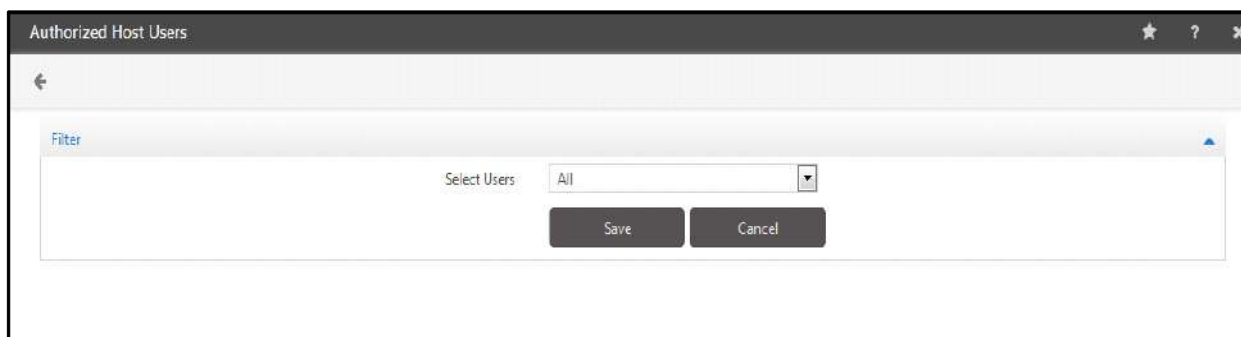
For Panel Door the command is sent to the Panel200 which will communicate further to the Door.

Once all the required credentials of an visitor are enrolled, the number of credentials enrolled will be displayed in the *Visitor Management > Visitor Profile (Select the particular Visitor Profile) > Credentials*.

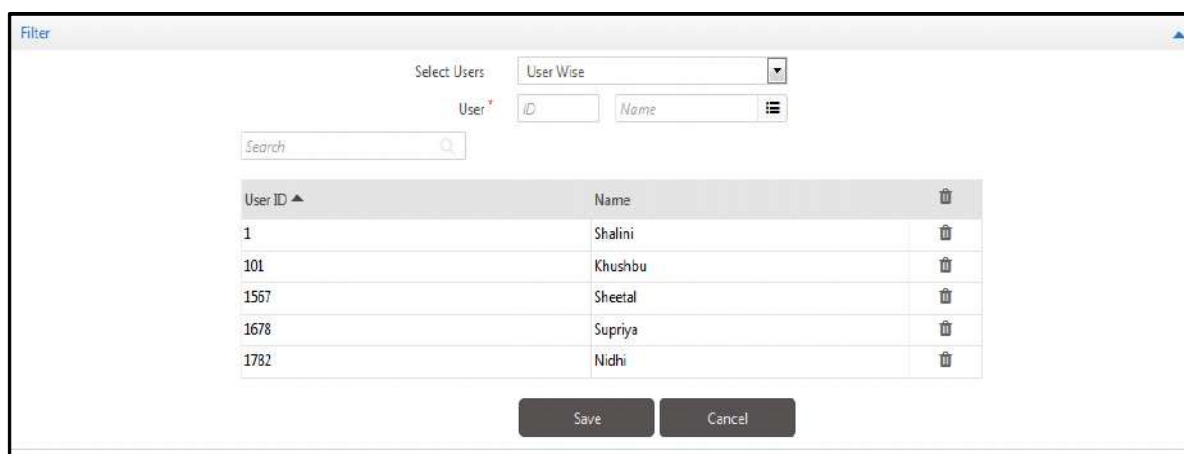
# Authorized Host Users

The selected few users are required to be authorized host users.

Select **Visitor Management module> Utilities> Authorized Host Users**. The Authorized Host Users page appears as shown below:



**Select Users** based on the options — User Wise, Group Wise or All.



User ID	Name
1	Shalini
101	Khushbu
1567	Sheetal
1678	Supriya
1782	Nidhi



The **"Pre-Registration"** of visitors can be done only by authorized host users from ESS account.

A host can also be authorized from the following paths:

- Users> User Configuration> Visitor Management.
- Users> Multi-User Option> User Configuration
- Contract Worker Management> Worker> Worker Profile

Click **Save** to save the selected users. These authorized host users will be available in host user picklist when system account user pre-registers a visitor.



# Visit Request Handling

The Visit Request handling page enables to configure any host user's (based on user rights) visit handling settings such as Auto Transfer & Auto Approval/Rejection of visits.

Select **Visitor Management module> Utilities> Visit Request Handling**. The page appears as shown below:

The screenshot shows the 'Visit Request Handling' interface. At the top, there's a 'Host User' section with a dropdown menu showing '1' and a text field with 'Khushbu'. Below this is the 'Auto Transfer Setting' section, which includes a checkbox for 'Enable Auto Transfer Visit' (checked) and a 'Transfer to User' section with a dropdown menu showing '2' and a text field with 'Chirag'. At the bottom is the 'Auto Approval / Rejection Setting' section, which is currently collapsed.

**Host User:** Select the host user for whom the visit request is to be handled.

## Auto Transfer Setting

**Enable Auto Transfer Visit:** Enable this check-box to automatically transfer the visit to another user.

**Transfer to User:** Select the user from the picklist to whom the visit is to be transferred. The picklist contains all active authorized host users.

## Auto Approval/Rejection Setting

The screenshot shows the 'Visit Request Handling' interface with the 'Auto Approval / Rejection Setting' section expanded. It includes a checkbox for 'Enable Visit Auto Approval/Rejection' (checked). Below this is the 'Working Days' section with checkboxes for Mon, Tue, Wed, Thu, Fri, Sat, and Sun. The 'Working Time' section has two time pickers: '11:00' and '17:00'. The 'Break Time' section has two time pickers: '13:00' and '14:00'. The 'Allowed Overlapping Duration (Mins)' section has a picker with '30'. At the bottom is the 'Unavailability Days' section, which includes a search bar and a table with columns 'Sr. No.', 'Date', and 'Reason'. The table is currently empty, showing 'No Data'.

**Enable Visit Auto Approval/Rejection:** Enable this check-box to automatically approve/reject the visit application.

**Working Days:** Select the days when the automatic visit approval/rejection is to be allowed.

**Working Time:** Enter the From time and To time in 24 hours format during which the visit can be auto approved.

**Break Time:** Enter the Start time and End time of Break duration during which the visit will be auto rejected.

**Allowed Overlapping Duration (Mins):** Enter the duration in minutes. This duration must be overlapping within working time for the visit to auto approve. The valid range is 0 to 999 mins.

### Unavailability Days

This section enables to configure days on which host user is not available i.e. the visit to host user can not be scheduled on the specified days.

Click on **Add** button.

Select the **Date** from the calendar. Enter the **reason** for unavailability. Then click **OK** and **Save** to save the days.

The screenshot shows a window titled "Unavailability Days". It features a search bar at the top right with a "+" icon. Below is a table with columns: "Sr. No.", "Date", "Reason", and action icons. The table contains two entries: one for "25/10/2018" with reason "Meeting with Client" and another for "16/10/2018" with reason "Official Tour".

Sr. No.	Date	Reason	
	25/10/2018	Meeting with Client	✓ ✕
1	16/10/2018	Official Tour	✎ ✕

The screenshot shows a "Visit Request Handling" window with a green status bar indicating "Saved Successfully". It includes fields for "Host User" (1) and "Khushbu". Below are sections for "Auto Transfer Setting" and "Auto Approval / Rejection Setting". The latter includes checkboxes for "Enable Visit Auto Approval/Rejection", "Working Days" (Mon-Fri), "Working Time" (11:00-17:00), "Break Time" (13:00-14:00), and "Allowed Overlapping Duration (Mins)" (30). At the bottom is the "Unavailability Days" table, which lists the same two entries as the previous screenshot.

Host User: 1 Khushbu

Auto Approval / Rejection Setting

Enable Visit Auto Approval/Rejection: ☒

Working Days: ☒ Mon ☒ Tue ☒ Wed ☒ Thu ☐ Fri ☐ Sat ☐ Sun

Working Time: 11:00 17:00

Break Time: 13:00 14:00

Allowed Overlapping Duration (Mins): 30

Sr. No.	Date	Reason	
1	16/10/2018	Official Tour	✎ ✕
2	25/10/2018	Meeting with Client	✎ ✕

# Delete Frequent Visitors

The Delete Frequent Visitors page enables to delete the frequent visitors as available in Visitor Utility.

Select **Visitor Management module> Utilities> Delete Frequent Visitors**. The page appears as shown below:

VisitorID	Visitor Name	Organization	Mobile No.	Visit Date Time
1	Pratibha Singh	Xylem	9824256789	



The frequent visitor's "Visit DateTime" will appear in the grid when pass is created for that frequent visitor.

## Authorize Process

**Username/Password:** Enter the username and password of System Account user to authorize the deletion process. For example: "sa" and "admin".

## Select Visitor

Select the frequent visitor to be deleted by checking the respective box. Then click on **Delete** button.

VisitorID	Visitor Name	Organization	Mobile No.	Visit Date Time
1	Pratibha Singh	Xylem	9824256789	

Click **OK** on Process Confirmation window. The selected visitor will be deleted from the COSEC system.

# Import Visitor and Visit

The COSEC application has an inbuilt utility for enabling users to import visitor and visit data from excel files with predefined format. This would thus save the end user a lot of time and effort in having to make individual visitor entries at the application level.




Make sure you have **View** and **Edit** rights for the **Import Visitor and Visit** page to import the visitors and visits.

The parameters will be mandatory in the Import sheet if set as mandatory in the [“Pre-Registration Template”](#).

To import Visitors and Visits,

Click **Visitor Management > Utilities > Import Visitor and Visit**.

Configure the following parameters:

- **Import Data For:** To download sample import file, click **Download Sample Import file** . The downloaded import sheet displays the details required for importing data. Enter the details to be imported in the **Visitor and Visit** sheet in this sample file and save the file at the desired location.
- **Import Data Of:** Select the desired option from the drop-down list options — Visitor Only, Visit Only, Both — for which you wish to import data.
- **File Format:** Select the desired option from the drop-down list options — XLS or CSV.
- **Import File:** Browse the saved file path from where you wish to import the file. Click **Choose File**. It displays all folders which are in the drive. Select the desired file from the folder.
- Click **Upload** to upload the data. The file will be saved and you can preview the data.

- Click **Preview Data** to preview the data before importing. The data in the uploaded file is displayed as follows.

Import Data For: Visitor and Visit

Import Data Of: Both

File Format: XLS

Import File: Choose File ImportData (1).xls

Preview Data Import Data

MobileNo	VisitorName	Organization	Address	City	State	Country	PINCode	EmailID	Gender	DOB	Designation	Nationality	IDProof1	IDProof2	VisitorCustomField1	VisitorCustomField2	VisitorCustomField3	VisitorCustomField4	VisitorCustomField5	VisitorProfileID
9452326134	Visitor 01	ABB																		
9856412354	Visitor 02	Siemens																		
9857452142	Visitor 03	P&G																		
9652310145	Visitor 04	Amul																		
9752003650	Visitor 05	L&T																		



Administrator needs to ensure that the user has full rights on the folder containing the Excel or CSV file for the import data operation.

- Click **Import Data** to import the Visitors/Visits/Both. The result of import is shown as Success or Failure along with Result Description.

You can also filter the result records.

- Result:** Select the desired option from the drop-down list — Both, Success or Failure— to view the import result.

Import Data For: Visitor and Visit

Import Data Of: Both

File Format: XLS

Import File: Choose File ImportData (1).xls

Preview Data Import Data

Result: Both

MobileNo	VisitorName	Organization	Address	City	State	Country	PINCode	EmailID	Gender	DOB	Designation	Nationality	IDProof1	IDProof2	VisitorCustomField1	VisitorCustomField2	VisitorCustomField3	VisitorCustomField4	VisitorCustomField5	VisitorProfileID
9452326134	Visitor 01	ABB																		
9856412354	Visitor 02	Siemens																		
9857452142	Visitor 03	P&G																		
9652310145	Visitor 04	Amul																		
9752003650	Visitor 05	L&T																		

# Device Logs

When you have enabled Auto-Device Assignment and the Device User Assignment limit is reached then the devices will not be assigned to the visitor. This list displays such devices with their details along with reason of failure.

To view the Device Logs, click **Visitor Management module > Utilities > Device Logs**.

Configure the following parameters:

- **Date:** Select the to and from date for which the log is to be generated
- **Select Device:** Select the desired option — **All** or **Device-wise**.
  - If you select **All**, the logs will generated for all the devices.

**OR**

- If you select **Device-wise**, click the **Device** picklist. The **Select Device** pop-up appears.

Select Device

Total Selected: 0 Records

Search

Show Selected

☐ Select All

<input type="checkbox"/>	Name	Type
<input type="checkbox"/>	ARCDC100_DD_Door	Panel200 Door
<input type="checkbox"/>	ARCDC100_DD_Door	Panel200 Door
<input type="checkbox"/>	ARCDC100_SD_Door	Panel200 Door
<input type="checkbox"/>	ARGO_PANEL	Panel200 Door
<input type="checkbox"/>	DoorV3	Panel200 Door
<input type="checkbox"/>	DoorV3_Door	Panel200 Door
<input type="checkbox"/>	DOORV4_PANEL	Panel200 Door
<input type="checkbox"/>	dumy	Panel200 Door
<input type="checkbox"/>	PATHV2_PANEL	Panel200 Door
<input type="checkbox"/>	VEGA_PANEL	Panel200 Door

1 - 10 of 94 records

« < 1 2 3 ... 10 > »

OK Cancel

You can either select particular device/s or can select all the devices at once.

- To select particular device/s, select the check boxes of the desired device/s.

The 'Select Device' dialog box shows a search bar, a 'Show Selected' link, and a 'Select All' checkbox. A table lists 10 devices, all of type 'Panel200 Door'. The first device, 'ARCDC100\_DD\_Door', is selected. The status bar at the bottom indicates '1 - 10 of 94 records'.

<input type="checkbox"/>	Name	Type
<input checked="" type="checkbox"/>	ARCDC100_DD_Door	Panel200 Door
<input type="checkbox"/>	ARCDC100_DD_Door	Panel200 Door
<input type="checkbox"/>	ARCDC100_SD_Door	Panel200 Door
<input type="checkbox"/>	ARGO_PANEL	Panel200 Door
<input type="checkbox"/>	DoorV3	Panel200 Door
<input type="checkbox"/>	DoorV3_Door	Panel200 Door
<input type="checkbox"/>	DOORV4_PANEL	Panel200 Door
<input type="checkbox"/>	dumy	Panel200 Door
<input type="checkbox"/>	PATHV2_PANEL	Panel200 Door
<input type="checkbox"/>	VEGA_PANEL	Panel200 Door

OR

- To select all the devices at once, click the **Select All** check box. The devices on all the pages will be selected.

The 'Select Device' dialog box shows the same search bar and 'Show Selected' link. The 'Select All' checkbox is now checked. The table shows the same 10 devices, but all are now selected. The status bar at the bottom indicates '1 - 10 of 94 records'.

<input checked="" type="checkbox"/>	Name	Type
<input checked="" type="checkbox"/>	ARCDC100_DD_Door	Panel200 Door
<input checked="" type="checkbox"/>	ARCDC100_DD_Door	Panel200 Door
<input checked="" type="checkbox"/>	ARCDC100_SD_Door	Panel200 Door
<input checked="" type="checkbox"/>	ARGO_PANEL	Panel200 Door
<input checked="" type="checkbox"/>	DoorV3	Panel200 Door
<input checked="" type="checkbox"/>	DoorV3_Door	Panel200 Door
<input checked="" type="checkbox"/>	DOORV4_PANEL	Panel200 Door
<input checked="" type="checkbox"/>	dumy	Panel200 Door
<input checked="" type="checkbox"/>	PATHV2_PANEL	Panel200 Door
<input checked="" type="checkbox"/>	VEGA_PANEL	Panel200 Door

- Click **OK**.


All the selected devices appear in the grid.

Name ▲	Type	
ARCDC100_DD_Door	Panel200 Door	
ARCDC100_DD_Door	Panel200 Door	
ARCDC100_SD_Door	Panel200 Door	
ARGO_PANEL	Panel200 Door	
DoorV3	Panel200 Door	

1 - 5 of 94 records

« 1 2 3 ... 19 »

View

You can also delete the desired devices. To do so, click **Delete**  of the respective device.

- Click **View**. The list of devices with the reason of failure in assignment appear.

Device Logs

Date \*  
26/09/2023  
Select Device  
All

View

Date-Time	Device Name	Type	Visitor Name	Appointment No.	Reason
22/10/2020 11:30	ARGO 1	ARGO	Visitor 1	201209000002	Maximum User limit exceeded.
22/10/2020 09:30	PVR 1	PVR DOOR	Visitor 3	201209000007	Maximum User limit exceeded.
21/10/2020 09:30	ARGO 1	ARGO	Visitor 1	201209000003	Maximum User limit exceeded.
22/10/2020 10:30	ARGO 1	ARGO	Visitor 1	201209000004	Maximum User limit exceeded.
22/10/2020 12:30	ARGO 1	ARGO	Visitor 1	201209000005	Maximum User limit exceeded.



# Visitor Management Reports

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COSEC Visitor Management module allows you to create and view an assortment of detailed and focused reports on the Visitor activities on your site. These reports can be viewed on the screen or printed at any time. Reports available within the COSEC Visitor management Module are as under:

“Visitor Access”

“Visitor Pass”

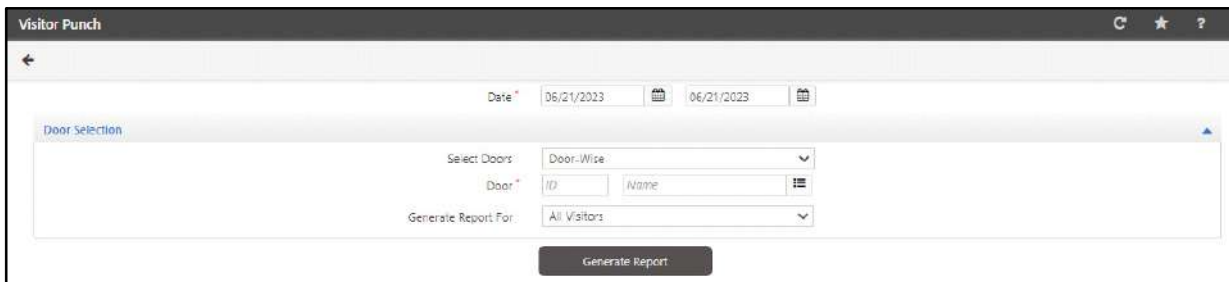
“Visitor Summary”

“Visitor Evacuation”

## Visitor Access

### Visitor Punch

Configure the following parameters:

The screenshot shows a web application window titled "Visitor Punch". At the top, there are navigation icons (back, forward, star, and help). Below the title bar, there is a "Date" section with two date pickers set to "06/21/2023". A "Door Selection" section is expanded, showing a "Select Doors" dropdown menu set to "Door-Wise". Below this, there are two input fields for "ID" and "Name", each with a search icon. At the bottom of the "Door Selection" section, there is a "Generate Report For:" dropdown menu set to "All Visitors". A "Generate Report" button is located at the bottom center of the form.

- **Date:** Select the to and from date for which the report is to be generated.


#### Door Selection

- Click the **Door selection** collapsible panel.
- **Select Doors:** Select the desired option — **All** or **Door-Wise**.
  - If you select **All**, a report of all the devices will be generated with the all the details regarding Visitor Punch.

- If you select **Door-Wise**, click the **Door** picklist. The **Picklist For Door** pop-up appears.

Picklist For Door

Total Selected: 0 Records

Search  [Show Selected](#)

<input type="checkbox"/>	ID ▲	Name
<input type="checkbox"/>	1	NGT Direct Door-Device-1
<input type="checkbox"/>	2	Door V3-Device-2
<input type="checkbox"/>	3	PVR Door-Device-3
<input type="checkbox"/>	4	Door FMX-Device-4
<input type="checkbox"/>	5	ARGO-Device-7
<input type="checkbox"/>	6	MODE-Device-6
<input type="checkbox"/>	7	Vega Controller-Device-8
<input type="checkbox"/>	8	Vega Controller-Device-9
<input type="checkbox"/>	9	Vega Controller-Device-10
<input type="checkbox"/>	10	ARGO-Device-14

1 - 10 of 18 records

« < 1 2 > »


OK Cancel

- Select the check boxes of the desired doors. Click **OK**.
- The selected doors appear in the grid.

Search 

ID	Name	Group ▲	
1	RnD1 Canteen1 ARGO	Door	
2	RnD1 2nd FLR Server Room VEGA	Door	
3	RnD1 4th FLR Server Room VEGA	Door	
4	RnD1 GF TRIPOD RIGHT IN	Door	

Generate Report For: All Visitors ▼

- You can delete the desired door. To do so, click **Delete**  of the respective door.
- **Generate Report For:** Select the desired option — **All Visitors**, **Active Visitors**, **Inactive Visitors**.
- Click **Generate Report**.

## Sample Report

Run by:	System Admin							Date: 17/04/2023	22:00
Visitor Name	Date	I/O	Type	Time	Panel/Door	Visitor Profile	Host User	ORG	BRC
22	02/02/2022	IN		14:07		222:Amit	test1:test1	ORG1	BRC1
vi	02/02/2022	IN		14:09		222:Amit	mitali:mitali	ORG1	BRC1
vi	02/02/2022	IN		14:10		222:Amit	mitali:mitali	ORG1	BRC1
vi	02/02/2022	OUT		14:19		222:Amit	mitali:mitali	ORG1	BRC1
vi	02/02/2022	IN		14:19		222:Amit	mitali:mitali	ORG1	BRC1
vi	02/02/2022	IN		14:19		222:Amit	mitali:mitali	ORG1	BRC1
vi	02/02/2022	IN		14:35		222:Amit	mitali:mitali	ORG1	BRC1
22	02/02/2022	IN		14:36		p2:profile2	test1:test1	ORG1	BRC1
22	02/02/2022	OUT		14:37		p2:profile2	test1:test1	ORG1	BRC1
22	02/02/2022	IN		14:38		p2:profile2	test1:test1	ORG1	BRC1
vi	02/02/2022	IN		14:38		222:Amit	mitali:mitali	ORG1	BRC1
vi	02/02/2022	OUT		16:44		222:Amit	mitali:mitali	ORG1	BRC1
22	02/02/2022	OUT		16:44		p2:profile2	test1:test1	ORG1	BRC1
vi	02/02/2022	IN		17:23		222:Amit	test1:test1	ORG1	BRC1
22	03/02/2022	IN		11:32		222:Amit	mitali:mitali	ORG1	BRC1
22	03/02/2022	IN		11:32		222:Amit	mitali:mitali	ORG1	BRC1
22	03/02/2022	IN		11:36		222:Amit	mitali:mitali	ORG1	BRC1
22	03/02/2022	IN		11:36		222:Amit	mitali:mitali	ORG1	BRC1
22	03/02/2022	IN		12:16		222:Amit	test1:test1	ORG1	BRC1
33	03/02/2022	IN		12:30		p2:profile2	Test2:test2	ORG2	B2
33	03/02/2022	IN		12:30	ARGO FACE-Device -19	p2:profile2	Test2:test2	ORG2	B2
33	03/02/2022	IN		12:31	ARGO FACE-Device -19	p2:profile2	Test2:test2	ORG2	B2

## Visitor Punch Detail

The report generated will display details of the visitors including Name, Entry Date and Time as well as the Host Name for the selected date range. The Exit Date and Time and Total Time of his/her presence in the premises will also be listed.

Configure the following parameter:

Visitor Punch Detail

Date: 15/03/2024 to 15/03/2024

Optional Parameters

Format Selection: Visitor Punch Detail 1

Select Station: All

Generate Report

## Optional Parameter

- **Format Selection:** Select the desired Format — Visitor Punch Detail 1 or Visitor Punch Detail 2 to generate the report. If you select Visitor Punch Detail 1, the report will be generated without Visitor photo and if you select Visitor Punch Detail 2, the report will be generated with Visitor photo.
- **Select Station:** Select the desired option — **All** or **Selected**.
  - If you select **All**, a report for all the stations will be generated. This report will include all the details regarding the Visitor Punch.

- If you select **Selected**, click the **Selected** picklist. The picklist for **Select Station** pop-up appears.

The 'Select Station' dialog box displays a table with 10 rows. The first row is 'RnD1' and the others are 'Station Location 2' through 'Station Location 10'. All checkboxes are unchecked. The status bar at the bottom indicates '1 - 10 of 13 records'.

<input type="checkbox"/>	ID ▲	Name
<input type="checkbox"/>	1	RnD1
<input type="checkbox"/>	2	Station Location 2
<input type="checkbox"/>	3	Station Location 3
<input type="checkbox"/>	4	Station Location 4
<input type="checkbox"/>	5	Station Location 5
<input type="checkbox"/>	6	Station Location 6
<input type="checkbox"/>	7	Station Location 7
<input type="checkbox"/>	8	Station Location 8
<input type="checkbox"/>	9	Station Location 9
<input type="checkbox"/>	10	Station Location 10

- You can either select particular Station/s or can select all the Stations at once.
- To select particular Station/s, select the check boxes of the desired Stations.

The 'Select Station' dialog box displays the same table as the previous screenshot, but with the first two rows ('RnD1' and 'Station Location 2') selected. The status bar at the bottom indicates '1 - 10 of 13 records'.

<input type="checkbox"/>	ID ▲	Name
<input checked="" type="checkbox"/>	1	RnD1
<input checked="" type="checkbox"/>	2	Station Location 2
<input type="checkbox"/>	3	Station Location 3
<input type="checkbox"/>	4	Station Location 4
<input type="checkbox"/>	5	Station Location 5
<input type="checkbox"/>	6	Station Location 6
<input type="checkbox"/>	7	Station Location 7
<input type="checkbox"/>	8	Station Location 8
<input type="checkbox"/>	9	Station Location 9
<input type="checkbox"/>	10	Station Location 10

OR

- To select all the Stations at once, select the **Select All** check box. The Stations on all the pages will be selected.

Select Station

Total Selected: 13 Records

Search:  Show Selected

☒ Select All

<input checked="" type="checkbox"/>	ID	Name
<input checked="" type="checkbox"/>	1	RnD1
<input checked="" type="checkbox"/>	2	Station Location 2
<input checked="" type="checkbox"/>	3	Station Location 3
<input checked="" type="checkbox"/>	4	Station Location 4
<input checked="" type="checkbox"/>	5	Station Location 5
<input checked="" type="checkbox"/>	6	Station Location 6
<input checked="" type="checkbox"/>	7	Station Location 7
<input checked="" type="checkbox"/>	8	Station Location 8
<input checked="" type="checkbox"/>	9	Station Location 9
<input checked="" type="checkbox"/>	10	Station Location 10

1 - 10 of 13 records

OK Cancel

- Click **OK**.

The selected Stations appears in the grid.

Select Station

Selected:

ID:  Name:

Search:

ID	Name	
1	RnD1	
2	Station Location 2	
3	Station Location 3	
4	Station Location 4	
5	Station Location 5	
6	Station Location 6	
7	Station Location 7	
8	Station Location 8	
9	Station Location 9	
10	Station Location 10	

1 - 10 of 13 records

Generate Report

- You can also delete the desired Station. To do so, click **Delete** of the respective station.
- Click **Generate Report**.

## Sample Report- Visitor Punch Detail 1

Visitor Punch Detail

Back

1 of 5

100%

DADB

Page 1 of 1

Visitor Punch Detail From 11/02/2020 To 11/02/2022

Run by:	System Admin							Date:	11/04/2023 21:38
Visitor Name	In	Out	Duration	Visitor Profile	Host User	ORG	BRC	Department	
02/02/2022									
v1	14:10	14:19	000:09	222:Amit	mitali:mitali	ORG1	BRC1	DPT1:Department-1	
v1	14:38			222:Amit	mitali:mitali	ORG1	BRC1	DPT1:Department-1	
03/02/2022									
22	11:32			222:Amit	mitali:mitali	ORG1	BRC1	DPT1:Department-1	
22	11:36			222:Amit	mitali:mitali	ORG1	BRC1	DPT1:Department-1	
33	12:30			p2:profile2	Test2:test2	ORG2	B2	DPT1:Department-1	

## Visitor Punch Exception

Exceptions like absence of In time or Out time of Visitors are listed in the report.

Configure the following parameters:

Date: 06/21/2023 to 06/21/2023

Optional Parameters

Select Station: All

Generate Report

- **Date:** Select the to and from date for which the report is to be generated.

### Optional Parameter

- **Select Station:** Select the desired option — **All** or **Selected**.
- If you select **All**, a report of all the exception punches on all the Stations will be generated.

- If you select **Selected**, click the **Selected** picklist. The **Select Station** pop-up appears.

The 'Select Station' pop-up window displays a green header bar with the text 'Total Selected: 0 Records'. Below this is a search bar with the placeholder text 'Search' and a magnifying glass icon, and a 'Show Selected' link. A 'Select All' checkbox is located below the search bar. The main area contains a table with the following columns: 'ID' (with an upward arrow icon) and 'Name'. The table lists 10 records, each with an unchecked checkbox in the first column. The records are:

ID	Name
1	RnD1
2	Station Location 2
3	Station Location 3
4	Station Location 4
5	Station Location 5
6	Station Location 6
7	Station Location 7
8	Station Location 8
9	Station Location 9
10	Station Location 10

At the bottom left, it says '1 - 10 of 13 records'. At the bottom right, there is a pagination control with buttons for 'Previous', 'First', '1', '2', 'Next', and 'Last'. The '1' button is highlighted. At the very bottom are 'OK' and 'Cancel' buttons.

- You can either select particular Station/s or can select all the Stations at once.
- To select particular Station/s, select the check boxes for the desired Stations.

The 'Select Station' pop-up window displays a green header bar with the text 'Total Selected: 2 Records'. Below this is a search bar with the placeholder text 'Search' and a magnifying glass icon, and a 'Show Selected' link. A 'Select All' checkbox is located below the search bar. The main area contains a table with the following columns: 'ID' (with an upward arrow icon) and 'Name'. The table lists 10 records, each with a checkbox in the first column. The first two checkboxes are checked, indicating that 'RnD1' and 'Station Location 2' are selected. The records are:

ID	Name
1	RnD1
2	Station Location 2
3	Station Location 3
4	Station Location 4
5	Station Location 5
6	Station Location 6
7	Station Location 7
8	Station Location 8
9	Station Location 9
10	Station Location 10

At the bottom left, it says '1 - 10 of 13 records'. At the bottom right, there is a pagination control with buttons for 'Previous', 'First', '1', '2', 'Next', and 'Last'. The '1' button is highlighted. At the very bottom are 'OK' and 'Cancel' buttons.

OR

- To select all the Stations at once, select the **Select All** check box. The Station on all the pages will be selected.

Select Station

Total Selected: 13 Records

Search:  Show Selected

☒ Select All

<input checked="" type="checkbox"/>	ID	Name
<input checked="" type="checkbox"/>	1	RnD1
<input checked="" type="checkbox"/>	2	Station Location 2
<input checked="" type="checkbox"/>	3	Station Location 3
<input checked="" type="checkbox"/>	4	Station Location 4
<input checked="" type="checkbox"/>	5	Station Location 5
<input checked="" type="checkbox"/>	6	Station Location 6
<input checked="" type="checkbox"/>	7	Station Location 7
<input checked="" type="checkbox"/>	8	Station Location 8
<input checked="" type="checkbox"/>	9	Station Location 9
<input checked="" type="checkbox"/>	10	Station Location 10

1 - 10 of 13 records

OK Cancel

- Click **OK**.

The selected Stations appear in the grid.

Select Station

Selected:

ID:  Name:

Search:

ID	Name	
1	RnD1	
2	Station Location 2	
3	Station Location 3	
4	Station Location 4	
5	Station Location 5	
6	Station Location 6	
7	Station Location 7	
8	Station Location 8	
9	Station Location 9	
10	Station Location 10	

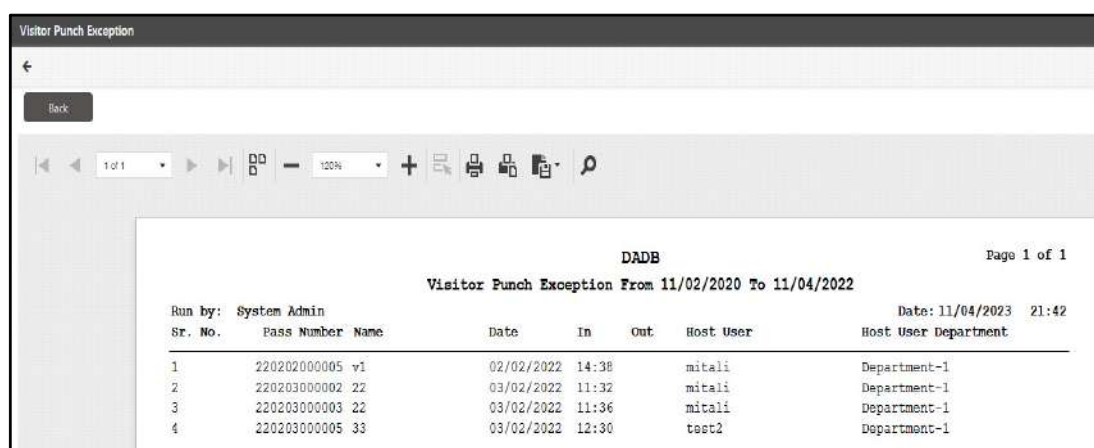
1 - 10 of 13 records

Generate Report

- You can also delete the desired Station. To do so, click **Delete** of the respective station.
- Click **Generate Report**.



## Sample Report

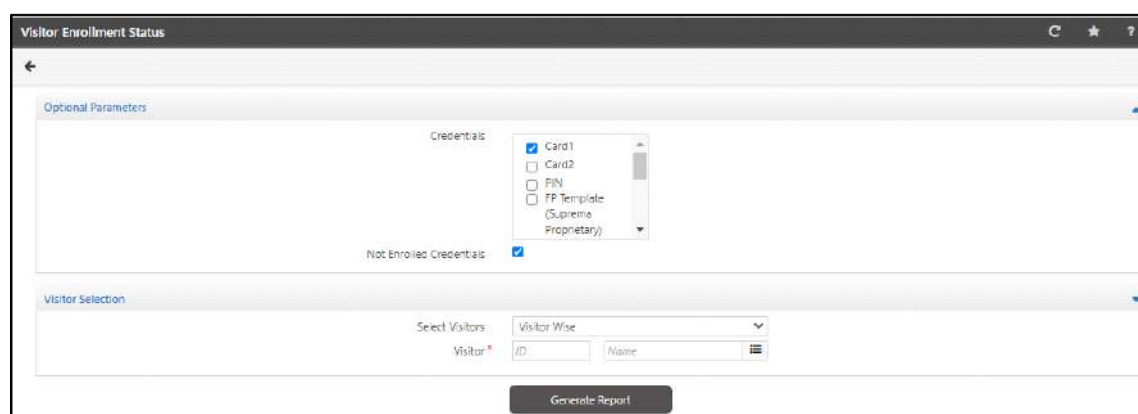


Sr. No.	Pass Number	Name	Date	In	Out	Host User	Host User Department
1	220202000005	v1	02/02/2022	14:38		mitali	Department-1
2	220203000002	22	03/02/2022	11:32		mitali	Department-1
3	220203000003	22	03/02/2022	11:36		mitali	Department-1
4	220203000005	33	03/02/2022	12:30		test2	Department-1

## Visitor Enrollment Status

This report list out the all the visitors whose credentials have been enrolled as well as whose credentials have not been enrolled.

Configure the following parameters:



### Optional Parameter

- **Credential:** Select check boxes of the desired credential option — Card 1/2, PIN, FP Template (Supreme Proprietary), FP Template (Supreme ISO), FP Template (Lumidigm ISO), FP Template (Lumidigm Proprietary), Palm Template, Face Template.
- **Not Enrolled Credentials:** Select this check box, if you wish to view the visitors whose credential have not been enrolled.

### Visitor Selection

- **Select Visitor:** Select the desired option — **Visitor Wise** or **All**.
- If you select **All**, the report will list all the Visitor Profiles with all the details regarding the Visitor Enrollment Status.

- If you select **Visitor Wise**, click the **Visitor** picklist. The **Picklist for Visitor Profile** pop-up appears.

Picklist For Visitor Profiles

Total Selected: 0 Records

Search  [Show Selected](#)

<input type="checkbox"/>	User ID ▲	Name
<input type="checkbox"/>	RnD1V001	RnD1Visitor1
<input type="checkbox"/>	RnD1V002	RnD1Visitor2
<input type="checkbox"/>	RnD1V003	RnD1Visitor3
<input type="checkbox"/>	RnD1V004	RnD1Visitor4
<input type="checkbox"/>	RnD1V005	RnD1Visitor5
<input type="checkbox"/>	RnD1V006	RnD1Visitor6
<input type="checkbox"/>	RnD1V007	RnD1Visitor7
<input type="checkbox"/>	RnD1V008	RnD1Visitor8
<input type="checkbox"/>	RnD1V009	RnD1Visitor9
<input type="checkbox"/>	RnD1V010	RnD1Visitor10

1 - 10 of 21 records

« < 1 2 3 > »

OK Cancel

- Select the check boxes of the desired Visitor Profiles. Click **OK**.
- The selected Visitor Profiles appear in the grid.

Select Projects  Project Wise ▼

Project  ID  Name

Search

ID	Name	Group ▲	
DOMESTIC	DOMESTIC	Project	
p1	p1	Project	

- You can also delete the desired Visitor Profiles. To do so, click **Delete** of the respective Visitor Profile.
- Click **Generate Report**.

## Sample Report

Visitor Enrollment Status

Back

1 of 1

112%

11/04/2023 21:47

Run by: System Admin

Suprema Proprietary

Suprema ISO

Lumidigm ISO

Lumidigm Proprietary

Enrolled Palms

Enrolled Faces

Enrollment Date-Time

222

Amit

Not Enrolled

Not Enrolled

Enrolled

1

0

0

0

0

0

03/02/2022 12:16:28

p3

profile3

Not Enrolled

Not Enrolled

Not Enrolled

0

0

0

0

0

0

## Panel Wise Visitor

This report lists out a Panel-wise list of the Visitor cards defined in the system.

Panel-Wise Visitor

1 of 1

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Print

Export

Share

Search

DADB

Page 1 of 1

Panel-Wise Visitor

Run by: System Admin

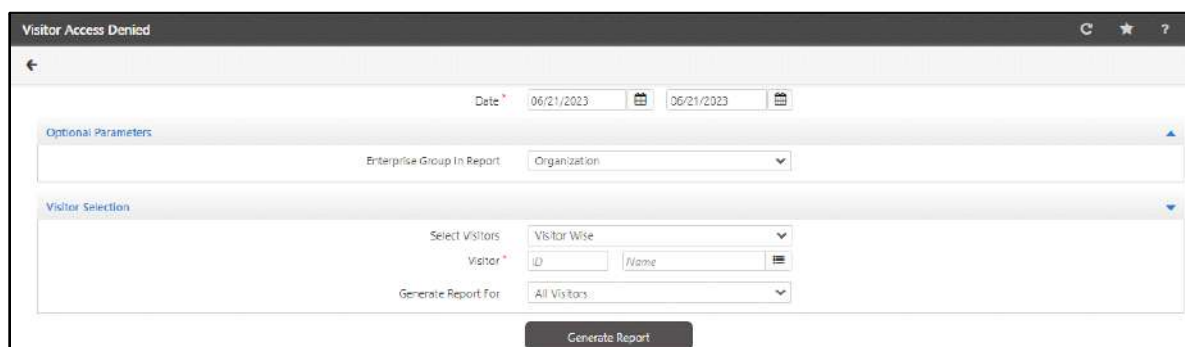
Date: 11/04/2023 21:52

Sr. No.	Visitor Profile	Visitor Access Group Index	Home Zone	Functional Group
p123:Panel				
1	222:Amit	1 Group-1	Zone-1	Staff
Panel200-Device-3:Panel200				
1	222:Amit	1 Group-1	Zone-1	Staff
2	p2:profile2	2 Group-1	Zone-1	Staff
3	p3:profile3	3 Group-1	Zone-1	Staff

## Visitor Access Denied

This report lists out all invalid punch events of the Visitors at various Door Controllers along with the reason.

Configure the following parameters:



The screenshot shows a web application window titled "Visitor Access Denied". It contains the following configuration fields:

- Date: 06/21/2023 to 06/21/2023
- Optional Parameters: Enterprise Group In Report (Organization)
- Visitor Selection: Select Visitors (Visitor Wise), Visitor (ID, Name), Generate Report For (All Visitors)
- Generate Report button

- **Date:** Select the to and from date for which the report is to be generated.

### Optional Parameter

- **Enterprise Group in Report:** Select the desired enterprise group options — Organization, Branch, Department, Section, Category, Grade, Designation, Custom Group 1(Association Maps,) Custom Group 2/3.

### Visitor Selection

- **Select Visitor:** Select the desired option — **All**, **Door-Wise** or **Visitor-Wise**.
  - If you select **All**, the report will list all Visitors data along with their respective devices.
  - If you select **Visitor-Wise**, click the **Visitor** picklist. The **Picklist For Visitor Profiles** pop-up appears.

Picklist For Visitor Profiles

Total Selected: 0 Records

Search  [Show Selected](#)

<input type="checkbox"/>	User ID ▲	Name
<input type="checkbox"/>	RnD1V001	RnD1Visitor1
<input type="checkbox"/>	RnD1V002	RnD1Visitor2
<input type="checkbox"/>	RnD1V003	RnD1Visitor3
<input type="checkbox"/>	RnD1V004	RnD1Visitor4
<input type="checkbox"/>	RnD1V005	RnD1Visitor5
<input type="checkbox"/>	RnD1V006	RnD1Visitor6
<input type="checkbox"/>	RnD1V007	RnD1Visitor7
<input type="checkbox"/>	RnD1V008	RnD1Visitor8
<input type="checkbox"/>	RnD1V009	RnD1Visitor9
<input type="checkbox"/>	RnD1V010	RnD1Visitor10

1 - 10 of 21 records

« < 1 2 3 > »

OK Cancel

- Select the check boxes of the desired Visitor Profiles. Click **OK**.
- The selected Visitor Profiles appear in the grid.

Select Visitors

Visitor Wise

Visitor

Search

User ID ▲	Name	
RnD1V001	RnD1Visitor1	
RnD1V002	RnD1Visitor2	

- You can also delete the desired Visitor Profile. To do so, click **Delete** of the respective Visitor Profile.

- If you select **Door-Wise**, click **Door** picklist. The **Picklist For Door** pop-up appears.

Picklist For Door

Total Selected: 0 Records

Search  [Show Selected](#)

<input type="checkbox"/>	ID ▲	Name
<input type="checkbox"/>	1	RnD1 Canteen1 ARGO
<input type="checkbox"/>	2	RnD1 2nd FLR Server Room VEGA
<input type="checkbox"/>	3	RnD1 4th FLR Server Room VEGA
<input type="checkbox"/>	4	RnD1 GF TRIPOD RIGHT IN
<input type="checkbox"/>	5	RnD1 Integra ARGO
<input type="checkbox"/>	6	RnD1 Basement Tripod Entry PVR
<input type="checkbox"/>	7	RnD1 4th Floor FB VEGA OUT
<input type="checkbox"/>	8	RnD1 4th Floor FB VEGA IN
<input type="checkbox"/>	9	RnD1 GF MODE TRIPOD LEFT IN
<input type="checkbox"/>	10	Factory Admin FMX

1 - 10 of 107 records

« < 1 2 3 ... 11 > »

OK Cancel

- Select the check boxes of the desired Doors. Click **OK**.
- The selected Doors appear in the grid.

Select Visitors: Door-Wise ▼

Door\* ID Name

Search

ID	Name	Group ▲	
1	RnD1 Canteen1 ARGO	Door	
2	RnD1 2nd FLR Server Room VEGA	Door	
10	Factory Admin FMX	Door	

- You can also delete the desired Door. To do so, click **Delete** of the respective Door.
- **Generate Report For:** Select the desired option — **All Visitor**, **Active Visitor** or **Inactive Visitor**
- Click **Generate Report**.

## Sample Report

Visitor Access Denied

←

Back

1 of 1

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DADB

Page 1 of 1

Access Denied From 11/04/2020 To 11/04/2023

Run by: System Admin

Date: 11/04/2023 23:16

Sr No	Visitor Card	Visitor Name	Time	IN/OUT	Reason
03/02/2022					
ARGO FACE-Device-19					
1	p2:profile2	33	12:30	IN	Denied - Control Zone

## Visitor Pass

### Visitor Pass Validity

Configure the following parameters:



Date: 06/21/2023

Validity End Time: 00:00

Generate Report

- **Date:** Select the to date for which the report is to be generated.
- **Validity End Time:** Select the desired time for which report is to be generated.
- Click **Generate Report**.

## Sample Report

Visitor Pass Validity

Back

1 of 1

DD

100%

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DADB

Page 1 of 1

Visitor Pass Validity On 02/02/2022 15:05

Run by: System Admin

Date: 12/04/2023 00:23

Sr No	Pass No	Visitor Name	Visitor Organization	Valid From	Valid UpTo	Host User	Host User Department
1	220202000002	22	22	02/02/2022 14:07	02/02/2022 15:07	test1	Department-1
2	220202000003	v1	org	02/02/2022 14:09	02/02/2022 15:09	mitali	Department-1
3	220202000004	v1	org	02/02/2022 14:19	02/02/2022 15:20	mitali	Department-1
4	220202000006	22	22	02/02/2022 14:35	02/02/2022 15:35	test1	Department-1
5	220202000005	v1	org	02/02/2022 14:35	02/02/2022 15:35	mitali	Department-1
6	220202000007	22	22	02/02/2022 14:37	02/02/2022 15:37	test1	Department-1

## Visitor Pass Status

Configure the following parameters:

The screenshot shows a web application window titled "Visitor Pass Status". It features a "Date" field set to "06/21/2023". Below this is a section labeled "Optional Parameters" containing a "Status" picklist with four checked options: "Issued", "Active", "Expired", and "Surrendered". There is also a "Select Station" dropdown menu currently set to "All". At the bottom of the window is a "Generate Report" button.

- **Date:** Select the date for which report is to be generated.

### Optional Parameters

- **Status:** You can select a particular check box or multiple check boxes — Issued, Active, Expired, Surrendered.
- **Select Station:** Select the desired option— **All** or **Selected**.
  - If you select **All**, the generated report lists out the details of all the Stations.
  - If you select **Selected**, click the **Selected** picklist. The **Select Station** pop-up appears.

The screenshot shows a "Select Station" pop-up window. At the top, it says "Total Selected: 0 Records". Below this is a search bar and a "Show Selected" button. There is a "Select All" checkbox. The main part of the window is a table with columns "ID" and "Name". The table contains 10 rows of data, with IDs 1 through 10 and names "RnD1" through "Station Location 10". At the bottom, it shows "1 - 10 of 13 records" and a pagination control with buttons for "1" and "2". There are "OK" and "Cancel" buttons at the very bottom.

ID	Name
1	RnD1
2	Station Location 2
3	Station Location 3
4	Station Location 4
5	Station Location 5
6	Station Location 6
7	Station Location 7
8	Station Location 8
9	Station Location 9
10	Station Location 10

- You can either select particular Station/s or can select all the Stations at once.

- To select particular Station/s, select the check boxes of the desired Stations.

The 'Select Station' dialog box displays a table with 10 rows. The first two rows are selected, indicated by blue checkmarks in the first column. The table has columns for 'ID' and 'Name'. Below the table, a status bar shows '1 - 10 of 13 records'. At the bottom, there are 'OK' and 'Cancel' buttons.

ID	Name
1	RnD1
2	Station Location 2
3	Station Location 3
4	Station Location 4
5	Station Location 5
6	Station Location 6
7	Station Location 7
8	Station Location 8
9	Station Location 9
10	Station Location 10

OR

- To select all the Stations at once, select the **Select All** check box. The Station on all the pages will be selected.

The 'Select Station' dialog box displays the same table as the previous screenshot, but now all 10 rows are selected, indicated by blue checkmarks in the first column. The 'Select All' checkbox at the top left is now checked. The status bar still shows '1 - 10 of 13 records'. At the bottom, there are 'OK' and 'Cancel' buttons.

ID	Name
1	RnD1
2	Station Location 2
3	Station Location 3
4	Station Location 4
5	Station Location 5
6	Station Location 6
7	Station Location 7
8	Station Location 8
9	Station Location 9
10	Station Location 10

- Click **OK**.



- The selected Stations appear in the grid.

Select Station

Selected

ID

Name

Search


ID	Name	
1	RnD1	
2	Station Location 2	
3	Station Location 3	
4	Station Location 4	
5	Station Location 5	
6	Station Location 6	
7	Station Location 7	
8	Station Location 8	
9	Station Location 9	
10	Station Location 10	

1 - 10 of 13 records

1

2

Generate Report

- You can also delete the desired Station. To do so, click **Delete**  of the respective Station.
- Click **Generate Report**.

## Sample Report

Visitor Pass Status

Back

1 of 1

115%

DADB							Page 1 of 1
Visitor Pass Status as On 11/04/2023 23:38:16							Date: 11/04/2023 23:38
Run By:	System Admin	Visitor Profile	Valid From	Valid UpTo	Surrender Date	Status	
Default Location							
220202000002	22	222:Amit	02/02/2022 14:07	02/02/2022 15:07	02/02/2022 14:08	Surrendered	
220202000003	v1	222:Amit	02/02/2022 14:09	02/02/2022 15:09	02/02/2022 14:19	Surrendered	
220202000004	v1	222:Amit	02/02/2022 14:19	02/02/2022 15:20	02/02/2022 14:21	Surrendered	
220202000005	v1	222:Amit	02/02/2022 14:35	02/02/2022 15:35	02/02/2022 16:44	Surrendered	
220202000006	22	p2:profile2	02/02/2022 14:35	02/02/2022 15:35	02/02/2022 14:37	Surrendered	
220202000007	22	p2:profile2	02/02/2022 14:37	02/02/2022 15:37	02/02/2022 16:44	Surrendered	
220202000008	v1	222:Amit	02/02/2022 17:23	02/02/2022 17:25		Expired	
220202000001	v1	222:Amit	02/02/2022 18:00	02/02/2022 19:00	02/02/2022 12:07	Surrendered	
Total:		Prepared	8	Issued	0	Active	0
		Surrendered	7	Expired	1		

## Expired Passes

This report lists out the Visitors whose passes are no longer valid but are yet to be surrendered.

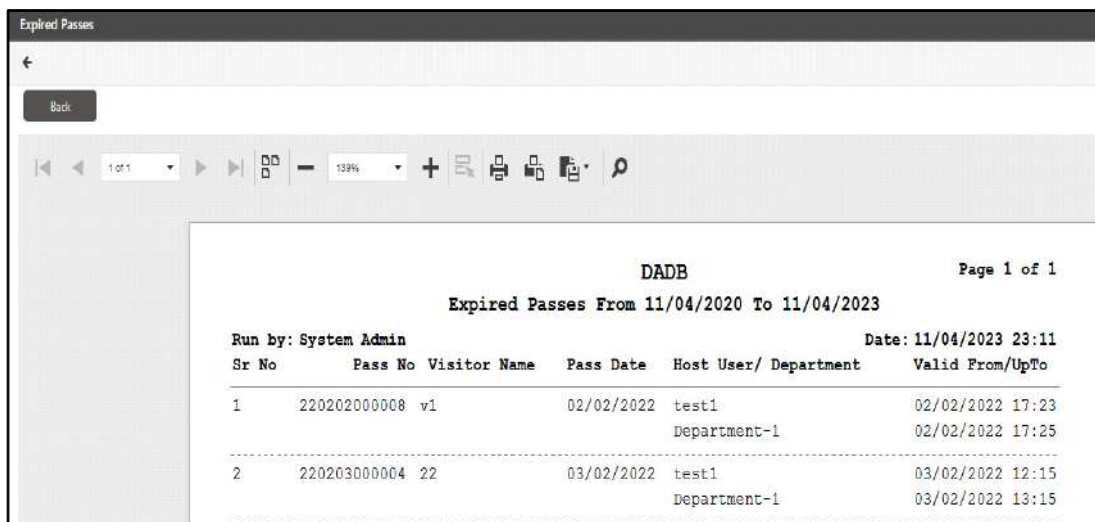
Configure the following parameter:



The 'Expired Passes' configuration screen shows a date range from 05/21/2023 to 06/21/2023. A 'Generate Report' button is located below the date range.

- **Date:** Select the to and from date for which the report is to be generated.

Sample Report



The report is titled 'Expired Passes From 11/04/2020 To 11/04/2023'. It was run by 'System Admin' on '11/04/2023 23:11'. The report contains two entries:

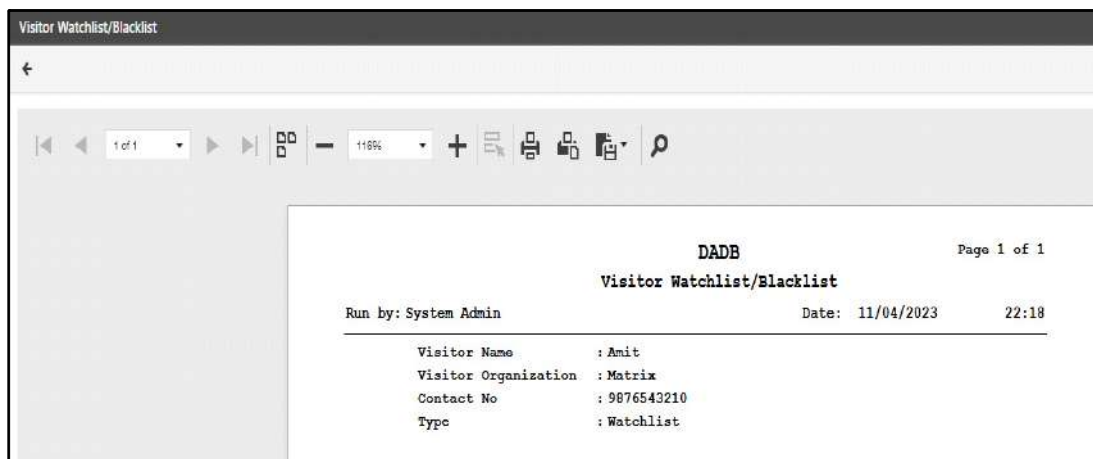
Sr No	Pass No	Visitor Name	Pass Date	Host User/ Department	Valid From/UpTo
1	220202000008	v1	02/02/2022	test1 Department-1	02/02/2022 17:23 02/02/2022 17:25
2	220203000004	22	03/02/2022	test1 Department-1	03/02/2022 12:15 03/02/2022 13:15

## Visitor Summary

### Visitor Watchlist/Blacklist

This report lists out the banned visitors along with their details as well as photograph wherever available.

Sample Report



The report is titled 'Visitor Watchlist/Blacklist'. It was run by 'System Admin' on '11/04/2023 22:18'. The report contains the following details:

DADB	
Visitor Watchlist/Blacklist	
Run by: System Admin	Date: 11/04/2023 22:18
Visitor Name	: Amit
Visitor Organization	: Matrix
Contact No	: 9876543210
Type	: Watchlist

## Pre-Registered Visitors

This report lists out all the pre-registered visitors along with their details.

Configure the following parameter:

The screenshot shows a web interface titled "Pre-Registered Visitors". It features a date selection field with two date pickers, both set to "06/21/2023". Below the date pickers is a "Generate Report" button.

**Date:** Select the to and from date for which the report is to be generated.

## Sampler Report

The screenshot displays a report titled "Pre-Registered Visitors From 11/02/2020 To 11/04/2022". The report is generated by "System Admin" on "11/04/2023 22:21". It shows a list of 15 visitors with their appointment numbers, names, organizations, host users, departments, dates, purposes, and statuses.

Sr No	Appointment No	Visitor Name/Organization	Host User/ Department	Date/Purpose	Status	Remark
1	200302000001	Amit Matrix	dfddd Department-1	02/03/2020 14:34	Approved	
2	220202000003	v1	test1 Department-1	02/02/2022 12:22	Approved	
3	220202000004	org	test1 Department-1	02/02/2022 13:00	Approved	
4	220202000005	22	test1 Department-1	02/02/2022 14:07	Approved	
5	220202000006	v1	mitali Department-1	02/02/2022 14:09	Approved	
6	220202000007	org	mitali Department-1	02/02/2022 14:19	Approved	
7	220202000008	v1	mitali Department-1	02/02/2022 14:35	Approved	
8	220202000009	22	test1 Department-1	02/02/2022 14:35	Approved	
9	220202000010	22	test1 Department-1	02/02/2022 14:37	Approved	
10	220202000011	v1	mitali Department-1	02/02/2022 16:49	Approved	
11	220202000012	org	test1 Department-1	02/02/2022 17:23	Approved	
12	220202000001	v1	mitali Department-1	02/02/2022 18:00	Approved	
13	220203000001	org	mitali Department-1	03/02/2022 11:20	Approved	
14	220203000002	22	test1 Department-1	03/02/2022 11:30	Approved	
15	220203000003	22	mitali Department-1	03/02/2022 11:32	Approved	

## Visitor History

This report lists out all the visitors during the specified time period along with the visit details.

Configure the following parameters:

Visitor History

Date: 14/03/2024 to 14/03/2024

**Optional Parameters**

Group By: Organization

Format Selection: Visitor History 1

Select Station: All

☐ Group Needed In Report

**User Selection**

Select Users: User Wise

User: / /

Generate Report For: All Users

Generate Report

- **Date:** Select the to and from date for which the report is to be generated.

### Optional Parameters

- **Group By:** Select the desired option — Organization, Branch, Department, Section, Category, Grade, Designation, Custom Group 1(Association Maps), Custom Group 2/3.
- **Group Needed in Report.:** Select the check box to enable, if required. Enabling this option will display the name for this particular group in the generated report.

Date: 14/03/2024 to 14/03/2024

Group By: Organization

Format Selection: Visitor History 1

Select Station: All

☒ Group Needed In Report

- **Format Selection:** Select the desired Format — Visitor History 1 or Visitor History 2 to generate the report. If you select Visitor History 1, the report will be generated without Visitor photo and if you select Visitor History 2, the report will be generated with Visitor photo.
- **Select Station:** Select the desired option— **All or Selected**.
  - If you select **All**, the generated report lists out all the details regarding the Visitor History for all the Stations.

- If you select **Selected**, click the **Selected** picklist. The **Select Station** pop-up appears.

The 'Select Station' pop-up window displays a green header bar with the text 'Total Selected: 0 Records'. Below this is a search bar with the placeholder text 'Search' and a magnifying glass icon, followed by a 'Show Selected' link. A checkbox labeled 'Select All' is positioned below the search bar. The main area contains a table with the following columns: a checkbox, 'ID' (with an upward arrow), and 'Name'. The table lists 10 records, with IDs 1 through 10 and names 'RnD1' and 'Station Location 2' through 'Station Location 10'. All checkboxes in the table are unchecked. At the bottom left, it says '1 - 10 of 13 records'. At the bottom right, there is a pagination control with buttons for first, previous, 1, 2, next, and last. The '1' button is highlighted. At the very bottom are 'OK' and 'Cancel' buttons.

<input type="checkbox"/>	ID ▲	Name
<input type="checkbox"/>	1	RnD1
<input type="checkbox"/>	2	Station Location 2
<input type="checkbox"/>	3	Station Location 3
<input type="checkbox"/>	4	Station Location 4
<input type="checkbox"/>	5	Station Location 5
<input type="checkbox"/>	6	Station Location 6
<input type="checkbox"/>	7	Station Location 7
<input type="checkbox"/>	8	Station Location 8
<input type="checkbox"/>	9	Station Location 9
<input type="checkbox"/>	10	Station Location 10

- You can either select particular Station/s or can select all the Station at once.
- To select particular Station/s, select the desired check boxes.

This screenshot shows the 'Select Station' pop-up window with the same layout as the previous one, but with two records selected. The green header bar now displays 'Total Selected: 2 Records'. In the table, the checkboxes for ID 1 ('RnD1') and ID 2 ('Station Location 2') are checked. The pagination control at the bottom right remains the same, with '1' highlighted. The 'OK' and 'Cancel' buttons are at the bottom.

<input type="checkbox"/>	ID ▲	Name
<input checked="" type="checkbox"/>	1	RnD1
<input checked="" type="checkbox"/>	2	Station Location 2
<input type="checkbox"/>	3	Station Location 3
<input type="checkbox"/>	4	Station Location 4
<input type="checkbox"/>	5	Station Location 5
<input type="checkbox"/>	6	Station Location 6
<input type="checkbox"/>	7	Station Location 7
<input type="checkbox"/>	8	Station Location 8
<input type="checkbox"/>	9	Station Location 9
<input type="checkbox"/>	10	Station Location 10

OR

- To select all the Stations at once, select the **Select All** check box. The Station on all the pages will be settled.

Select Station

Total Selected: 13 Records

Search:  Show Selected

☒ Select All

ID	Name
<input checked="" type="checkbox"/> 1	RnD1
<input checked="" type="checkbox"/> 2	Station Location 2
<input checked="" type="checkbox"/> 3	Station Location 3
<input checked="" type="checkbox"/> 4	Station Location 4
<input checked="" type="checkbox"/> 5	Station Location 5
<input checked="" type="checkbox"/> 6	Station Location 6
<input checked="" type="checkbox"/> 7	Station Location 7
<input checked="" type="checkbox"/> 8	Station Location 8
<input checked="" type="checkbox"/> 9	Station Location 9
<input checked="" type="checkbox"/> 10	Station Location 10

1 - 10 of 13 records

« < 1 2 > »

OK Cancel

- Click **OK**.
- The selected Stations appears in the grid.

Select Station

Selected:  ID Name

Search:

ID	Name	
1	RnD1	
2	Station Location 2	
3	Station Location 3	
4	Station Location 4	
5	Station Location 5	
6	Station Location 6	
7	Station Location 7	
8	Station Location 8	
9	Station Location 9	
10	Station Location 10	

1 - 10 of 13 records

« < 1 2 > »

Generate Report

- You can also delete the desired Station. To do so, click **Delete** of the respective station.

## User Selection

- Select User:** Select the desired option — **User Wise**, **Group Wise**, or **All**.

- If you select **User Wise**, click the **User** picklist. The **Picklist For All Users** pop-up appears.

Picklist For All Users

Total Selected: 0 Records

Search  Show Selected

<input type="checkbox"/>	User ID ▲	Name
<input type="checkbox"/>	1	SALIM ANSARI
<input type="checkbox"/>	10	RAJENDRA GOSWAMI
<input type="checkbox"/>	1001	ANKITKUMAR SOHLIYA
<input type="checkbox"/>	1002	MEGHA H SHUKLA
<input type="checkbox"/>	1003	UMESH M TALANPURI
<input type="checkbox"/>	1004	DARSHAK B PATEL
<input type="checkbox"/>	1007	DHAVAL I PATEL
<input type="checkbox"/>	1008	MAYANK K KORAT
<input type="checkbox"/>	1009	DIPTI K RATHWA
<input type="checkbox"/>	1010	RAHUL S SHAH

1 - 10 of 2469 records

OK Cancel

- Select check boxes of the desired Users. Click **OK**.
- The selected Users appear in the grid.

Select Users: User Wise

User ID Name

Search  Show Selected

User ID ▲	Name	
1	SALIM ANSARI	
10	RAJENDRA GOSWAMI	
1001	ANKITKUMAR SOHLIYA	
1002	MEGHA H SHUKLA	

1 - 4 of 2469 records

- You can also delete the desired User. To do so, click **Delete** of the respective user.
- If you select **Group Wise** option, select the desired enterprise group — Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1(Association Maps), Custom Group2/3.

For each enterprise group — Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1(Association Maps) Custom Group 2/3, click the corresponding picklist to select the desired option/s.

The selected Groups appear in the grid.

Select Users  
Select Group  
Branch \*

Group Wise  
Branch

ID	Name	Group	
1	ACCOUNTS & FINANCE	Department	
2	ADMINISTRATION	Department	
5	FIELD EMPLOYEE	Branch	

You can also delete particular Group. To do so, click **Delete** of the respective Group.

- If you select **All**, then all users will be selected.
- **Generate Report For:** Select the desired option— **All User**, **Active User**, **Inactive User**.
- Click **Generate Report**.

### Sample Report- Visitor History 1

Visitor History

1 of 1

**DAAB**  
 Visitor History From 11/04/2020 To 11/04/2023

Run by: System Admin
Date: 11/04/2023 22:29

Pass No	Visitor Name	Visitor Profile	Organization	Contact No.	Host User	Pass IN Date-Time	Pass OUT Date-Time	Check IN Date-Time	Check OFF Date-Time	Surrender By
22/02/202000002	22	222:Amc	22	22	test1-test1	02/02/2022 14:07	02/02/2022 15:07	02/02/2022 14:07	02/02/2022 14:08	Visitor
22/02/202000003	22	222:Amc	org	11	mitelli-mitelli	02/02/2022 14:09	02/02/2022 14:09	02/02/2022 14:09	02/02/2022 14:19	Visitor
22/02/202000004	22	222:Amc	org	11	mitelli-mitelli	02/02/2022 14:19	02/02/2022 15:20	02/02/2022 14:19	02/02/2022 14:21	Visitor
22/02/202000005	22	222:Amc	org	11	mitelli-mitelli	02/02/2022 14:35	02/02/2022 15:35	02/02/2022 14:35	02/02/2022 14:44	System
22/02/202000006	22	g0:profiled	22	22	test1-test1	02/02/2022 14:35	02/02/2022 15:35	02/02/2022 14:35	02/02/2022 14:37	Visitor
22/02/202000007	22	g0:profiled	22	22	test1-test1	02/02/2022 14:37	02/02/2022 15:37	02/02/2022 14:35	02/02/2022 14:44	System
22/02/202000008	22	222:Amc	org	11	mitelli-mitelli	02/02/2022 15:00	02/02/2022 15:00	02/02/2022 15:07	02/02/2022 15:07	Visitor
22/02/202000009	22	222:Amc	22	22	test1-test1	03/02/2022 11:30	03/02/2022 12:25	03/02/2022 11:24	03/02/2022 11:25	Visitor
22/02/202000010	22	222:Amc	22	22	mitelli-mitelli	03/02/2022 11:52	03/02/2022 12:52	03/02/2022 11:52	03/02/2022 11:53	Visitor
22/02/202000011	22	222:Amc	22	22	mitelli-mitelli	03/02/2022 11:56	03/02/2022 12:56	03/02/2022 11:56	03/02/2022 11:57	Visitor
22/02/202000012	33	g0:profiled	33	33	Test1-test2	03/02/2022 12:30	03/02/2022 12:30	03/02/2022 12:30	03/02/2022 12:31	Visitor

### Visitor Head Count

This report lists out a department wise list of Visitor Head Count during the specified time period.

Configure the following parameters:

Visitor Head Count

Date \*

Visitor Selection

Select Visitors  
Select Group  
Organization \*

Group Wise  
Organization

- **Date:** Select the to and from date for which the report is to be generated.

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Matrix COSEC System Manual



## Visitor Selection


- **Select Visitor:** Select the desired option— **Group Wise** or **All**.
- If you select **All**, the generated report list out all the details for all the Visitors.
- If you select **Group Wise** option, select the desired enterprise group — Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1(Association Maps) Custom Group /2/3

For each enterprise group — Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1/2/3, click the corresponding picklist to select the desired option/s.

The selected Groups appear in the grid.

The screenshot shows the 'Select Visitors' section with a dropdown menu set to 'Group Wise'. Below it, 'Select Group' is set to 'Organization'. There are input fields for 'Organization \*', 'ID', and 'Name'. A search bar is also present. Below the filters is a table with the following data:

ID	Name	Group
1	DADB	Organization
2	ORG2	Organization

You can also delete particular Group. To do so, click **Delete**  of the respective Group.

- Click **Generate Report**.

## Sample Report

The screenshot shows a 'Visitor Head Count' report. At the top, it says 'DADB' and 'Page 1 of 1'. Below that, it says 'Visitor Head Count From 11/04/2020 To 11/04/2023'. The report is run by 'System Admin' on '11/04/2023 22:37'. The table below shows the following data:

Sr No	Department ID	Name	No of Visitors
1	1	Department-1	13

## Visitor Evacuation

This report lists out the list of Visitors who are present and missing in/from a secured zone at the time of emergency. You can select the desired sites as well as the type of visitors.

Configure the following parameters:

The screenshot shows a window titled "Visitor Evacuation". At the top, there are date and time pickers. Below that, there are two expandable sections: "Optional Parameters" and "Visitor Selection". In "Optional Parameters", there is a "Select Site" dropdown menu currently set to "All". In "Visitor Selection", there is a "Select Visitors" dropdown set to "Visitor Wise", a "Visitor" section with "ID" and "Name" input fields, and a "Generate Report For" dropdown set to "All Visitors". A "Generate Report" button is located at the bottom center.

- **Date:** Select the to and from date for which the report is to be generated.
- **Time:** Specify the time duration for which the report is to be generated.

### Optional Parameter

- **Select Site:** Select the desired option— **All** or **Selected**.
  - If you select **All**, the generated report lists out the Visitor details for all the Sites.
  - If you select **Selected**, click the **Select Site** picklist. The **Select Sites** pop-up appears.

The screenshot shows a "Select Sites" pop-up window. At the top, it says "Total Selected: 0 Records". Below that is a search bar and a "Show Selected" button. There is a "Select All" checkbox. The main part of the window is a table with two columns: "ID" and "Name". The table contains 10 rows of data. At the bottom, it says "1 - 10 of 11 records" and has a pagination control showing "1" as the current page. "OK" and "Cancel" buttons are at the bottom.

ID	Name
1	Factory
2	HO
3	RnD1
4	RnD2
5	site5
6	site6
7	site7
8	site8
9	site9
10	site10

- You can either select particular Site/s or can select all the Sites at once.

- To select particular Site/s, select the check boxes for the desired Site/s.

The 'Select Sites' dialog box displays a table with 10 records. The first two records, 'Factory' (ID 1) and 'HO' (ID 2), are selected. The 'Total Selected' bar at the top indicates 2 records. The 'Select All' checkbox is unchecked. The pagination shows '1 - 10 of 11 records' and the first page is active.

<input type="checkbox"/>	ID ▲	Name
<input checked="" type="checkbox"/>	1	Factory
<input checked="" type="checkbox"/>	2	HO
<input type="checkbox"/>	3	RnD1
<input type="checkbox"/>	4	RnD2
<input type="checkbox"/>	5	site5
<input type="checkbox"/>	6	site6
<input type="checkbox"/>	7	site7
<input type="checkbox"/>	8	site8
<input type="checkbox"/>	9	site9
<input type="checkbox"/>	10	site10

OR

- To select all the Sites at once, select the **Select All** check box. The Sites on all the pages will be selected.

The 'Select Sites' dialog box displays the same table as before, but now all 10 records are selected. The 'Total Selected' bar at the top indicates 11 records. The 'Select All' checkbox is checked. The pagination shows '1 - 10 of 11 records' and the first page is active.

<input checked="" type="checkbox"/>	ID ▲	Name
<input checked="" type="checkbox"/>	1	Factory
<input checked="" type="checkbox"/>	2	HO
<input checked="" type="checkbox"/>	3	RnD1
<input checked="" type="checkbox"/>	4	RnD2
<input checked="" type="checkbox"/>	5	site5
<input checked="" type="checkbox"/>	6	site6
<input checked="" type="checkbox"/>	7	site7
<input checked="" type="checkbox"/>	8	site8
<input checked="" type="checkbox"/>	9	site9
<input checked="" type="checkbox"/>	10	site10

- Click **OK**.

- The selected Sites appears in the grid.

Select Site

Selected


ID Name

Search

ID	Name	
1	Factory	
2	HO	
3	RnD1	
4	RnD2	
5	site5	
6	site6	
7	site7	
8	site8	
9	site9	
10	site10	

1 - 10 of 11 records

Save

- You can also delete the desired Sites. To do so, click **Delete**  of the respective Site.

- Click **Save**.

### Visitor Selection

- **Select Visitor:** Select the desired option — **Visitor Wise** or **All**.
- If you select **Visitor Wise**, click the **Visitor** picklist. The **Picklist For Visitor Profiles** pop-up appears.

Picklist For Visitor Profiles

Total Selected: 0 Records

Search

Show Selected

<input type="checkbox"/>	User ID ▲	Name
<input type="checkbox"/>	RnD1V001	RnD1Visitor1
<input type="checkbox"/>	RnD1V002	RnD1Visitor2
<input type="checkbox"/>	RnD1V003	RnD1Visitor3
<input type="checkbox"/>	RnD1V004	RnD1Visitor4
<input type="checkbox"/>	RnD1V005	RnD1Visitor5
<input type="checkbox"/>	RnD1V006	RnD1Visitor6
<input type="checkbox"/>	RnD1V007	RnD1Visitor7
<input type="checkbox"/>	RnD1V008	RnD1Visitor8
<input type="checkbox"/>	RnD1V009	RnD1Visitor9
<input type="checkbox"/>	RnD1V010	RnD1Visitor10


1 - 10 of 20 records

OK Cancel

- Select the check boxes of the desired Visitor Profiles. Click **OK**.

- The selected Visitor Profiles appear in the grid.

The screenshot shows a web interface for managing visitors. At the top, there's a 'Select Visitors' section with a dropdown menu set to 'Visitor Wise'. Below this are input fields for 'Visitor ID' and 'Visitor Name', and a search bar. A table lists four visitors: RnD1V001 (RnD1 Visitor1), RnD1V002 (RnD1 Visitor2), RnD1V003 (RnD1 Visitor3), and RnD1V004 (RnD1 Visitor4). Each row has a delete icon. At the bottom, there's a 'Generate Report For' dropdown set to 'All Visitors' and a 'Generate Report' button.

- You can also delete the desired Visitor Profiles. To do so, click **Delete**  of the respective Visitor Profile.
- If you select **All**, the generated report lists out all the visitor.
- **Generate Report For:** Select the desired option— **All Visitors**, **Active Visitor**, **Inactive Visitor**.
- Click **Generate Report**.

## Sample Report

Visitor Evacuation

Back

1 of 1

113%

DADE

Page 1 of 1

Visitor Evacuation From 10/04/2020 00:00 To 11/04/2023 22:59

Run by: System Admin

Date: 11/04/2023 22:59

Site ID	Name	IN Count	OUT Count	Who Is IN	Assembly Count	Missing Count
1	Site-1	6	0	6	0	6
Total		6	0	6	0	6



## Contract Worker Management

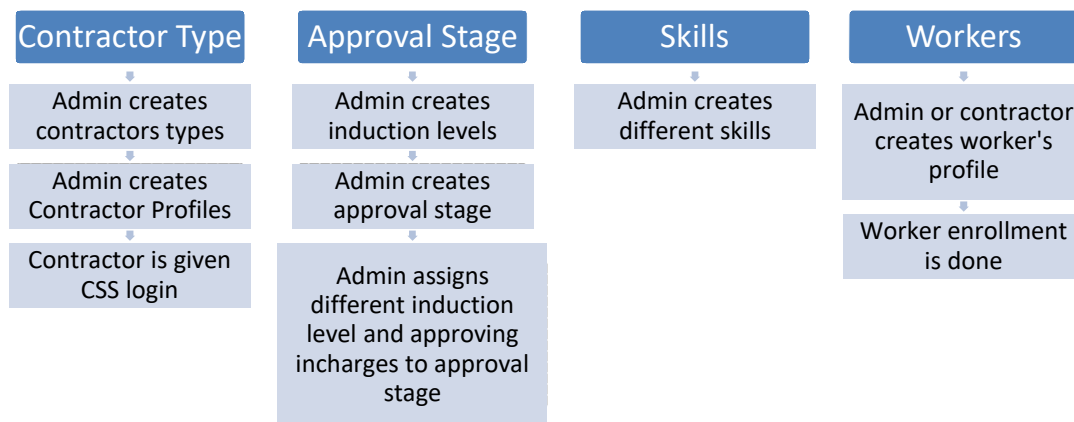
Contract Worker Management (CWM) System is the system which can be used by big and small industries to meet their demand of skilled manpower supply and hence monitoring the contract workers.

CWM comprises of readily available computer hardware, card readers, biometric fingerprint/palm readers, webcams and the software. A typical installation consist of a server where database of all contract workers is maintained.



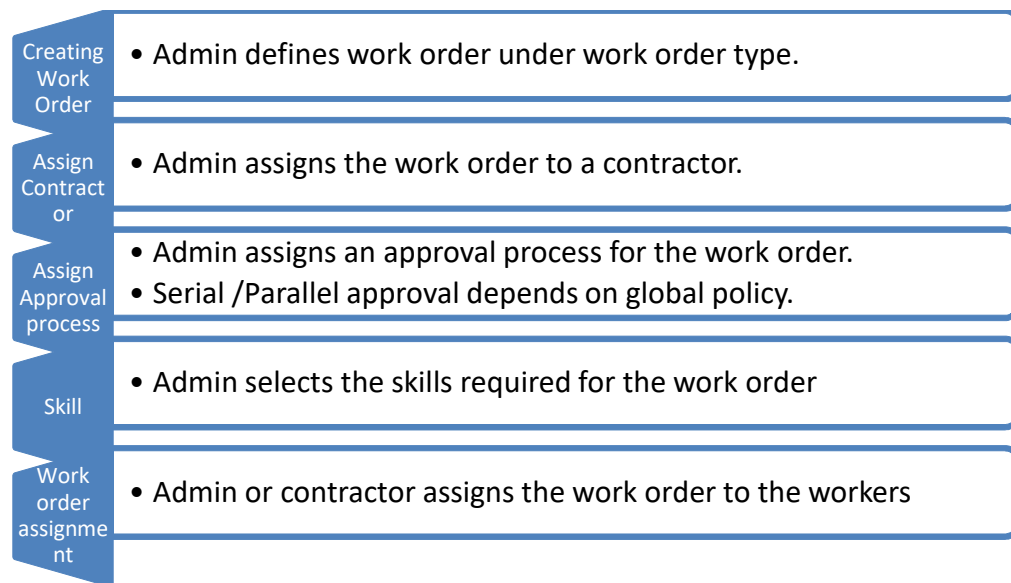
*This functionality will be available only with the COSEC **CWM** license.*

The contract worker management configuration is explained in the following diagram. To start with CWM, the contractor type, approval stages and skills are configured through CWM module. Then workers can be added through CWM or CSS.



### Work Order creation & Worker assignment

After the contractor and workers are added in the system, the work order is created and assigned to the workers as mentioned below.



## Features

1. Approvals and Training through Induction Levels
2. Enrollment of the contract workers based on
  - RFID Cards
  - Biometric Fingerprints
  - Palm Vein Templates
3. Planning and Scheduling for future Work Orders
4. Location wise Entry/Exit Access Control
5. Maintaining Attendance Records of Workers
6. Detailed Reports

## Benefits of CWM

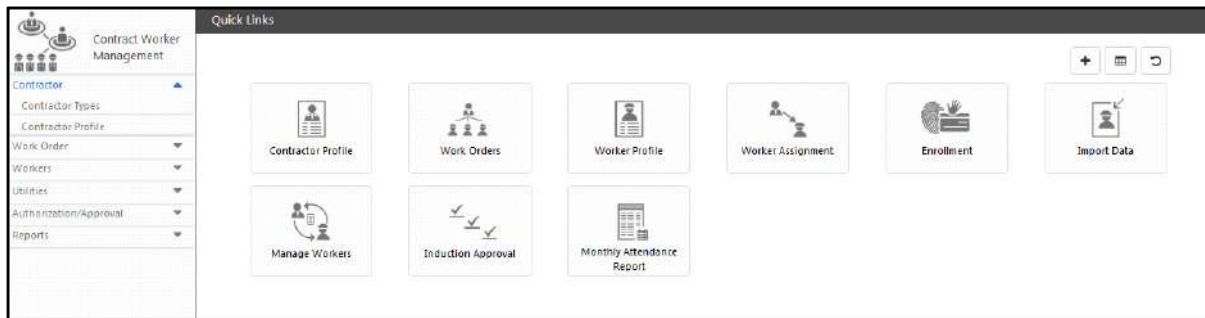
1. The probability of payroll inflation by falsifying the records of workers deployed gets totally eliminated.
2. The company gets reports on the time spent by each worker to enable accurate calculating of billing for various contractors.
3. It will ensure that the blacklisted workers do not get entry into the work area, even under different identity or through another contractor.
4. The company can get warnings when a worker is nearing maximum number of days' attendance after which he will become eligible to various benefits which regular employees are entitled to.
5. Workers can be scheduled more accurately, thus minimizing the possibility of excess worker hiring.
6. The company can ensure that workers of the desired skill only get deployed.



To use this functionality, Click on the **Contract Worker Management** module. The Contract Worker Management page will appear on your screen.



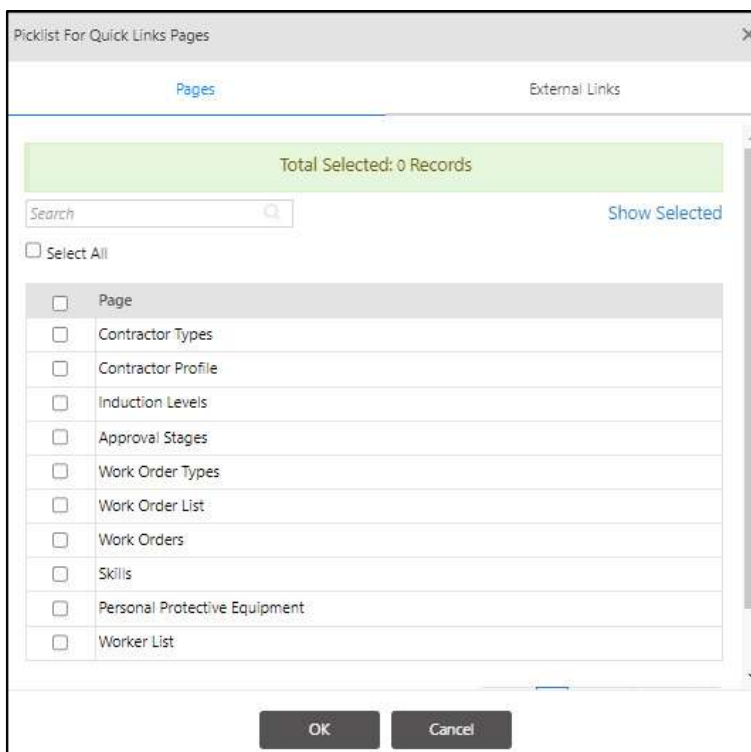
module. The Contract Worker



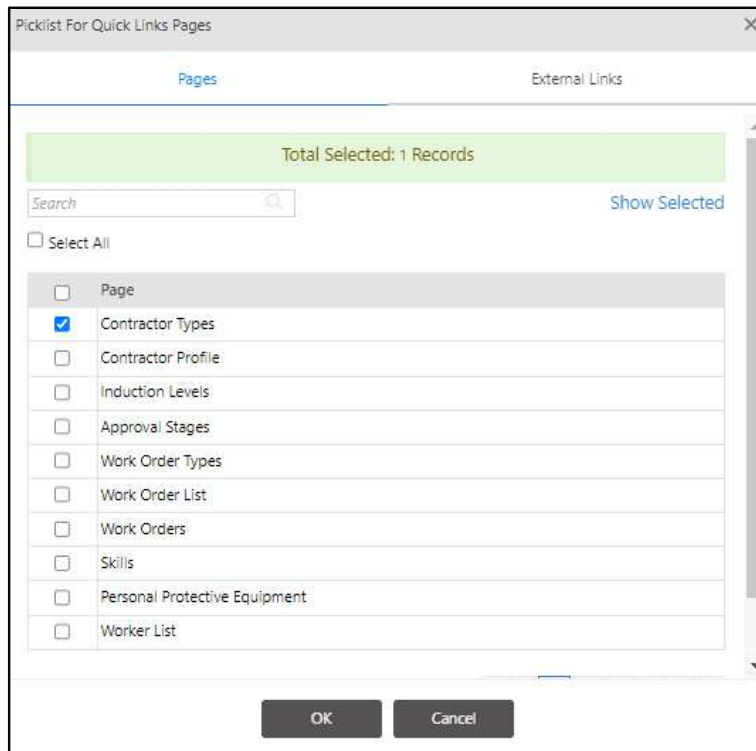
The page displays a menu and **Quick Links** to go to the required page in just one click. Quick Links are shortcuts to reach to a specific page easily. You can configure these options for Quick Links — **Add Quick Link**, **Select Layout** and **Reset to Default**.

### Add Quick Links

- Click **Add** . The **Picklist For Quick Links Pages** pop-up appears.

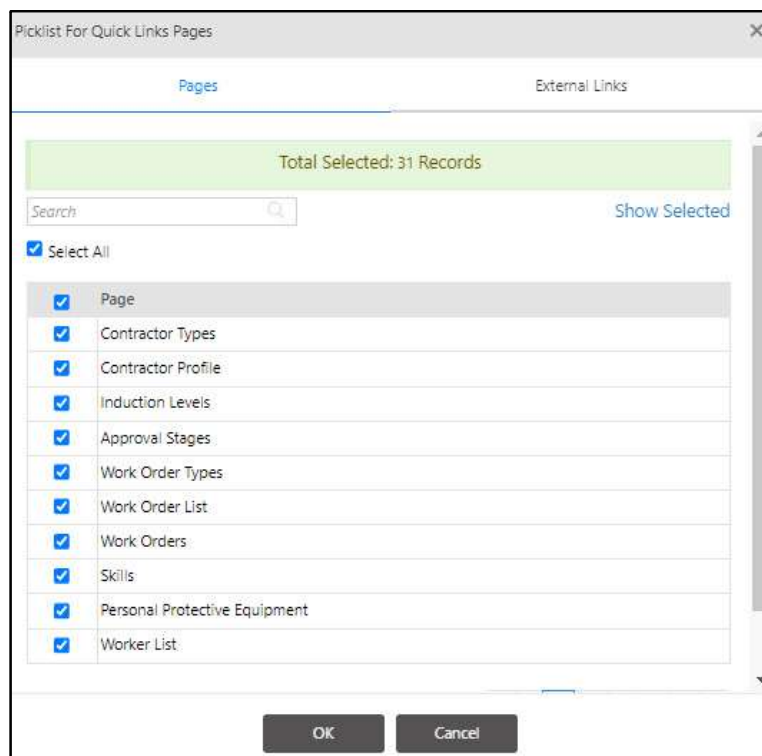


- You can either select particular page or can select all the pages at once. Maximum **20** quick links can be displayed.
- To select particular pages, select the check boxes of the desired pages.



OR


- To select all the pages at once, select the **Select All** check box. All the pages will be selected.

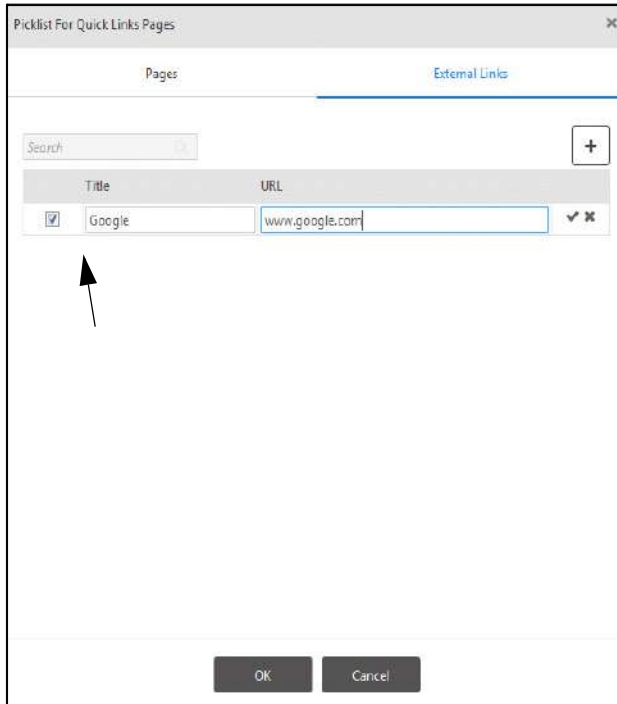




- Click **OK**.

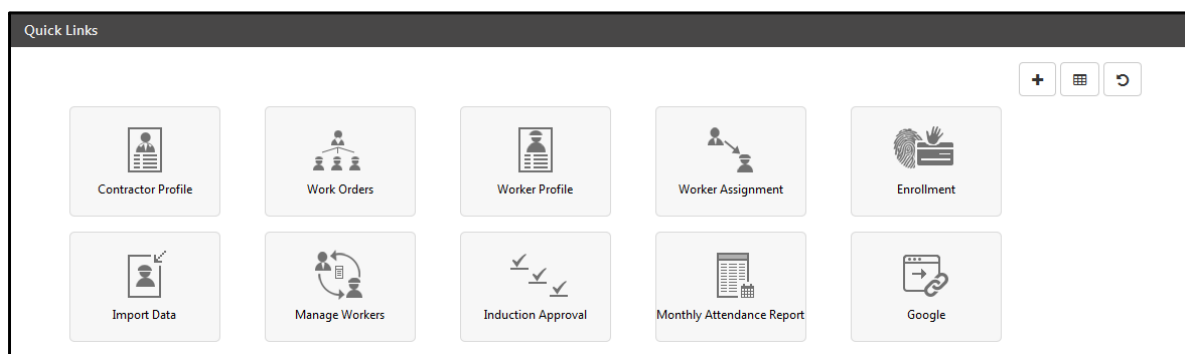
- The Quick Links for selected pages appear on the Quick Link page.

### Adding External Links,


- Select **External Link** tab and click on  button to add new external link.
- Configure the **Title** and **URL** of the external link under the respective fields. Select the checkbox to display the Quick Link for the configured link.




- Click **Save**  to save the configuration.
- Once you have saved the configuration, you can edit it. Click **Edit**  to edit the saved configuration.
- Click **OK** to save the configuration of the external link. The Quick Link for the external link appears on the Quick Link page.



### Select Layout

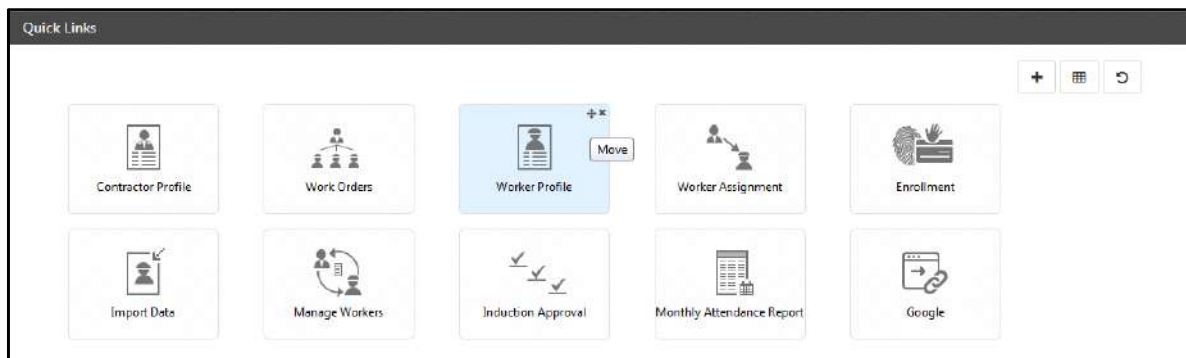
Click **Select Layout**  to select a layout for the quick links. You can select 5x4 or 4x5 layout to manage the quick links.

## Reset To Default

Click **Reset To Default**  to reset the quick links to the default quick links.

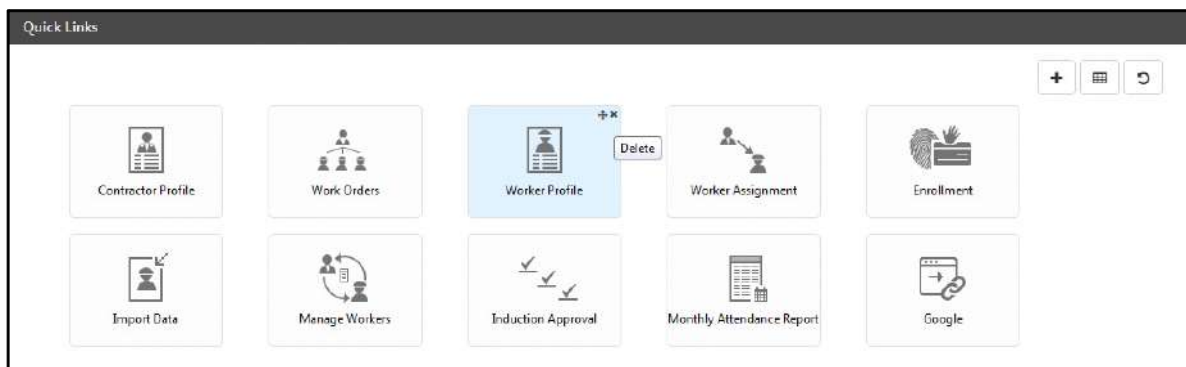
## Move the Link

To move the link from one place to another, hover on the link on top right corner and click **Move** icon as shown below. Then drag the quick link to the desired place. It will be placed at the desired location on the quick links page.




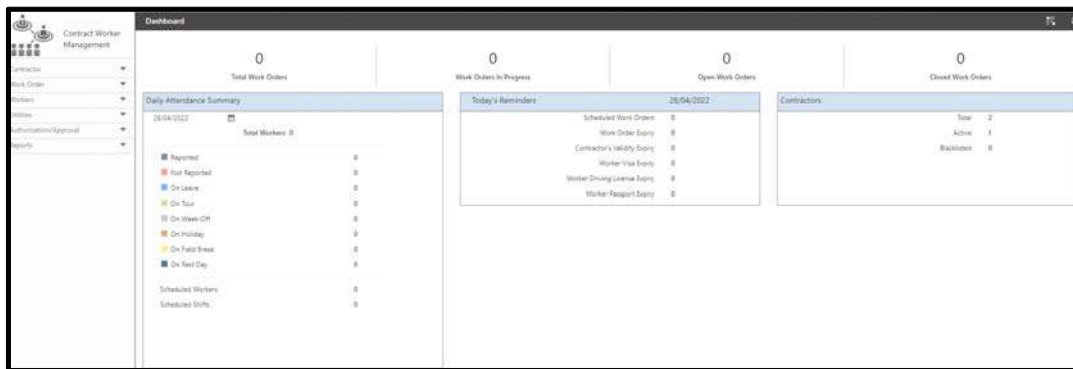
## Delete the Link

To delete a particular link, hover on the link on top right corner and click **Delete** icon as shown below.



## Contract Worker Management Dashboard

To view the **Contract Worker Management** Dashboard, select Dashboard  on the **CWM** page. The Dashboard displays the basic information set and configured in CWM module under the following groups:



The Dashboard displays basic information related to work orders, contractors and workers:

- Total Work Orders- Total work orders created in COSEC.
- Work Orders In-Progress - Sum of all In Progress work orders.
- Open Work Orders- Sum of all work orders that haven't started yet.
- Closed Work Orders - Sum of all work orders that are already over.

### Daily Attendance Summary



*This section is displayed only if TAM license is available.*

- Reported- Total number of workers who have shifts scheduled today and have at least one punch on current day.
- Not Reported- Total of all unreported workers who have no punch for current day, though their shift is scheduled and are not on WO, PH or leave.
- On Leave - Total number of workers on leave on current day.
- On Tour - Total number of workers on tour on current day.
- On Week-Off- Total number of workers on week-off on current day.
- On Holiday- Total number of workers on holiday on current day.
- On Field Break - Total number of workers on Field on current day.
- On Rest Day - Total number of workers on rest day on current day.
- Scheduled Workers - Total number of workers who are scheduled to start work on current day.
- Scheduled Shifts - Total number of workers' shifts that are scheduled to start on current day.


### Today's Reminders

- Scheduled Work Orders - Total of all such active work orders starting on current day.
- Work Order Expiry- Total of all such active work orders whose validity is expiring on current day.
- Contractor's Validity Expiry- Total of all such active contractors whose validity is expiring on current day.
- Worker Visa Expiry- Total of all such active workers whose visa validity is expiring on current day.
- Worker's Driving License Expiry- Total of all such active workers whose driving license is expiring on current day.
- Worker's Passport Expiry- Total of all such active workers whose passport is expiring on current day.

### Contractors

- Total -Total contractors created in contractor master.
- Active - Contractor having: Current Date <= Validity Date.
- Blacklisted- Total contractors marked as Blacklisted by the administrator.

## Workers

- Total - Sum of all Active and Inactive workers. Click on  button. The Import Data page opens from where data can be imported in XLS and CSV format.

### Active

- Approved - All Active Workers, having assignment Status as Approved.
- Pending- All Active Workers, having assignment Status as Pending.
- Rejected- All Active Workers, having assignment Status as Rejected.
- Free- All Active Workers, having assignment Status as Free.
- Blacklisted- All Active Workers, having assignment Status as Blacklisted.

### Inactive

- Free- All Inactive Workers, having assignment Status as Free.
- Blacklisted- All Inactive Workers, having assignment Status as Blacklisted.

For more information on the above Dashboard options, click the respective information links on the Dashboard. The

Latest values on Dashboard are updated on clicking the Refresh  button.

# Contractor Types

For execution of a big project, different types of contractors like civil contractor, mechanical contractor, IT contractor etc are required.

To create the type of contractors go to **Contract Worker Management > Contractor > Contractor Types**

The screenshot shows the 'Contractor Types' management window. It features a toolbar with icons for back, add, edit, delete, and search. Below the toolbar, there are input fields for 'Contractor Types' (with a dropdown arrow), 'ID' (highlighted with a blue border), and 'Name'. A 'Default' checkbox is also present. On the right, a table lists the existing contractor types.

ID	Name
1	Contractor Type-1

Click on **Add** button to add a contractor type.

Specify the **Name** of the contractor type.

Click on **Save**. The ID of contractor type is auto-generated and all the contractor types will be listed in the right grid.

Check the box to make the contractor type as **default**. There is always one default contractor type which cannot be deleted. Also any contractor type can be made as default.

This screenshot shows the 'Contractor Types' management window after adding a new entry. The 'Contractor Types' dropdown now shows '2'. The 'ID' field contains '2' and the 'Name' field contains 'Civil Contractor'. The 'Default' checkbox is still unchecked. The table on the right now lists two contractor types.

ID	Name
1	Contractor Type-1
2	Civil Contractor

# Contractor Profile

Contractor Profile is the detailed profile of the contractors belonging to one of the contractor type.

For example: TCE, HPCL, Hiranandani, Alps Engineers etc are configured as Contractor Profiles under the Civil Contractor.

To create the contractor profile go to **Contract Worker Management > Contractor > Contractor Profile**

The screenshot shows a web application window titled "Contractor Profile". It contains a form with the following fields: ID\* (text input with value "COL"), Name\* (text input with value "HPCL"), Type (dropdown menu with "Civil Contractor" selected), and Validity End Date\* (calendar icon). Below these fields are five expandable sections: Address, Contact Information, Details, License Information, and Account Information. On the right side of the window, there is a table with columns ID, Name, Type, and Validity End. The table is currently empty, displaying "No Data".

Click on **Add** button to add a contractor profile.

Specify the **ID** of the contractor profile. This ID would be the CSS login ID and should be different from employee's ID and worker's ID.

Specify the **Name** of the contractor profile. For eg: HPCL is a contractor profile.

Select the **Type** from the drop down list of contractor types. For Eg: HPCL is a profile of civil contractor type.

Select the **Validity End Date** from the calendar button which is the end date for the contractor validity. This date shall not be included in the validity period.

This screenshot shows the same "Contractor Profile" form, but with the "Validity End Date" field populated with the date "31/05/2017". The other fields (ID, Name, Type) remain the same as in the previous screenshot.

Specify the **Address, Contact Information, Details, License Information and Account Information** by clicking the respective collapsible panel.



## Address:

Address	
Address	421 GIDC, Makarpura
Street	Vadar Road
City	Vadodara
Pincode	390011
State	Gujarat
Country	India
Phone	0265 2631666

## Contact Information:

Contact Person 1		Parth Thakar	
Mobile	9685623486		i
Email	parththakar@gmail.com		
Contact Person 2		Sanjay Mistry	
Mobile	8912352562		i
Email	sanjaymistry1@gmail.com		

## Details:

Details		
Service Tax No.		↑
PAN	30 Chars	↑
PF No.	30 Chars	↑
ESI No.		↑

## License Information:

License Information		
License No. *		↑
Description		

## Account Information:

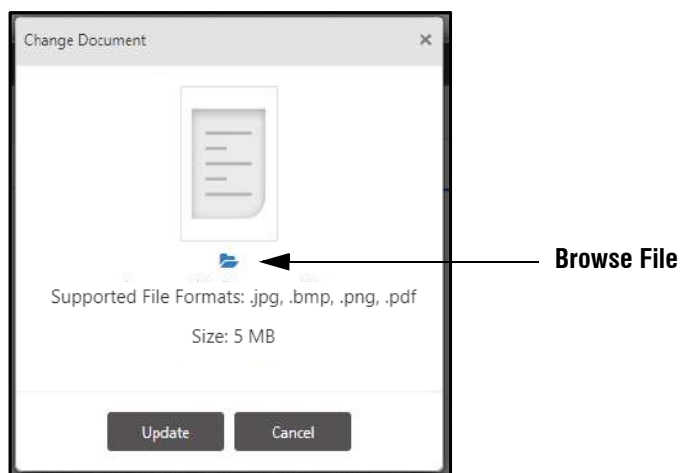
Account Information	
Enable Account	<input type="checkbox"/>
Edit Basic Details	<input type="checkbox"/>
Preferred Language	English

Enter the relevant information under each of the following collapsible panel:

- Address, Street, City, Pincode, State, Country and Phone under **Address** collapsible panel.
- Contact Person 1 and 2 and their Mobile and Email under **Contact Information** collapsible panel. The alerts —SMS, WhatsApp and Email are sent on the Mobile Number and Email ID configured here.
- Service Tax No., PAN, PF No., ESI No. under **Details** collapsible panel.
- License No. and Description under **License Information** collapsible panel.
- Select Enable Account and Edit Basic Details check boxes to enable the **CSS Account** of the contractor and enable him to edit the basic details. Select the Preferred language from the drop-down list under **Account Information** collapsible panel.

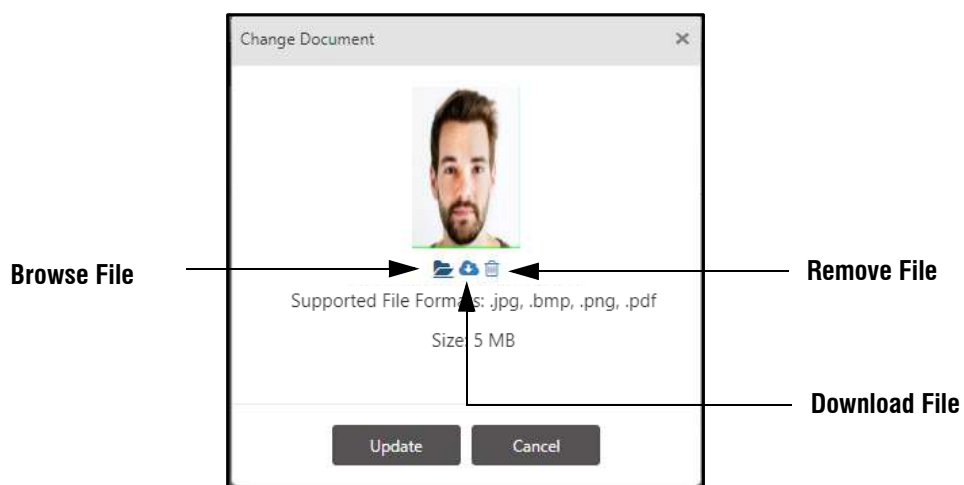
There are 10 additional fields in which you can enter the desired details of the Contractor as per your requirement. These are visible only after they are configured from **Admin> System Configuration> Global Policy> CWM**. For details refer [“Custom Fields For Contractors”](#). For example Security Number, ID Proof, Nominee Name, etc.


You can upload certain documents by clicking **Upload**  button. Then **Change Document** pop-up appears as shown below.





Click **Browse File**  .

To upload, select the desired file as per the supported formats and size (.jpg, .bmp, .png, pdf) from your local PC.




After uploading the file, if you wish to upload a different file instead of the current uploaded file, click **Browse File**  again and select the desired file from your local PC. The previously uploaded file will get replaced with the new file.

To download the uploaded file, click **Download File**  .

To remove the uploaded file, click **Remove File**  .

Then click **Update**.

The document will be uploaded and can be previewed by clicking on **Preview**  button.

Click on **Save** button to save the profile details.

After these details are entered, work order can be assigned to the contractor.

Multiple work orders can be assigned to a single contractor but each worker must be associated with one and only one Contractor.

A Contractor has assignment rights for only those Work Orders that are assigned to him, and those workers that are associated with him.

# Induction Levels

Once assigned to a work order, a worker needs to go through levels of approval that may comprise background check, orientation, skill-based training, safety training etc. before the organization considers the worker fit for the work. These levels are defined in COSEC as *Induction Levels*. The HR administrator can create upto 7 induction levels for workers in COSEC.

Configuring the approval process for a worker involves the following:

- Defining Induction Levels
- Assigning Induction Levels to an Approval Stage
- Assigning Approving In-Charges to each Induction Level in an Approval Stage

To define a new Induction Level, go to: **Contract Worker Management > Work Order > Induction Levels**

The screenshot shows the 'Induction Level' form. The 'ID' field contains '1' and the 'Name' field contains 'Induction Level-1'. The 'Default' checkbox is checked. The 'Description' field contains 'IT Induction'. On the right, a table lists the existing induction levels.

ID	Name
1	Induction Level-1

*Induction Level-1* is a system-defined default Induction Level. Click **New** to add a new level.

Enter a suitable **name** for the level (e.g. Medical Checkup, Safety Training etc.)

Enable the **Default** checkbox to make this the default induction level.

Enter a description for the level.

Click **Save** button to save the induction level.

New Induction Levels will appear in the grid list as shown:

The screenshot shows the 'Induction Level' form after adding a new level. The 'ID' field contains '4' and the 'Name' field contains 'Induction Level-4'. The 'Default' checkbox is checked. The 'Description' field contains 'Medical Checkup'. On the right, a table lists the updated induction levels.

ID	Name
1	Induction Level-1
2	Induction Level-2
3	Induction Level-3
4	Induction Level-4

# Approval Stages

An Approval Stage is a sequence of Induction Levels that a worker must complete before finally being approved for a work order. Each Induction Level can be assigned an *Approving In-Charge* who shall be responsible for approving or rejecting a worker once the level is completed.

An *Approval Stage*, in turn, can be assigned to a *Work Order* and becomes subsequently applicable to all workers associated with this work order.

To create a new Approval Stage, go to: **Contract Worker Management > Work Order > Approval Stages**

Level	ID	Induction Level
Level 1	1	Induction Level-1
Approving In-Charge 1	3	Isha
Level 2	2	Induction Level-2
Approving In-Charge 2	2	Chirag
Level 3	3	Induction Level-3
Approving In-Charge 3	101	Khushbu
Level 4	4	Induction Level-4
Approving In-Charge 4	1678	Supriya
Level 5	ID	Name
Approving In-Charge 5	ID	Name
Level 6	ID	Name
Approving In-Charge 6	ID	Name
Level 7	ID	Name
Approving In-Charge 7	ID	Name

ID	Name	Assigned Induction Levels
1	Approval Stage-1	1

Click **New**.

Enter an appropriate name for the Approval Stage.

Select the **Induction Level Assignment** section. This section allows you to select upto 7 Induction Levels for this Approval Stage in the required sequence using the respective pick-lists.

For each level, select an **Approving In-Charge** using the respective user picklist.

Click **Save**. The new Approval Stage appears in the grid list as shown.

The screenshot shows a web application window titled 'Approval Stages'. At the top, there is a green status bar that says 'Saved Successfully'. Below this, there is a search bar and a dropdown menu for 'Approval Stage' set to '2'. The main area is divided into two sections. The left section, titled 'Induction Level Assignment', contains a table with columns for 'Level', 'ID', and 'Name'. The right section contains a table with columns for 'ID', 'Name', and 'Assigned Induction Levels'.

Level	ID	Name
Level 1	1	Induction Level-1
Approving In-Charge 1	3	Isha
Level 2	2	Induction Level-2
Approving In-Charge 2	2	Chirag
Level 3	3	Induction Level-3
Approving In-Charge 3	101	Khushbu
Level 4	4	Induction Level-4
Approving In-Charge 4	1678	Supriya
Level 5	ID	Name
Approving In-Charge 5	ID	Name
Level 6	ID	Name
Approving In-Charge 6	ID	Name
Level 7	ID	Name
Approving In-Charge 7	ID	Name

ID	Name	Assigned Induction Levels
1	Approval Stage-1	1
2	Approval Stage-Technical	4

A worker can successfully complete an Approval Stage only when he gets approved by all the designated Approving In-Charges. The worker approval request will get rejected if the worker gets rejected at any level of the approval stage.



*If no Approving In-Charge is assigned for a particular Induction Level, then the approval request for this level will be sent directly to the system administrator.*

## Worker Approval Process

An Approval Request is generated in the following instances:

- When a Contractor creates a new Worker from CSS
- When a Contractor assigns Work Order to an existing Worker from CSS

Approval Requests generated by the admin are pre-approved. Approval Requests generated by a Contractor (from the *Contractor Self Service* account) are sent to the concerned approving in-charges depending on the type of approval policy defined in the COSEC Global Policy.

Based on the Global Policy, Worker Approval can be of two types as illustrated below:

- Direct Approval
- Approval Stage

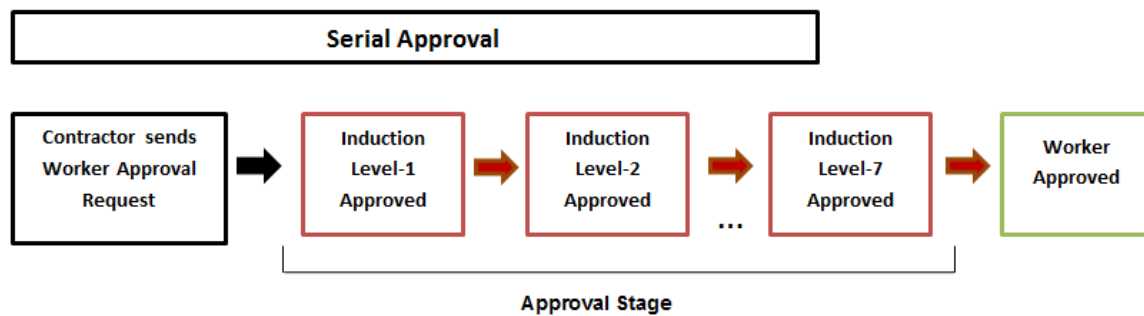
**Direct Approval:** In this type of approval, a worker approval request from CSS is sent directly to the system administrator, ignoring any Approval Stage that may be assigned to the Work Order.



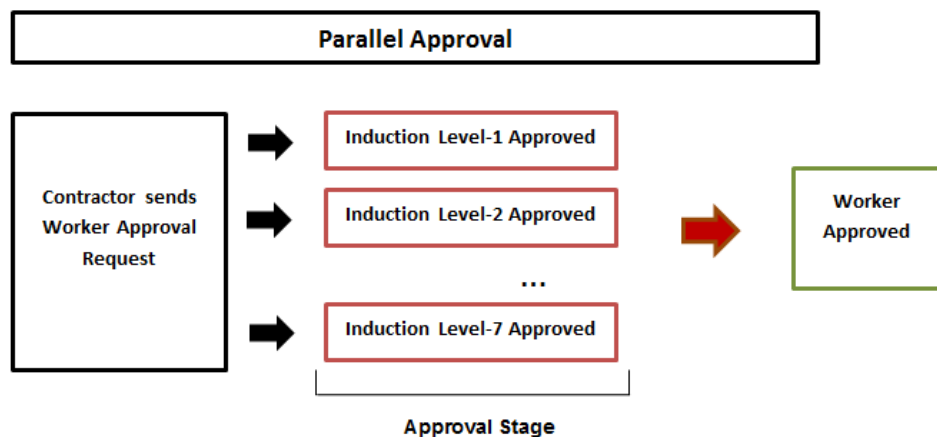
**Approval Stage:** In this type of approval, a worker approval request from CSS is sent to Approving In-Charges as per the *Approval Scheme* selected in Global Policy. There can be two types of Approval Scheme:

- Serial
- Parallel

In case of *Serial Approvals*, a worker must be approved serially by the designated Approving In-Charges, in the defined sequence of an Approval Stage.



In case of *Parallel Approvals*, worker approval requests are sent to all the Approving In-Charges at the same time and approvals may be performed in any sequence.

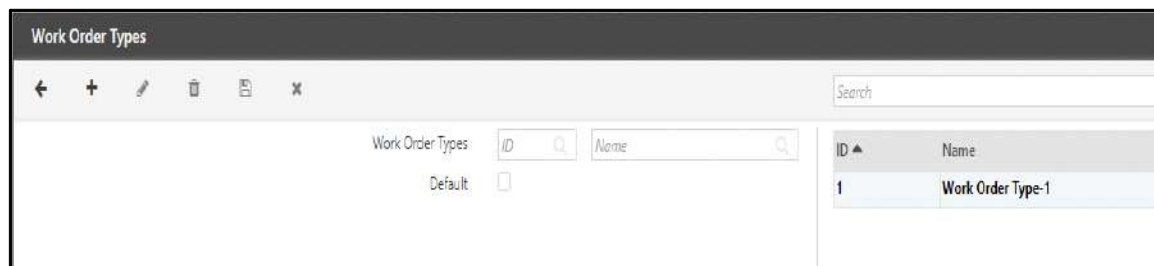


For more information on setting an approval type for the **Contract Worker Management** module, refer to Global Policy.

# Work Order Types

Work Orders of similar nature can be classified or grouped together as a **Work Order Type**. For e.g. Work Orders for mending broken machinery or repairing a pump can be grouped as “Repair”, while a Work Order for fitting a light bulb may be assigned the type “Installation”.

To define a Work Order Type, go to **Contract Worker Management > Work Order > Work Order Types**



The screenshot shows the 'Work Order Types' management interface. It includes a toolbar with icons for back, add, edit, delete, and search. Below the toolbar, there are input fields for 'Work Order Types' (ID and Name) and a 'Default' checkbox. A table on the right displays the current data:

ID	Name
1	Work Order Type-1

Click the **New** button to add a work order type.

Enter the **name** for the Work Order Type. The ID will be generated automatically.

Select the **Default** checkbox to make this Work Order Type as default.

Click the **Save** button.



The screenshot shows the 'Work Order Types' management interface after adding a new type. The 'Work Order Types' input field now contains '2' and the 'Name' field contains 'Constuction'. The 'Default' checkbox is still unchecked. The table on the right now displays two entries:

ID	Name
1	Work Order Type-1
2	Constuction

An arrow points to the second row (ID 2, Name Constuction) in the table.



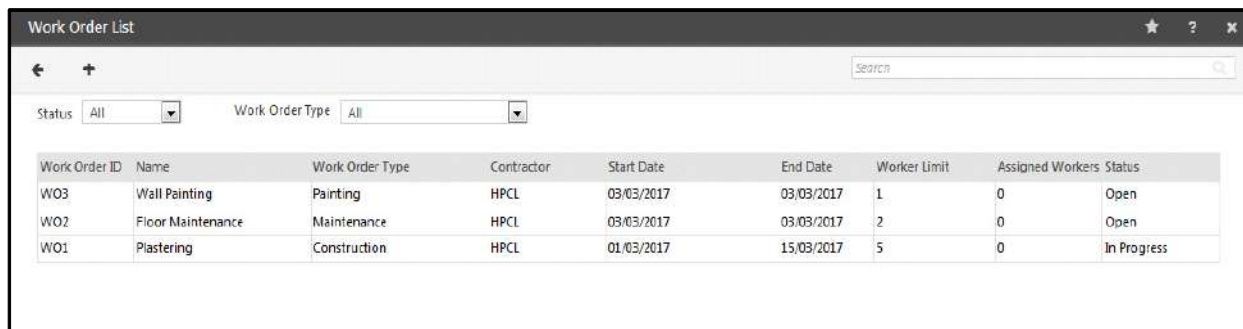
Once the Work Order type is created, you can create the work orders to be assigned to contractors by selecting the “type” created in Work Order type.



# Work Order List

This page shows a list of all the created Work Orders. The list can be viewed based on the filters. The work orders can be searched by entering the key word in the Search box.

To view a Work Order List, go to **Contract Worker Management > Work Order > Work Order List**



Work Order ID	Name	Work Order Type	Contractor	Start Date	End Date	Worker Limit	Assigned Workers	Status
WO3	Wall Painting	Painting	HPCL	03/03/2017	03/03/2017	1	0	Open
WO2	Floor Maintenance	Maintenance	HPCL	03/03/2017	03/03/2017	2	0	Open
WO1	Plastering	Construction	HPCL	01/03/2017	15/03/2017	5	0	In Progress

Use the following Status filters to view all or specific Work Orders:

- All
- Open
- In Progress
- Closed

Select any work order in the list to go to the corresponding **Work Order** page.

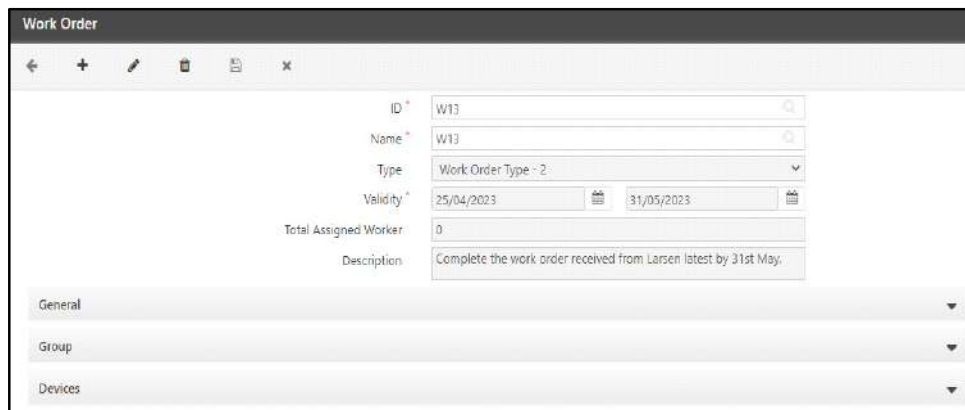
Also you can create the work orders from this page by clicking on **New** button.

# Work Order

---

Work Order is a work contract assigned to a Contractor to carry out a specific task within a stipulated time and cost. Hence a work order is always associated with a Contractor, who is responsible for completing the same by deploying suitable work force.

To create a new Work Order, go to: **Contract Worker Management > Work Order > Work Orders**



Click **New** button.

**ID:** Enter the Work Order **ID**

**Name:** Enter the Work Order **Name**.

**Type:** Select a Work Order **Type** from the drop down list.



The drop down list shows the Work order types created in Work Order Type section.

**Validity:** Select a Start and End date as the **Validity** period of the Work Order. The SA can also extended the date, provided if the work is **In Progress**.

**Description:** Enter a **Description** of the Work Order, if required.

## General

Select the **General** section to assign a *Contractor*, a *Site In-Charge* (Any ESS user), and an *Approval Stage* ([See "Approval Stages" on page 2699.](#)) to the Work Order.

Enter the maximum number of workers allowed for this Work Order (**Maximum Worker Limit**).

General

Associated Contractor *	CP12	Contractor Profile 12	⋮
Site In-Charge	Divya	Divya	⋮
Approval Stage *	1	Approval Stage-1	⋮
Maximum Worker Limit *	2		
Check Limit While Assigning Worker	<input checked="" type="checkbox"/>		

**Check Limit While Assigning Worker:** Enable the checkbox if maximum work order's limit & skill-wise limit for adding a worker needs to be checked.

When this checkbox is enabled, then while assigning the work order to a worker/workers, system will check the maximum worker limit provided for that particular work order.

If the no. of workers to whom particular work order is assigned in *CSS> Worker> Worker Profile* exceeds the maximum worker limit then the system will show error.

If disabled, then a contractor can assign a particular work order to more workers irrespective of the maximum worker limit provided.

#### Example:

*Work Order: Labeling work*

*Max Worker Limit: 12*

*Check Limit While Assigning Worker: Enabled*

*Now while assigning the work order, if 13 workers are assigned for this work order, then an error message will be displayed saying "Maximum Worker Limit exceeded" if Check Limit While Assigning Worker is enabled.*

### Skill-Wise Worker Limit

Click **Add** button. You can select the skill from the picklist and enter the worker limit for that particular skill. Then click OK to save skill wise worker limit.

Skill-Wise Worker Limit

Search

Skill ID	Name	Worker Limit
1	Skill-1	

⊕

✓ ✕

### Group

You can select the desired option— Organization, Branch and Department. Click on the respective picklist and select the desired option to assign the same to the new Work Order.

Group

Organization\*
1
MATRIX COMSEC PVT. LTD.

Branch\*
1
HEAD OFFICE

Department\*
1
ACCOUNTS & FINANCE

## Devices

To assign the Device Groups,

Click the **Device Group** picklist. The **Picklist For Device Group** pop-up appears.

Picklist For Device Group

Total Selected: 0 Records

Search
Show Selected

☐ Select All

<input type="checkbox"/>	DGID ▲	Name
<input type="checkbox"/>	1	ACTA Devices
<input type="checkbox"/>	2	RnD1Visitor
<input type="checkbox"/>	3	Device Group 3
<input type="checkbox"/>	4	Device Group 4
<input type="checkbox"/>	5	Device Group 5
<input type="checkbox"/>	6	Device Group 6
<input type="checkbox"/>	7	Device Group 7
<input type="checkbox"/>	8	Device Group 8
<input type="checkbox"/>	9	Device Group 9
<input type="checkbox"/>	10	Device Group 10

1 - 10 of 12 records

«
<
1
2
>
»

OK

Cancel

You can either select particular device groups or can select all the device groups at once.

To select particular device groups, select the check boxes of the desired devices groups.

Picklist For Device Group

Total Selected: 2 Records

Search  Show Selected

☐ Select All

<input type="checkbox"/>	DGID ▲	Name
<input checked="" type="checkbox"/>	1	ACTA Devices
<input checked="" type="checkbox"/>	2	RnD1Visitor
<input type="checkbox"/>	3	Device Group 3
<input type="checkbox"/>	4	Device Group 4
<input type="checkbox"/>	5	Device Group 5
<input type="checkbox"/>	6	Device Group 6
<input type="checkbox"/>	7	Device Group 7
<input type="checkbox"/>	8	Device Group 8
<input type="checkbox"/>	9	Device Group 9
<input type="checkbox"/>	10	Device Group 10

1 - 10 of 12 records

1 2

OK Cancel

OR

To select all the device groups at once, select the **Select All** check box. The device groups on all the pages will be selected.

Picklist For Device Group

Total Selected: 12 Records

Search  Show Selected

☒ Select All

<input checked="" type="checkbox"/>	DGID ▲	Name
<input checked="" type="checkbox"/>	1	ACTA Devices
<input checked="" type="checkbox"/>	2	RnD1Visitor
<input checked="" type="checkbox"/>	3	Device Group 3
<input checked="" type="checkbox"/>	4	Device Group 4
<input checked="" type="checkbox"/>	5	Device Group 5
<input checked="" type="checkbox"/>	6	Device Group 6
<input checked="" type="checkbox"/>	7	Device Group 7
<input checked="" type="checkbox"/>	8	Device Group 8
<input checked="" type="checkbox"/>	9	Device Group 9
<input checked="" type="checkbox"/>	10	Device Group 10

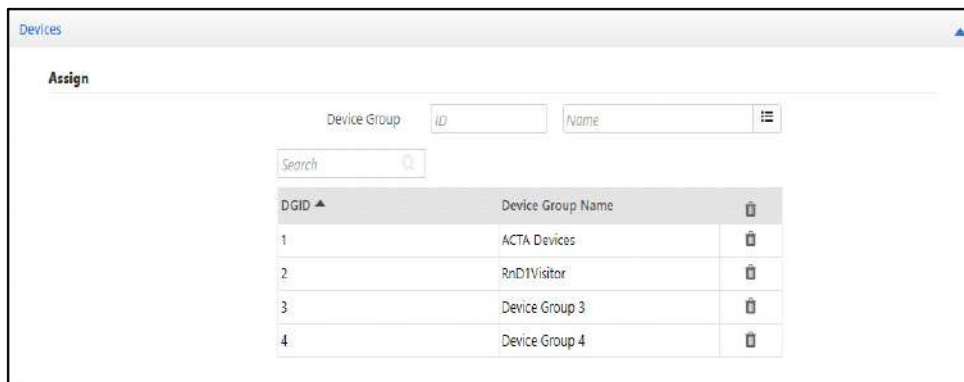
1 - 10 of 12 records

1 2





OK Cancel


Click **OK**.

The selected device groups appears in the grid.



The screenshot shows a web interface titled "Devices". Inside, there is a tab labeled "Assign". Below the tab, there is a "Device Group" section with two input fields: "ID" and "Name". Below these fields is a search bar with the placeholder text "Search". Below the search bar is a table with the following data:

DGID ▲	Device Group Name	
1	ACTA Devices	
2	RnD1Visitor	
3	Device Group 3	
4	Device Group 4	

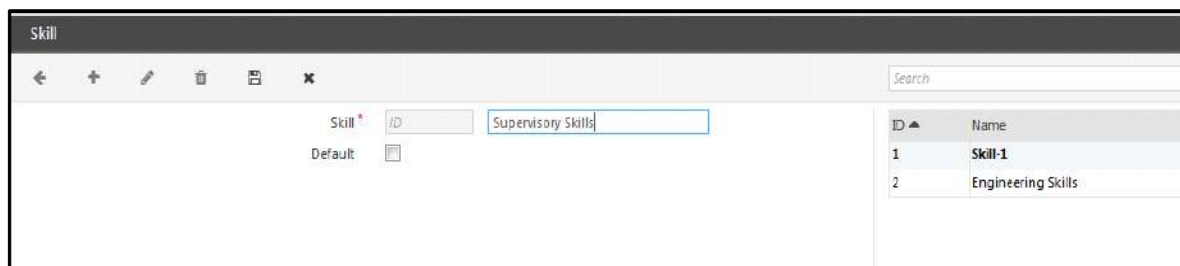
You can delete the desired device groups. To do so, click **Delete**  of the respective device group.

Click **Save** to save the Work Order.

# Skills

The skills are useful in assigning workers to work order based on their skill and also in defining worker limit in work order for different skills.

To create the skills of workers go to **Contract Worker Management >Workers > Skills**



The screenshot shows the 'Skill' management interface. On the left, there is a form with a 'Skill' field (marked with an asterisk) containing 'Supervisory Skills' and a 'Default' checkbox. Above the form is a toolbar with icons for back, add, edit, delete, and save. On the right, there is a table listing existing skills.

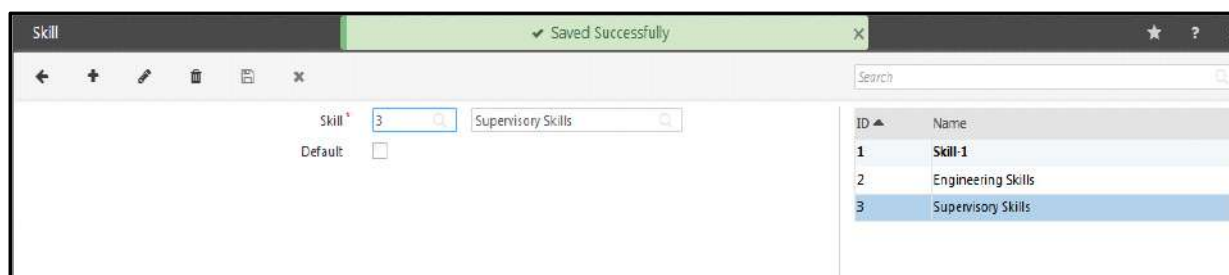
ID	Name
1	Skill-1
2	Engineering Skills

Click on **New** button to add a skill.

Specify the **Name** of the skill.

Click on **Save**.The ID of skill is auto-generated and all the skills will be listed in the right grid.

The skills can be searched by ID or Name from the search box on top right of the page.



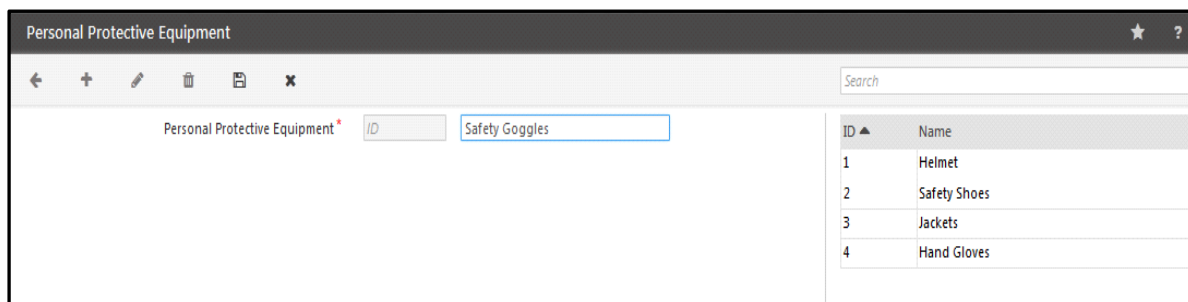
The screenshot shows the 'Skill' management interface after saving a new skill. A green banner at the top indicates 'Saved Successfully'. The 'Skill' field now contains '3' and the 'Supervisory Skills' name. The table on the right now includes three skills.

ID	Name
1	Skill-1
2	Engineering Skills
3	Supervisory Skills

# Personal Protective Equipment

Use this option to create a list of safety equipments that the organization issues to contract workers, for protection against hazards at work. Personal Protective Equipment (PPE) defined here can later be assigned to workers. This will help the administrator maintain records of the assigned equipments.

To define a new PPE, go to **Contract Worker Management > Workers > Personal Protective Equipment**




The screenshot shows the 'Personal Protective Equipment' form. On the left, there is a 'Personal Protective Equipment' label with a red asterisk, followed by an 'ID' input field and a 'Safety Goggles' input field. On the right, there is a table with two columns: 'ID' and 'Name'.

ID	Name
1	Helmet
2	Safety Shoes
3	Jackets
4	Hand Gloves

Click **New** button. Enter a **name** for the equipment (For e.g. Safety Shoes).

Click **Save**. The new equipment is successfully saved and appears on the grid list as shown.



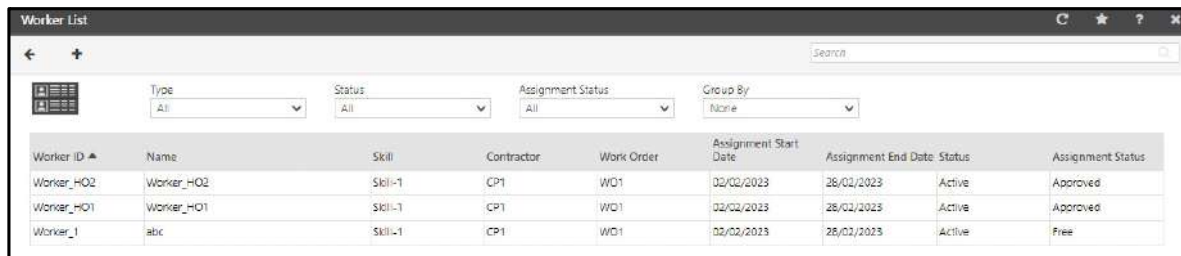
The screenshot shows the 'Personal Protective Equipment' form after a successful save. A green banner at the top indicates 'Saved Successfully'. The 'ID' input field now contains the number '5'. The 'Safety Goggles' input field is still present. The table on the right now includes a new row for 'Safety Goggles' with ID '5'.

ID	Name
1	Helmet
2	Safety Shoes
3	Jackets
4	Hand Gloves
5	Safety Goggles



# Worker List

To view the list of workers go to **Contract Worker Management > Workers > Worker List**.



The screenshot shows the 'Worker List' application window. It features a search bar at the top right and four filter dropdowns: Type (set to 'All'), Status (set to 'All'), Assignment Status (set to 'All'), and Group By (set to 'None'). Below the filters is a table with the following data:

Worker ID	Name	Skill	Contractor	Work Order	Assignment Start Date	Assignment End Date	Status	Assignment Status
Worker_HO2	Worker_HO2	Skill-1	CP1	WO1	02/02/2023	28/02/2023	Active	Approved
Worker_HO1	Worker_HO1	Skill-1	CP1	WO1	02/02/2023	28/02/2023	Active	Approved
Worker_1	abc	Skill-1	CP1	WO1	02/02/2023	28/02/2023	Active	Free

The Worker List will display only those workers/temporary workers for which rights are assigned to the SA, that is as per the enterprise groups assigned to the workers/temporary workers.

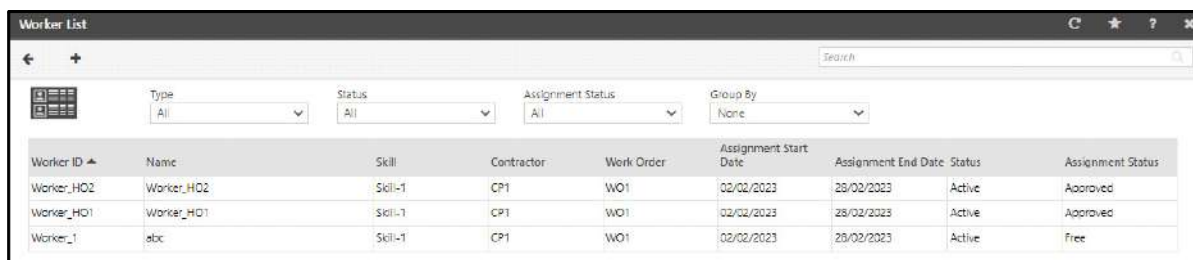
For example, if for Worker1 in Groups, Organization is ORG1 and if the rights for ORG1 are not assigned to the SA, then through the SA login the Worker List will not display Worker1.

For details, refer to [“Assigning Group-Wise Rights”](#) under [“System Accounts”](#) as well as [“Group”](#) under [“Worker Profile- Group”](#).

The workers list can be viewed in **Grid** and **Photo** View.

## Grid View

Click Worker List the Grid View appears. This view is the default view.




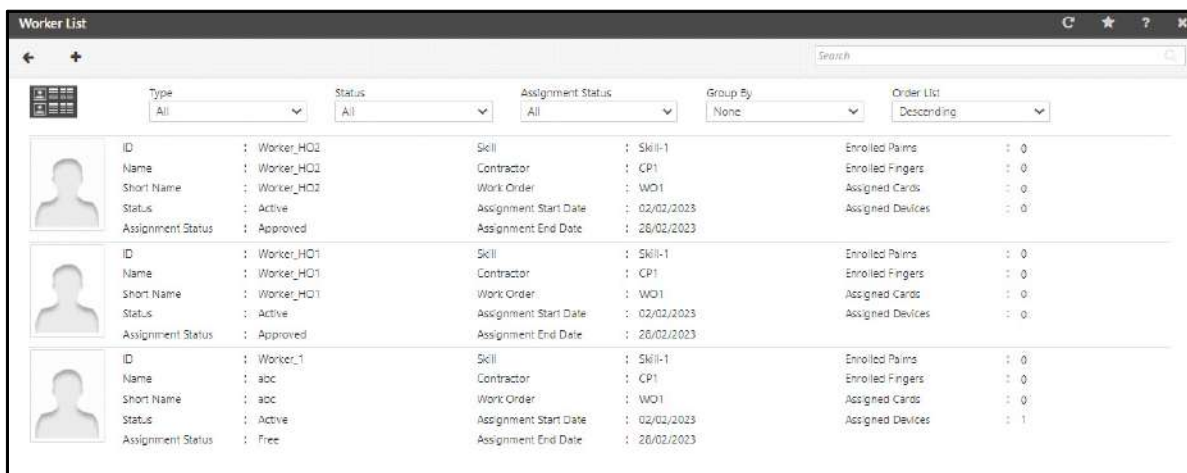
This screenshot is identical to the one above, showing the 'Worker List' application window in Grid View. It includes the same search bar, filters, and table of worker data.

The list can be filtered on the basis of **Type**, **Status**, **Assignment Status** and **Group By**.

- The Type options are All, Worker, Temporary Worker.
- The Status options are All, Active and Inactive.
- The Assignment Status options are All, Pending, Approved, Rejected, Free and Blacklisted.
- The Group By options are Work Order and Contractor.

## Photo View

Click **Photo View**  to view the workers in this view.



The screenshot shows the 'Worker List' application window. It features a search bar at the top right and five filter dropdowns: Type (All), Status (All), Assignment Status (All), Group By (None), and Order List (Descending). The main area displays a grid of worker profiles. Each profile includes a placeholder photo, a list of attributes (ID, Name, Short Name, Status, Assignment Status), and a list of details (Skill, Contractor, Work Order, Assignment Start Date, Assignment End Date). To the right of each profile, there are counts for Enrolled Pairs, Enrolled Fingers, Assigned Cards, and Assigned Devices.

ID	Name	Short Name	Status	Assignment Status	Skill	Contractor	Work Order	Assignment Start Date	Assignment End Date	Enrolled Pairs	Enrolled Fingers	Assigned Cards	Assigned Devices
Worker_HQ2	Worker_HQ2	Worker_HQ2	Active	Approved	Skill-1	CP1	WD1	02/02/2023	26/02/2023	0	0	0	0
Worker_HQ1	Worker_HQ1	Worker_HQ1	Active	Approved	Skill-1	CP1	WD1	02/02/2023	26/02/2023	0	0	0	0
Worker_1	abc	abc	Active	Free	Skill-1	CP1	WD1	02/02/2023	26/02/2023	0	0	0	1


The list can be filtered on the basis of **Type**, **Status**, **Assignment Status**, **Group By** and **Order List**.

- The Type options are All, Worker, Temporary Worker.
- The Status options are All, Active and Inactive.
- The Assignment Status options are All, Pending, Approved, Rejected, Free and Blacklisted.
- The Group By options are Work Order and Contractor.
- The Order List options are Ascending or Descending.

The worker can be searched by either ID, Name, Skill, contractor or work order from the search box on top right of the page.

Click on the worker's entry in the grid. The respective worker's profile page appears.

You can also add new worker's. To do so,

Click **New**  to add a new worker. The Worker Profile page appears. The new worker can be added from this page.

Worker Profile

←

+

🔑

🗑️

📄

✕

👤

🔄

🛡️

🔧

Search Worker ID or Name

🔍

👤

ID

Name

Active/Inactive

Profile

Devices

Credentials

Group

T&A

Access Control

ESS

Cafeteria

CWM

Basic

General

Personal

Contact

ID\*

15 char

Name\*

45 chars

Active

☒

Optional

Short Name

15 chars

Reference ID

8 chars

Integration Reference

20 chars

To know about the addition of workers See “Worker Profile” on page 2714.

# Worker Profile

Worker Profile enables to add new worker and edit/delete worker details. The worker details are displayed along with user details in the user configuration section of Users module.



*The new worker can be added from CWM or CSS module only.*

To add the worker select **Contract Worker Management > Workers > Worker Profile**.

## Profile

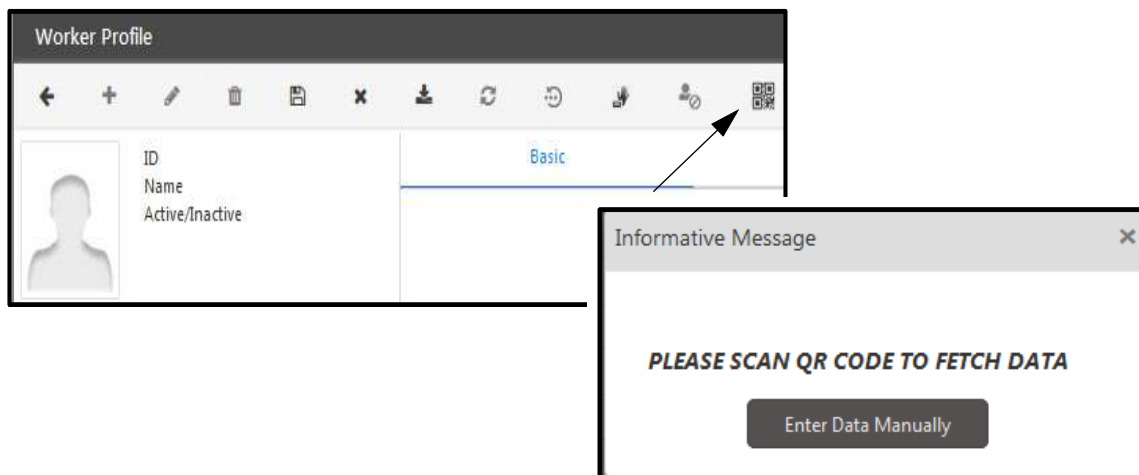
A screenshot of the 'Worker Profile' form in a web application. The form has a sidebar on the left with a list of menu items: Profile, Devices, Credentials, Group, T&A, Access Control, ESS, Cafeteria, CWM, Job Costing, Field Visit Management, Face Recognition, Visitor Management, and Events. The main area is divided into four tabs: Basic, General, Personal, and Contact. The 'Basic' tab is active and shows fields for ID (15 chars), Name (45 chars), and Active (checkbox). Below these is an 'Optional' section with fields for Full Name (200 Chars), Short Name (15 Chars), Reference ID (8 chars), and Integration Reference (20 Chars). The top of the form has a search bar labeled 'Search Worker ID or Name' and a toolbar with various icons.

To configure a Worker Profile, configure the following tabs:.

- Basic
- General
- Personal
- Contact

The Worker details can also be fetched directly from Worker's Aadhar Card. By Scanning the QR Code of Aadhar Card through 'QR Code Scanner', the information like Name, Gender, DoB, Address etc. available in Aadhar Card will be automatically fetched, and filled into the respective fields of above mentioned sections.

From the Top menu Bar click on the **QR Code** button and the pop-up will open as shown below.



Scan the worker's Aadhaar Card QR through the QR Code scanner or click on the **Enter Data Manually** button to enter the details manually into a pop-up window.

Once the Aadhaar Card is scanned and information is received by COSEC Server, the fetched details including Aadhaar Number will display as shown below.

The image shows a 'Fetched User Data' pop-up window. It contains a form with the following fields: Aadhaar No. (702351944240), Name (Bindu Singh), Gender (Female), Date Of Birth (15/09/1987), Address (A2-92-Sanidhya Township, Behin), Street (d Dasalad, Ajwa Road, Vadodara), City-Pincode (Vadodara - 390019), State (Gujarat), Country (India), and Father/Spouse Name (Roopnarayan Singh). At the bottom are 'OK' and 'Cancel' buttons.

You can edit the details if required.



*The Aadhaar Number must be unique from existing workers to configure a new one.*

Click **OK** to save the details or **Cancel** to discard the configuration.

The fetched details will be placed into the fields of respective sections.

If the Admin has configured QR Code scanning optional then, the above step can be skipped and the details can be added manually.

Configure the following details of the Worker— **Basic**, **General**, **Personal** and **Contact**.

If the Date of Birth Mandatory check box is enabled in “[Minimum Age Requirement for Workers](#)” in “CWM”, then Date of Birth parameter will be mandatory. When the date is configured here, the age will be displayed in Years and Months. Any Worker Profile below the age configured in Minimum Age under “[Minimum Age Requirement for Workers](#)” in Global Policy will not be created.

Under **General** tab, there are 10 additional fields in which you can enter the desired details of the workers as per your requirement. These are visible only after they are customized from **Admin> System Configuration> Global Policy> CWM**. For details refer “[Custom Fields For Contractors](#)”. For example Security Number, ID Proof, Nominee Name.

The Worker Profile configuration is same as that of User Profile. For more details, refer to “[Profile](#)” under “[Configuring Users](#)”.



*The worker profile will be saved only if contractor is assigned to the worker from the **CWM** tab.*

### Temporary Worker

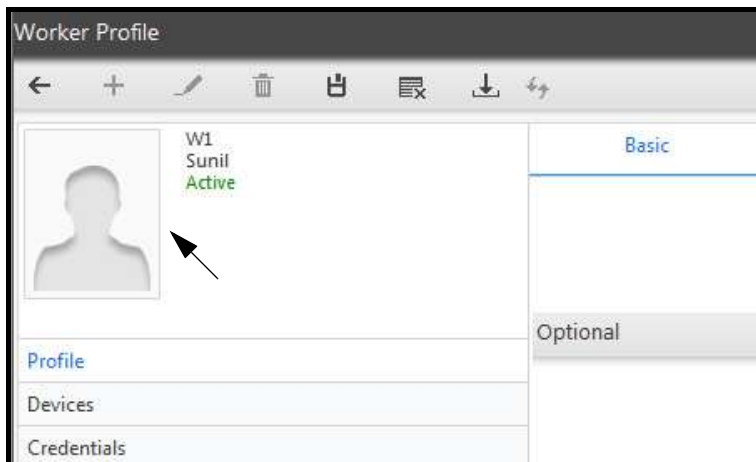
This panel will be visible only for Temporary Workers.

Temporary Worker	
Auto-Registered Date & Time	02/02/2023 10:05
Auto-Registered via Device	ARGO
Auto-Registered via Credential	Finger



- **Auto-Registered Date & Time:** Displays the date and time when the temporary worker is auto-registered.
- **Auto-Registered via Device:** Displays the name of the Device using which the temporary worker is auto-registered.
- **Auto-Registered via Credential:** Displays the credentials using which the temporary worker is auto-registered.

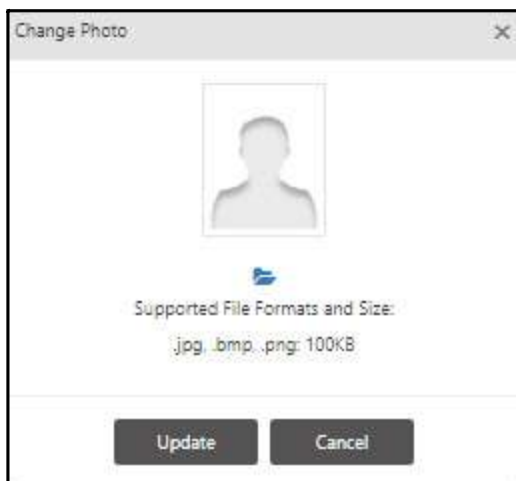
## Adding Worker Photo

The administrator can add a profile photograph for each worker defined on the COSEC system, from the **Worker Profile** page as shown below.



To add an image as the profile photograph for a worker,

1. On the **Worker Profile** page, click **Edit**  for the selected worker.
2. Click the **Change Photo** box.
3. On the **Change Photo** pop up window, click  to browse your computer for an image file. The Supported File Formats are \*.jpg, .bmp and .png.



4. Once the required image file is selected, click the **Update** button.
5. Click **Save**. The worker photo is successfully updated on the **Worker Profile** page as shown.

Worker Profile

W1

Sunil

Active

Basic

Optional

Profile

Devices

Credentials

T&A



# Worker Profile- Devices

The **Devices** tab enables the administrator to assign panels, direct doors and device groups already defined in the system to the workers.

Click the **Contract Worker Management > Worker Profile > Devices**.

Worker Profile

Search Worker ID or Name

Assign Configure

Device Group ID Name

Device Name

Search

DGID Device Group Name

No Data

Search

Device Name	Type	Restrict Access	Restrict Attendance	Action
No Data				

Note: Device(s) will be automatically retained which are part of any Access Rule(s) assigned to the Worker. For more details [Click here](#)

You can assign Device Groups as well as Devices to the workers.

To assign Device Groups,

Click the **Device Group** picklist. The **Picklist For Device Group** pop-up appears.

Picklist For Device Group

Total Selected: 0 Records

Search  Show Selected

☐ Select All

<input type="checkbox"/>	DGID ▲	Name
<input type="checkbox"/>	1	ACTA Devices
<input type="checkbox"/>	2	RnD1Visitor
<input type="checkbox"/>	3	Device Group 3
<input type="checkbox"/>	4	Device Group 4
<input type="checkbox"/>	5	Device Group 5
<input type="checkbox"/>	6	Device Group 6
<input type="checkbox"/>	7	Device Group 7
<input type="checkbox"/>	8	Device Group 8
<input type="checkbox"/>	9	Device Group 9
<input type="checkbox"/>	10	Device Group 10

1 - 10 of 12 records

« < 1 2 > »

OK Cancel

You can either select particular device group or can select all the device groups at once.

To select particular device group, select the check boxes of the desired device groups.

Picklist For Device Group

Total Selected: 2 Records

Search  Show Selected

☐ Select All

<input type="checkbox"/>	DGID ▲	Name
<input checked="" type="checkbox"/>	1	ACTA Devices
<input checked="" type="checkbox"/>	2	RnD1Visitor
<input type="checkbox"/>	3	Device Group 3
<input type="checkbox"/>	4	Device Group 4
<input type="checkbox"/>	5	Device Group 5
<input type="checkbox"/>	6	Device Group 6
<input type="checkbox"/>	7	Device Group 7
<input type="checkbox"/>	8	Device Group 8
<input type="checkbox"/>	9	Device Group 9
<input type="checkbox"/>	10	Device Group 10

1 - 10 of 12 records

« < 1 2 > »

OK Cancel

OR

To select all the device groups at once, select the **Select All** check box. The device group on all the pages will be selected.

Picklist For Device Group

Total Selected: 12 Records

Search  Show Selected

☒ Select All

<input checked="" type="checkbox"/>	DGID ▲	Name
<input checked="" type="checkbox"/>	1	ACTA Devices
<input checked="" type="checkbox"/>	2	RnD1Visitor
<input checked="" type="checkbox"/>	3	Device Group 3
<input checked="" type="checkbox"/>	4	Device Group 4
<input checked="" type="checkbox"/>	5	Device Group 5
<input checked="" type="checkbox"/>	6	Device Group 6
<input checked="" type="checkbox"/>	7	Device Group 7
<input checked="" type="checkbox"/>	8	Device Group 8
<input checked="" type="checkbox"/>	9	Device Group 9
<input checked="" type="checkbox"/>	10	Device Group 10

1 - 10 of 12 records

« < 1 2 > »

OK Cancel

Click **OK**.

The selected device groups appears in the grid.


Assign Configure

Device Group ID Name

Device Name

Search

DGID ▲	Device Group Name	
1	ACTA Devices	
2	RnD1Visitor	
3	Device Group 3	
4	Device Group 4	

You can delete the desired device group. To do so, click **Delete**  of the respective device group.

Then click **Save**. The devices belonging to the selected device group/s appear in the grid.


DGID	Device Group Name	
1	ACTA Devices	
3	Device Group 3	

Device Name	Type	Restrict Access	Restrict Attendance	Action
FACTORY ACCOUNT	Door V3	<input type="checkbox"/>	<input type="checkbox"/>	
Factory Admin FMX	Door FMX	<input type="checkbox"/>	<input type="checkbox"/>	
Factory Canteen FMX	Door FMX	<input type="checkbox"/>	<input type="checkbox"/>	
Factory Production1 ARGO	ARGO	<input type="checkbox"/>	<input type="checkbox"/>	
Factory QC ARGO	ARGO	<input type="checkbox"/>	<input type="checkbox"/>	
Factory QC FMX	Door FMX	<input type="checkbox"/>	<input type="checkbox"/>	
FACTORY STORE	Door V3	<input type="checkbox"/>	<input type="checkbox"/>	
Factory Vega Production-2	Vega Controller	<input type="checkbox"/>	<input type="checkbox"/>	
HO Access VEGA	Vega Controller	<input type="checkbox"/>	<input type="checkbox"/>	
HO TA ARGO	ARGO	<input type="checkbox"/>	<input type="checkbox"/>	

Click **Edit**. You can un-assign the particular device from the assigned Device Group by clicking on icon. Click on the icon to assign the device again.

Device Name	Type	Restrict Access	Restrict Attendance	Action
Factory Vega Production-2	Vega Controller	<input type="checkbox"/>	<input type="checkbox"/>	
RnD1 BOOM BARRIER IN	Vega Controller	<input type="checkbox"/>	<input type="checkbox"/>	
RnD1 GF TRIPOD LEFT OUT	PVR Door	<input type="checkbox"/>	<input type="checkbox"/>	

Select the corresponding **Restrict Access** and **Restrict Attendance** check boxes to enable these restrictions for the selected worker on the selected device.

 *If any device or a device belonging to any device group is un-assigned against any worker or is selected for deletion but is a part of the Access Rule which is assigned to that worker, then those door(s) will be retained against that worker.*

To assign Devices,

Click the **Device** picklist. The picklist for **Select Device** pop-up appears.

Select Device

Total Selected: 0 Records

Search

Show Selected

☐ Select All

<input type="checkbox"/>	Name	Type
<input type="checkbox"/>	ARCDC100_DD_Door	Panel200 Door
<input type="checkbox"/>	ARCDC100_DD_Door	Panel200 Door
<input type="checkbox"/>	ARCDC100_SD_Door	Panel200 Door
<input type="checkbox"/>	ARGO_PANEL	Panel200 Door
<input type="checkbox"/>	DoorV3	Panel200 Door
<input type="checkbox"/>	DoorV3_Door	Panel200 Door
<input type="checkbox"/>	DOORV4_PANEL	Panel200 Door
<input type="checkbox"/>	dumy	Panel200 Door
<input type="checkbox"/>	PATHV2_PANEL	Panel200 Door
<input type="checkbox"/>	VEGA_PANEL	Panel200 Door

1 - 10 of 89 records

<<

<

1

2

3

...

9

>

>>

OK

Cancel

You can either select particular device or can select all of the devices at once.

To select particular devices, select the check boxes of the desired devices.

Select Device

Total Selected: 2 Records

Search

☐ Select All

<input type="checkbox"/>	Name	Type
<input checked="" type="checkbox"/>	ARCDC100_DD_Door	Panel200 Door
<input checked="" type="checkbox"/>	ARCDC100_DD_Door	Panel200 Door
<input type="checkbox"/>	ARCDC100_SD_Door	Panel200 Door
<input type="checkbox"/>	ARGO_PANEL	Panel200 Door
<input type="checkbox"/>	DoorV3	Panel200 Door
<input type="checkbox"/>	DoorV3_Door	Panel200 Door
<input type="checkbox"/>	DOORV4_PANEL	Panel200 Door
<input type="checkbox"/>	dumy	Panel200 Door
<input type="checkbox"/>	PATHV2_PANEL	Panel200 Door
<input type="checkbox"/>	VEGA_PANEL	Panel200 Door

1 - 10 of 89 records

OK Cancel

**OR**

To select all the devices at once, select the **Select All** check box. The devices on all the pages will be selected.

Select Device

Total Selected: 10 Records

Search:  Show Selected

☒ Select All

<input checked="" type="checkbox"/>	Name	Type
<input checked="" type="checkbox"/>	ARCDC100_DD_Door	Panel200 Door
<input checked="" type="checkbox"/>	ARCDC100_DD_Door	Panel200 Door
<input checked="" type="checkbox"/>	ARCDC100_SD_Door	Panel200 Door
<input checked="" type="checkbox"/>	ARGO_PANEL	Panel200 Door
<input checked="" type="checkbox"/>	DoorV3	Panel200 Door
<input checked="" type="checkbox"/>	DoorV3_Door	Panel200 Door
<input checked="" type="checkbox"/>	DOORV4_PANEL	Panel200 Door
<input checked="" type="checkbox"/>	dumy	Panel200 Door
<input checked="" type="checkbox"/>	PATHV2_PANEL	Panel200 Door
<input checked="" type="checkbox"/>	VEGA_PANEL	Panel200 Door

1 - 10 of 89 records

« < 1 2 3 ... 9 > »

OK Cancel

Click **OK**.

The selected devices appears in the grid.

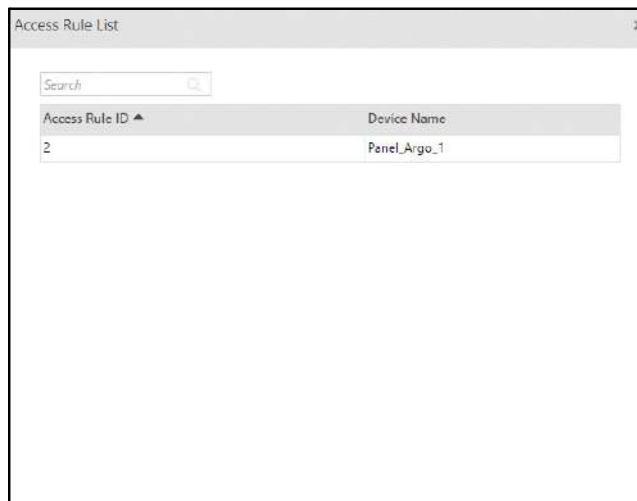
Search: <input type="text"/>				
Device Name	Type	Restrict Access	Restrict Attendance	Action
ARCDC100_DD_Door	Panel200 Door	<input type="checkbox"/>	<input type="checkbox"/>	
ARCDC100_DD_Door	Panel200 Door	<input type="checkbox"/>	<input type="checkbox"/>	
ARCDC100_SD_Door	Panel200 Door	<input type="checkbox"/>	<input type="checkbox"/>	
ARGO_PANEL	Panel200 Door	<input type="checkbox"/>	<input type="checkbox"/>	
DoorV3	Panel200 Door	<input type="checkbox"/>	<input type="checkbox"/>	
DoorV3_Door	Panel200 Door	<input type="checkbox"/>	<input type="checkbox"/>	
DOORV4_PANEL	Panel200 Door	<input type="checkbox"/>	<input type="checkbox"/>	
dumy	Panel200 Door	<input type="checkbox"/>	<input type="checkbox"/>	
PATHV2_PANEL	Panel200 Door	<input type="checkbox"/>	<input type="checkbox"/>	
VEGA_PANEL	Panel200 Door	<input type="checkbox"/>	<input type="checkbox"/>	

You can also delete the desired device. To do so, click **Delete** of the respective devices.

Select the corresponding **Restrict Access** and **Restrict Attendance** check boxes to enable these restrictions for the selected worker on the selected device.

- If you select the **Restrict Access** check box, then worker will be restricted for access on that Door. The punches of the worker on this door will be considered for attendance only and the door will not open for access.
- If you select the **Restrict Attendance** check box, the punch of the worker on door will open the door for access but will not be considered for calculating the attendance.

If you wish to check the devices assigned against any Access Rule, click the **Click here** link at the bottom of the page. The **Access Rule List** pop-up appears.



The 'Access Rule List' pop-up window features a search bar at the top with a magnifying glass icon. Below it is a table with two columns: 'Access Rule ID' and 'Device Name'. The table contains one entry with '2' in the first column and 'Panel\_Argo\_1' in the second column.

Access Rule ID	Device Name
2	Panel_Argo_1

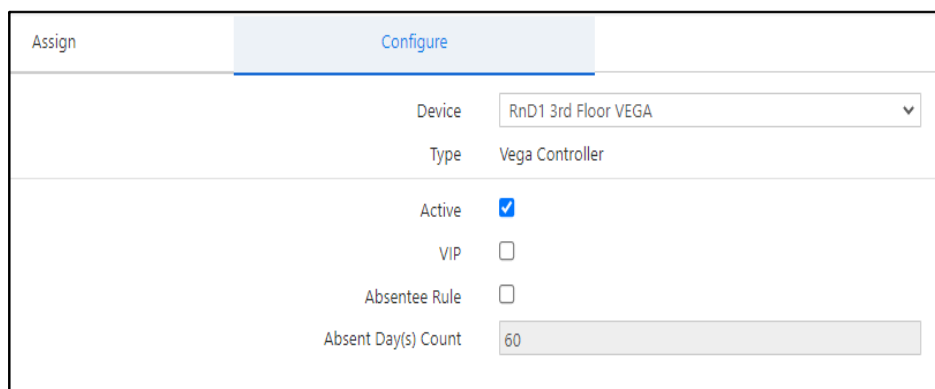
It displays the list of Devices along with the Access Rule ID against which they are assigned.



*If any device or a device belonging to any device group is un-assigned against any user or is selected for deletion but is a part of the Access Rule which is assigned to that user, then those door(s) will be retained against that user.*

Click the **Save** button to save the device selection for assigning to the user.

## Configure



The 'Configure' window has two tabs: 'Assign' and 'Configure'. The 'Configure' tab is active. It contains several settings: 'Device' is a dropdown menu showing 'RnD1 3rd Floor VEGA'; 'Type' is 'Vega Controller'; 'Active' is a checked checkbox; 'VIP' is an unchecked checkbox; 'Absentee Rule' is an unchecked checkbox; and 'Absent Day(s) Count' is a text input field with the value '60'.

Device	RnD1 3rd Floor VEGA
Type	Vega Controller
Active	<input checked="" type="checkbox"/>
VIP	<input type="checkbox"/>
Absentee Rule	<input type="checkbox"/>
Absent Day(s) Count	60

**Device:** Select a device from the **Device** drop down list. This list displays all devices on which the selected worker is assigned.

**Active:** The Active checkbox is selected by default to enable the worker credentials on the selected device.

**VIP:** Check the VIP box if the worker is to be given unrestricted access rights.

**Absentee rule:** Check this box to enable Absentee rule feature at worker level for Direct door. However, this option needs to be first enabled at the Direct door levels.

- **Absent Days Count:** Specify the days count ranging from 1 to 365 for which if the worker remains absent, he will be marked inactive.

- Check the **VIP** box if the user is to be given unrestricted access rights.
- Option is provided for enabling **Absentee rule** feature at worker level for each PANEL and DIRECT DOOR. However, this option needs to be first enabled at the PANEL and DOOR levels.
- Specify the day count for the Absentee rule ranging from 1 to 365.
- In the event of a PANEL controller select the **Access Profile** to be assigned to the user from the drop down list.
- Select the **Functional Group** in the event of a PANEL controller to be assigned to the user from the pull down list.
- In the event of a PANEL controller select the user's **Home Zone** and the **Visit Zone** from the respective drop down lists.
- In the event of a PANEL device the administrator can also assign a defined access route to the user. Select the access route from the drop down list if required. Select another device and configure the access control options as applicable.



*This option is only available with the **Access Control** add on module.*



# Worker Profile- Credentials

The **Credential** tab enables the configuration and enrollment of worker credentials in the COSEC system for the selected worker. On selection of the **Credentials** tab, the following page is displayed:

PIN	<input type="text"/>
Biometric Group No.	<input type="text"/>
Roaming User	<input type="checkbox"/>
Access Card 1	<input type="text"/>
Access Card 2	<input type="text"/>
Enrolled Fingers (Suprema Proprietary)	<input type="text"/>
Enrolled Fingers (Suprema ISO)	<input type="text"/>
Enrolled Fingers (Lumidigm ISO)	<input type="text"/>
Enrolled Fingers (Lumidigm Proprietary)	<input type="text"/>
Enrolled Palms	<input type="text" value="No. of Enrolled Palm"/>
Enrolled Faces	<input type="text"/>
Enable Self-Enrollment	<input type="checkbox"/>

The following parameters are available for configuration in the **Edit**  mode for the selected worker:

- **PIN:** Specify the PIN no. for the worker. PIN should be a numeric value ranging from 1 digit to a maximum of 15 digits. The value entered in this field will only be visible to the “sa” worker. For all other login workers the value in this field will be masked.
- **Biometric Group No.:** Specify the Biometric group number to be assigned to the worker if applicable. It is a number allotted to a group of workers assigned on a device. This enables the device to match a template against only those workers who are part of the same Biometric Group thus reducing processing time.

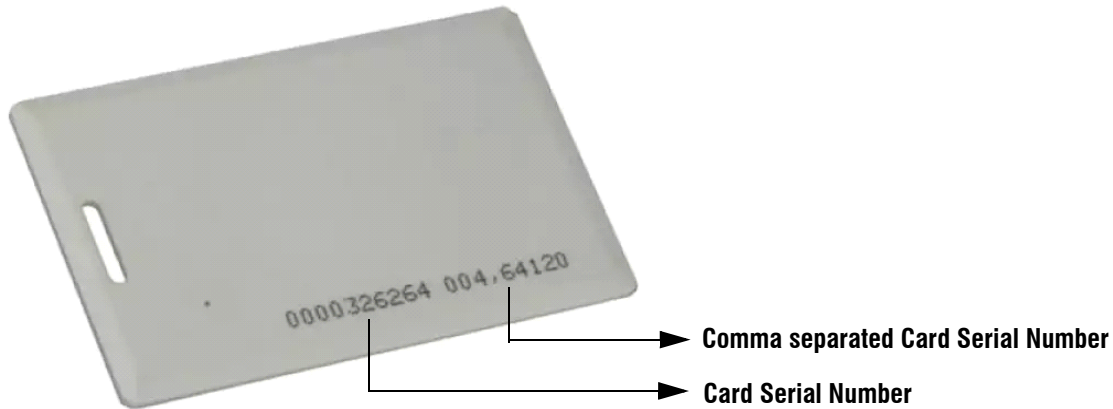
This value is used for Palm/Face Identification of worker on Identification Server in shorter time span considering worker first specifies Group No and then punches on the device.

Identification Server will be allocating templates to its child threads on the basis of this field.

- **Access Card 1:** Enter a Card Serial Number (CSN) or a Comma separated CSN which is to be assigned to the Worker Profile.

Format:

- **Card Serial Number** = 1343933547.
- **Comma separated CSN** = 12,345789



The maximum character limit for Card Serial Number (CSN) is 20 digits. While the maximum character limit for Comma separated CSN is 21 digits.

To configure a comma separated card value, make sure you configure a 26-bit card format in the system and then assign the same to the device. To know more, refer [“Card Formats”](#).

If there is any discrepancy while entering the Access Card number (CSN), the system will display an error.

This Access Card number will be synced with the devices to allow/deny access to workers.

COSEC accepts up to two cards per worker. So if required and available, enter the **Access Card 2** number.

Once you save the configurations, hover your mouse over the Comma separated CSN value of any Access Card, the system will display an encoded (converted) value of Comma separated CSN.

While importing the data of workers, make sure you enter the correct Access Card details in the desired format — Card Serial Number (CSN) or Comma separated CSN. To know more about importing workers, refer [“Import Workers”](#).

**Access Card 2**, can also be used to generate the QR Code. Workers can access the device using this QR Code.



*Access Via QR Code feature is not applicable for Temporary Workers.*

*Make sure you have saved the earlier configurations as QR Code can be generated in view mode only*

For QR Code functionality, make sure:

- you have enabled **Allow Access Via QR** in the desired ARGO FACE (Direct Door / Panel Door) device as well as configured the Image Setting parameters. For details refer to [“Face/Image Settings”](#).
- enabled the Alert, so that the generated/re-generated QR can be sent to the desired users/workers using SMS/Email/WhatsApp. Make sure you select the Alert Filter as **Users** and Event as **User Access - QR Credentials**. For details, refer to [“Configuring Alert Messages”](#).

If you add new devices and want **Allow Access Via QR** check box to be enabled by default, make sure you have enabled the same in Global Policy > Device. For details refer to [“Device”](#) in [“Defining Global Policies”](#).

QR Code can be generated in two ways:

- If a card is enrolled, then with the same details a QR Code can also be generated. In this case the worker will be able to use, both the Card as well as the QR Code to access the device.

To generate the QR Code:

Worker Profile

Worker1  
Worker1  
Active

Credentials

PIN

Biometric Group No 6

Roaming User ☐

Access Card 1

Access Card 2

Enrolled Fingers (Suprema Proprietary) 0

Enrolled Fingers (Suprema ISO) 0

Enrolled Fingers (Lumidigm ISO) 0

Enrolled Fingers (Lumidigm Proprietary) 0

Enrolled Palms 0



Enrolled Faces 0

Enable Self-Enrollment ☐

Click Here



**Generate** will be accessible in view mode only.

- Click **Generate** . This generated QR Code is sent to the desired users via User Access - QR Credentials Alert using SMS, Email or WhatsApp as per the configurations done. Now, this QR Code can be used as a credential to access the device.
- Click **Download** , to download the generated QR Code on the local PC.
- If a card is enrolled, but you do not wish to generate the QR Code using the same details, then the QR Code can be generated using Re-generate option. In this case the Card value will be overwritten with the QR Code value and the worker will be able to use only the QR Code.

You can also click Re-generate to generate a new QR Code after you have generated the QR Code once.

To generate the QR Code:



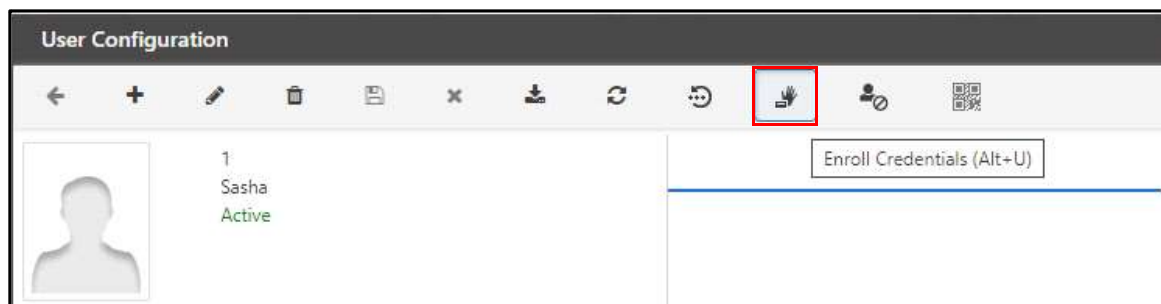
**Re-generate** will be accessible in view mode only.

- Click **Re-generate** . A warning pop-up appears as the existing value of the Access Card will be erased. Click Yes to confirm. The new QR Code is generated. This generated QR Code is sent to the desired users via User Access - QR Credentials Alert using SMS, Email or WhatsApp as per the configurations done. Now, this QR Code can be used as a credential to access the device.
- Click **Download** , to download the generated QR Code on the local PC.
- **Enrolled Fingers:** This option displays the number of fingerprint templates enrolled against the selected worker.
- **Enrolled Palm:** This option displays the number of palm vein templates enrolled against the selected worker.
- **Enrolled Face:** This option displays the number of Face templates enrolled against the selected worker.
- **Enable Self-Enrollment:** This option can be enabled to allow a worker to enroll himself/herself on COSEC using an already provided access card/PIN.

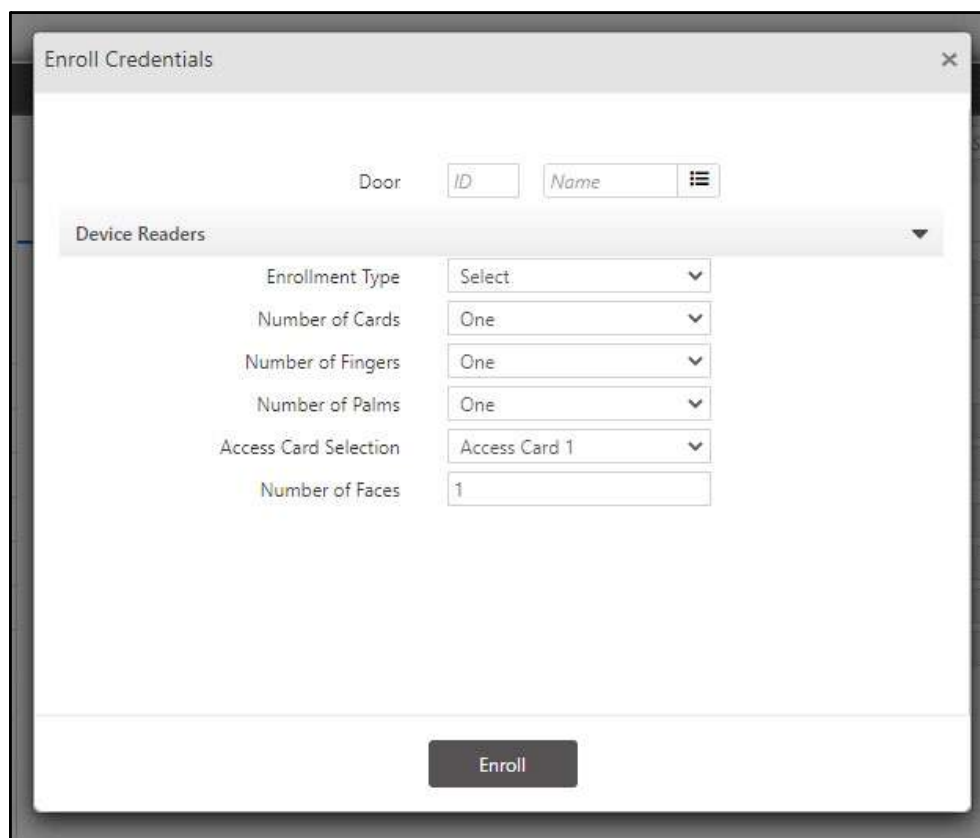
The administrator can also perform enrollment for the selected worker by clicking the **Enroll Credentials** button.

## Enroll Credentials

The Administrator can enroll credentials for the worker by clicking **Enroll Credentials** as shown below.



The **Enroll Credentials** window appears as shown below:



- **Door:** Select the desired door from the pick list on which the enrollment is to done.

#### **Device Readers**

Device Readers displays the information of the readers configured in the selected **Door**.

Enroll Credentials

Door ID Name

**Device Readers**

Card Reader

Biometric Reader

External Reader

Enrollment Type Select

Number of Cards One

Number of Fingers One

Number of Palms One

Access Card Selection Access Card 1

Number of Faces 1

Enroll

Card Reader, Biometric Reader and External Reader information are displayed here.

Enroll Credentials

Door 2 ARGO

**Device Readers**

Card Reader MiFare Reader

Biometric Reader None

External Reader HID Prox Reader

Enrollment Type Read Only Card

Number of Cards One

Enroll

- **Enrollment Type:** From the dropdown list, select the desired enrollment type — **Read Only Card, Smart Card, Biometrics, BiometricsThenCard, Face, Mobile** or **Duress Finger**.

Based on the selection of the **Door** and **Enrollment Type**, below parameters will be displayed for configuration.



*When Enrollment Type selected is Smart card or BiometricThenCard, Duress Finger Templates will not be written in the Smart Card.*

*Below parameters also depend on the Readers configured in the Door. To configure the desired Reader, refer Readers section under Devices > Device Configuration (of the desired Door) > Profile > Readers.*

**1. Enrollment Type = Read Only Card**

**Number of Cards:** Select the desired number of cards from the drop down list.

**2. Enrollment Type = Smart Card**

**Number of Cards:** Select the desired number of cards from the drop down list.

**Details on Smart Card**

Select the desired check boxes of the parameters — **Worker ID**, **Facility Code (FC)**, **Additional Security Code (ASC)** — which are to be displayed on the Smart Card.

Select the desired number of **Finger Templates** from the drop down list.

If the **Door** is selected as PVR Door, **Palm Templates** parameter will be visible. Select the check box of this parameter if you wish to display it on the Smart Card.

To store palm templates, MiFare 4k reader must be configured in the PVR Door.



*Door PVR must be set in the Adaptive mode (configure from Admin> System Configuration> Global Policy) for the palm templates to be saved into the Smart Card.*

### **Additional Details on Smart Card**

Other than the parameters mentioned in the Details on Smart Card, you can display additional details on Smart Card.

Select the desired check boxes of the parameters — **Short Name, Branch, Department, Designation, Emergency Contact, Blood Group and Medical History**— which are to be displayed on the Smart Card.

The values of these additional details are displayed as well. Make sure the values of these additional details are not blank for successful enrollment process.

### **3. Enrollment Type = Face**

**Number of Faces:** Select the desired number of faces from the dropdown list.

The screenshot shows a window titled "Enroll Credentials". Inside, there are several fields: "Door" with the value "13", "Device Readers" with a dropdown menu showing "ARGO-Device", "Enrollment Type" with a dropdown menu showing "Face", and "Number of Faces" with a text input field containing "1". At the bottom center, there is a dark button labeled "Enroll".

### **4. Enrollment Type = Biometrics**

**Number of Fingers/ Number of Palms:** Select the desired number of fingers or palms from the drop down list.



The image displays two screenshots of a configuration interface for door access control. The top screenshot shows a configuration for 'Door 3' with 'ARGO' device readers. The 'Enrollment Type' is set to 'Biometrics' and the 'Number of Fingers' is set to 'One'. The bottom screenshot shows a configuration for 'Door 1' with 'PVR' device readers. The 'Enrollment Type' is set to 'Biometrics' and the 'Number of Palms' is set to 'One'.

**5. Enrollment Type = BiometricsThenCard**

**Number of Cards:** Select the desired number of cards from the drop down list.

**Number of Fingers/ Number of Palms:** Select the desired number of fingers or palms from the drop down list.

### Details on Smart Card

Select the desired check boxes of the parameters — **Worker ID**, **Facility Code (FC)**, **Additional Security Code (ASC)** — which are to be displayed on the Smart Card.

Select the desired number of **Finger Templates** from the drop down list.

If the **Door** is selected as PVR Door, **Palm Templates** parameter will be visible. Select the check box of this parameter if you wish to display it on the Smart Card.

To store palm templates, MiFare 4k reader must be configured in the PVR Door.



*Door PVR must be set in the Adaptive mode (configure from Admin> System Configuration> Global Policy) for the palm templates to be saved into the Smart Card.*

### Additional Details on Smart Card

Other than the parameters mentioned in the Details on Smart Card, you can display additional details on Smart Card.

Select the desired check boxes of the parameters — **Short Name, Branch, Department, Designation, Emergency Contact, Blood Group** and **Medical History**— which are to be displayed on the Smart Card.

The values of these additional details are displayed as well. Make sure the values of these additional details are not blank for successful enrollment process.

#### 6. Enrollment Type = Mobile



To select **Enrollment Type** as **Mobile**, the particular device must have BLE support and ensure Bluetooth is ON in the mobile.

**Access Card Selection:** Select the desired Access Card from the drop down list.

Facility Code (FC): Select this check box to enroll the Facility Code (FC) against the worker.

Click **Enroll** to initiate the enrollment process.

Enroll Credentials

✓ Enrollment Command Sent

Door 3 ARGO

Device Readers

Enrollment Type Mobile

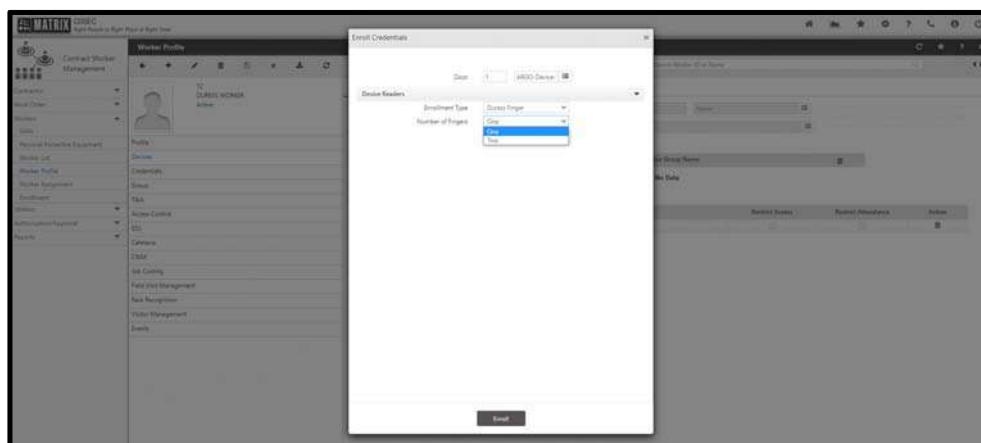
Access Card Selection Access Card 1

Facility Code (FC) ☐

Enroll

## 7. Enrollment Type = Duress Finger

**Number of Fingers:** Select the desired number of fingers that you want to enroll as **Duress Finger** from the drop-down list— **One** or **Two**.



Click **Enroll** to initiate the enrollment process.

To know more about enrolling credentials of workers, refer [“Enrollment”](#).

# Worker Profile- Group

The Group section enables to assign the Enterprise groups, Reporting group, Approval Policy, Leave group and Week off group to the worker. On selection of the **Group** tab, the following page is displayed:

Field	Value	Picklist
Organization *	1	Organization-1
Branch *	1	Branch-1
Department *	1	Department-1
Section *	1	Section-1
Category *	1	Category-1
Grade *	1	Grade-1
Designation *	1	Designation-1
Custom Group 1 *	1	Custom Group 1
Custom Group 2 *	1	Custom Group 2
Custom Group 3 *	1	Custom Group 3
Reporting Group	ID	Name
Approval Policy	ID	Name
Leave Group *	1	Leave Group-1
Week Off Group	ID	Name

This page will be available with the Time & Attendance add on module.

The default groups will be shown in the respective fields. Click on the picklist buttons and select the appropriate enterprise groups (Organization, Branch, Department, Section, Category, Grade, Designation) to assign the worker.



*The Enterprise Groups changed from here will be effective from the current date only. For the changed group to be effective from previous date, change the group from User module> Utilities> Change Group.*

*The picklist options that appear in each enterprise group will be as per the rights assigned to the SA. For details, refer to "Assigning Group-Wise Rights" under "System Accounts".*

**Reporting Group:** Select the group from the picklist to be assigned as reporting group for the worker. The In-charge of the selected group will be the in-charge of the worker. The different applications of worker will require authorization of the in-charge of the group.

To create the Reporting group; go to *Users module> Reporting In-charge> Reporting Group*.

**Approval Policy:** When Reporting group is assigned to the worker only then you can select the approval policy from the pick-list to assign to the worker.

The Approval policy is created from *Users module> Reporting In-charge> Approval Policy*.

The Approval Policy set in Enterprise Structure> Master page will be set as default approval policy when new worker is created. Eg: Suppose Organization 1 is assigned Approval Policy1; when new worker is added in Organization1 then by default Approval policy1 will be assigned to the worker.

**Leave Group:** Select the leave group from the pick-list to assign a group of leaves to the worker.



To assign the new leave to the worker, add the leave to the Leave group and assign the leave group to the worker.

**Week Off Group:** Select the week off group from the picklist to assign the configured week offs to the worker.



To create the Week Off group, go to Shifts and Schedule module > Week Off Group

Group			
Organization *	<input type="text" value="1"/>	<input type="text" value="Organization-1"/>	
Branch *	<input type="text" value="1"/>	<input type="text" value="Branch-1"/>	
Department *	<input type="text" value="1"/>	<input type="text" value="Department-1"/>	
Section *	<input type="text" value="1"/>	<input type="text" value="Section-1"/>	
Category *	<input type="text" value="1"/>	<input type="text" value="Category-1"/>	
Grade *	<input type="text" value="1"/>	<input type="text" value="Grade-1"/>	
Designation *	<input type="text" value="1"/>	<input type="text" value="Designation-1"/>	
Custom Group 1 *	<input type="text" value="1"/>	<input type="text" value="Custom Group 1"/>	
Custom Group 2 *	<input type="text" value="1"/>	<input type="text" value="Custom Group 2"/>	
Custom Group 3 *	<input type="text" value="1"/>	<input type="text" value="Custom Group 3"/>	
Reporting Group	<input type="text" value="5"/>	<input type="text" value="Factory Group"/>	
Approval Policy	<input type="text" value="4"/>	<input type="text" value="Both Final-2"/>	
Leave Group *	<input type="text" value="1"/>	<input type="text" value="Leave Group-1"/>	
Week Off Group	<input type="text" value="ID"/>	<input type="text" value="Name"/>	



If 'Shift Based Access' flag is enabled in User Configuration, then effect of Week Off group assigned to worker differently won't be effective.

Also if flag of 'Deny Access On Week Off' is enabled in Shift Schedule assigned to worker, then worker won't be granted access though worker did not have week off based on Week Off group.

# Worker Profile- T&A

This tab will be available only for the *Time and Attendance license* Here, the administrator can enter the attendance and the working policy related information for the worker:

The screenshot shows the 'Worker Profile' window for a worker named 'W1 Sunil Active'. The left sidebar contains a list of tabs: Profile, Devices, Credentials, Group, T&A (selected), Access Control, ESS, Cafeteria, CWM, Job Costing, Field Visit Management, Face Recognition, and Events. The main area is divided into two sections: 'Attendance' and 'Policy'. The 'Attendance' section includes fields for 'Enable Attendance Calculation' (checked), 'Restrict Half Day Considerations' (unchecked), 'Attendance Marking Type' (Normal), 'Max Punches To Be Considered' (Select), and 'Bypass Finger/Palm/Face For Attendance' (unchecked). The 'Policy' section includes fields for 'Max Short Leaves Allowed' (None), 'OT/C-OFF Eligibility' (None), 'Authorize C-OFF On' (WO, PH, WO/PH, FB, RD, Normal Day), 'Bus Route' (ID, Name), 'Enable Site Based Auto Tour Application' (unchecked), 'Tour' (Select), 'Base Site Selection' (ID, Name), and 'Auto Authorize Site Based Tour Application' (unchecked).

This section shows the configuration for 'Location Based Auto Tour Application'. It includes fields for 'Enable Location Based Auto Tour Application' (checked), 'Tour' (T2 - Tour2), 'Base Location Assignment' (Selected), 'Location' (Code, Name), 'Location Group' (ID, Name), 'Auto Authorize Location Based Tour Application' (checked), and 'Show Attendance Details On Device' (checked). A message box indicates '1 Location(s) are selected'.



*If the Attendance Policy for the worker is configured then assign that policy to the worker. There is no need to configure same parameters i.e. "Max Punches to be considered" and "Max Short Leaves Allowed" here. Still If configured, then parameters configured here will be applicable for the worker.*

## Attendance

In the **Attendance** section, configure the following parameters:

- **Enable Attendance Calculation** - This field is checked by default. uncheck this box if you want to disable attendance calculation for this worker. This option has to be enabled for configuring any of the other parameters on this page.

Attendance Policy

Enable Attendance Calculation	<input checked="" type="checkbox"/>
Restrict Half Day Considerations	<input type="checkbox"/> ⓘ
Attendance Marking Type	Normal ▼
Max Punches To Be Considered	Normal
Bypass Finger/Palm/Face For Attendance	First Punch Only
Max Short Leaves Allowed	Executive
OT/C-OFF Eligibility	Flexible
	Present

- **Restrict Half Day Considerations** - Enabling this option will restrict the half day markings and will consider only the full day attendance calculations.

*For Example:*

If the worker has completed only the half of the required working hours, and **Restrict Half Day Considerations** is enabled for him, then his attendance will be considered as full day absent and the half day consideration will be restricted.

- **Attendance Marking Type** - In case the attendance calculation is enabled then the worker needs to select the attendance marking type from the drop down list.

The following options are available:

- **Normal:** type will be default for all workers.
- **First Punch Only:** type workers need only entry punch at the start of the shift. In this case the system will assume that the shift end time is the last out Punch for the day. All other calculations remain the same as for normal type workers.
- **Executive:** type workers will be marked full day present if at least one punch (entry/exit) is available in the day. There will not be any late/early & overtime calculation like it is done for normal and single punch type workers.
- **Present:** category workers do not require any punch for them to be marked full day present. All workers belonging to this category are marked present by default.
- **Flexible:** category workers' working will be checked against required minimum working and if it is more than required, full day attendance will be marked. In this case the minimum working hours required in a day for full day attendance and half day attendance can also be defined for each worker as explained below.



- **Minimum Working Hours Required** - In the event of selecting the Flexible type for a worker the administrator can also specify the minimum working hours required in a day to be marked **Full Day** or **Half Day** present. Specify the hours in hh:mm format.

- **Max Punches to be Considered** - This parameter specifies the maximum entry/exit events per worker to be considered in a day for attendance calculation.
- Specify a value in this field if the value defined at the global level is to be overridden for this worker. The options available are 2, 4, 6, 8, 10, 12 and N-Punch. N-Punch allows unlimited number of punches in IN/OUT pair.

- **Bypass Finger/Palm/Face For Attendance** - On checking this option, the worker can punch in or out using any of the assigned credentials and the same will be considered for attendance calculation. On selection of this option, finger/palm/face identification is not required for marking attendance. The worker can use pin or card to mark the attendance.
- **Max Short Leaves Allowed** - This parameter specifies the maximum number of short leaves (personal hours) to be allowed to selected workers in an attendance period. This parameter is also defined at the global system configuration level and can be overridden for specific workers using this option. The administrator can specify a value of a maximum two digits in this field.
- **OT/C-OFF Eligibility:** This parameter enables the administrator to determine whether the overtime authorization for this worker is to be done in one of the following ways:

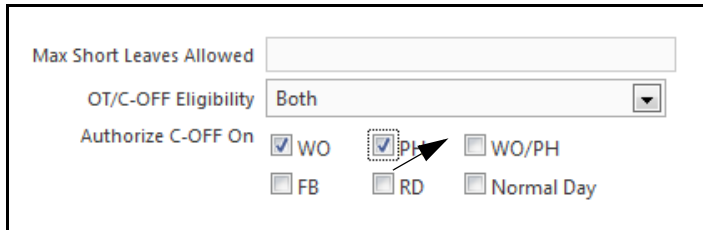
**None** - Extra work cannot be authorized as overtime or C-OFF for worker.

**Only Overtime** - Extra Work can only be authorized as overtime.

**Only C-OFF** - Extra Work can only be authorized as C-OFF.

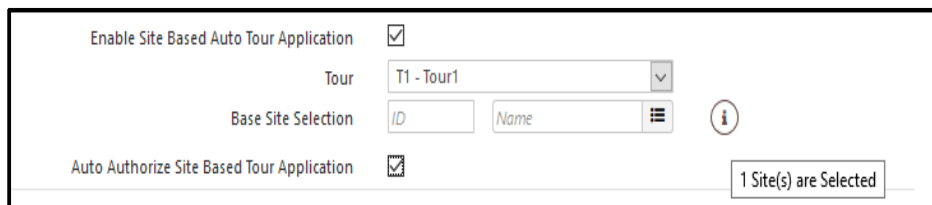
**Both** - Extra Work can be authorized both as overtime and C-OFF.

On selecting **Both**, worker can set the extra hours to be authorized as OT or C-OFF separately for Normal Day, WO, PH, WO/PH, FB and RD.




*If only Compensatory off is to be given to the worker, then you must select Only C-OFF option.*


- **Bus Route:** Click on the picklist and select the bus route to be assigned to the worker.
- **Enable Site Based Auto Tour Application:** Select this check box so that tour application will be automatically applied for a particular worker, if he punches from some site other than the Base Site.



- **Tour:** Select the tour application from the drop-down list which will be automatically applied.
- **Base Site Selection:** Select the base site to be assigned to the worker. You can select a particular site or can select all the sites.

To select particular sites, select the check boxes of the desired sites.

To select all the sites at once select the **Select All** check box. The sites on all the pages will be selected.

Click **OK**. Hover over the **Info**  icon. It displays the number of sites selected.

- **Auto Authorize Site Based Tour Application:** Select this check box to automatically authorize the tour application for a particular worker, if auto tour application feature is enabled.
- **Enable Location Based Auto Tour Application:** Select this check box so that tour application will be automatically applied for a particular worker, if he/she punches from some location other than the Base location.

If a worker goes for official activity to some location other than base location; then new location can be assigned to the worker and tour application will be automatically applied for that day when event is generated from the new location.

- **Tour:** Select the tour application from the drop-down list which will be automatically applied when worker goes to other location. The Tour application will be available in the drop-down only if it is added in the Leave Group assigned to the worker.
- **Base Location Assignment:** Select the base location to be assigned to the worker as **All** or **Selected**.

If you select **All**; all the locations configured in Location Master will be assigned to the worker. When new location is added to Location master then it will be automatically assigned to the worker.

If you select **Selected**; Location and Location Group will be enabled for the selection which is to be assigned to the worker.

- If you select **All**, all the locations configured in Location Master will be assigned to the user. When new location is added in the Location Master then it will be assigned to the user automatically.
- If you select **Selected**, you can assign Locations as well as Location Group/s to the user.
- **Location:** You can assign particular locations or assign all the locations at once.

Click the **Location** picklist. The **Picklist for Location** pop-up appears.

You can either select particular locations or can select all the location at once.

To select particular location, select the check boxes of the desired location.

The screenshot shows the 'Picklist For Location' dialog box. At the top, a green bar indicates 'Total Selected: 1 Records'. Below this is a search bar and a 'Show Selected' button. A 'Select All' checkbox is present and unchecked. The main table lists 14 records with columns 'Code' and 'Name'. The first record, 'RnDGPS' (RnD1 GPS), is selected with a blue checkmark. The other 13 records are not selected. At the bottom, it shows '1 - 10 of 14 records' and a pagination control with '1' selected. 'OK' and 'Cancel' buttons are at the bottom.


<input type="checkbox"/>	Code ▼	Name
<input checked="" type="checkbox"/>	RnDGPS	RnD1 GPS
<input type="checkbox"/>	RnD2GP	RnD2 GPS
<input type="checkbox"/>	I9	Location 7
<input type="checkbox"/>	I8	Location 6
<input type="checkbox"/>	I7	Location 5
<input type="checkbox"/>	I6	Location 4
<input type="checkbox"/>	I13	Location 3
<input type="checkbox"/>	I12	Location 2
<input type="checkbox"/>	I11	Factory 2
<input type="checkbox"/>	I10	RnD 2

OR

To select all the locations, select the **Select All** check box. The location on all the pages will be selected.

The screenshot shows the 'Picklist For Location' dialog box with all records selected. The green bar at the top now indicates 'Total Selected: 14 Records'. The 'Select All' checkbox is now checked. In the table, all 14 records have blue checkmarks in the first column. The pagination control still shows '1' selected, and the bottom buttons 'OK' and 'Cancel' are visible.

<input checked="" type="checkbox"/>	Code ▼	Name
<input checked="" type="checkbox"/>	RnDGPS	RnD1 GPS
<input checked="" type="checkbox"/>	RnD2GP	RnD2 GPS
<input checked="" type="checkbox"/>	I9	Location 7
<input checked="" type="checkbox"/>	I8	Location 6
<input checked="" type="checkbox"/>	I7	Location 5
<input checked="" type="checkbox"/>	I6	Location 4
<input checked="" type="checkbox"/>	I13	Location 3
<input checked="" type="checkbox"/>	I12	Location 2
<input checked="" type="checkbox"/>	I11	Factory 2
<input checked="" type="checkbox"/>	I10	RnD 2

- Click **OK**. Hover over the **Info**  icon. It displays the number of locations selected.

- **Location Group:** You can assign particular location group or assign all the location groups at once. If a Location Group is assigned to worker, then whenever new location is added to this group then this new location will also be assigned to the worker.

Click the **Location Group** picklist. The **Picklist for Location Group** pop-up appears.

Picklist For Location Group

Total Selected: 0 Records

Search  Show Selected

☐ Select All

<input type="checkbox"/>	ID ▲	Name
<input type="checkbox"/>	1	Matrix
<input type="checkbox"/>	2	Location Group 2
<input type="checkbox"/>	3	Location Group 3
<input type="checkbox"/>	4	Location Group 4
<input type="checkbox"/>	5	Location Group 5
<input type="checkbox"/>	6	Location Group 6
<input type="checkbox"/>	7	Location Group 7
<input type="checkbox"/>	8	Location Group 8
<input type="checkbox"/>	9	Location Group 9
<input type="checkbox"/>	10	Location Group 10

1 - 10 of 12 records

« < 1 2 > »

OK Cancel

You can either select particular location group or can select all the location group at once.

To select particular location groups, select the check boxes of the desired location groups.

Picklist For Location Group

Total Selected: 1 Records

Search  Show Selected

☐ Select All

<input type="checkbox"/>	ID ▲	Name
<input checked="" type="checkbox"/>	1	Matrix
<input type="checkbox"/>	2	Location Group 2
<input type="checkbox"/>	3	Location Group 3
<input type="checkbox"/>	4	Location Group 4
<input type="checkbox"/>	5	Location Group 5
<input type="checkbox"/>	6	Location Group 6
<input type="checkbox"/>	7	Location Group 7
<input type="checkbox"/>	8	Location Group 8
<input type="checkbox"/>	9	Location Group 9
<input type="checkbox"/>	10	Location Group 10

1 - 10 of 12 records

« < 1 2 > »

OK Cancel

OR

To select all the location groups, select the **Select All** check box. The location group on all the pages will be selected.

Picklist For Location Group

Total Selected: 12 Records


Search  Show Selected

☒ Select All

<input checked="" type="checkbox"/>	ID	Name
<input checked="" type="checkbox"/>	1	Matrix
<input checked="" type="checkbox"/>	2	Location Group 2
<input checked="" type="checkbox"/>	3	Location Group 3
<input checked="" type="checkbox"/>	4	Location Group 4
<input checked="" type="checkbox"/>	5	Location Group 5
<input checked="" type="checkbox"/>	6	Location Group 6
<input checked="" type="checkbox"/>	7	Location Group 7
<input checked="" type="checkbox"/>	8	Location Group 8
<input checked="" type="checkbox"/>	9	Location Group 9
<input checked="" type="checkbox"/>	10	Location Group 10

1 - 10 of 12 records

OK Cancel

- Click **OK**. Hover over the **Info**  icon. It displays the number of location groups selected.



You can see the example for Location Based Auto Tour in User module> T&A.

- Auto Authorize Location Based Tour Application:** Select this checkbox to automatically authorize the tour application for a particular worker, if auto tour application feature is enabled.
- Show Attendance Details on Device:** Select the checkbox to display the attendance summary of the worker on Vega and or FMX direct door. Hence the Vega/FMX direct doors assigned to the worker will display the current month's data (as per device time) when the worker is allowed access to the door.

See details in Device Configuration> Advanced > Settings (of Vega Door/ FMX Door).

## Policy

In the **Policy** section assign different Policies to the selected worker. This page will be available only with the **Time & Attendance** add on module.

Policy Name	ID	Assign Policy
Attendance Policy	1	Attendance Policy-1
Absentee Policy	1	Absentee Policy-1
Overtime Policy	1	OverTime Policy-1
Late-IN Policy	2	Late-In 2
Early-OUT Policy	1	Early Out Policy-1
C-OFF Policy	1	COFF Policy-1

The default policies will automatically be assigned to the new worker. It will be displayed in the respective fields as shown above.

To change the policies from current date, click the respective picklist and select the policy to be assigned to the worker. If the policies (other than Attendance Policy) are to be assigned from previous date, then go to *T&A > Utilities > Change Policy*.



*To configure the Policies go to T&A> Policies.*

# Worker Profile-Access Control

On selection of the **Access Control** tab, the following page is displayed:

The screenshot displays the 'Worker Profile' interface. On the left is a sidebar with a list of tabs: Profile, Devices, Credentials, Group, T&A, Access Control (highlighted), ESS, Cafeteria, and CWM. The main area is titled 'Worker Profile' and contains two sub-tabs: 'Basic' and 'Advance'. The 'Basic' tab is selected, showing the following configuration options:

- Bypass Finger:** A checkbox that is currently unchecked.
- Bypass Palm:** A checkbox that is currently unchecked.
- Access Validity:** A checkbox that is currently unchecked.
- Access Validity Date:** A date selection field with a calendar icon.
- Access Level:** A dropdown menu currently set to '8'.
- Shift Schedule:** A dropdown menu currently set to 'Schedule Group'.
- Start Shift:** A dropdown menu currently set to 'General Shift'.
- Holiday Schedule:** A dropdown menu currently set to 'Schedule 1'.
- Access Cluster Checking:** A checkbox that is currently unchecked.

## Basic

In the **Basic** section, the administrator can define access parameters for the selected worker. This tab offers the following sections for configuration:

**Bypass Finger** - This option can be enabled in the event of the Finger Print image not being in order and the system thus has problems identifying the worker. In such cases, the system administrator can disable the Finger Print check for the worker thus enabling the worker to gain access using either the assigned pin or card.

**Bypass Palm** - This option can be enabled in the event of the Palm Vein image not being in order and the system thus has problems identifying the worker. In such cases, the system administrator can disable the Palm vein check for the worker thus enabling the worker to gain access using either the assigned pin or card.

**Access Validity** - Enable this option if the worker credential is to be activated for a predefined period.

**Access Validity Date** - Specify the end date of the validity in this field.

**Access Level** - Specify the access level for which the Smart Identification feature will be applicable to the worker.

**Shift Schedule** - Assign a shift schedule to the selected worker from the dropdown list.

**Start Shift** - In case of multiple shifts in the schedule group, the starting shift needs to be selected from the drop down list.

**Holiday Schedule** - Select the Holiday schedule to be assigned to the worker from the drop down list.

**Access Cluster Checking** - Select this checkbox to enable checking for access cluster restrictions for the selected worker. It is available only with the Access Control add-on license.



## Advance

The **Advance** section is available only with the Access Control add-on module. Here, the administrator can define access parameters for the selected worker. The **Advance** page appears as follows:

ID	Name
1	AC1
2	AC2
3	AC3
4	AC4
5	AC5
6	AC6
7	AC7
8	AC8
9	AC9
10	AC10

**Enable Advance Access Control:** Check this box to enable the advance access control feature.

**Shift based Access:** This parameter allows the administrator to enable worker access based on the shift working time of the worker.



*In the event of not selecting the **Shift Based Access** option then the system will apply the **Default Access Settings** as defined on a Panel200 as the access settings for the worker.*

**Smart Access Route** - Select the Smart Access Route to be assigned to the worker from the Access Route picklist window.

**Maximum Route Level:** Select the route level up to which the worker is to be allowed access from the drop down list.

**Enable Elevator Access Control:** Check this box to enable the Elevator access control feature for the worker.

**Elevator Floor Group:** Click the picklist and select the Elevator floor group to be assigned to the worker. The worker can access the floors of the Elevators included in Elevator Floor Group.

The Elevator Floor group is created from Access Control> Elevator Access Control> Elevator floor group



*Certain parameters when configured for a specific worker may over-ride corresponding parameters pre-defined at the Global Policy level.*

**Access Rule List:** The table displays the Access Rule/s assigned to the worker.

# Worker Profile-ESS

The **ESS** tab is available only with the *ESS* module. This is used to enable and configure ESS account access for the selected worker. On selection of the **ESS** tab, the following page is displayed:

The screenshot displays the 'Worker Profile' window with the 'ESS' tab selected. The left sidebar contains a list of navigation options: Profile, Devices, Credentials, Group, T&A, Access Control, ESS (highlighted), Criteria, CWM, Job Costing, Field Visit Management, Face Recognition, Visitor Management, and Events. The main content area is titled 'Settings' and contains the following configuration sections:

- Enable Account:** ☒
- Edit Basic Details:** ☒
- Punch Marking Via ESS:** ☒
- ESS Role Rights:** 1 (Default Rights)
- Preferred Language:** English
- Login Via Active Directory:** ☐
  - Username: [Text Field]
  - Domain: [Text Field]
  - Default Domain: [Button]
- Auto Authorize IVEI Registration:** ☐
  - Mobile Identification Number: [Text Field]
- Punch Marking Via API:** ☒
  - Mark Punch As Per: Server Time Zone
- Auto-Punch Marking:** ☐
- Manual Punch Marking:** ☐
  - Face Mandatory for Punch: None
- APTA Face Anti-Spoofing:** ☐
  - Capture Photo: ☐
- Allow Offline Punch:** ☐
  - Location Mandatory for Punch: None
- Reason For Punching From Unassigned Location:** ☐
- Location Assignment:** All
  - Location: [Code: [Text Field], Name: [Text Field]]
  - Location Group: [ID: [Text Field], Name: [Text Field]]
- Allow Door Access Through API:** ☐
- PIN Authentication For Door Access:** ☐

## Settings

The **Settings** section under the **ESS** tab offers the following parameters for configuration:

**Enable Account** - Select this checkbox to enable ESS account access for the selected worker.

**Edit Basic Details** - Select this checkbox to enable the selected workers to edit basic details on their respective ESS accounts.

**Punch marking via ESS** - Select this checkbox to enable workers to mark their attendance punch manually from their respective ESS accounts.

**ESS Role Rights**- Select the Role Rights from the picklist to be assigned to the worker.

**Preferred Language**- Specifies the language preferred for the selected ESS Users as *English, Arabic, Spanish, Albanian, Turkish or Vietnamese*.

**Login via Active Directory** - Select this checkbox to enable the selected ESS user to login using his Active Directory credentials.

**User name** - Assign a user name to the selected ESS user for Active Directory login.

**Domain** - Specify the Active Directory domain name in this field for Active Directory login.

**Auto -Authorize IMEI Registration** -Select this checkbox to automatically authorize the user request through device with registered IMEI number in COSEC database. If the box is unchecked, the user request (attendance, leave application etc.) goes to the **IMEI Authorization** which can be then authorized by the administrator.

**Mobile Identification Number** - Specify the Mobile Identification Number which is the unique number of the mobile device from which the ESS application is to be used. This can consist of maximum 40 alphanumeric characters.

**Punch Marking Via API** - Select this checkbox to enable user to mark punches by firing API. Auto-Punch and Manual-Punch marking checkbox will be activated only if Punch marking via API is enabled.

**Mark Punch As Per-** Select the option of Time Zone which is to be applied for punch time (punch marked from API)

- **Server Time Zone-** The date- time of the punch will be as per the server time zone.
- **Local Time Zone-** The date-time of the punch will be as per the time zone of the place from where the punch is marked.

**Auto-Punch Marking** - Select this checkbox to enable the auto-attendance marking feature for the selected user from the COSEC APTA mobile application. On enabling this feature, if the user's current location matches any of the assigned locations; a punch will be marked automatically for the user from the mobile application.

Auto-Punch Marking	<input type="checkbox"/>	(i)
Manual Punch Marking	<input type="checkbox"/>	
Face Mandatory For Punch	None	(i)
Allow Offline Punch	<input type="checkbox"/>	
Location Mandatory For Punch	None	
Reason For Punching From Unassigned Location	<input type="checkbox"/>	
<b>Location Assignment</b>		
	All	
Location	Code	Name
Location Group	ID	Name
Allow Door Access Through API	<input type="checkbox"/>	
PIN Authentication For Door Access	<input type="checkbox"/>	(i)

**Manual Punch Marking** - Select this checkbox to enable manual punch marking from the COSEC APTA mobile application.

**Face Mandatory For Punch** - When Manual Punch Marking and Face Recognition feature is enabled for user then you can select the specific option for which face is to be made mandatory for the punch. The options are **Attendance, Access Control, Both** and **None**.

For Access Control and Both option; you must enable “Allow Door Access Through API” checkbox.

**APTA Face Anti-Spoofing** - When **Manual Punch Marking** is enabled and **Face Mandatory For Punch** is selected as — **Attendance, Access Control** or **Both** — then select **APTA Face Anti-Spoofing** checkbox to enable **Face Anti-Spoofing** feature via COSEC APTA Application to prevent false face verification by using a photo, video, mask or a different substitute for an unauthorized person's face.

**Allow Offline Punch** - This checkbox is activated only when “Punch marking via API” and “Manual Punch Marking” are enabled. This allows users to apply for offline punches.

In Mobile devices, when there is no connectivity between server and the Mobile device, the punches, with their timings can be stored through offline punch and send to server when connectivity is restored.

**Location Mandatory For Punch** - This field determines if information regarding the source location from where the punch has been marked should accompany a punch marking by user. Select None if location information should not accompany a punch. For *Manual Punch Marking*, select Any Location (locations need not be configured). For *Auto-Punch Marking* (auto-attendance feature), select Configured Locations Only (locations must be configured on “Location Master”).

**Reason For Punching From Unassigned Location:** This checkbox will be activated only when ‘Location Mandatory For Punch’ has either **None** or **Any Location** as values. By enabling this checkbox, the In-charge Users can know the reason for which the punch is made from unassigned location by the employee user.

**Location Assignment-** Select the desired option — **All**, **Selected** — for assigning location to user.

- If you select **All**; all the locations configured in Location Master will be assigned to the user. When new location is added to Location master then it will be automatically assigned to the user if “All” is selected.
- If you select **Selected**; Location and Location Group will be enabled for the selection which is to be assigned to the user.
- **Location:** Click the **Location** picklist. The **Picklist For Location** pop-up appears.

Picklist For Location

Total Selected: 0 Records

Search  Show Selected

☐ Select All

<input type="checkbox"/>	Code ▼	Name
<input type="checkbox"/>	RnDGPS	RnD1 GPS
<input type="checkbox"/>	RnD2GP	RnD2 GPS
<input type="checkbox"/>	I9	Location 7
<input type="checkbox"/>	I8	Location 6
<input type="checkbox"/>	I7	Location 5
<input type="checkbox"/>	I6	Location 4
<input type="checkbox"/>	I13	Location 3
<input type="checkbox"/>	I12	Location 2
<input type="checkbox"/>	I11	Factory 2
<input type="checkbox"/>	I10	RnD 2

1 - 10 of 14 records

« < 1 2 > »

OK Cancel

You can either select particular location or can select all the locations at once.

To select particular location, select the check boxes of the desired location.

The screenshot shows a 'Picklist For Location' dialog box. At the top, a green bar indicates 'Total Selected: 1 Records'. Below this is a search bar and a 'Show Selected' link. A 'Select All' checkbox is present. The main table lists 14 records with columns for 'Code' and 'Name'. The first record, 'RnD1 GPS' with code 'RnDGP', is selected. The bottom of the dialog shows '1 - 10 of 14 records' and pagination controls. At the very bottom are 'OK' and 'Cancel' buttons.


<input type="checkbox"/>	Code ▼	Name
<input checked="" type="checkbox"/>	RnDGP	RnD1 GPS
<input type="checkbox"/>	RnD2GP	RnD2 GPS
<input type="checkbox"/>	I9	Location 7
<input type="checkbox"/>	I8	Location 6
<input type="checkbox"/>	I7	Location 5
<input type="checkbox"/>	I6	Location 4
<input type="checkbox"/>	I13	Location 3
<input type="checkbox"/>	I12	Location 2
<input type="checkbox"/>	I11	Factory 2
<input type="checkbox"/>	I10	RnD 2

OR

To select all the location at once, select the **Select All** check box. The location on all the pages will be selected.

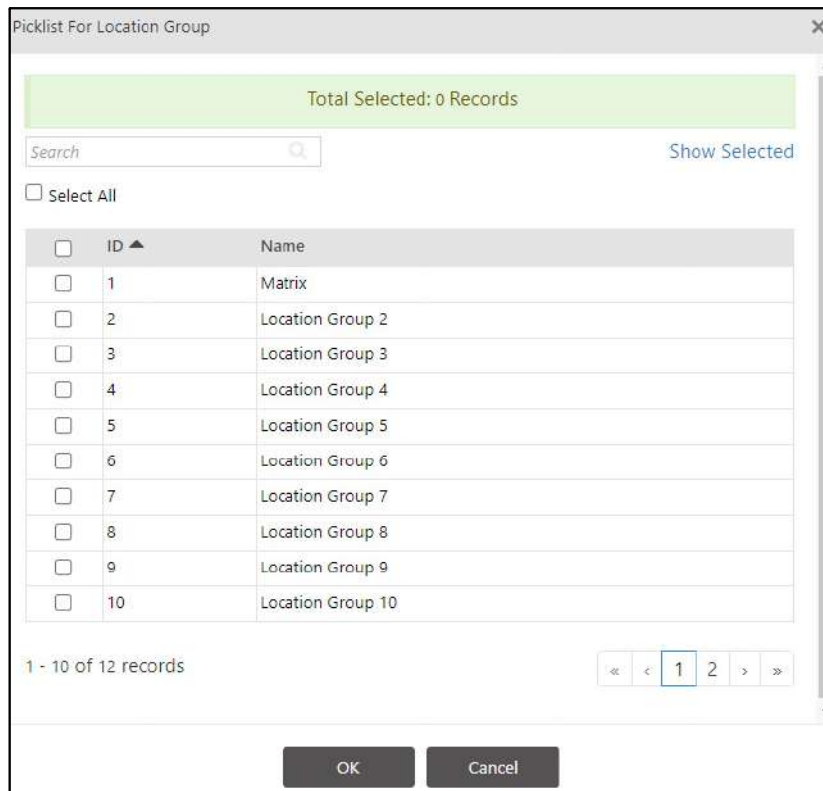
This screenshot shows the same 'Picklist For Location' dialog box, but now the 'Select All' checkbox is checked. The green bar at the top now indicates 'Total Selected: 14 Records'. In the table, all 14 records have their selection checkboxes checked. The rest of the interface, including the search bar, pagination, and buttons, remains the same.

<input checked="" type="checkbox"/>	Code ▼	Name
<input checked="" type="checkbox"/>	RnDGP	RnD1 GPS
<input checked="" type="checkbox"/>	RnD2GP	RnD2 GPS
<input checked="" type="checkbox"/>	I9	Location 7
<input checked="" type="checkbox"/>	I8	Location 6
<input checked="" type="checkbox"/>	I7	Location 5
<input checked="" type="checkbox"/>	I6	Location 4
<input checked="" type="checkbox"/>	I13	Location 3
<input checked="" type="checkbox"/>	I12	Location 2
<input checked="" type="checkbox"/>	I11	Factory 2
<input checked="" type="checkbox"/>	I10	RnD 2

Click **OK**. Hover over the **Info**  icon. It displays the number of locations selected.


- **Location Group:** If Selected Location Groups are assigned to user and whenever new location is added to the location group then newly added location in location group will also be assigned to the user.

Click the **Location Group** picklist. The **Picklist For Location Group** pop-up appears.



Picklist For Location Group

Total Selected: 0 Records

Search  Show Selected

☐ Select All

<input type="checkbox"/>	ID ▲	Name
<input type="checkbox"/>	1	Matrix
<input type="checkbox"/>	2	Location Group 2
<input type="checkbox"/>	3	Location Group 3
<input type="checkbox"/>	4	Location Group 4
<input type="checkbox"/>	5	Location Group 5
<input type="checkbox"/>	6	Location Group 6
<input type="checkbox"/>	7	Location Group 7
<input type="checkbox"/>	8	Location Group 8
<input type="checkbox"/>	9	Location Group 9
<input type="checkbox"/>	10	Location Group 10

1 - 10 of 12 records

<< < 1 2 > >>

OK Cancel

You can either select particular location group or can select all the location groups at once.

To select particular location group, select the check boxes of the desired location groups.

Picklist For Location Group

Total Selected: 1 Records

Search  Show Selected

☐ Select All

<input type="checkbox"/>	ID ▲	Name
<input checked="" type="checkbox"/>	1	Matrix
<input type="checkbox"/>	2	Location Group 2
<input type="checkbox"/>	3	Location Group 3
<input type="checkbox"/>	4	Location Group 4
<input type="checkbox"/>	5	Location Group 5
<input type="checkbox"/>	6	Location Group 6
<input type="checkbox"/>	7	Location Group 7
<input type="checkbox"/>	8	Location Group 8
<input type="checkbox"/>	9	Location Group 9
<input type="checkbox"/>	10	Location Group 10

1 - 10 of 12 records

« < 1 2 > »

OK Cancel

OR

To select all the location group at once, select the **Select All** check box. The location group on all the pages will be selected.

Picklist For Location Group

Total Selected: 12 Records

Search  Show Selected


☒ Select All

<input checked="" type="checkbox"/>	ID	Name
<input checked="" type="checkbox"/>	1	Matrix
<input checked="" type="checkbox"/>	2	Location Group 2
<input checked="" type="checkbox"/>	3	Location Group 3
<input checked="" type="checkbox"/>	4	Location Group 4
<input checked="" type="checkbox"/>	5	Location Group 5
<input checked="" type="checkbox"/>	6	Location Group 6
<input checked="" type="checkbox"/>	7	Location Group 7
<input checked="" type="checkbox"/>	8	Location Group 8
<input checked="" type="checkbox"/>	9	Location Group 9
<input checked="" type="checkbox"/>	10	Location Group 10

1 - 10 of 12 records

« < 1 2 > »

OK Cancel

Click **OK**. Hover over the **Info**  icon. It displays the number of location groups selected



*Locations can be configured from COSEC Web Application > Admin > System Configuration > Location Master.*

**Allow Door Access Through API-** Select this check-box to allow the access to device through API.

**PIN Authentication For Door Access-** Enable this check-box for Dual Authentication with PIN when Bluetooth or QR based access is used for Access control feature in COSEC APTA mobile application.



*Pin Authentication For Door Access can be enabled only when Allow Door Access Through API is enabled.*



# Worker Profile-Cafeteria

This **Cafeteria** tab is available only with the *Cafeteria* module. The Cafeteria tab displays the following page:

## Settings

**Enable Account** - Select this checkbox to enable Cafeteria account access for the selected worker.

**Enable Offline Transaction**- Select the desired option from the drop-down list for the Worker to perform the offline transaction

- Select **None**, if you do not want to allow transactions to be made by the Worker when the device is in offline mode.
- Select **Allow With Discount**, if you want to allow transactions with discount to be made by the Worker, when the device is in offline mode.
- Select **Allow Without Discount**, if you want to allow transactions without discount to be made by the Worker, when the device is in offline mode.

**Discount Level** - Select the appropriate discount level from the drop down list as shown.

Discount Level	None
Account Type	None Discount Level 1 Discount Level 2 Discount Level 3 Discount Level 4

**Account Type** - Specify the account type as **Pre-Paid** or **Post-Paid** by selecting from the drop down list.

#### ***Pre-paid Account***

- For **Pre-Paid** account type, specify whether the **Balance Management** should be **Device-based** or **Server-based**.
- When Balance Management is selected as **Server based**, then you can enable **Device-Server Balance Check**. This will allow Device to check Server-side balance before allowing transaction. For this, Device and Server must be connected.

#### ***Post-paid Account***

- For **Post-Paid** account type, enter the **Allowed Usage Per Month** based on which monthly dues for the worker can be calculated.

Enable Account	<input checked="" type="checkbox"/>	
Enable Offline Transaction	None	
Discount Level	None	
Account Type	Post-Paid	
Allowed Usage Per Month *	0.00	
Cafeteria Usage Policy	ID	Name

**Cafeteria Usage Policy**- Select the cafeteria usage policy to assign to the user based on which cafeteria transaction restrictions will be applied to the Worker.

# Worker Profile-CWM

This tab is available for configuration only for the *Contract Worker Management (CWM)* module worker when an existing worker is selected from the *Worker List*. This enables the administrator to assign Contractor, Work Order, Skills and PPE (Personal Protective Equipment) to the selected worker as well as add ID Proof and Address Proof.

The CWM tab for the worker is shown as below.

## Assignment

After the worker is added in the system from **profile** tab, the contractor and the work order is to be assigned to him from the **Assignment** tab of **CWM**.

For the assignment:

**Skill-** Select the skill from the picklist to be assigned to the worker.

**Contractor-** Select the contractor from the picklist under whom the worker is to be assigned.



*If the Contractor does not appear in the picklist, check the Contractor's **Validity End Date**. The Validity End Date shall not be included in the validity period of the Contractor. For details, refer to "[Contractor Profile](#)".*

**Work Order-** Select a work order from the picklist which shows the list of work orders of the selected contractor to be assigned to the worker.

**Assignment Period-** The work order assignment period is auto generated based on the work order selected. The induction levels grid appear as shown. The assignment period can be changed by clicking on Edit button and selecting the assignment period from calendar buttons.

**Assignment Status-** This is the auto generated field. When all the stages are approved, the status is marked as approved. If any of the stage is rejected, the status is marked as rejected.

**Approval Stage-** This is the auto generated field based on the work order selected.

Click on **Save** button to save the worker assignment. The worker profile will be saved and listed under **Worker List**.

An the grid with the assigned induction levels are shown as below. There are maximum seven stages of induction which needs to be approved before the worker is approved for the work order.

The screenshot shows the 'Worker Profile' window for CWM2 Mangesh Yadav (Active). The 'Assignment' tab is selected, displaying the following details:

- Skill: 3 (Electrician)
- Contractor: C101 (Samarth)
- Work Order: WO2 (Electrical Installation)
- Assignment Period: 31/08/2014 to 31/12/2014
- Assignment Status: Approved
- Approval Stage: 2 (Approval Stages-NonTechnical)

Below these details is a table of induction levels:

Level	Induction Level Name	Status	Detail
1	Personal Interview	Approved	(i)
2	Police Verification	Approved	(i)
3	Medical Checkup	Approved	(i)
4	Health Training	Approved	(i)

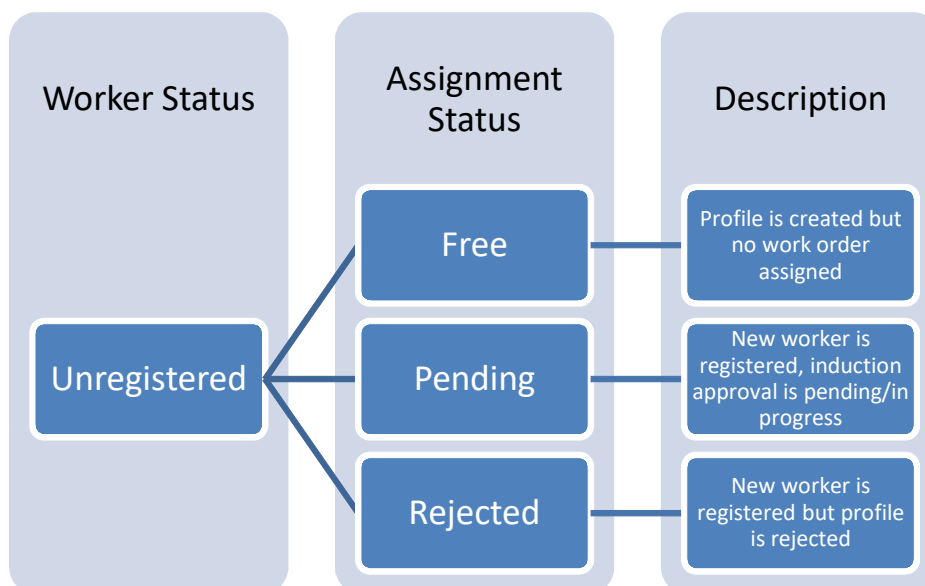
Click on **Details** (i) button to view the induction level details.

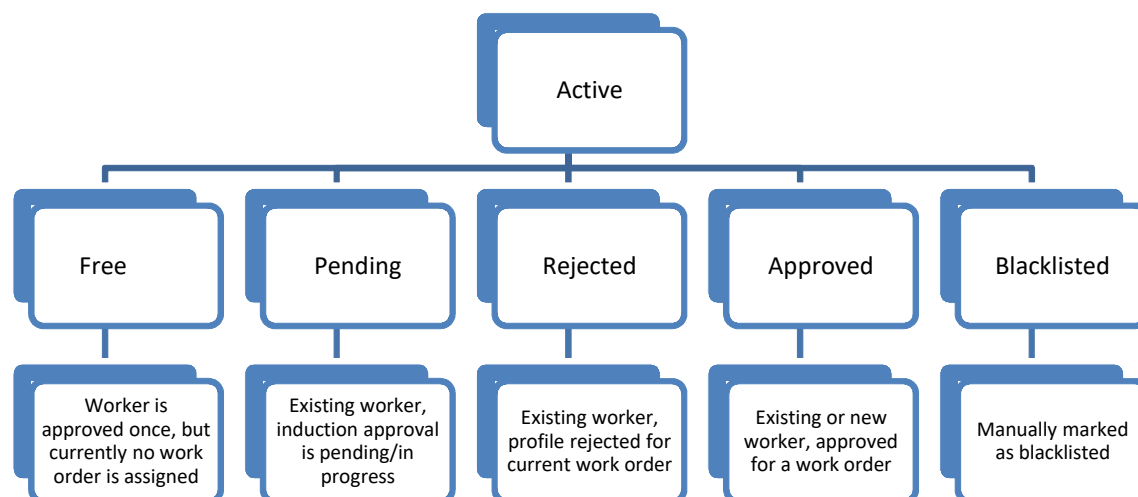
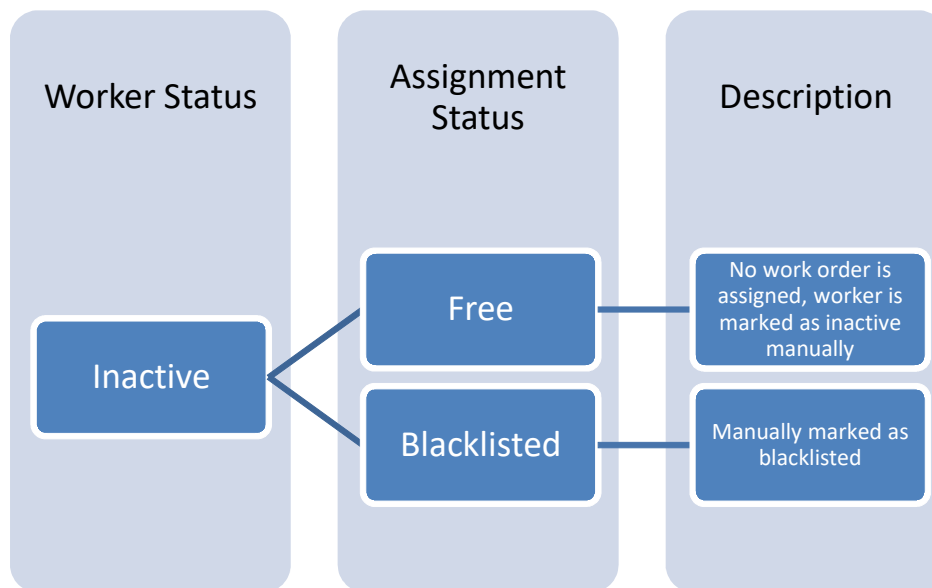
The 'Induction Level Detail' window shows the following information for level 1:

- Induction Level: 1 (Personal Interview)
- In-Charge: 1263 (AASHISH GANDHI)
- Status: Approved
- Remark: (empty field)

A 'Close' button is located at the bottom right.


The various worker status and the respective assignment status is shown in the below figures:

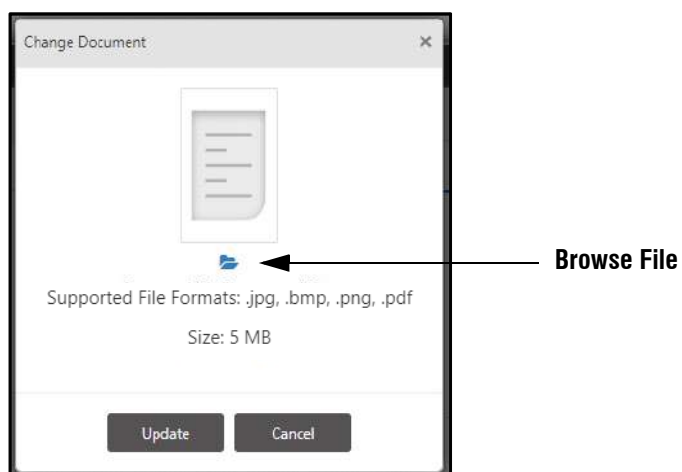




## Other Details

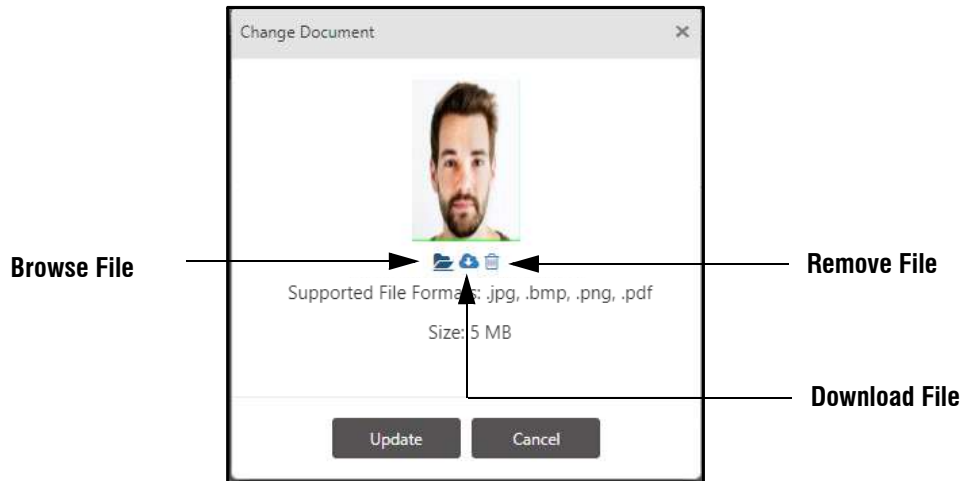
ID	Name
1	Helmet
2	Safety Shoes


**ID Proof-** Specify the name of the ID proof and upload the document. You can upload the documents by clicking **Upload**  button. Then **Change Document** pop-up appears as shown below.





Click **Browse File**  .

To upload, select the desired file as per the supported formats and size (.jpg, .bmp, .png, pdf) from your local PC.




After uploading the file, if you wish to upload a different file instead of the current uploaded file, click **Browse File**  again and select the desired file from your local PC. The previously uploaded file will get replaced with the new file.


To download the uploaded file, click **Download File** .


To remove the uploaded file, click **Remove File** .

Then click **Update**.

The document will be uploaded and can be previewed by clicking on **Preview**  button.

**Address Proof-** Specify the name of the Address proof and upload or change the document similar to ID proof.

The documents can be deleted by clicking **delete**  button.

The documents can be viewed by clicking Preview  button.

**PPE (Personal Protective Equipment)-** You can select particular PPE or can select all the PPE at once.

- Click the **PPE** picklist. The **Picklist For PPE** appears.

Picklist For PPE

Total Selected: 0 Records

Search

[Show Selected](#)

☐ Select All

<input type="checkbox"/>	ID ▲	Name
<input type="checkbox"/>	1	PE1
<input type="checkbox"/>	2	PE2

OK Cancel

- To select particular PPE, select the check boxes of the desired PPE.

OR

- To select all the PPE, select the **Select All** check box. The PPE on all the pages will be selected.

The selected PPE appear in the grid.

You can delete the desired PPE. To do so, click **Delete** of the respective PPE.

Click **Save** to save the details.



# Worker Profile-Job Costing

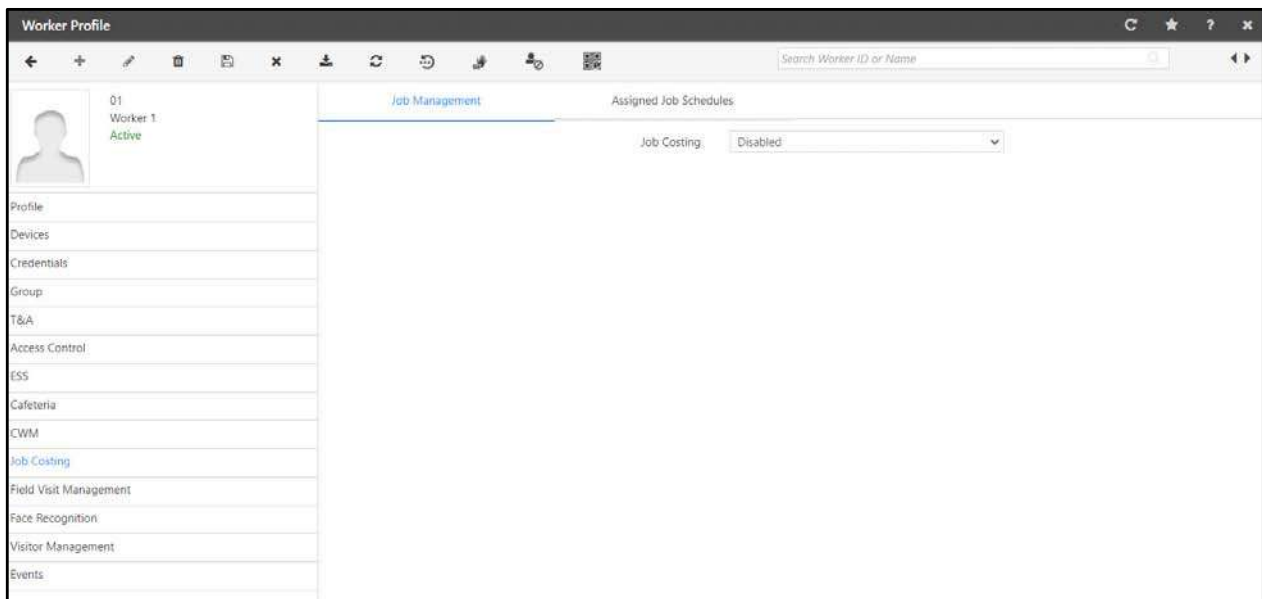
There are two tabs displayed namely:

- “Job Management”
- “Assigned Job Schedules”

## Job Management

To assign jobs to the worker,

- Click **Contract Worker Management > Workers > Worker Profile > Job Costing > Job Management**.



- **Job Costing:** Select the option **Enabled** from the drop down list to enable Job Costing feature for the worker.
- **Device based Job Assignment:** Select this check box to assign jobs to the worker based on the devices assigned to the worker.

If Job Costing is enabled and Device Based Job Assignment is selected, then the it will work in mixed mode.

When this check box is enabled, then the system will check for the Jobs configured on the assigned Device only and not to the workers. In this case worker can punch in the assigned Default Job or is displayed a list of jobs on the device display from which they can select the desired Job.They can also select few additional options like 'Continue Current Job' and 'Start Default Job'. For more details, refer to Device Configuration > Job Costing of the desired device.

If this check box is disabled, then the system will check for the Jobs assigned to the worker. For details refer to “Default Jobs”.

## Default Jobs



*Jobs are created from **Job Processing and Costing module > Project Management> Job**.*

Jobs can be assigned to the worker manually or via Job Scheduler.

- To assign jobs manually, refer to [“Manual Job Assignment”](#).
- To assign jobs via Job Scheduler, refer to [“Job Scheduler”](#).



*Default Jobs and Job Schedulers assigned from Enterprise Structure Module > Enterprise Groups > Association Mapping > Job Costing will appear here when the enterprise group is assigned to the worker.*

*Once the Job Scheduler assignment is done and If Job Costing is disabled and is enabled again, then all the Job Schedulers assigned to the user will be revoked. You need to re-assign the Job Schedulers to the user from the [“Job Scheduler”](#) page again.*

*Jobs assigned via Job Schedulers cannot be deleted. However, Job Schedulers assigned to workers can be deleted/changed. If jobs have already been assigned using Job Schedulers and then the Job Scheduler is deleted or the Enterprise Group assigned to the worker is changed, the jobs already assigned will not be deleted. However, new jobs will not be assigned to workers using the same Job Scheduler. New jobs will be assigned to the worker via the new Job Scheduler assigned to the workers via change of Enterprise Group.*

*Enterprise Group - Organization 1, has Job Scheduler J1 and J2*

*Enterprise Group - Organization 2, has Job Scheduler J3 and J4*

*Enterprise Group - Organization 3, has no Job Scheduler*

- *If the Enterprise Group of the user is Organization 1, then Job Schedulers J1 and J2 will be assigned to the user.*
- *If you change the Enterprise Group of the user to Organization 2, then Job Schedulers J3 and J4 will be assigned to the user and J1/J2 will be removed.*
- *If you change the Enterprise Group of the user to Organization 3, as there are no Job Schedulers in Organization 3, the assigned Job Schedulers J3 and J4 will be retained.*

The Default Jobs will display all the jobs assigned manually or via Job Scheduler.

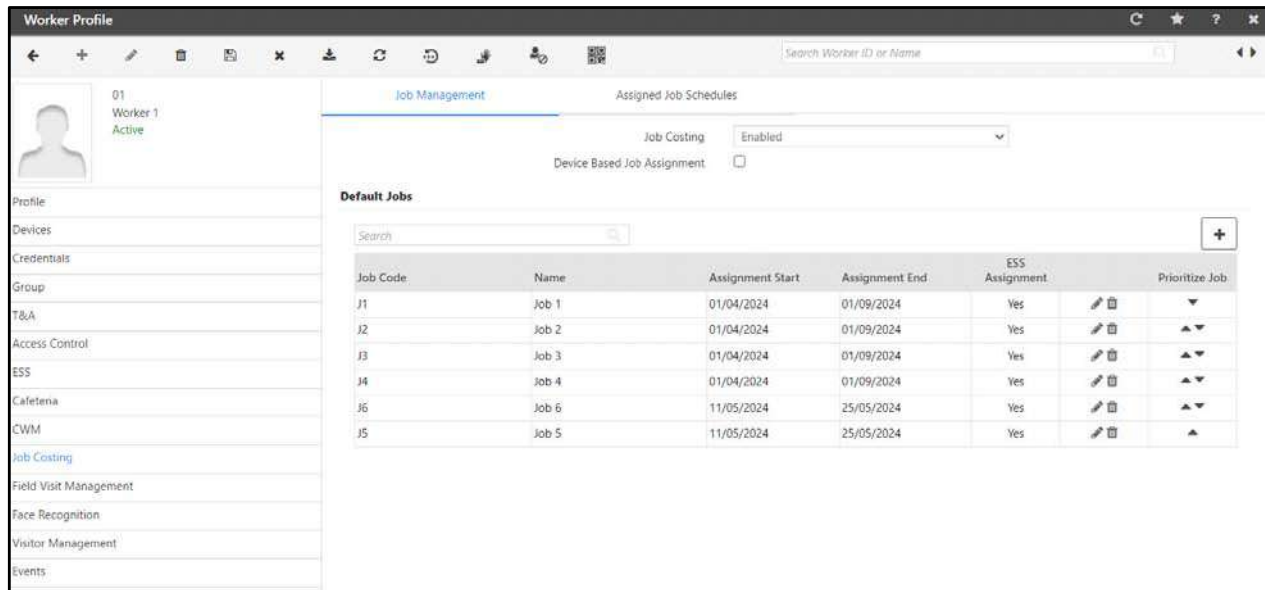
If you have added jobs manually and then run the Job Scheduler, in such cases, the jobs assigned via Job Scheduler will appear above manually assigned jobs in the same sequence as configured in the Job Scheduler.

Let us understand this with the help of an example,

Jobs assigned manually — J5 and J6.

Jobs assigned via Job Scheduler — J1, J2, J3 and J4.

Once the Job Scheduler is run, the jobs will appear under Default Jobs as shown below:



You can change the priority manually, if required.

- Under **Prioritize Job**, click the **Up** arrow button to move a job upwards in the list. Similarly, click the **Down** arrow button to move a job downwards in the list.

If there are overlapping dates in multiple jobs, then by default, the workers punch will be marked in the job with the highest priority. When Jobs are assigned via Job Scheduler then the Assignment Start / End Date will be the Start/ End Date of the Job as configured in the Job Scheduler. The ESS Assignment check box for the jobs assigned via Job Scheduler will be selected by default.



*If a Job is assigned manually to a worker and the same is assigned again via Job Scheduler, following scenarios are possible:*

- *Jobs may have different Job Codes but they have the same Start/End Date, then the system will create a new job.*
- *Jobs may have same Job Codes but they have a different Start/End Date, then the system will create a new job.*
- *Jobs may have same Job Codes and they have the same Start/End Date, then the system will not create a new job.*

## Manual Job Assignment

Multiple default jobs can be assigned with overlapping Assignment Date Ranges. You can also set the priority of the assigned jobs if required. If you have jobs with overlapping dates and you have set their priority as per your requirement, then the first job will be considered as the default job.

The screenshot shows the 'Worker Profile' window for 'Worker 2' (Active). The left sidebar contains a list of profile categories: Profile, Devices, Credentials, Group, T&A, Access Control, ESS, Cafeteria, CWM, Job Costing (highlighted), Field Visit Management, Face Recognition, Visitor Management, and Events. The main area is titled 'Job Management' and 'Assigned Job Schedules'. It includes a 'Job Costing' dropdown set to 'Enabled' and a 'Device Based Job Assignment' checkbox. Below this is a 'Default Jobs' section with a search bar and a table header. The table header has columns: Job Code, Name, Assignment Start, Assignment End, ESS Assignment, and Prioritize Job. The table currently displays 'No Data'. An 'Add' button (+) is located at the top right of the table area.

- Click **Add** . Click the picklist under **Job Code/Name** to select the desired Jobs.

The **Picklist For Job** appears.

The 'Picklist For Job' dialog box is shown. It has a search bar, a filter dropdown set to 'Active', and a table of jobs. The table has columns: Job Code, Name, Start, and End. The jobs listed are J1 through J7. A 'Cancel' button is at the bottom.

Job Code	Name	Start	End
J1	Job 1	01/04/2024	01/09/2024
J2	Job 2	01/04/2024	01/09/2024
J3	Job 3	01/04/2024	01/09/2024
J4	Job 4	01/04/2024	01/09/2024
J5	Job 5	11/05/2024	25/05/2024
J6	Job 6	11/05/2024	25/05/2024
J7	Job 7	01/04/2024	01/09/2024

By default, all the **Active** jobs are displayed. Click **Active** and select the desired option — **All**, **Active**, **Expired** — to filter the jobs. The jobs appear as per the set filter.

If you select **Expired**, you can set another filter.

Configure the number of days in Ended Days (1-999). The system will display the expired jobs, derived using the following: Current Date minus Number of days configured in Ended Days.

For example:

Ended Days configured = 2

Current Date= April 25, 2024

All the jobs expired between April 23, 2024 to April 25, 2024 (midnight), will be displayed.

Click to select the desired job from the list. You can also search for the desired job using the search bar.

The selected job appears in the grid.

- **Assignment Start and Assignment End:** The selected Jobs Start and End dates are displayed. You can change the Assignment Start and Assignment End dates of the job if required. To do so, click the calendar and select the desired start and end dates.
- **ESS Assignment:** The check box is enabled by default. This Job will be displayed in the list of Jobs assigned to the user through the ESS login. If you do not want this job to be displayed, clear the check box.



The ESS Assignment column will not be displayed if the **Show All Jobs while Punching** check box is enabled. For details, refer to [“Job Costing”](#) in [“Defining Global Policies”](#).

The Jobs assigned here which are In-progress, Assigned and have the ESS Assignment check box enabled will be displayed in the **ESS login > Job** drop-down while Marking a Punch.

Job Code	Name	Assignment Start	Assignment End	ESS Assignment	Prioritize Job
J1	Job 1	01/04/2024	01/09/2024	<input checked="" type="checkbox"/>	<input type="checkbox"/>

- Click **OK**  to save the details.

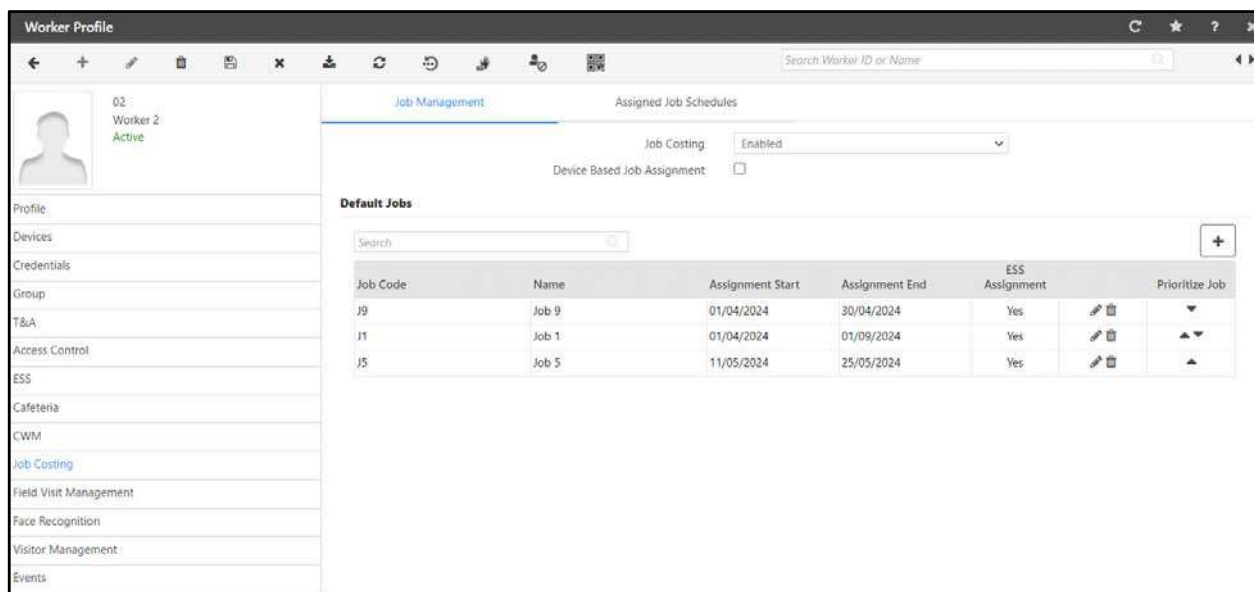
The **Default Jobs** grid will consist of all the jobs, that is, expired, in-progress as well as assigned.



It is recommended to set job priority only if overlapping dates are assigned to the jobs.

If a new job is assigned, by default it will appear at the highest priority. You can change the priority later, if required.

You can set the priority of the jobs as per your requirement. To do so,



- Under **Prioritize Job**, click the **Up** arrow button to move a job upwards in the list. Similarly, click the **Down** arrow button to move a job downwards in the list.

If you have overlapping dates assigned to Jobs, in such scenarios there will be multiple Jobs in which the punches are possible.

To resolve this set the Job with highest priority at the first position, so that when the system searches for the Job as per the date, the punch will be marked in the first Job in which the date is detected.

Let us understand this with the help of an example.

#### Example:

Worker 1 has been assigned the following jobs:

Job Code	Job Name	Assignment Start	Assignment End	Prioritize Job
J1	Job 1	01/10/2023	10/10/2023	1
J2	Job 2	09/10/2023	15/10/2023	2
J3	Job 3	17/10/2023	25/10/2023	3
J4	Job 4	25/10/2023	31/10/2023	4

Now, Worker 1 changes the priority of the assigned jobs as follows:

Job Code	Job Name	Assignment Start	Assignment End	Prioritize Job
J2	Job 2	09/10/2023	15/10/2023	1
J1	Job 1	01/10/2023	10/10/2023	2
J4	Job 4	25/10/2023	31/10/2023	3
J3	Job 3	17/10/2023	25/10/2023	4

When Worker 1 will punch on 09/10/2023, the punch will be marked against Job 2 as it has been set at priority number 1. Similarly, when Worker 1 will punch on 25/10/2023, the punch will be marked against Job 4 as it is at a higher priority than Job 3.



*Make sure that the assigned jobs are prioritized correctly to ensure that the punches are in place.*

*Worker configuration will be resent to devices only when there is some change in Job Assignment.*

*When new worker is added or existing worker's Enterprise group is changed. Then if worker is assigned to the Enterprise group with which Job costing parameters are associated, then the configured job costing parameters will be reflected in Worker Configuration > Job Costing Tab.*

## Assigned Job Schedules

To view the Job Schedulers assigned to the worker,

- Click **Job Costing > Assigned Job Schedules**.

Scheduler ID	Scheduler Name	Scheduler Start Date	Scheduler End Date
1	Job Scheduler 1	13/05/2024	30/05/2024

- All the Job Schedulers assigned to the worker from the “[Job Scheduler](#)” and “[Association Mapping](#)” of the Enterprise Groups appear here. You can view the Scheduler Start and End Date from this page.



*Jobs assigned via Job Schedulers cannot be deleted. However, Job Schedulers assigned to workers can be deleted/changed. If jobs have already been assigned using Job Schedulers and then the Job Scheduler is deleted or the Enterprise Group assigned to the worker is changed, the jobs already assigned will not be deleted. However, new jobs will not be assigned to workers using the same Job Scheduler. New jobs will be assigned to the worker via the new Job Scheduler assigned to the workers via change of Enterprise Group.*

# Worker Profile-Field Visit Management

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On selecting Field Visit Management tab, the following page appears.

The screenshot shows a web application window titled "Worker Profile". The interface is divided into a left sidebar and a main content area. The sidebar contains a list of tabs: Profile, Devices, Credentials, T&A, Access Control, ESS, Cafeteria, CWM, Job Costing, and Field Visit Management (which is highlighted in blue). Above the tabs is a section for worker information, including a placeholder for a profile picture and fields for ID, Name, and Active/Inactive status. The main content area is titled "Settings" and contains a single checkbox labeled "Enable FVM".

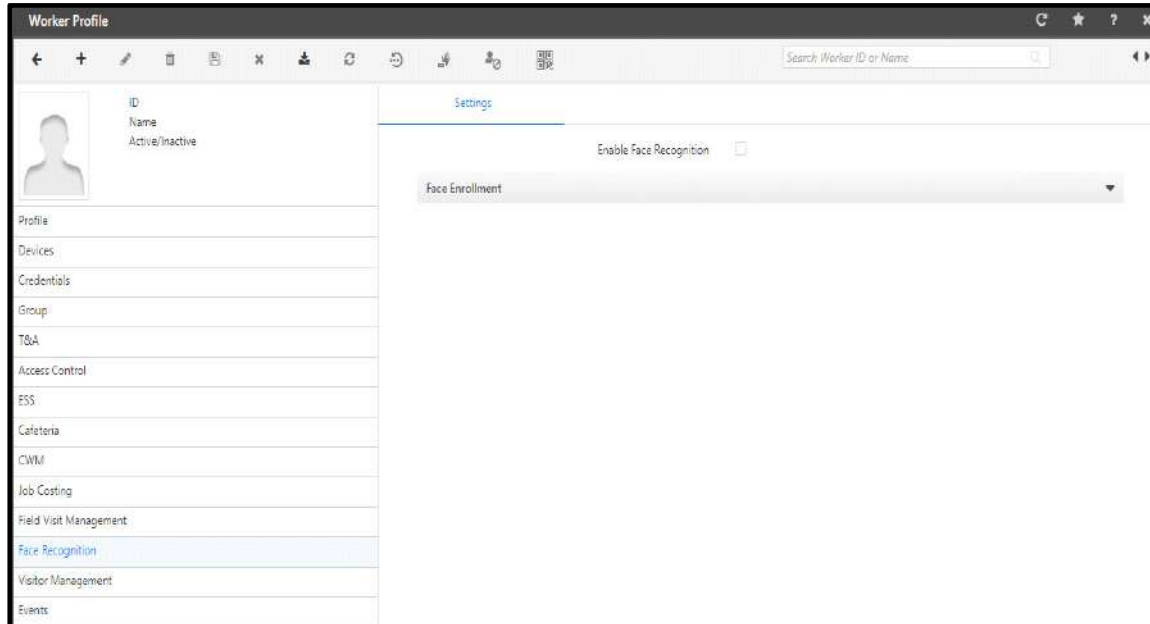
In this module, you can assign schedules to the workers and keep a track of their activities, while on site and also check if the assigned tasks are being fulfilled correctly or not.

In the **Settings** tab, check the **Enable FVM** box to consider the selected worker as FVM user.



# Worker Profile-Face Recognition

In this feature, worker can access the device or mark the attendance by verifying his Face as the credential. On selecting Face Recognition tab, the following page appears.



## Settings

**Enable Face Recognition:** Check this box to enable Face Recognition feature for the worker.

1. Create a Worker. Enable Face Recognition feature.
2. Assign Vega, FMX, ARGO or ARGO FACE door to the user.
3. Connect the FR module and IP Camera to the network. Ensure that COSEC Device, FR Module and IP Camera are in the same subnet.

If you are connecting the ARGO FACE device, it has an in-built FR Module and camera.

4. Configure IP camera to be used for capturing face credential. Select the Capturing device as IP Camera in Video Surveillance section of Device Configuration and configure the snapshot URL.
5. Configure FR settings on Device. Go to Identification Server of Device Configuration. Enable FR and select the Face capturing mode. Select the FR mode as Local/Server-Assisted. Enter the FR Server Address as the IP address of FR module. Enter FR Server Port as 12000 which is default port for Identification Service.
6. Now Tap on Device screen. The motion streaming of camera will appear on COSEC Device.
7. Now Enroll the worker for Face credential using Enroll Utility.
8. When you show your face in front of camera, the camera will capture your face and identify with the enrolled template. If it matches, you will be allowed access on the door.

## Face Enrollment via Web

This functionality enables the SA to enroll face/s against a worker. Face Enrollment can be done by either directly uploading the images of the desired worker or by capturing and then uploading the images.



*To use the capture functionality for images, make sure you have a secure login, that is you have logged in using HTTPS.*

Using Face Enrollment you can:

- Replace existing images (if any) with new images
- Add new images
- Remove enrolled images

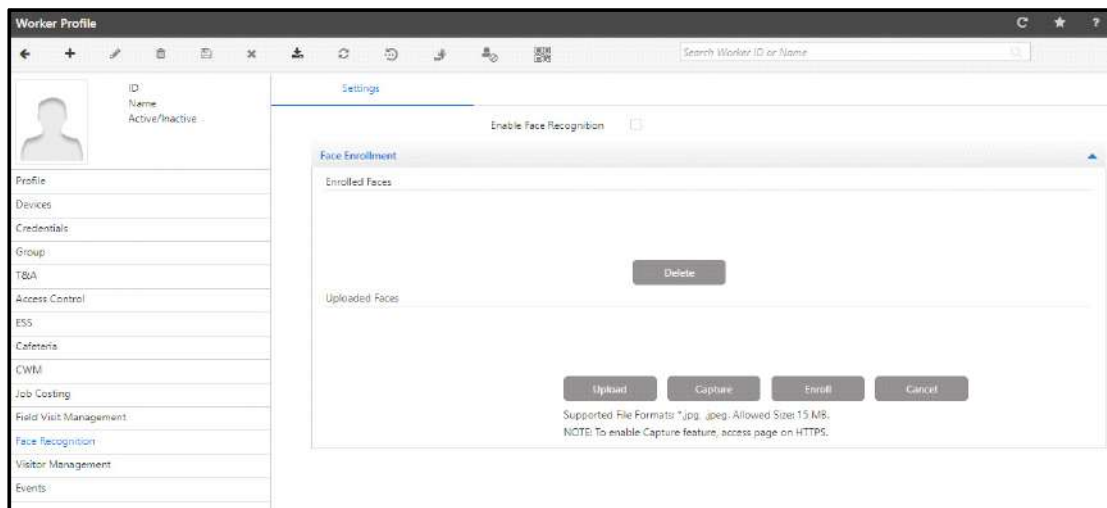
Click the **Face Enrollment** collapsible panel in order to enroll faces against a worker.



*For Face Enrollment via Web feature to work, ensure that Identification Service is defined in COSEC Admin > License and Service. For more details refer Admin Management Portal User Manual.*

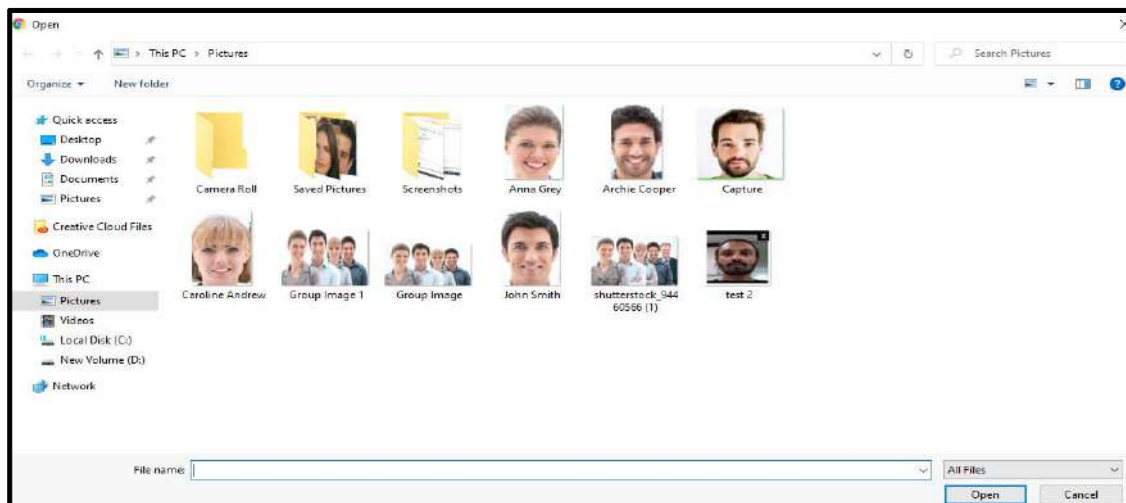
To Upload the images directly, refer **“Upload”**

To Capture and then upload the images, refer **“Capture”**

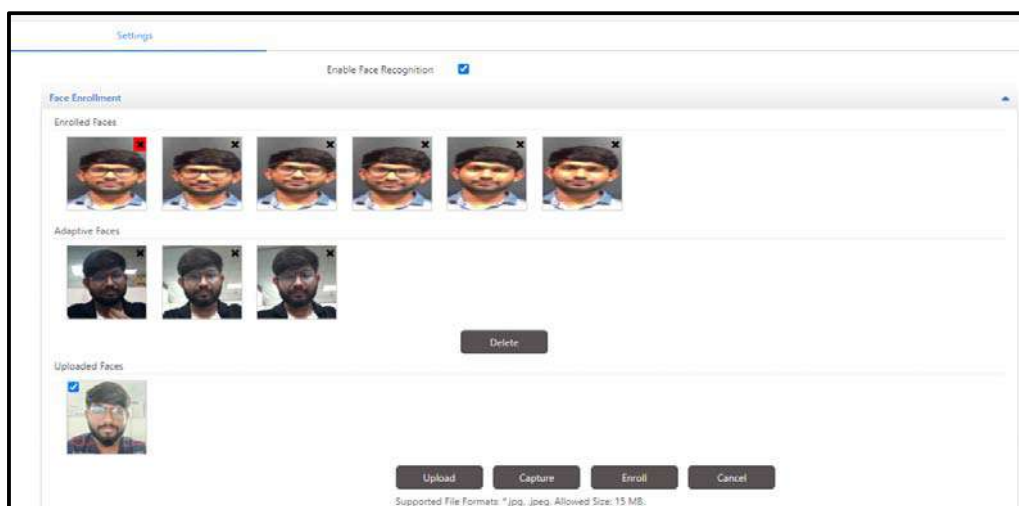


### Upload

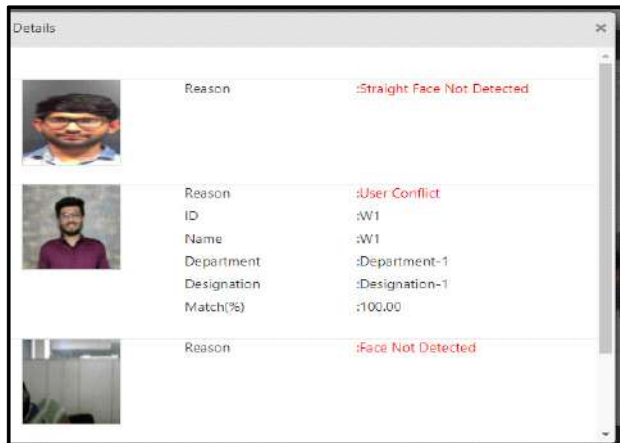
- In order to upload face/s against a worker click **Upload** in **Face Enrollment**.
- Browse to select the desired file from your local PC wherein the image is stored.
- Make sure the selected image is in the .jpg or .jpeg format.
- Click **Open**.



- All the faces that are uploaded will be reflected in **Uploaded Faces** Grid.
- Select the face/s that you want to enroll by clicking the checkbox provided on the top left corner of the uploaded face.

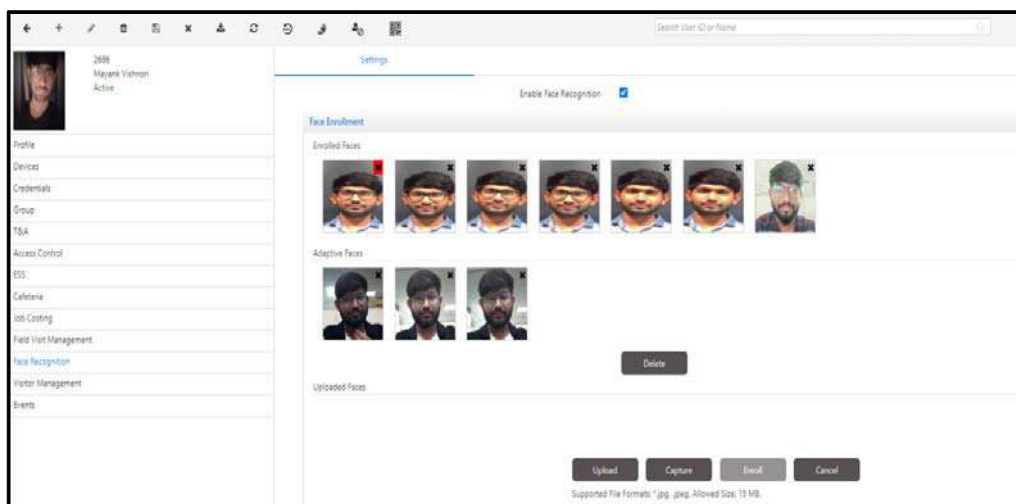


- While uploading a face if any error occurs, the **Info** icon will be displayed.
- On clicking the **Info** icon a pop up with the discarded face/s will be displayed along with the possible reason for discarding the image.

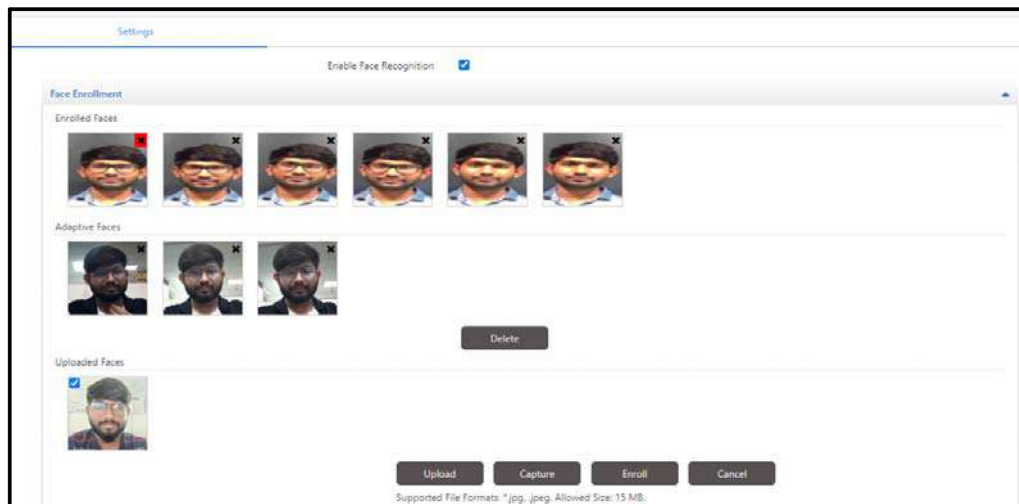


Let us understand this with the help of an example, you have uploaded 5 faces out of which 3 got discarded and then again you uploaded 5 more faces out of which 2 got discarded then the pop-up will display all the 5 discarded faces with the probable reasons for discarding.

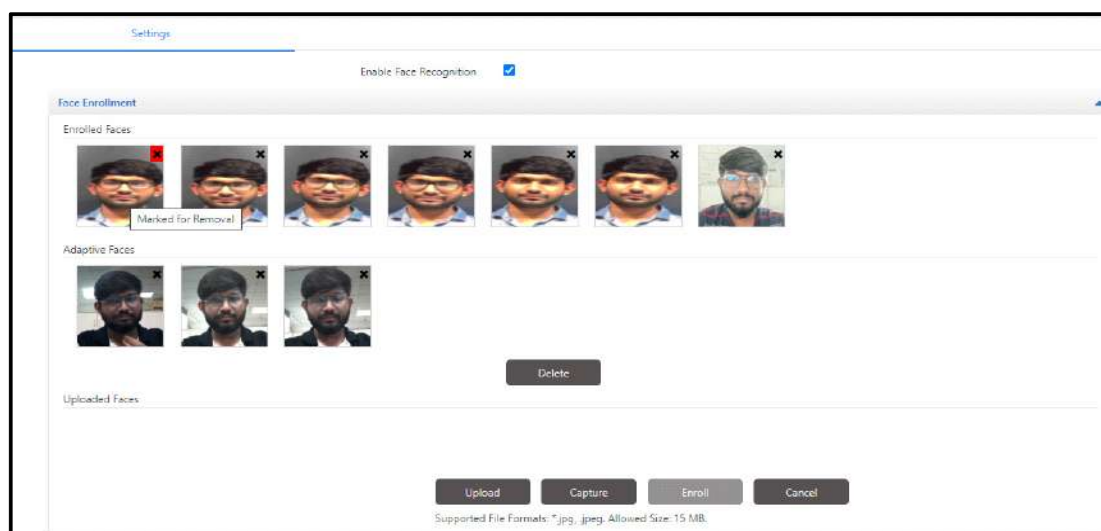
- To add the new image as the enrolled face,
- Select the check box of the desired image under **Uploaded Faces**.
- Click **Enroll** in order to enroll the selected face/s. The selected face/s will be reflected in the **Enrolled Faces** grid.




- To replace an existing enrolled faces,
- Click on the desired image, the red cross icon appears on the top right corner of the face under **Enrolled Faces**.
- Select the check box of the desired image under Uploaded Faces.
- Click **Enroll**.



- To remove an existing enrolled faces,
  - Click on the desired image, the red cross icon appears on the top right corner of the face under **Enrolled Faces**.
  - Click **Delete**.

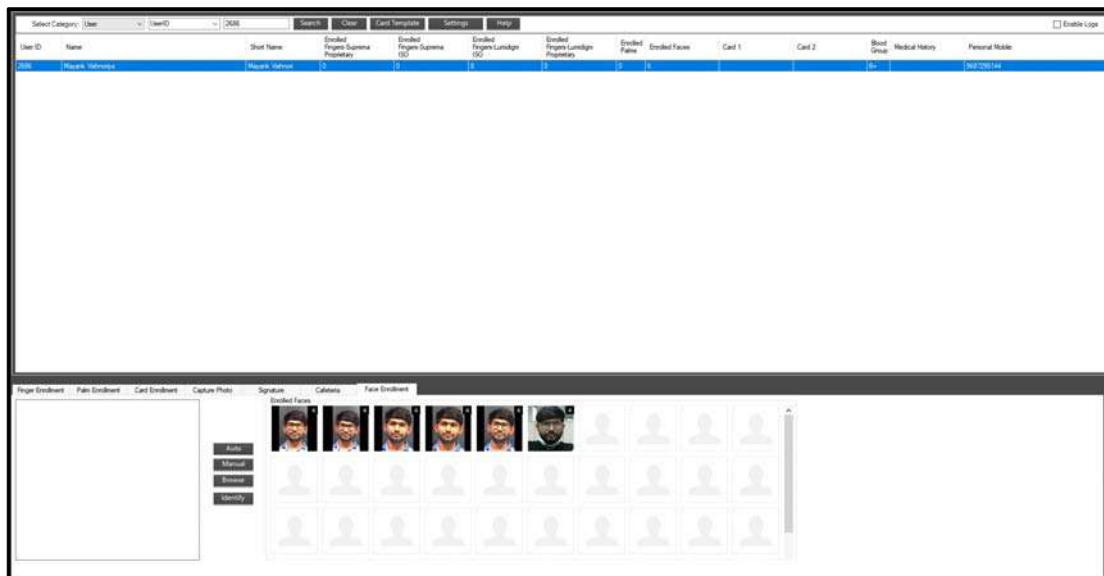


*Make sure the number of faces you consider for enrollment is lesser than or equal to the defined value in **Maximum No. of Faces** in Admin >System configuration> Global Policy >User.*

- If there is an occurrence of an adaptive face, it will be displayed under the **Adaptive Faces** grid, a sub-section under **Enrolled Faces** grid. If you desire, you may delete the image. To do so, follow the same instructions as mentioned above.
- Click the Save  in order to save all the enrolled faces. The faces will be successfully saved and considered for face recognition.

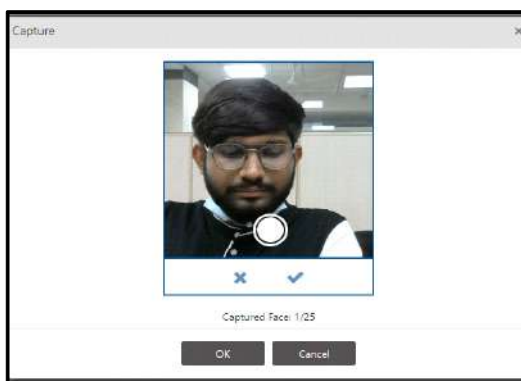


*The enrolled faces of the user will be successfully reflected in the Enroll Utility under **Face Enrollment**. Refer the COSEC Enroll User Manual for more details.*





## Capture

- In order to capture face/s, click **Capture** in Face Enrollment.
- The **Capture** pop-up will be displayed.



- Set the camera in a desired angle and capture the image.

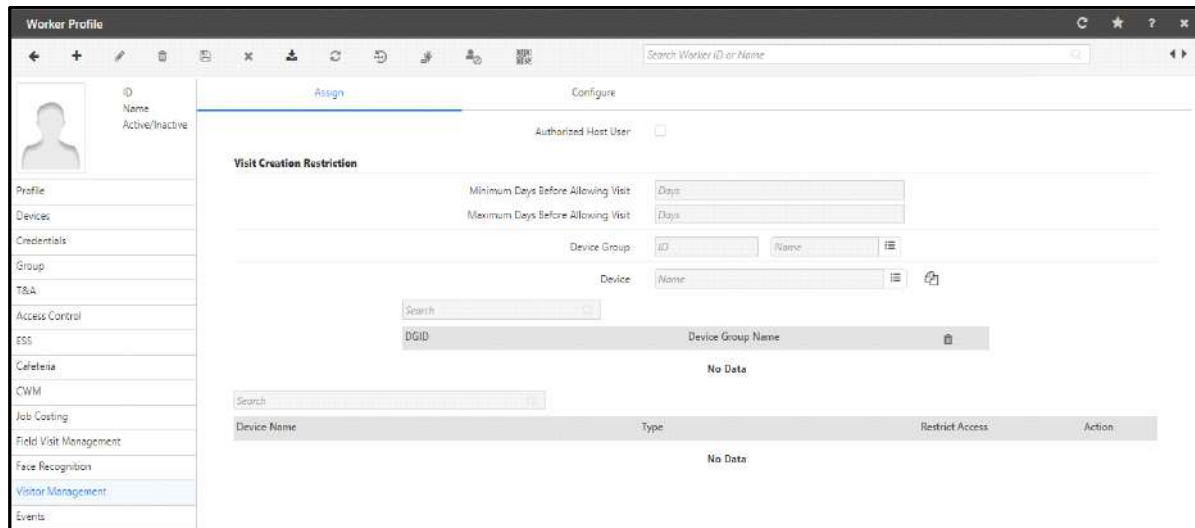


- If the image captured is appropriate click the icon . Now, you can again capture a new image if required.
- If the image clicked is not appropriate then click the icon  and a retake will be considered.

- After completing the capture, click **OK** to upload the image. Click **Cancel** if you desire to restart the **Capture**.
- The uploaded faces will be reflected in **Uploaded Faces** Grid.
- Now, refer to [“Upload”](#) for further instructions.

# Worker Profile-Visitor Management

In this page you can authorize a host user, restrict the visitor pre-registration on the basis of no.of days and assign device groups and devices to the visitors.



## Assign

- **Authorized Host User:** Select the checkbox to authorize a Host user. Once you authorize the host, the host user will be added in the list of Authorized Host Users in *Visitor Management > Utilities > Authorized Host Users*. For more information, refer [“Authorized Host Users”](#).

## Visit Creation Restriction

- **Minimum Days before Allowing Creation:** The minimum days configured in *Admin > System Configuration > Global Policy > Visitor Management* will be displayed here as the default value.

You can change the number of minimum days as per your requirement.

For more details, refer [“Visit Creation Restriction”](#) in *Admin > System Configuration > Global Policy > Visitor Management*.

- **Maximum Days Before Allowing Creation:** The maximum days configured in *Admin > System Configuration > Global Policy > Visitor Management* will be displayed here as the default value.

You can change the number of maximum days as per your requirement.

For more details, refer [“Visit Creation Restriction”](#) in *Admin > System Configuration > Global Policy > Visitor Management*.



You can assign Device Groups as well as Devices to the workers.

## Device Group

Click the **Device Group** picklist. The **Picklist for Device Group** pop-up appears.

The screenshot shows a window titled "Picklist For Device Group". At the top, a green bar displays "Total Selected: 0 Records". Below this is a search bar with the placeholder "Search" and a "Show Selected" button. A "Select All" checkbox is present. The main area contains a table with columns "DGID", "Name", and a checkbox. The table lists 12 records, with the first 10 visible. The first two records, "1 ACTA Devices" and "2 RnD1Visitor", are selected. The bottom of the window shows "1 - 10 of 12 records" and a pagination control with "1" selected. At the bottom are "OK" and "Cancel" buttons.

<input type="checkbox"/>	DGID ▲	Name
<input checked="" type="checkbox"/>	1	ACTA Devices
<input checked="" type="checkbox"/>	2	RnD1Visitor
<input type="checkbox"/>	3	Device Group 3
<input type="checkbox"/>	4	Device Group 4
<input type="checkbox"/>	5	Device Group 5
<input type="checkbox"/>	6	Device Group 6
<input type="checkbox"/>	7	Device Group 7
<input type="checkbox"/>	8	Device Group 8
<input type="checkbox"/>	9	Device Group 9
<input type="checkbox"/>	10	Device Group 10

You can either select particular device group or can select all the device groups at once.

To select particular device group, select the check boxes of the desired device groups.

This screenshot shows the same "Picklist For Device Group" window, but now with "Total Selected: 2 Records". The checkboxes for the first two records, "1 ACTA Devices" and "2 RnD1Visitor", are checked. The rest of the interface, including the search bar, "Select All" checkbox, table, pagination, and "OK/Cancel" buttons, remains the same.

<input type="checkbox"/>	DGID ▲	Name
<input checked="" type="checkbox"/>	1	ACTA Devices
<input checked="" type="checkbox"/>	2	RnD1Visitor
<input type="checkbox"/>	3	Device Group 3
<input type="checkbox"/>	4	Device Group 4
<input type="checkbox"/>	5	Device Group 5
<input type="checkbox"/>	6	Device Group 6
<input type="checkbox"/>	7	Device Group 7
<input type="checkbox"/>	8	Device Group 8
<input type="checkbox"/>	9	Device Group 9
<input type="checkbox"/>	10	Device Group 10

OR

To select all the device groups at once, select the **Select All** check box. The device group on all the pages will be selected.

Picklist For Device Group

Total Selected: 12 Records

Search

☒ Select All

<input checked="" type="checkbox"/>	DGID ▲	Name
<input checked="" type="checkbox"/>	1	ACTA Devices
<input checked="" type="checkbox"/>	2	RnD1Visitor
<input checked="" type="checkbox"/>	3	Device Group 3
<input checked="" type="checkbox"/>	4	Device Group 4
<input checked="" type="checkbox"/>	5	Device Group 5
<input checked="" type="checkbox"/>	6	Device Group 6
<input checked="" type="checkbox"/>	7	Device Group 7
<input checked="" type="checkbox"/>	8	Device Group 8
<input checked="" type="checkbox"/>	9	Device Group 9
<input checked="" type="checkbox"/>	10	Device Group 10

1 - 10 of 12 records

« < 1 2 > »

OK Cancel

Click **OK**.

The selected device groups appears in the grid.

Assign Configure

Authorized Host User ☒

**Visit Creation Restriction**

Minimum Days Before Allowing Visit


Maximum Days Before Allowing Visit

Device Group

Device



Search

DGID ▲	Device Group Name	
1	Device Group1	<input type="button" value="🗑"/>
2	Device Group 2	<input type="button" value="🗑"/>

You can also delete the desired device group. To do so, click **Delete**  of the respective device group.

Click **Save**.

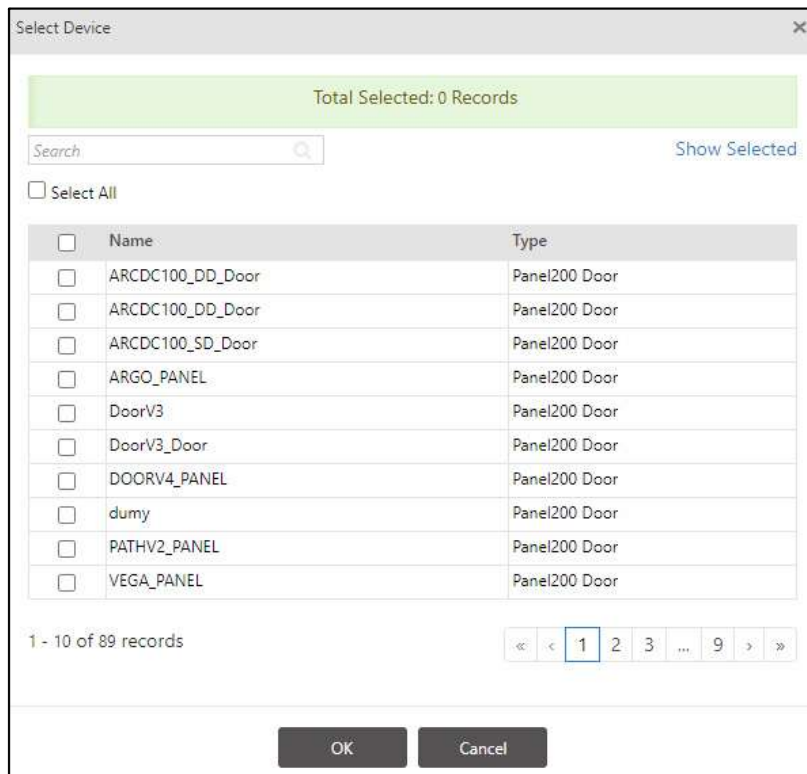
The devices that belong to the selected group/s appear in the grid.

Click **Edit**. You can un-assign the particular device from the assigned Device Group by clicking on  icon. Click on the  icon to assign the device again.

Select the corresponding **Restrict Access** check box to enable the restrictions for the selected worker on the selected device.

## Device

Click the **Device** picklist. The picklist for **Select Device** pop-up appears.



The 'Select Device' pop-up window displays a table of available devices. At the top, a green bar indicates 'Total Selected: 0 Records'. Below this is a search bar and a 'Show Selected' link. A 'Select All' checkbox is located above the table. The table lists 10 devices, all of type 'Panel200 Door'. At the bottom, there is a pagination control showing '1 - 10 of 89 records' and a set of navigation buttons. The 'OK' and 'Cancel' buttons are at the very bottom.

<input type="checkbox"/>	Name	Type
<input type="checkbox"/>	ARCDC100_DD_Door	Panel200 Door
<input type="checkbox"/>	ARCDC100_DD_Door	Panel200 Door
<input type="checkbox"/>	ARCDC100_SD_Door	Panel200 Door
<input type="checkbox"/>	ARGO_PANEL	Panel200 Door
<input type="checkbox"/>	DoorV3	Panel200 Door
<input type="checkbox"/>	DoorV3_Door	Panel200 Door
<input type="checkbox"/>	DOORV4_PANEL	Panel200 Door
<input type="checkbox"/>	dumy	Panel200 Door
<input type="checkbox"/>	PATHV2_PANEL	Panel200 Door
<input type="checkbox"/>	VEGA_PANEL	Panel200 Door

You can either select particular device or can select all the devices at once.

To select particular devices, select the check boxes for the desired devices.

Select Device

Total Selected: 1 Records

☐ Select All

<input type="checkbox"/>	Name	Type
<input checked="" type="checkbox"/>	ARCDC100_DD_Door	Panel200 Door
<input type="checkbox"/>	ARCDC100_DD_Door	Panel200 Door
<input type="checkbox"/>	ARCDC100_SD_Door	Panel200 Door
<input type="checkbox"/>	ARGO_PANEL	Panel200 Door
<input type="checkbox"/>	DoorV3	Panel200 Door
<input type="checkbox"/>	DoorV3_Door	Panel200 Door
<input type="checkbox"/>	DCORV4_PANEL	Panel200 Door
<input type="checkbox"/>	dumy	Panel200 Door
<input type="checkbox"/>	PATHV2_PANEL	Panel200 Door
<input type="checkbox"/>	VEGA_PANEL	Panel200 Door

1 - 10 of 89 records

**OR**

Select Device

Total Selected: 89 Records

☒ Select All

<input checked="" type="checkbox"/>	Name	Type
<input checked="" type="checkbox"/>	ARCDC100_DD_Door	Panel200 Door
<input checked="" type="checkbox"/>	ARCDC100_DD_Door	Panel200 Door
<input checked="" type="checkbox"/>	ARCDC100_SD_Door	Panel200 Door
<input checked="" type="checkbox"/>	ARGO_PANEL	Panel200 Door
<input checked="" type="checkbox"/>	DoorV3	Panel200 Door
<input checked="" type="checkbox"/>	DoorV3_Door	Panel200 Door
<input checked="" type="checkbox"/>	DOORV4_PANEL	Panel200 Door
<input checked="" type="checkbox"/>	dumy	Panel200 Door
<input checked="" type="checkbox"/>	PATHV2_PANEL	Panel200 Door
<input checked="" type="checkbox"/>	VEGA_PANEL	Panel200 Door

1 - 10 of 89 records

Click **OK**.

The selected devices appears in the grid.

Device Name	Type	Restrict Access	Action
aegofacedummy	ARGO FACE	<input type="checkbox"/>	
ARC200	ARC DC 200	<input type="checkbox"/>	
ARCD100_DD_Door	Panel200 Door	<input type="checkbox"/>	
ARCD100_DD_Door	Panel200 Door	<input type="checkbox"/>	
ARCD100_DS_Door	Panel200 Door	<input type="checkbox"/>	
ARCD100_DS_Door	Panel200 Door	<input type="checkbox"/>	
ARCD100_SD_Door	Panel200 Door	<input type="checkbox"/>	
ARCD200_Door	Panel200 Door	<input type="checkbox"/>	
ARCD200_Door_DD	Panel200 Door	<input type="checkbox"/>	
ARCD200_Door_DD	Panel200 Door	<input type="checkbox"/>	

1 - 10 of 89 records

You can also restrict access and delete desired devices. To do so, select the desired check box of **Restrict Access** or click **Delete** of the respective devices.

To add devices which are assigned to the host, click **Add Host's Devices** .

## Configure

This option enables the Admin to change the settings of the devices assigned to the Visitor.

To know more about the configurations, refer [“Configure”](#) in *User> User Configuration> Devices*.

### Panel Door

Assign

Configure

Device

Panel

Type

Panel

Active

☒

VIP

☐

Access Profile

Access Group-1

Functional Group

Staff

Home Zone

Zone-1

Visit Zone

Select

Access Route

Select

### Direct Door

Configure

Device

Argo Door

Type

ARGO

Active

☒

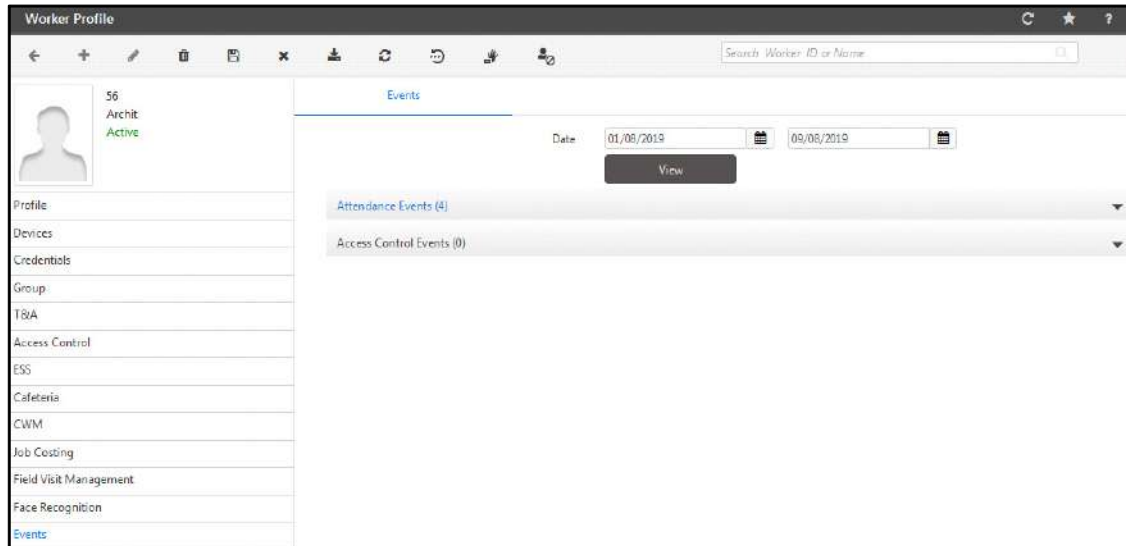
VIP

☐

# Worker Profile-Events

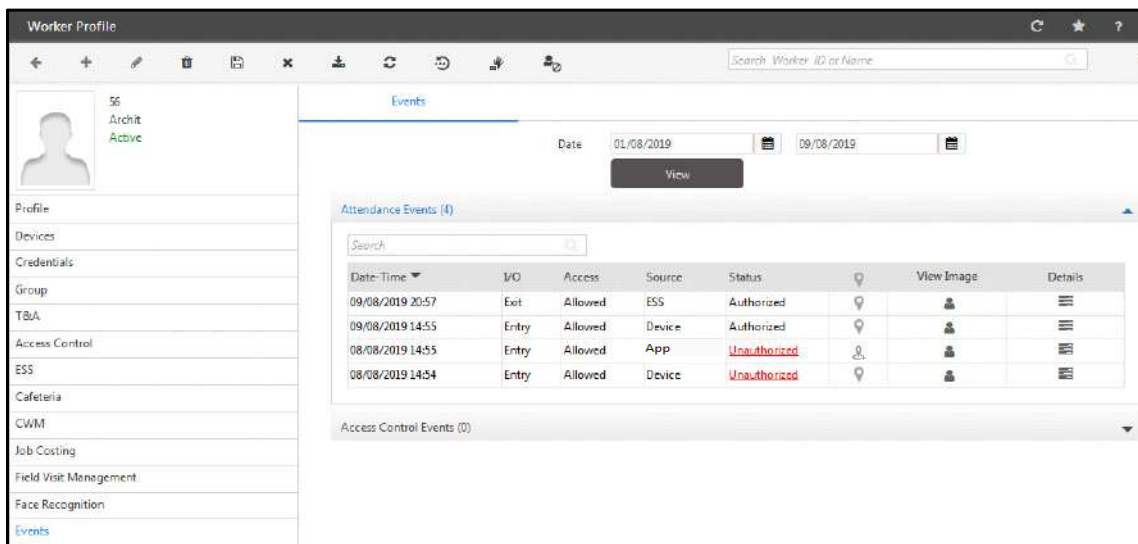
The Events tab is used for the security purpose by monitoring the workers in the organization. The Attendance Events and Access Control Events can be viewed by filtering the date range.

In cases of infringement or suspicion; the security supervisor can blacklist, delete or inactivate the worker creating problems in the organization. On selecting Events tab, the following page appears.



**Date:** Select the date range for which events are to be viewed.


Click on **View** button to view the Attendance events and Access Control events.



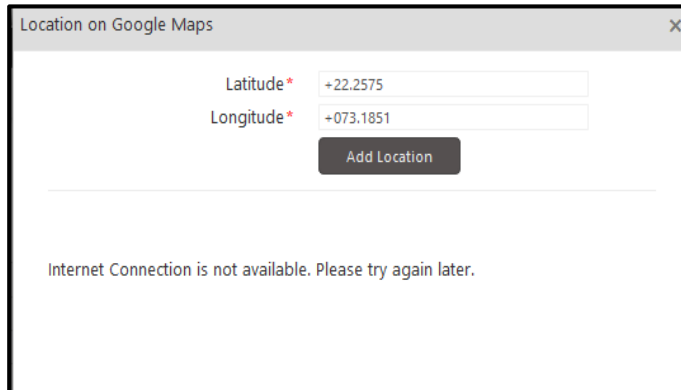
The Attendance Events shows the Date and time when the event is generated along with the I/O, Access, Source, Status and Location details. It also displays Image and Details of the punch.

The location details will display Latitude/Longitude or MAC address from where event has generated.

- You can view the location on Map if the GPS/GSM location is configured in Location Master by clicking on View Map icon.

- If the location is not configured in Location Master then you can add this location by clicking on **Add this Location**  icon shown in above figure.

Now click on **Add Location** button which will redirect to Location Master page from where you can add this location.



Location on Google Maps

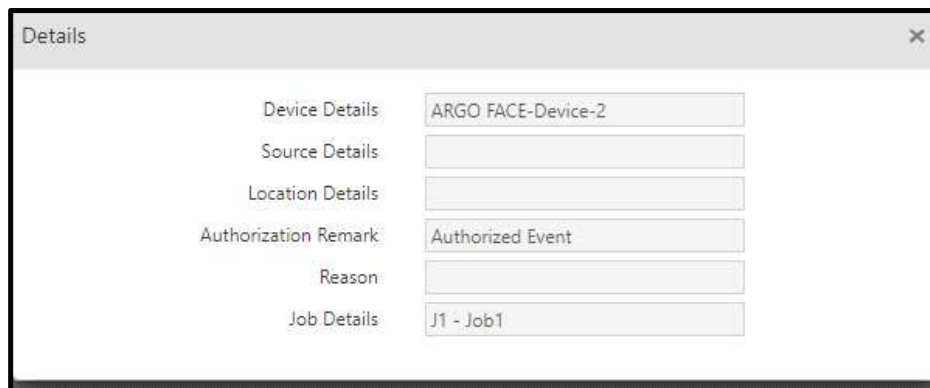
Latitude\* +22.2575

Longitude\* +073.1851

Add Location

Internet Connection is not available. Please try again later.

After the location is added, the location Name will be updated and map can be viewed by clicking **Details** as shown below.



Details

Device Details ARGO FACE-Device-2

Source Details

Location Details

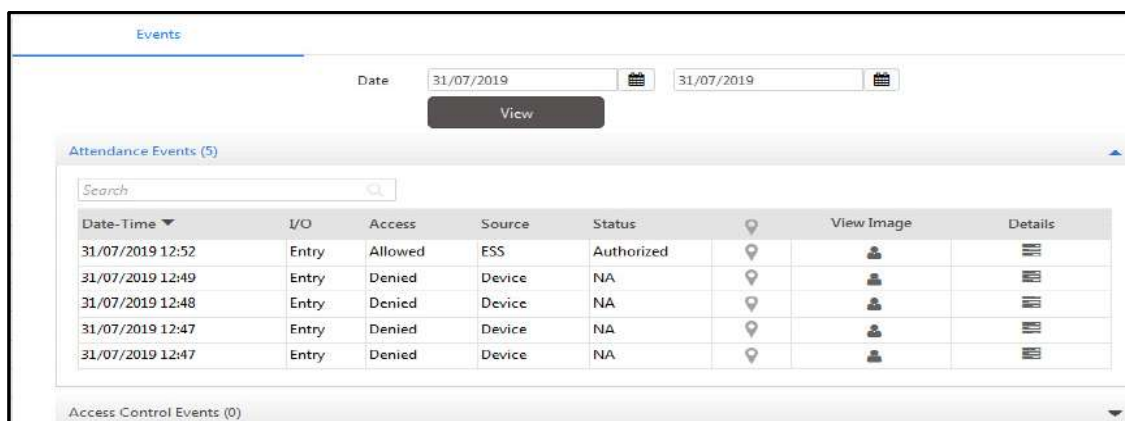
Authorization Remark Authorized Event

Reason

Job Details J1 - Job1

The Status of event, i.e. whether it is authorized or unauthorized is displayed under Status.

- If the status is Unauthorized, it will display a link which on clicking will be redirected to Events Authorization Page as per login user's rights.
- If the status is shown as NA, then Authorized status will be Null and the access will be shown as **Denied** as shown below:



Events

Date 31/07/2019 31/07/2019

View

Attendance Events (5)

Date-Time	I/O	Access	Source	Status		View Image	Details
31/07/2019 12:52	Entry	Allowed	ESS	Authorized			
31/07/2019 12:49	Entry	Denied	Device	NA			
31/07/2019 12:48	Entry	Denied	Device	NA			
31/07/2019 12:47	Entry	Denied	Device	NA			
31/07/2019 12:47	Entry	Denied	Device	NA			


Access Control Events (0)

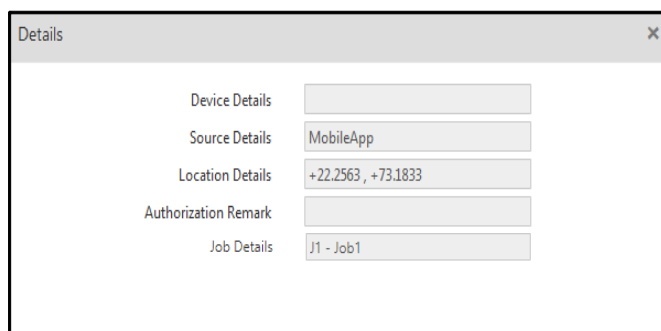
You can view the image captured by the Built-In Camera by clicking on **View Image** icon.

If there is camera to capture the image of the worker punching on door; then his image will be captured and can be viewed for that event by clicking on View Image icon.



*If the event is generated by API then there will not be any image popup window on clicking View Image icon.*

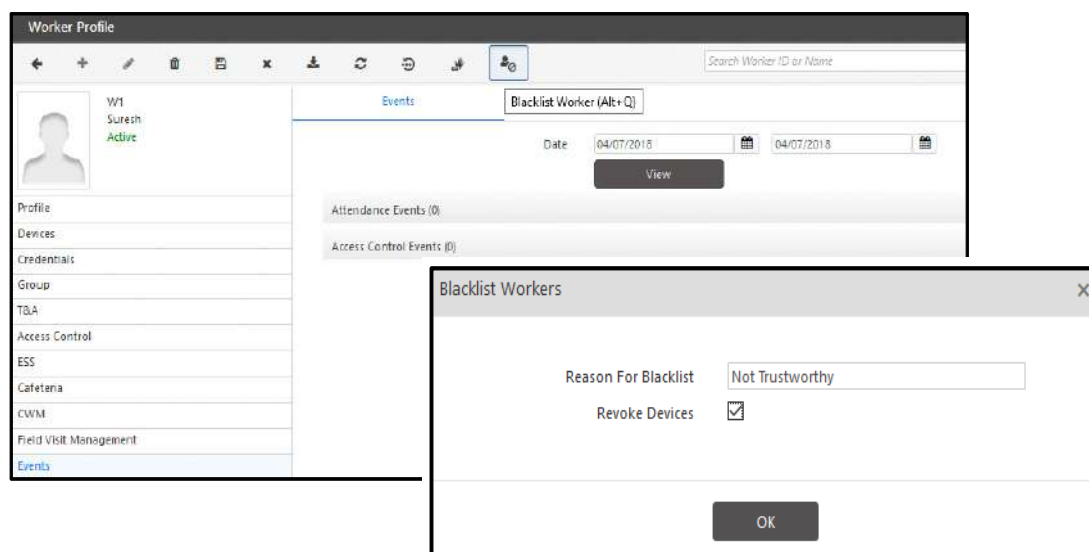
The Reason for punching from unassigned location can be known by clicking on Details icon  as shown in the figure below:



## Blacklist

Click on the **Blacklist Worker** button. The Blacklist Workers window appears.

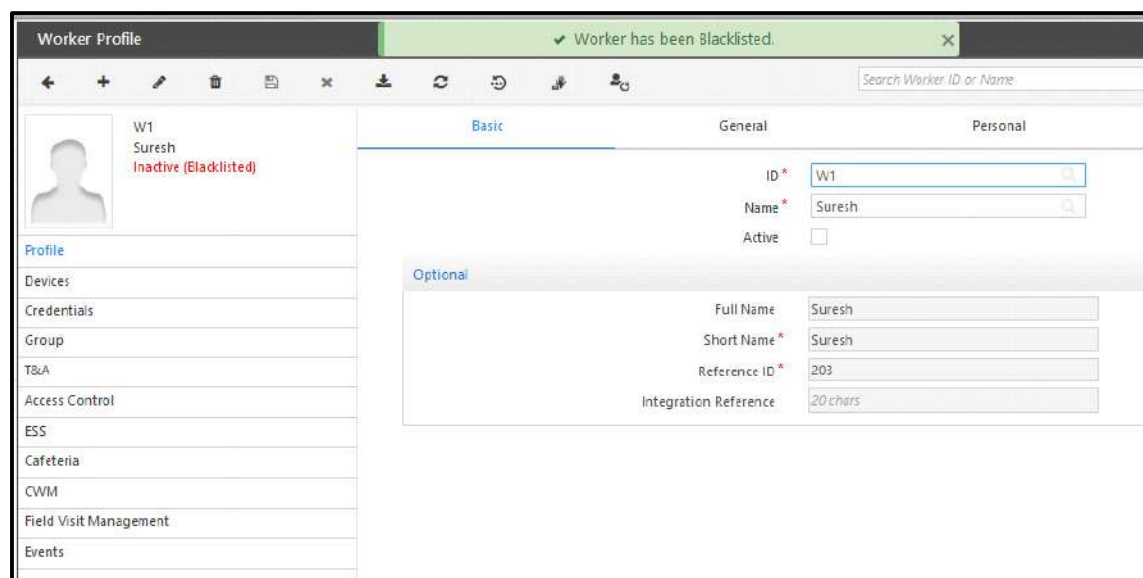




Enter the **Reason** for Blacklisting the worker.

Click on **Revoke Devices** to remove the assignment of devices from the worker.

Click **OK** and **Save** button to save the changes. The worker will be blacklisted and Inactive as shown below.



The blacklisted worker can be revoked by clicking **Restore and Activate Worker** button. It will make the worker active.

Worker Profile

←

+

✎

🗑

📁

✕

📄

🔄

🕒

👤

🔍

Search Worker ID or Name

W1

Suresh

Inactive (Blacklisted)

Profile

Devices

Credentials

Group

T&A

Access Control

ESS

Cafeteria

CWM

Field Visit Management

Events

Basic

Restore and Activate Worker (Alt+Q)

Personal

ID \*

W1

Name \*

Suresh

Active

☐

Optional

Full Name

Suresh

Short Name \*

Suresh

Reference ID \*

203

Integration Reference

20 chars

2792

Matrix COSEC System Manual

# Worker Assignment

Worker Assignment enables to assign worker to the work order and also view already assigned workers having assignment status as Approved and Pending. Workers can be assigned for as many number of days within the work order depending on the requirements of work order. Also workers can be un-assigned from the work order.

To assign the workers to the work order go to **Contract Worker Management > Workers > Worker Assignment**

The screenshot shows the 'Worker Assignment' form. On the left, there are input fields for 'Work Order' (ID, Name), 'Validity' (From, To), 'Contractor' (ID, Name), and 'Status'. Below these are tabs for 'Current Assignment', 'Unregistered Workers', and 'Past Assignments'. On the right, there is a search bar and a table with columns: ID, Work Order Name, Status, and Current Assignment. The table contains one row: WO6, Servicing, In Progress, 0.

**Work order:** Select the work order from the grid on the right or through the work order picklist.

The **Validity, Contractor ID, Name** and **Status** of the selected work order are displayed in the respective fields.

The screenshot shows the 'Worker Assignment' form with data populated. The 'Work Order' fields are filled with 'WO6' and 'Servicing'. The 'Validity' fields are filled with '04/27/2017' and '05/24/2017'. The 'Contractor' fields are filled with 'CO1' and 'HPC'. The 'Status' field is filled with 'In Progress'. The table on the right still contains the same row: WO6, Servicing, In Progress, 0.





## Current Assignment

It displays already assigned workers to the selected work order. Further new workers can be assigned to the work order.




To assign the new workers for the selected work order, select the **worker** from the picklist. The worker with the assignment details will appear in the grid.

The screenshot shows the 'Current Assignment' dialog box. It has input fields for 'Assignment Period' (From, To) and 'Worker' (ID, Name). Below these is a search bar and a table with columns: ID, Worker Name, From, To, Assigned Days, and Assignment Status. The table contains two rows: AP, Aakash, 04/27/2017, 04/28/2017, 2, Approved; and RG, Rutuja, 04/27/2017, 05/02/2017, 28, Free. Below the table are tabs for 'Unregistered Workers' and 'Past Assignments'. An 'OK' button is at the bottom right.

To change the assigned days click on **Edit** button. Then specify the from and to date. Then click on **OK** button.

Search						
ID ▲	Worker Name	From	To	Assigned Days	Assignment Status	
AP	Aakash	04/27/2017	04/28/2017	2	Approved	 
RG	Rutuja	04/27/2017	05/02/2017	6	Free	 

Click on **Save** button from the menu bar to save the assignment of worker to the work order.

Search						
ID ▲	Worker Name	From	To	Assigned Days	Assignment Status	
AP	Aakash	04/27/2017	04/28/2017	2	Approved	 
RG	Rutuja	04/27/2017	05/02/2017	6	Approved	 

### Unregistered Workers

It displays the total count of (Unregistered + pending) workers who were added by contractor and are in pending stage.


Current Assignment						
Unregistered Workers						
Search						
ID ▲	Worker Name	From	To	Assigned Days	Assignment Status	
2	Dinesh	04/27/2017	04/29/2017	3	Pending	
Past Assignments						

The **Past Assignments** tab shows the workers who were previously assigned the selected work order.

Past Assignments						
Search						
ID ▲	Worker Name	From	To	Assigned Days	Assignment Status	
AP	Aakash	04/27/2017	04/27/2017	1	Approved	

### Copy Workers

If some work order's validity is over and contractor or site in-charge forgot to extend its validity, in such cases it might be required to create a new work order and assign same workers to this work order. Also it can be required to assign same workers to some similar work order.

- Select the Work Order to which workers are to be copied.
- Click **Copy**  .The **Copy Worker From** pop-up appears.

You can either select particular workers or can select all the workers at once.

- To select particular workers, select the check boxes of the desired workers.

**OR**

- To select all the workers, select the **Select All** check box.

Click **OK**. The selected workers appear under the **Current Assignment** collapsible panel.



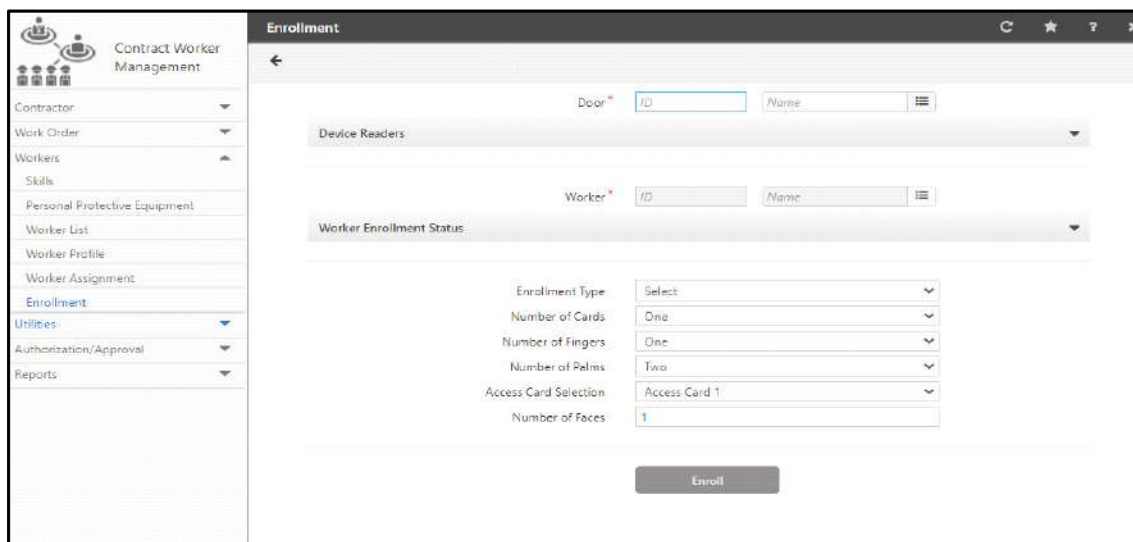
*Work Orders having status as “In Progress” or “Open” can be assigned workers from some “Closed” work order having same contractor.*

*While creating a work order, enable the **Check Limit While Assigning Worker**, so while assigning a work order to any of the worker, Max Worker Limit and Skill-Wise Worker Limit will be checked.*

# Enrollment

The COSEC Access Control System supports enrollment of worker cards, finger print templates, palm templates and special cards. The enrollment process can be initiated from the COSEC application or from the Door Controller by using special cards or Menu.

To enroll the worker credentials, select **Contract Worker Management > Workers > Enrollment**



- **Door:** Select the desired door from the pick list on which the enrollment is to be done.

## Device Readers

Device Readers displays the information of the readers configured in the selected **Door**.



Card Reader, Biometric Reader and External Reader information are displayed here.

- **Worker:** Select the desired worker from the picklist for whom the enrollment is to be done.

Worker Enrollment Status	
Enrolled Fingers (Suprema Proprietary)	0
Enrolled Fingers (Suprema ISO)	0
Enrolled Fingers (Lumidigm ISO)	0
Enrolled Fingers (Lumidigm Proprietary)	0
Enrolled Palms	0
Enrolled Card 1	
Enrolled Card 2	
Enrolled Faces	0

### Worker Enrollment Status

Worker Enrollment Status displays the information related to the number of already enrolled credentials of the worker like fingers, palms, cards and faces.

Details like — **Enrolled Fingers (Suprema Proprietary)**, **Enrolled Fingers (Suprema ISO)**, **Enrolled Fingers (Lumidigm ISO)**, **Enrolled Fingers (Lumidigm Proprietary)**, **Enrolled Palms**, **Enrolled Card 1**, **Enrolled Card 2** and **Enrolled Faces** — are displayed here.

- **Enrollment Type:** Select the desired enrollment type — **Read Only Card**, **Smart Card**, **Face**, **Biometrics**, **BiometricsThenCard**, **Mobile** or **Duress Finger** — from the drop down list.

Based on the selection of the **Door** and **Enrollment Type**, below parameters will be displayed for configuration.



*When Enrollment Type selected is Smart card or BiometricThenCard, Duress Finger Templates will not be written in the Smart Card.*

*Below parameters also depend on the Readers configured in the Door. To configure the desired Reader, refer Readers section under Devices > Device Configuration (of the desired Door) > Profile > Readers.*

#### 1. Enrollment Type = Read Only Card

**Number of Cards:** Select the desired number of cards from the drop down list.

Enrollment Type	Read Only Card	▼
Number of Cards	One	▼

#### 2. Enrollment Type = Smart Card

**Number of Cards:** Select the desired number of cards from the drop down list.

### Details on Smart Card

Select the desired check boxes of the parameters — **Worker ID**, **Facility Code (FC)**, **Additional Security Code (ASC)** — which are to be displayed on the Smart Card.

Select the desired number of **Finger Templates** from the drop down list.

If **Door** is selected as PVR Door, **Palm Templates** parameter will be visible. Select the check box of this parameter if you wish to display it on the Smart Card.

To store the palm templates, MiFare 4k reader must be configured in the PVR Door.



*Door PVR must be set in the Adaptive mode (configure from Admin> System Configuration> Global Policy) for the palm templates to be saved into the Smart Card.*

### Additional Details on Smart Card

Other than the parameters mentioned in the Details on Smart Card, you can display additional details on Smart Card.

Select the desired check boxes of the parameters — **Short Name**, **Branch**, **Department**, **Designation**, **Emergency Contact**, **Blood Group** and **Medical History**— which are to be displayed on the Smart Card.

The values of these additional details are displayed as well. Make sure the values of these additional details are not blank for successful enrollment process.

### 3. Enrollment Type = Face

**Number of Faces:** Select the desired number of face from the dropdown list.



Enrollment Type	Face
Number of Faces	1

4. **Enrollment Type** = Biometrics

**Number of Fingers/ Number of Palms:** Select the desired number of fingers or palms from the drop down list.

Enrollment Type	Biometrics
Number of Fingers	One

Enrollment Type	Biometrics
Number of Palms	One

5. **Enrollment Type** = BiometricsThenCard

**Number of Cards:** Select the desired number of cards from the drop down list.

**Number of Fingers/ Number of Palms:** Select the desired number of fingers or palms from the drop down list.

Enrollment Type: BiometricsThenCard

Number of Cards: One

Number of Fingers: One

**Details on Smart Card**

Worker ID: ☐

Facility Code (FC): ☐

Additional Security Code (ASC): ☐

Finger Templates: None

Duress Finger Templates will not be written in the Smart Card

**Additional Details On Smart Card**

Short Name: ☐

Branch: ☐

Department: ☐

Designation: ☐

Emergency Contact: ☐

Blood Group: ☐

Medical History: ☐

**Enroll**

### Details on Smart Card

Select the desired check boxes of the parameters — **Worker ID**, **Facility Code (FC)**, **Additional Security Code (ASC)** — which are to be displayed on the Smart Card.

Select the desired number of **Finger Templates** from the drop down list.

If the **Door** is selected as PVR Door, **Palm Templates** parameter will be visible. Select the check box of this parameter if you wish to display it on the Smart Card.

To store palm templates, MiFare 4k reader must be configured in the PVR Door.



*Door PVR must be set in the Adaptive mode (configure from Admin> System Configuration> Global Policy) for the palm templates to be saved into the Smart Card.*

### Additional Details on Smart Card

Other than the parameters mentioned in the Details on Smart Card, you can display additional details on Smart Card.

Select the desired check boxes of the parameters — **Short Name**, **Branch**, **Department**, **Designation**, **Emergency Contact**, **Blood Group** and **Medical History**— which are to be displayed on the Smart Card.

The values of these additional details are displayed as well. Make sure the values of these additional details are not blank for successful enrollment process.

## 6. Enrollment Type = Mobile



To select **Enrollment Type** as **Mobile**, the particular device must have BLE support and ensure Bluetooth is ON in the mobile.

**Access Card Selection:** Select the desired Access Card from the drop down list.

Enrollment Type: Mobile  
Access Card Selection: Access Card 1  
Facility Code (FC): ☐

**Facility Code (FC):** Select this check box to enroll the Facility Code (FC) against the worker.

## 7. Enrollment Type = Duress Finger

**Number of Fingers:** Select the desired number of fingers that you want to enroll as **Duress Finger** from the drop-down list— **One** or **Two**.

Enrollment Type: Duress Finger  
Number of Fingers: One  
Enroll

Click **Enroll** to initiate the enrollment process.

After the enrollment process, the worker must tap on **Tap to Register > Matrix Device** from the ACS Application installed on respective mobile phone and select the same configured Door from **Available Doors**. Thereafter, that worker can access the device through ACS application for Access Control purpose.

The value in Access Card selected will be consider as Access ID of the worker. If Access Card selected has no value i.e blank, then after the enrollment process, the system will auto-generate 18 digits number as worker Access ID and store the same value.

Click **Enroll** to initiate the enrollment process and the enrollment command is sent to the Door.

For Panel Door the command is sent to the Panel200 which will communicate further to the Door.

Once all the required credentials of an worker are enrolled, the number of credentials enrolled will be displayed in the Contract Worker Management > *Workers*> *Worker Profile* > *Credentials*.

# Temporary Worker

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Temporary Workers are workers which can be auto-added from the desired devices connected with the system, with bare minimum parameters without the intervention of the Admin. Hence, this reduces the burden on the Admin to add as well as allow access to such workers. Temporary Workers can also be deleted/de-activated automatically after a desired time interval or converted into Normal Workers.

Devices that support Temporary Workers include the following Direct Doors and Panel Doors — ARGO, VEGA and ARGO FACE.



*The license consumption for Temporary Workers will be the same as for Normal Workers.*

*Temporary Worker is not applicable for Cafeteria mode of devices.*

*Make sure you enable the check box **Confirm before adding Temporary User** under **Temporary User** in the respective device, so that you get a confirmation message before enrolling a Temporary Worker.*

To add Temporary Workers, you need to:

- Enable Temporary Worker and configure its parameters. For details refer to [“Temporary User”](#) in [“ARGO Door”](#), [“Temporary User”](#) in [“VEGA Door”](#) and [“Temporary User”](#) in [“ARGO FACE Door”](#).
- For Panel Doors, configure the Temporary Workers parameters in the Panel as well as Panel Doors. For details refer to [“Temporary User”](#) in [“Panel200”](#), [“Temporary User”](#) in [“ARGO Door”](#), [“Temporary User”](#) in [“VEGA Door”](#) and [“Temporary User”](#) in [“ARGO FACE Door”](#).
- Make sure the credentials (Finger) of the unknown user are presented on the desired device 3 times consecutively for enrollment.
- For Direct Doors make sure the User Access Mode in Device Configuration (of the respective device) > Profile is selected as — Face, Biometrics or Card.
- For Panel Doors, you need to set the User Access Mode (Door) in Panel Configuration > Zones as — Face, Biometrics or Card.
- Configure the Auto Generate Worker ID in Global Policy, if required. For details refer to [“Generate Worker ID”](#)
- Configure the Alerts to receive notifications when the Temporary Worker is added, if required. To do so, click Admin > Alert Message Configuration, in *Alert Filter* select *System* and in *Event* select *Temporary User/Worker Added*. For details refer to [“Configuring Alert Messages”](#).
- Configure the Task Scheduler to delete/de-activate Temporary Workers automatically or convert Temporary Workers to Normal Workers automatically. For details refer to [“For Schedule Parameter: Temporary User/Worker”](#).
- When the Temporary Workers are deleted/de-activated or converted to Normal Workers using Task Schedulers the logs of these tasks can be seen in the Scheduler Log. For details, refer to [“Scheduler Log”](#).

After such workers are enrolled, to view the list of Temporary Workers, click **Contract Worker Management > Workers > Temporary Worker**.



*You can also view Temporary Workers from the Worker List as well as User List. For details, refer to [“Worker List”](#).*

The **Temporary Worker** page appears.

ID	Name	Photo	Status	Auto-Registered Date & Time	Auto-Registered via Device	Auto-Registered via Credential	Make Worker
Worker_2	Worker_2		Active	01/02/2023 14:56	ARGO	Finger	
Worker_1	Worker_1		Active	31/01/2023 17:02	ARGO	Finger	

## Setting the Filters

- **Date:** Select the desired date range to display the temporary workers created during that duration.
- **Filter:** Select the desired option — All, Device or Group Wise — as per which you wish to view the temporary workers.

Select **All**, if you wish to view all the temporary workers added during the selected date range.

Select **Device**, if you wish to view the temporary workers added using a particular device. Click the picklist to select the desired device.


Select **Group Wise**, if you wish to view the temporary workers as per the desired Enterprise Group. Click the picklist to select the desired group.

- Click **View**. The temporary workers will appear as per the set filters.

## Filtered Records

The grid displays the temporary workers with the following details:

- **ID:** Displays the ID assigned to the temporary worker. This can be auto-generated, if required. To auto-generate the ID, you must enable the **Auto Generate User ID** check box in Global Policy.

Only if you have enabled this check box the **Auto-Generate as per Global Policy**  icon appears here. For details refer to [“Generate Worker ID”](#) in Global Policy.

- **Name:** Displays the name of the temporary worker.
- **Photo:** Displays the image of the temporary worker.



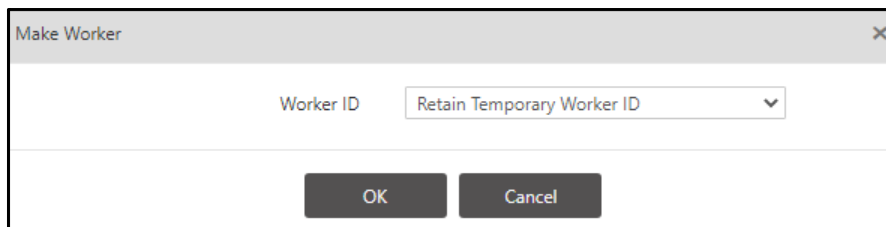
*If GDPR is enabled a dummy photo will be displayed as Photo. For details refer to [“GDPR Reflections”](#).*

- **Status:** Displays the Status of the temporary worker — Active, Inactive.
- **Auto-Registered Date & Time:** Displays the auto-registration date and time of the temporary worker.
- **Auto-Registered via Device:** Displays the name of the device via which the temporary worker is auto-registered.

- **Auto-Registered via Credential:** Displays the credential using which the temporary worker is auto-registered.
- **Make Worker:** You can convert a temporary worker to a normal worker, if required.

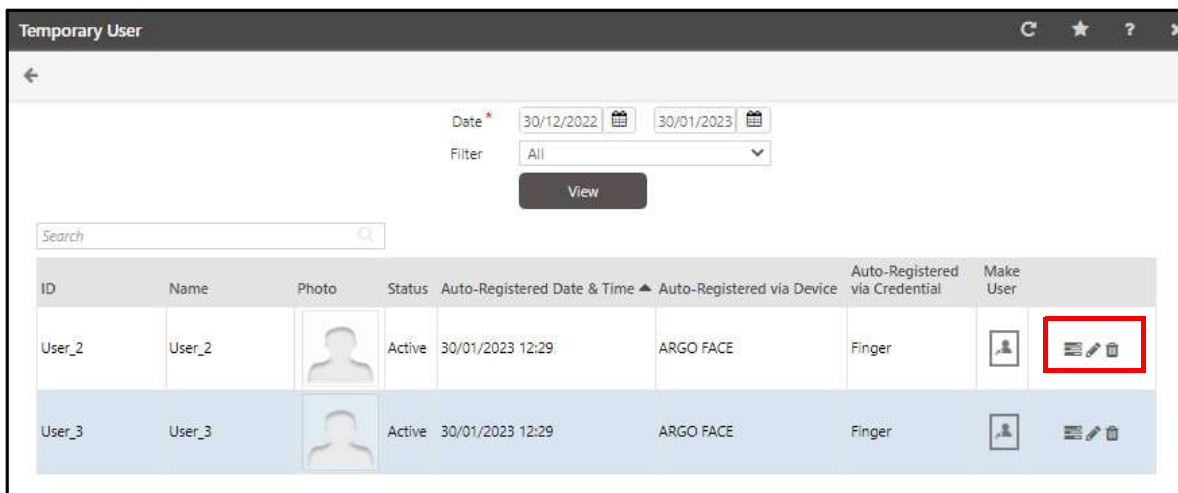
To do so, click **Make Worker** .

If you have enabled **Auto Generate User ID**, then the **Make Worker** pop-up appears.






The 'Make Worker' dialog box has a title bar with a close button. It contains a label 'Worker ID' and a dropdown menu currently showing 'Retain Temporary Worker ID'. At the bottom are 'OK' and 'Cancel' buttons.

- Select the desired **Worker ID** option — Retain Temporary Worker ID, Auto Generate as per Global Policy — from the drop-down list.
- Click **OK** to save the changes or click **Cancel**.
- The temporary worker is added as a normal worker and appears in the Workers List.
- You can also perform the following actions on each record — Details, Edit, Delete



The 'Temporary User' interface shows a search bar, date filters (30/12/2022 to 30/01/2023), a filter dropdown set to 'All', and a 'View' button. Below is a table with columns: ID, Name, Photo, Status, Auto-Registered Date & Time, Auto-Registered via Device, Auto-Registered via Credential, Make User, and a set of action icons (Details, Edit, Delete). The first two rows are visible, with the action icons for the first row highlighted by a red box.

ID	Name	Photo	Status	Auto-Registered Date & Time	Auto-Registered via Device	Auto-Registered via Credential	Make User	
User_2	User_2		Active	30/01/2023 12:29	ARGO FACE	Finger		
User_3	User_3		Active	30/01/2023 12:29	ARGO FACE	Finger		

- Click **Details** of the desired temporary worker, if you wish to edit various worker parameters. The Worker Profile page appears with the relevant details of temporary worker. You can edit the parameters as per your requirement.
- Click **Edit** of the desired temporary worker, if you wish to edit the:
  - Name
  - ID, that is, you can click **Auto-Generate as per Global Policy** , if required.
  - Click **OK**  to save the changes or click **Cancel**  to discard.
- Click **Delete**, if you wish to delete the temporary worker.



*You can also Edit the parameters of the Temporary Workers or Delete Temporary Workers from the Worker List. To do so, Click Contractor Worker Management > Workers > Worker List. Click on the desired entry. You can edit or delete it. For details, refer to [“Worker List”](#).*

# Import Workers

The *Import Workers* utility helps in manually sending information about workers to selected devices. The data is sent in Excel or CSV file formats. The information to be sent can be previewed before actually importing it to device. Also, there is a provision to make multiple entries of workers at once.



The parameter **Birth Date** will be mandatory in the Import sheet if set as mandatory in the “[Minimum Age Requirement for Workers](#)” in “CWM”.

To import worker’s information to devices go to **Contract Worker Management > Utilities > Import Workers**.

Configure the following parameters:

- **Import Data For** - Select the option from the drop-down list for which the data is to be imported.

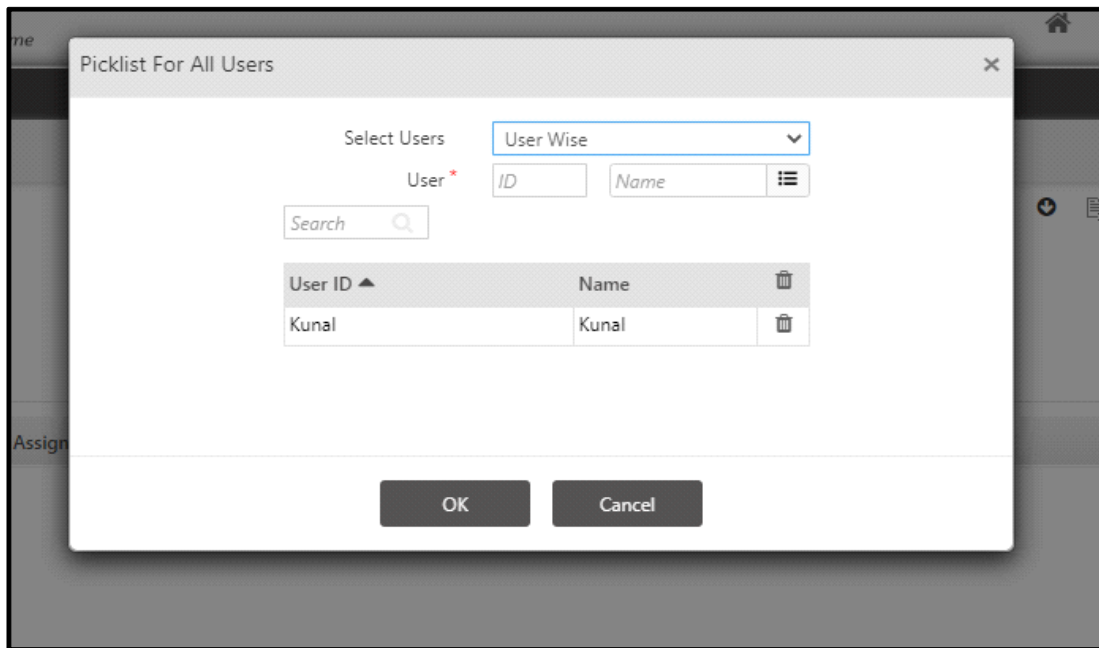
You can download sample import file by clicking on **Download Sample Import file** button. The import sheet displays the fields required for importing specific data.

The mandatory fields list is given in **Document guidelines** section of Import sheet.

	BG	BH	BI	BJ	BK	BL	BM	BN	BO	BP	BQ	BR	BS	BT	BU	BV
1	SkillID	ContractorID	WorkOrderID	StartDate	EndDate	WeekOffGroupID	Field1	Field2	Field3	Field4	Field5	Field6	Field7	Field8	Field9	Field10
2	11	45	1	21/1/2020	2/2/2020											
3	23	564	2	28/1/2020	3/2/2020											
4	32	6556	3	25/1/2020	5/2/2020											
5	34	56	4	11/1/2020	4/2/2020											

To download detailed sheet, click on **Download Detailed Data Sheet** button. On clicking this button, a pop-up will be displayed as shown below:



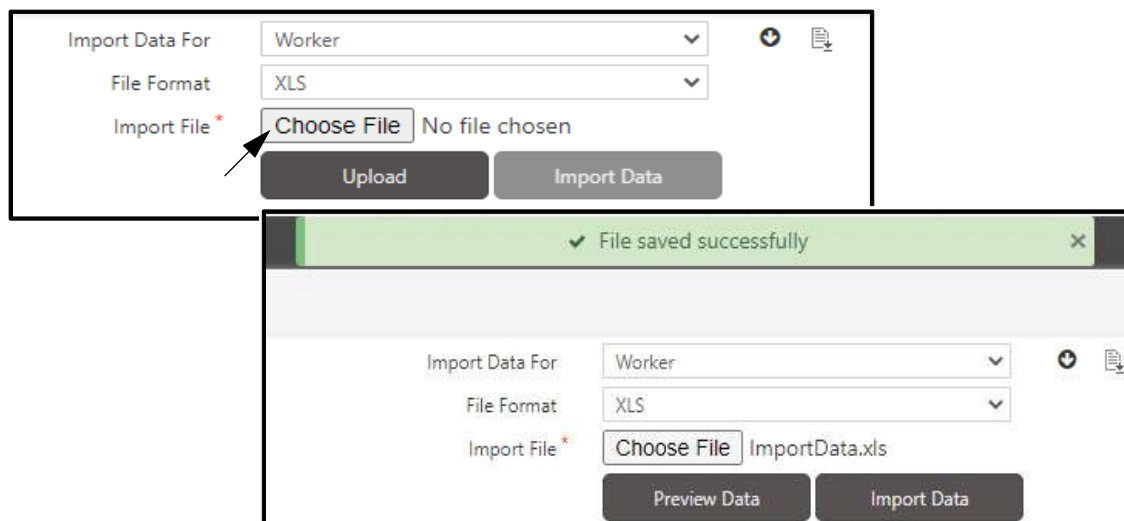


**Select Users:** Select the desired option — User Wise, Group Wise or All. If you select User Wise or Group Wise the select the desired users/groups from the picklist.

Click **OK** button to download the Data Sheet or click on **Cancel** button to abort the process.

The Detailed Data Sheet will be as per the selected option.

- **File Format** - Select the file format of the specific file from the drop-down list. The options available are XLS or CSV.
- **Import File** - Browse the path of the file from which the data is to be imported.



Click on **Upload** to save the file.

Click on **Preview Data** button to view the data in the respective worksheets to confirm that the data is in order prior to giving the import command.

Now click on **Import Data** to start importing the uploaded data. The result of import is shown as Success or Failure along with result description.

### Select Devices To Assign To WORKER

Click the **Select Devices To Assign To WORKER** collapsible panel.

You can assign particular devices or all the devices at once.



ID	Name	Type	
9	ARCDC100_DD_Door	Panel200 Door	<input type="checkbox"/>
9	ARCDC100_DD_Door	Panel200 Door	<input type="checkbox"/>
9	ARCDC100_DS_Door	Panel200 Door	<input type="checkbox"/>
9	ARGQ_PANEL	Panel200 Door	<input type="checkbox"/>
9	DoorV3	Panel200 Door	<input type="checkbox"/>
9	DoorV3_Door	Panel200 Door	<input type="checkbox"/>
9	DOORV4_PANEL	Panel200 Door	<input type="checkbox"/>
9	dummy	Panel200 Door	<input type="checkbox"/>
9	PATHV2_PANEL	Panel200 Door	<input type="checkbox"/>
9	PD_ARGQ	Panel200 Door	<input type="checkbox"/>
9	VEGA_PANEL	Panel200 Door	<input type="checkbox"/>
12	ARCDC100_DS_Door	Panel200 Door	<input type="checkbox"/>
12	ARCDC100_DS_Door	Panel200 Door	<input type="checkbox"/>
12	ARCDC200_Door	Panel200 Door	<input type="checkbox"/>
12	ARCDC200_Door_DD	Panel200 Door	<input type="checkbox"/>

To assign particular devices, select the check boxes of the desired devices.

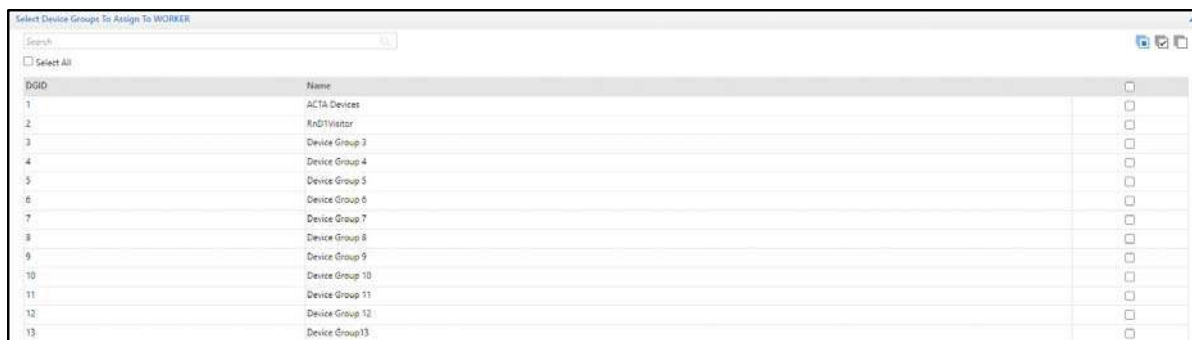
**OR**

To assign all the devices, select the **Select All** check box.

### Select Device Groups To Assign To WORKER

Click the **Select Device Groups To Assign To WORKER** collapsible panel.

You can assign particular device groups or all the device groups at once.



Dgid	Name	
1	ACTA Devices	<input type="checkbox"/>
2	AndTVistor	<input type="checkbox"/>
3	Device Group 3	<input type="checkbox"/>
4	Device Group 4	<input type="checkbox"/>
5	Device Group 5	<input type="checkbox"/>
6	Device Group 6	<input type="checkbox"/>
7	Device Group 7	<input type="checkbox"/>
8	Device Group 8	<input type="checkbox"/>
9	Device Group 9	<input type="checkbox"/>
10	Device Group 10	<input type="checkbox"/>
11	Device Group 11	<input type="checkbox"/>
12	Device Group 12	<input type="checkbox"/>
13	Device Group 13	<input type="checkbox"/>

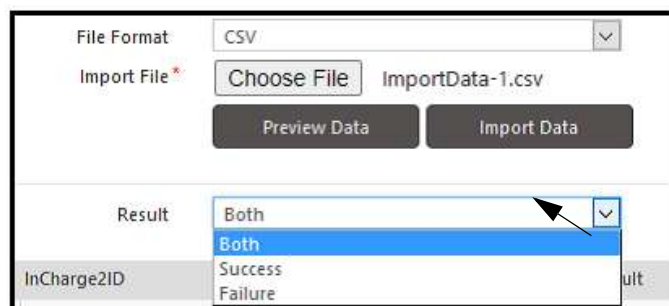
To assign particular device groups, select the check boxes of the desired device groups.

**OR**

To assign all the device groups, select the **Select All** check box.

Click **Upload**. The Devices/Device Groups will be assigned to the workers.

You can also filter import result records on the basis of their Success, Failure or Both using the **Result** drop-down options.



The screenshot displays a web interface for importing data. At the top, there is a 'File Format' dropdown set to 'CSV'. Below it, an 'Import File' section includes a 'Choose File' button and the filename 'ImportData-1.csv'. Two buttons, 'Preview Data' and 'Import Data', are positioned below the filename. A 'Result' dropdown menu is open, showing three options: 'Both' (highlighted in blue), 'Success', and 'Failure'. An arrow points to the 'Both' option. Below the dropdown, a table header is partially visible with the label 'InCharge2ID'.

InCharge2ID
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Once the data is imported successfully, data will be added or updated in Worker Profile in COSEC Web.

# Blacklist

This feature is used to blacklist workers and contractors. Blacklisting will ensure that contractor/worker is not assigned any work order.

To blacklist the workers go to **Contract Worker Management >Utilities > Blacklist**

The screenshot shows the 'Blacklist' application window. At the top, there's a 'Blacklist' dropdown menu set to 'Worker'. Below it are input fields for 'Worker ID', 'Worker Name', and 'Reason' (with a '50 Char' limit). A 'Search' button is next to the 'Reason' field. Below these fields is a table with columns 'ID' and 'Name', and a 'No Data' message. A 'Add To Blacklist' button is positioned below the table. At the bottom, there are two sections: 'Blacklisted Workers (0)' and 'Restored Workers (0)'. The 'Blacklisted Workers' section has a search bar and a table with columns: 'Worker ID', 'Name', 'Blacklist Date-Time', 'Contractor', 'Reason For Blacklisting', and 'Restore'. It also shows a 'No Data' message.

**Blacklist:** Select the desired option — Workers, Contractors — to be blacklisted from drop-down list.

**Worker/Contractor:** If you have selected **Contractor** as the Blacklist option.

- Click the **Contractor** picklist. The **Picklist For Contractor** pop-up appears.

The screenshot shows the 'Picklist For Contractor' pop-up window. At the top, it says 'Total Selected: 0 Records'. Below this is a search bar and a 'Show Selected' button. There's a 'Select All' checkbox. The main part of the window is a table with columns: 'ID', 'Name', and 'Type'. The table contains 11 records, each with a checkbox in the 'ID' column. The records are: cp1, cp10, cp11, cp2, cp3, cp4, cp5, cp6, cp7, cp8, and cp9. All 'Type' values are 'Contractor Type-1'. At the bottom, it says '1 - 10 of 11 records' and has a pagination control showing '1' as the current page. There are 'OK' and 'Cancel' buttons at the bottom.

You can either select particular contractors or can select all the contractors at once.

To select particular contractor select the check boxes of the desired contractors.

The screenshot shows a dialog box titled "Picklist For Contractor". At the top, a green bar indicates "Total Selected: 2 Records". Below this is a search bar with the placeholder text "Search" and a "Show Selected" button. A "Select All" checkbox is present and is currently unchecked. The main area contains a table with columns: ID (with a sort arrow), Name, and Type. The table lists 11 records, all of which are "Contractor Type-1". The first two records, "cp1" and "cp10", have their selection checkboxes checked. At the bottom left, it says "1 - 10 of 11 records". At the bottom right, there is a pagination control with buttons for first, previous, next, last, and a page number "1" which is highlighted. At the very bottom are "OK" and "Cancel" buttons.

<input type="checkbox"/>	ID ▲	Name	Type
<input checked="" type="checkbox"/>	cp1	cp4	Contractor Type-1
<input checked="" type="checkbox"/>	cp10	cp10	Contractor Type-1
<input type="checkbox"/>	cp11	cp11	Contractor Type-1
<input type="checkbox"/>	cp2	cp2	Contractor Type-1
<input type="checkbox"/>	cp3	cp3	Contractor Type-1
<input type="checkbox"/>	cp4	cp5	Contractor Type-1
<input type="checkbox"/>	cp5	cp5	Contractor Type-1
<input type="checkbox"/>	cp6	cp6	Contractor Type-1
<input type="checkbox"/>	cp7	cp7	Contractor Type-1
<input type="checkbox"/>	cp8	cp8	Contractor Type-1

OR

To select all the contractors at once, select the **Select All** check box. The contractors on all the pages will be selected.

This screenshot shows the same "Picklist For Contractor" dialog box, but now the "Select All" checkbox is checked. Consequently, the "Total Selected" at the top has increased to "11 Records". In the table, all 11 records now have their selection checkboxes checked. The rest of the interface, including the search bar, pagination, and buttons, remains the same as in the previous screenshot.


<input checked="" type="checkbox"/>	ID ▲	Name	Type
<input checked="" type="checkbox"/>	cp1	cp4	Contractor Type-1
<input checked="" type="checkbox"/>	cp10	cp10	Contractor Type-1
<input checked="" type="checkbox"/>	cp11	cp11	Contractor Type-1
<input checked="" type="checkbox"/>	cp2	cp2	Contractor Type-1
<input checked="" type="checkbox"/>	cp3	cp3	Contractor Type-1
<input checked="" type="checkbox"/>	cp4	cp5	Contractor Type-1
<input checked="" type="checkbox"/>	cp5	cp5	Contractor Type-1
<input checked="" type="checkbox"/>	cp6	cp6	Contractor Type-1
<input checked="" type="checkbox"/>	cp7	cp7	Contractor Type-1
<input checked="" type="checkbox"/>	cp8	cp8	Contractor Type-1

- Click **OK**.

All the selected contractors appear in the grid.

The screenshot shows a 'Blacklist' window with a search bar and a table of contractors. The table has columns for ID and Name. Two contractors are listed: 'cp2' (Contractor Profile 2) and 'CP12' (Contractor Profile 12). Each row has a delete icon. Below the table is an 'Add To Blacklist' button.

ID	Name
cp2	Contractor Profile 2
CP12	Contractor Profile 12

You can also delete the desired contractor. To do so, click **Delete**  of the respective contractor.

**Reason:** Specify the reason for blacklisting the selected contractor.

Click **Add To Blacklist**.



*A Contractor cannot be blacklisted by the administrator in the following conditions:*

- Any worker associated with the Contractor has a Pending status for work order assignment.
- Any associated work order is still in Progress (i.e. All work orders must be terminated).

*Blacklisted Contractors will become inactive.*

*If the Contractor does not appear in the picklist, check the Contractor's **Validity End Date**. The Validity End Date shall not be included in the validity period of the Contractor. For details, refer to "[Contractor Profile](#)".*

All the selected contractors will be added to the blacklist. To view all the Blacklisted Contractors. Click the **Blacklisted Contractors** collapsible panel.

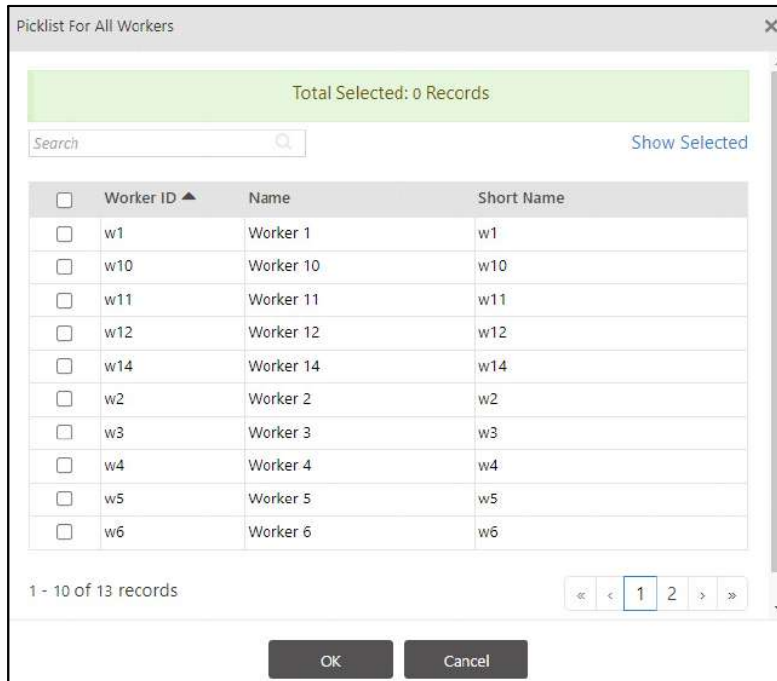
The screenshot shows the 'Blacklist' window with a search bar and a table of blacklisted contractors. The table has columns for Contractor ID, Name, Blacklist Date-Time, Reason for Blacklisting, and Restore. Three contractors are listed: 'cp11', 'cp1', and 'cp10'. Each row has a restore icon. Below the table is an 'Add To Blacklist' button.

Contractor ID	Name	Blacklist Date-Time	Reason for Blacklisting	Restore
cp11	Contractor Profile 11	06/12/2023 23:28:30		
cp1	Contractor Profile 1	04/17/2023 10:36:07		
cp10	Contractor Profile10	04/17/2023 10:36:07		

Click **Restore**  to remove the Contractor from the Blacklisted list. The Contractor appears under the Restored Contractors collapsible panel. Make sure to active the Contractor again.

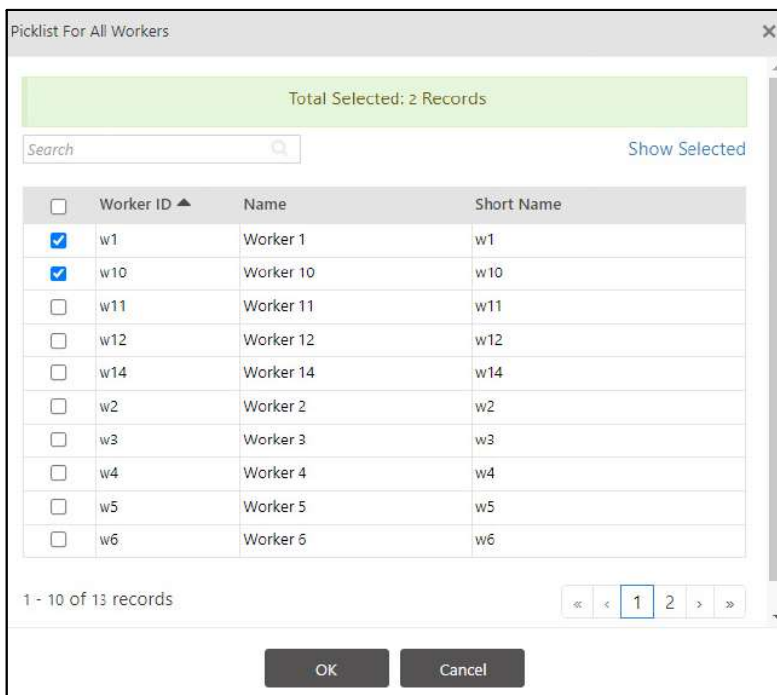
If you have selected **Worker** as the Blacklist option.

- Click the **Worker** picklist. The **Picklist For All Workers** pop-up appears.



<input type="checkbox"/>	Worker ID ▲	Name	Short Name
<input type="checkbox"/>	w1	Worker 1	w1
<input type="checkbox"/>	w10	Worker 10	w10
<input type="checkbox"/>	w11	Worker 11	w11
<input type="checkbox"/>	w12	Worker 12	w12
<input type="checkbox"/>	w14	Worker 14	w14
<input type="checkbox"/>	w2	Worker 2	w2
<input type="checkbox"/>	w3	Worker 3	w3
<input type="checkbox"/>	w4	Worker 4	w4
<input type="checkbox"/>	w5	Worker 5	w5
<input type="checkbox"/>	w6	Worker 6	w6

Select the check boxes of the desired workers.




<input type="checkbox"/>	Worker ID ▲	Name	Short Name
<input checked="" type="checkbox"/>	w1	Worker 1	w1
<input checked="" type="checkbox"/>	w10	Worker 10	w10
<input type="checkbox"/>	w11	Worker 11	w11
<input type="checkbox"/>	w12	Worker 12	w12
<input type="checkbox"/>	w14	Worker 14	w14
<input type="checkbox"/>	w2	Worker 2	w2
<input type="checkbox"/>	w3	Worker 3	w3
<input type="checkbox"/>	w4	Worker 4	w4
<input type="checkbox"/>	w5	Worker 5	w5
<input type="checkbox"/>	w6	Worker 6	w6

Click **OK**.

All the selected workers appears in the grid.

The screenshot shows the 'Blacklist' interface. At the top, there is a form with fields for 'Blacklist' (set to 'Worker'), 'Worker' (with 'ID' and 'Name' sub-fields), and 'Reason' (set to '30 Char'). Below the form is a search bar. A table displays two workers: 'w11' (Worker 11) and 'w10' (Worker 10), each with a delete icon. Below the table is an 'Add To Blacklist' button. At the bottom, there are two collapsible panels: 'Blacklisted Workers (2)' and 'Restored Workers (10)'.

You can also delete the desired workers. To do so, click **Delete**  of the respective worker.

Click **Add To Blacklist**. A **Warning** pop-up appears, to revoke the devices assigned to the selected worker.

The warning dialog has a title 'Warning' and a message: 'Would you like to revoke devices (as per device-wise rights)?'. At the bottom, there are two buttons: 'Yes' and 'No'.

If you select **Yes**, then worker will become inactive and worker's data will be removed from the devices.

If you select **No**, then worker will become inactive but worker's data will still be there on assigned devices.


All the selected workers will be added to the blacklist. To view all the Blacklisted Workers. Click the **Blacklisted Workers** collapsible panel.

The screenshot shows the 'Blacklist' interface with the 'Blacklisted Workers' panel expanded. The panel shows a search bar and a table with the following data:

Worker ID	Name	Blacklist Date-Time	Contractor	Reason for Blacklisting	Restore
w10	Worker 10	06/12/2023 23:52:18	Contractor Profile 10		
w11	Worker 11	06/12/2023 23:52:18	Contractor Profile 11		
w8	Worker 8	05/08/2023 15:50:13	Contractor Profile 2	Theft	
w1	Worker 1	04/20/2023 12:26:06	Contractor Profile 1		

Below the table, there is a 'Restored Workers (8)' panel. The 'Add To Blacklist' button is still visible above the expanded panel.



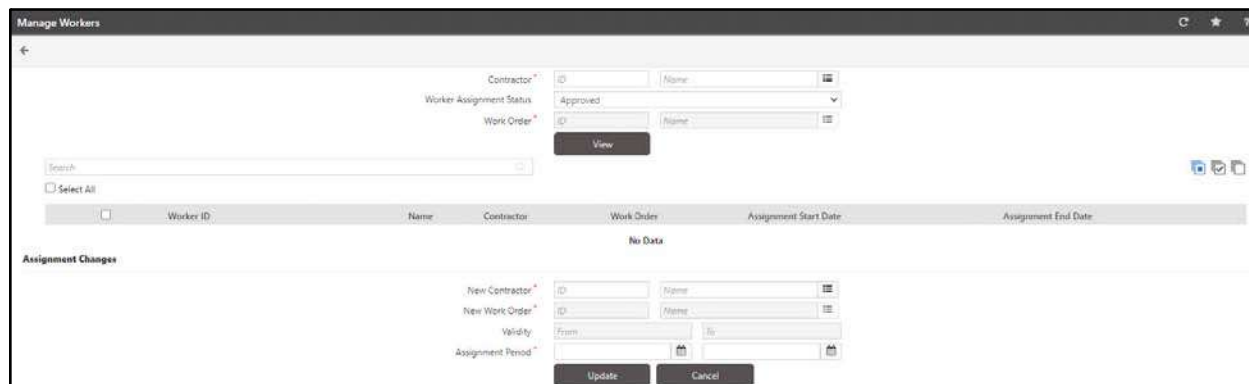
Click **Restore**  to remove the Worker from the Blacklisted list. The Worker appears under the Restored Workers collapsible panel. Make sure to active the Worker again.

Click **Save** button to save the changes.

# Manage Workers

The manage workers utility is used to change contractor, work order and assignment period for the selected workers.

To manage the workers go to **Contract Worker Management >Utilities >Manage Workers**



Configure the following parameters:

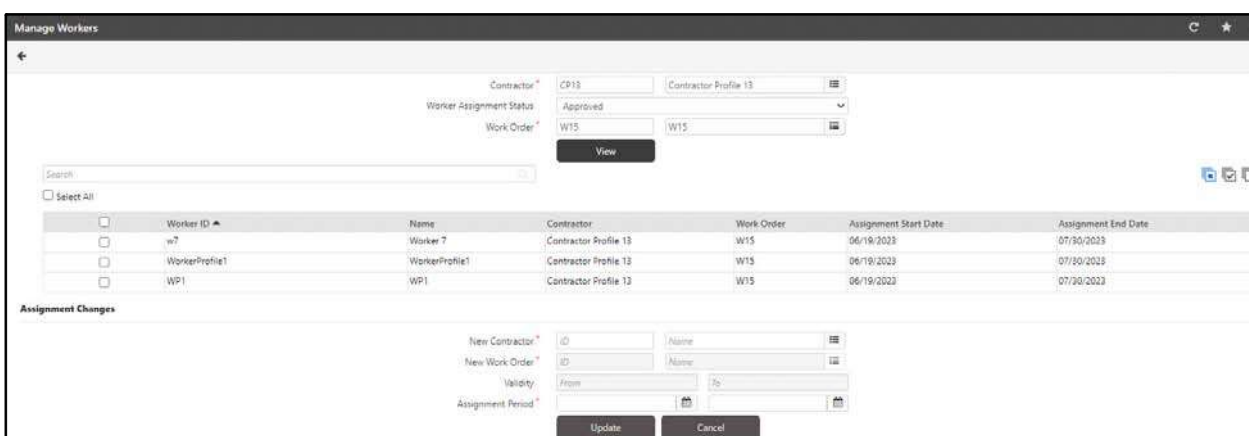
- **Contractor:** Click the picklist and click again to select the desired contractor.



If the Contractor does not appear in the picklist, check the Contractor's **Validity End Date**. The Validity End Date shall not be included in the validity period of the Contractor. For details, refer to "[Contractor Profile](#)".

- **Worker Assignment Status:** Select the desired assignment status from the dropdown list to filter the workers based on their assignment status.
- **Work Order:** Click the picklist and click again to select the desired work order.

Click **View** to view the list of all the associated workers. The list of workers appears in a grid.



Select the workers for which you wish to make the assignment changes.

You can select particular workers or select all the workers at once.

<input type="checkbox"/>	Worker ID	Name	Contractor	Work Order	Assignment Start Date	Assignment End Date
<input type="checkbox"/>	w7	Worker 7	Contractor Profile 13	W15	06/19/2023	07/30/2023
<input type="checkbox"/>	WorkerProfile1	WorkerProfile1	Contractor Profile 13	W15	06/19/2023	07/30/2023
<input type="checkbox"/>	WP1	WP1	Contractor Profile 13	W15	06/19/2023	07/30/2023

**Assignment Changes**

New Contractor: ID:  Name:

New Work Order: ID:  Name:

Validity: From:  To:

Assignment Period:

To select particular workers, select the check boxes of the desired workers.

**OR**

To select all the workers, select the **Select All** check box.

### Assignment Changes

- **New Contractor:** Click the picklist and click again to select the desired contractor.



*If the Contractor does not appear in the picklist, check the Contractor's **Validity End Date**. The Validity End Date shall not be included in the validity period of the Contractor. For details, refer to "[Contractor Profile](#)".*

- **New Work Order:** Click the picklist and click again to select the desired work order.
- **Validity:** The validity of the work order is displayed here once you select the work order.
- **Assignment Period:** Select the From and To dates for the assignment duration of the work order to the worker.

Click **Update** to update the assignment changes for the selected worker.

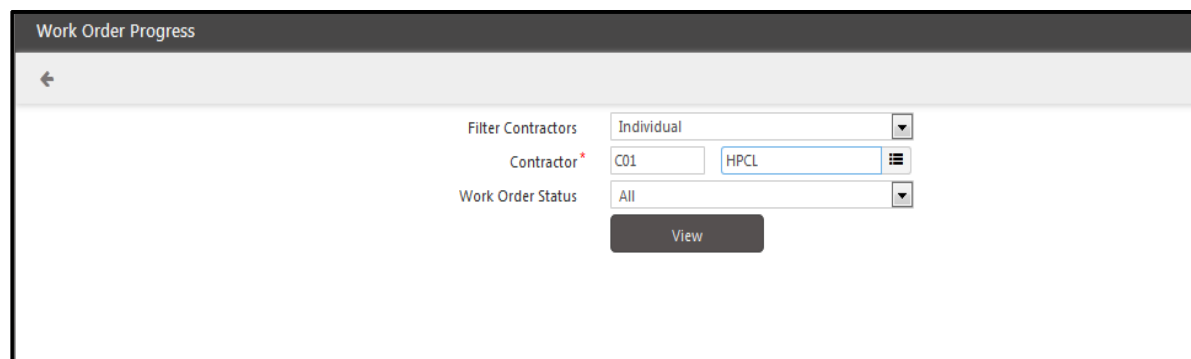


*To change only the assignment period for a worker, select the existing Contractor and Work Order in the **New Contractor** and **New Work Order** fields respectively.*

# Work Order Progress

This utility helps in viewing the progress of all work orders as well as work orders specific to a selected contractor. On selection of a contractor, associated work orders and their details can be filtered based on their progress status.

To view the work order progress go to **Contract Worker Management >Utilities >Work Order Progress**



The screenshot shows a web application window titled "Work Order Progress". It contains a filter section with the following controls:

- Filter Contractors:** A dropdown menu currently set to "Individual".
- Contractor:** A field with a red asterisk, containing "C01" and a picklist button. The picklist is open, showing "HPCL".
- Work Order Status:** A dropdown menu currently set to "All".
- View:** A dark button to execute the filter.

**Filter Contractors-** Select the contractors from the option of All and Individual.

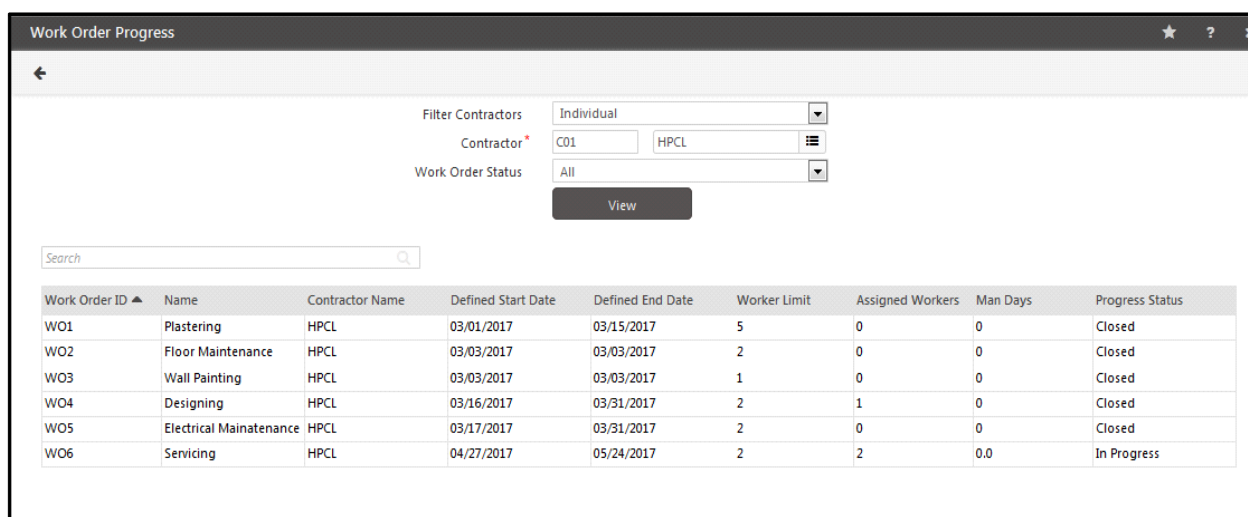
**Contractor-** The individual contractor can be selected from the picklist.



If the Contractor does not appear in the picklist, check the Contractor's **Validity End Date**. The Validity End Date shall not be included in the validity period of the Contractor. For details, refer to "[Contractor Profile](#)".

**Work Order Status-** Select the work order status from the options of All, Closed, In Progress and Open from the drop down list.

**View-** Click the **View** button. The details of work orders and their status are displayed in the grid as shown below.



The screenshot shows the same filter form as above, but with the "View" button clicked. Below the filter form is a search bar and a table displaying the work order details.

Work Order ID ▲	Name	Contractor Name	Defined Start Date	Defined End Date	Worker Limit	Assigned Workers	Man Days	Progress Status
WO1	Plastering	HPCL	03/01/2017	03/15/2017	5	0	0	Closed
WO2	Floor Maintenance	HPCL	03/03/2017	03/03/2017	2	0	0	Closed
WO3	Wall Painting	HPCL	03/03/2017	03/03/2017	1	0	0	Closed
WO4	Designing	HPCL	03/16/2017	03/31/2017	2	1	0	Closed
WO5	Electrical Mainatenance	HPCL	03/17/2017	03/31/2017	2	0	0	Closed
WO6	Servicing	HPCL	04/27/2017	05/24/2017	2	2	0.0	In Progress

## Work Order Progress Grid

- **Defined Start Date** reflects start date of work order.
- **Defined End Date** reflects end date of work order.
- **Worker Limit** reflects the maximum worker limit as defined in the Work Order section.

- **Assigned Workers** reflect the workers which are in approved or in pending state.
- **Man Days** reflects number of days spent by workers for the work order. Suppose 10 workers worked for 10 days each, Man Days=  $10 \times 10 = 100$  Man Days.
- **Progress Status** in grid reflects whether work order has started or not and if started then whether it has completed or not.
  - **In Progress** status reflects that work order has started but not completed yet.
  - **Closed** status reflects that work order has started and completed.
  - **Open** status reflects that work order has not started yet.

# Induction Approval

The Induction Approval is used to view all pending, approved and rejected applications sent for approval for each induction level assigned to worker for the assigned work order. SA has rights to approve or reject a pending application.

If some worker needs to complete 5 induction levels and is rejected in even 1 of them then worker's assignment status will turn into Rejected and approval in other induction level will no longer be required.

To authorize the workers go to **Contract Worker Management > Authorization/Approval > Induction Approval**

Worker ID	Name	Application Date	Induction Level	Contractor	Work Order	Approve	Reject	Remark	Details
1	Dinesh	04/07/2018	Induction Level-1	HPCL	Servicing	<input type="checkbox"/>	<input type="checkbox"/>		
2	Ramesh	04/07/2018	Induction Level-1	HPCL	Servicing	<input type="checkbox"/>	<input type="checkbox"/>		



If global policy is set to direct authorization, induction level for workers will remain blank in such cases.

**Filter Work Orders-** Select the work orders from the option of All and Individual.

**Work Order-** The individual work order can be selected from the picklist.

**View-** Click on View button. The pending, approved and rejected work orders are displayed in the respective grids along with the available counts.

The worker details from the grid can be viewed by clicking on the **Details** button. The worker details pop window is displayed as shown below:

Worker ID: 2  
Name: Ramesh  
Induction Level: 1  
Induction Level-1  
Work Order: W02  
Servicing  
Application Date: 04/07/2018

General  
Personal  
Contact

Worker ID

w1

Name

Rohit

Induction Level

Work Order

WOL

Plastering

Application Date

14/05/2019

General

Date Of Birth

Vehicle Registration No.

Driving License

Driving License Expiry

Passport No.

Passport Expiry

PAN

Driving License

The documents of the worker can be viewed by clicking the Preview document button. This will ensure the credibility of the worker.

After the verification of worker; the verdict can be given by checking the Approve or Reject check box along with Remark as shown below.

Induction Approval

Filter Work Orders

All

Work Order

ID

Name

View

Pending (2)

Search

Worker ID	Name	Application Date	Induction Level	Contractor	Work Order	Approve	Reject	Remark	Details
1	Dinesh	04/07/2018	Induction Level-1	HPCL	Servicing	<input type="checkbox"/>	<input type="checkbox"/>	Approved Induction Level	
2	Ramesh	04/07/2018	Induction Level-1	HPCL	Servicing	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Approved Induction Level	

Approved (0)

Rejected (0)

Click on **Save** button to save the verdict. The authorized application will then move to Approved or Rejected section.

Pending (1)

Approved (1)

Search

Worker ID	Name	Application Date	Induction Level	Contractor	Work Order	Remark	Details
CWM1	Ramesh	04/07/2018	Induction Level-1	HPCL	Servicing	Approved Induction Level	

Rejected (0)

# CWM Reports

These reports can be obtained using the **Reports** section under the **Contract Worker Management** add-on module. The Reports can be categorized as follows:

[“Worker Details”](#)  
[“Contractor Details”](#)  
[“Work Order Details”](#)  
[“Blacklisted Workers”](#)  
[“Work Order Man Days”](#)  
[“Daily Head Count”](#)  
[“Daily Work Hours”](#)  
[“Status Summary”](#)  
[“Attendance Details”](#)



*If the Contractor does not appear in the picklist, check the Contractor’s **Validity End Date**. The Validity End Date shall not be included in the validity period of the Contractor. For details, refer to [“Contractor Profile”](#).*

## Worker Details

Worker Details Report provides the workers basic details against respective work order and contractor.

Set the report filters as per requirement.

## Optional Parameter

**Group By:** Select the desired enterprise group from the drop-down list — Organization, Branch, Department, Section, Category, Grade, Custom Group1/2/3

**Organization Name in Header As Per:** Select the desired option from the drop down list—**User Selection** or **Customized Selection**.

If you select **Customized Selection**, click on Customize Report Header. You can select the desired option from the drop-down list or can also add a new header according to your choice.



## Worker Selection

Select the desired options for Contractors, Work Orders and Workers

**Select Contractor:** Select the desired option— **All** or **Randomly**

If you select **All**, the report will include all the contractors.

If you select **Randomly**, click the **Contractor** picklist. The **Picklist For Contractor** pop-up appears.

Picklist For Contractor

Total Selected: 0 Records

Search

☐ Select All

<input type="checkbox"/>	ID ▲	Name	Type
<input type="checkbox"/>	cp1	cp4	Contractor Type-1
<input type="checkbox"/>	cp10	cp10	Contractor Type-1
<input type="checkbox"/>	cp11	cp11	Contractor Type-1
<input type="checkbox"/>	cp2	cp2	Contractor Type-1
<input type="checkbox"/>	cp3	cp3	Contractor Type-1
<input type="checkbox"/>	cp4	cp5	Contractor Type-1
<input type="checkbox"/>	cp5	cp5	Contractor Type-1
<input type="checkbox"/>	cp6	cp6	Contractor Type-1
<input type="checkbox"/>	cp7	cp7	Contractor Type-1
<input type="checkbox"/>	cp8	cp8	Contractor Type-1

1 - 10 of 11 records

You can either select particular contractor or can select all the contractors at once.

To select particular contractor, select the check boxes of the desired contractors.

The screenshot shows a dialog box titled "Picklist For Contractor". At the top, a green bar indicates "Total Selected: 2 Records". Below this is a search bar and a "Show Selected" button. A "Select All" checkbox is present and unchecked. The main area contains a table with 11 records. The first two records, "cp1" and "cp10", have their selection checkboxes checked. The table has columns for "ID", "Name", and "Type". At the bottom, there is a pagination control showing "1 - 10 of 11 records" and a page selector with "1" highlighted. "OK" and "Cancel" buttons are at the bottom.

<input type="checkbox"/>	ID ▲	Name	Type
<input checked="" type="checkbox"/>	cp1	cp4	Contractor Type-1
<input checked="" type="checkbox"/>	cp10	cp10	Contractor Type-1
<input type="checkbox"/>	cp11	cp11	Contractor Type-1
<input type="checkbox"/>	cp2	cp2	Contractor Type-1
<input type="checkbox"/>	cp3	cp3	Contractor Type-1
<input type="checkbox"/>	cp4	cp5	Contractor Type-1
<input type="checkbox"/>	cp5	cp5	Contractor Type-1
<input type="checkbox"/>	cp6	cp6	Contractor Type-1
<input type="checkbox"/>	cp7	cp7	Contractor Type-1
<input type="checkbox"/>	cp8	cp8	Contractor Type-1

OR

To select all the contractors at once, select the **Select All** check box. The contractors on all the pages will be selected.

This screenshot shows the same "Picklist For Contractor" dialog box, but now the "Select All" checkbox is checked. The green bar at the top now indicates "Total Selected: 11 Records". In the table, all 11 records have their selection checkboxes checked. The rest of the interface, including the search bar, pagination, and buttons, remains the same.

<input checked="" type="checkbox"/>	ID ▲	Name	Type
<input checked="" type="checkbox"/>	cp1	cp4	Contractor Type-1
<input checked="" type="checkbox"/>	cp10	cp10	Contractor Type-1
<input checked="" type="checkbox"/>	cp11	cp11	Contractor Type-1
<input checked="" type="checkbox"/>	cp2	cp2	Contractor Type-1
<input checked="" type="checkbox"/>	cp3	cp3	Contractor Type-1
<input checked="" type="checkbox"/>	cp4	cp5	Contractor Type-1
<input checked="" type="checkbox"/>	cp5	cp5	Contractor Type-1
<input checked="" type="checkbox"/>	cp6	cp6	Contractor Type-1
<input checked="" type="checkbox"/>	cp7	cp7	Contractor Type-1
<input checked="" type="checkbox"/>	cp8	cp8	Contractor Type-1

Click **OK**.

The selected contractors appear in the grid.

ID	Name	
cp1	Contractor Profile 1	
cp10	Contractor Profile10	
cp11	Contractor Profile 11	
cp2	Contractor Profile 2	

You can also delete the desired contractor. To do so, click **Delete** of the respective contractor.

**Select Work Orders:** Similarly, follow the same steps as **Select Contractors**.

**Select Worker:** Select the desired option— All or Randomly.

If you select **All**, then all the workers will be selected.

If you select **Randomly**, click on **Worker** picklist. The **Picklist For All Worker** pop-up appears.

<input type="checkbox"/>	Worker ID	Name	Short Name
<input type="checkbox"/>	w1	Worker 1	w1
<input type="checkbox"/>	w10	Worker 10	w10
<input type="checkbox"/>	w11	Worker 11	w11
<input type="checkbox"/>	w12	Worker 12	w12
<input type="checkbox"/>	w14	Worker 14	w14
<input type="checkbox"/>	w2	Worker 2	w2
<input type="checkbox"/>	w3	Worker 3	w3
<input type="checkbox"/>	w4	Worker 4	w4
<input type="checkbox"/>	w5	Worker 5	w5
<input type="checkbox"/>	w6	Worker 6	w6

Select the check boxes of the desired workers. Click **OK**.

The selected workers appear in the grid.

ID ▲	Name	
w1	Worker 1	
w10	Worker 10	
w11	Worker 11	
w12	Worker 12	
w14	Worker 14	

You can also delete the desired worker. To do so, click **Delete** of the respective worker.

**Generate Report For:** Select the desired option — All Workers, Active Worker or Inactive Worker.

Click **Generate Report**.

Sample Report

Worker Details

Back

1 of 1

119%

DADB

Page 1 of 1

Organization-Wise Worker Details

Run by: System Admin Date: 20/04/2023 22:21

Worker ID	Name
W2	W2
Gender	NA
Birth Date	
Blood Group	NA
PF No	
Mobile	
Qualification	
Skill	Skill-1
Nationality	
ESI No	
Phone	-

Approved

## Contractor Details

This report provides the details of the Contractors.

Set the report filters as per requirement.



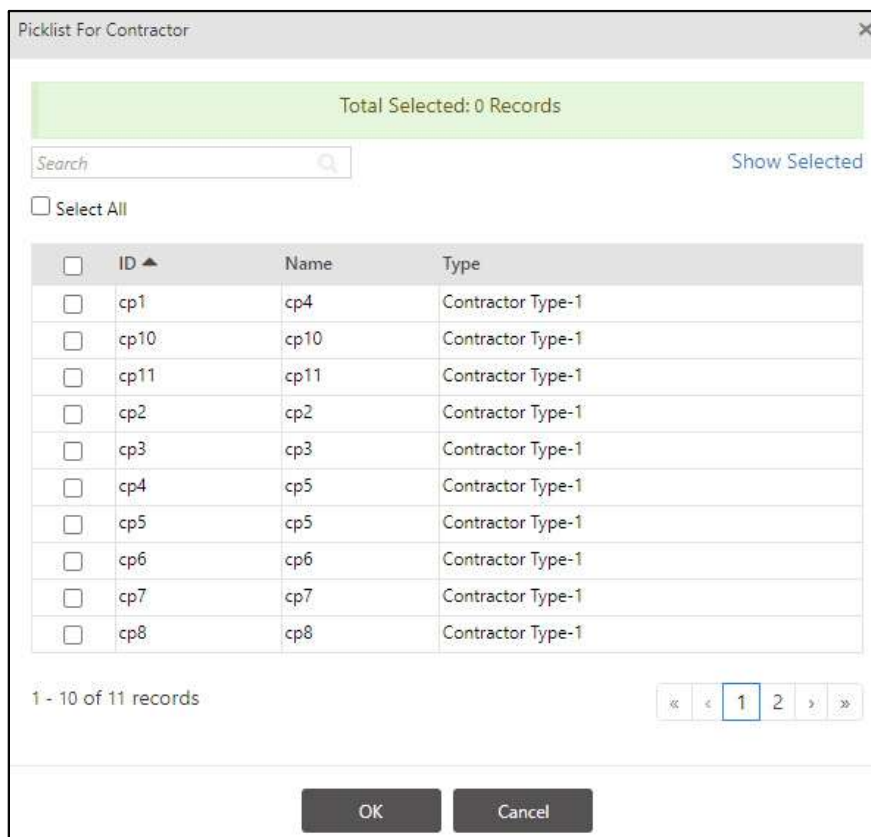
The Contractor Details window features a 'Contractor Selection' section. It includes a 'Select Contractors' dropdown menu currently set to 'Randomly'. Below this, there are input fields for 'Contractor ID' and 'Name', with a small icon to the right of the 'Name' field. A 'Generate Report' button is positioned at the bottom of this section.

## Contractor Selection

**Select contractor:** Select the desired option from the drop down list— **All** or **Randomly**.

If you select **All**, the report will include all the contractors.

If you select **Randomly**, click the **Contractor** picklist. The **Picklist For Contractor** pop-up appears.



The 'Picklist For Contractor' pop-up window displays a table of contractors. At the top, a green bar indicates 'Total Selected: 0 Records'. Below this is a search bar and a 'Show Selected' link. A 'Select All' checkbox is located above the table. The table has four columns: 'ID', 'Name', and 'Type'. It lists 11 contractors, with the first 10 visible on this page. At the bottom, there is a pagination control showing '1 - 10 of 11 records' and a page number '1' in a box, with navigation arrows. 'OK' and 'Cancel' buttons are at the bottom.

<input type="checkbox"/>	ID ▲	Name	Type
<input type="checkbox"/>	cp1	cp4	Contractor Type-1
<input type="checkbox"/>	cp10	cp10	Contractor Type-1
<input type="checkbox"/>	cp11	cp11	Contractor Type-1
<input type="checkbox"/>	cp2	cp2	Contractor Type-1
<input type="checkbox"/>	cp3	cp3	Contractor Type-1
<input type="checkbox"/>	cp4	cp5	Contractor Type-1
<input type="checkbox"/>	cp5	cp5	Contractor Type-1
<input type="checkbox"/>	cp6	cp6	Contractor Type-1
<input type="checkbox"/>	cp7	cp7	Contractor Type-1
<input type="checkbox"/>	cp8	cp8	Contractor Type-1

You can either select particular contractor or can select all the contractors at once.

To select particular contractor, select the check boxes of the desired contractors.

**OR**

To select all the contractors at once, select the **Select All** check box. The contractors on all the pages will be selected.

Picklist For Contractor

Total Selected: 11 Records

Search

Show Selected

☒ Select All

<input checked="" type="checkbox"/>	ID ▲	Name	Type
<input checked="" type="checkbox"/>	cp1	cp4	Contractor Type-1
<input checked="" type="checkbox"/>	cp10	cp10	Contractor Type-1
<input checked="" type="checkbox"/>	cp11	cp11	Contractor Type-1
<input checked="" type="checkbox"/>	cp2	cp2	Contractor Type-1
<input checked="" type="checkbox"/>	cp3	cp3	Contractor Type-1
<input checked="" type="checkbox"/>	cp4	cp5	Contractor Type-1
<input checked="" type="checkbox"/>	cp5	cp5	Contractor Type-1
<input checked="" type="checkbox"/>	cp6	cp6	Contractor Type-1
<input checked="" type="checkbox"/>	cp7	cp7	Contractor Type-1
<input checked="" type="checkbox"/>	cp8	cp8	Contractor Type-1

1 - 10 of 11 records

<<

<

1

2

>

>>

OK

Cancel

Click **OK**.

The selected contractors appear in the grid.

Select Contractors

Randomly


Contractor

ID

Name

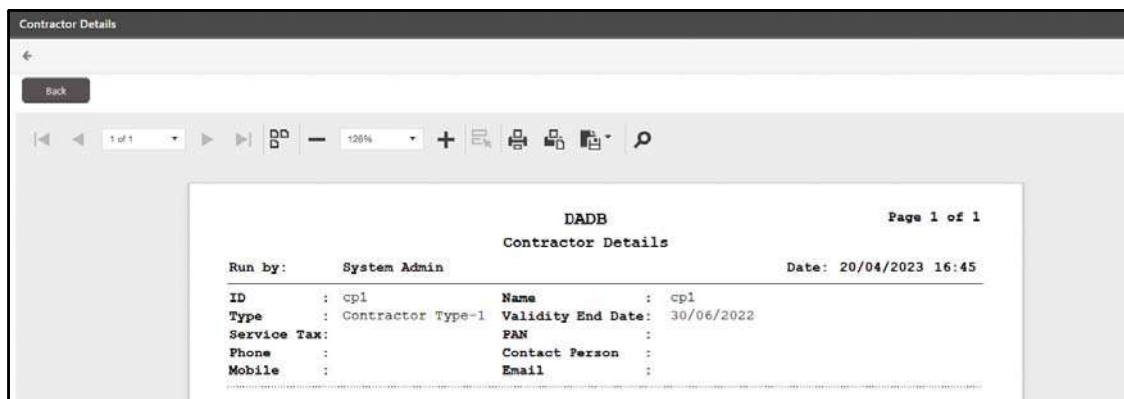
Search

ID ▲	Name	
cp1	Contractor Profile 1	
cp10	Contractor Profile10	
cp11	Contractor Profile 11	
cp2	Contractor Profile 2	

You can also delete the desired contractor. To do so, click **Delete**  of the respective contractors.

Click **Generate Report**.

## Sample Report



The screenshot shows a web application window titled "Contractor Details". It features a navigation bar with a "Back" button and a toolbar with various icons. The main content area displays a report titled "DADB Contractor Details" on "Page 1 of 1". The report includes a header with "Run by: System Admin" and "Date: 20/04/2023 16:45". Below the header is a table with two columns: "ID" and "Name". The table contains one row with the value "cp1" in both columns. To the right of the table, there are additional details: "Type: Contractor Type-1", "Validity End Date: 30/06/2022", "Service Tax: PAN", "Contact Person", "Phone", "Mobile", and "Email".

ID	Name
cp1	cp1

Run by: System Admin Date: 20/04/2023 16:45

Type: Contractor Type-1 Validity End Date: 30/06/2022

Service Tax: PAN

Contact Person

Phone

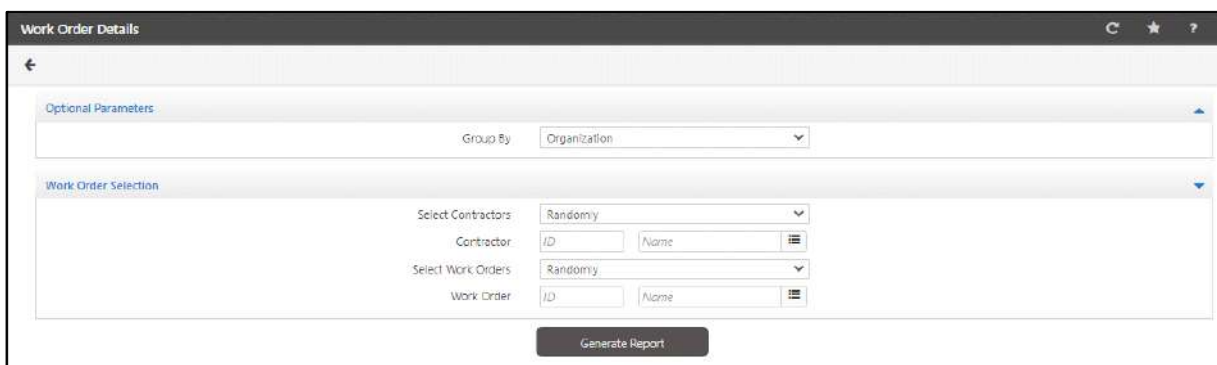
Mobile

Email

## Work Order Details

Work Order Details Report provides the basic details of respective worker order.

Set the report filters as per requirement.



The screenshot shows a web application window titled "Work Order Details". It features a navigation bar with a "Back" button and a toolbar with various icons. The main content area displays a form with two sections: "Optional Parameters" and "Work Order Selection". The "Optional Parameters" section has a "Group By" dropdown menu with "Organization" selected. The "Work Order Selection" section has two dropdown menus: "Select Contractors" with "Randomly" selected and "Select Work Orders" with "Randomly" selected. Below these dropdowns are two rows of input fields for "Contractor" and "Work Order", each with "ID" and "Name" columns. At the bottom of the form is a "Generate Report" button.

Optional Parameters

Group By: Organization

Work Order Selection

Select Contractors: Randomly

Contractor: ID Name

Select Work Orders: Randomly

Work Order: ID Name

Generate Report

## Optional Parameter

**Group By:** Select the desired enterprise group from the drop-down list — Organization, Branch, Department.

## Work Order Selection

**Select Contractors:** Select the desired option from the drop down list — **All** or **Randomly**.

If you select **All**, the report will include all the contractors.

If you select **Randomly**, click the **Contractor** picklist. The **Picklist For Contractor** pop-up appears.

The dialog box titled "Picklist For Contractor" has a green header bar that says "Total Selected: 0 Records". Below this is a search bar with the placeholder text "Search" and a magnifying glass icon, and a "Show Selected" link. A "Select All" checkbox is located below the search bar. The main area contains a table with the following columns: a checkbox, "ID ▲", "Name", and "Type". The table lists 11 records, all of which are "Contractor Type-1". The first record has ID "cp1" and Name "cp4". The last record has ID "cp8" and Name "cp8". Below the table, it says "1 - 10 of 11 records" and a pagination control showing "1" selected. At the bottom are "OK" and "Cancel" buttons.

<input type="checkbox"/>	ID ▲	Name	Type
<input type="checkbox"/>	cp1	cp4	Contractor Type-1
<input type="checkbox"/>	cp10	cp10	Contractor Type-1
<input type="checkbox"/>	cp11	cp11	Contractor Type-1
<input type="checkbox"/>	cp2	cp2	Contractor Type-1
<input type="checkbox"/>	cp3	cp3	Contractor Type-1
<input type="checkbox"/>	cp4	cp5	Contractor Type-1
<input type="checkbox"/>	cp5	cp5	Contractor Type-1
<input type="checkbox"/>	cp6	cp6	Contractor Type-1
<input type="checkbox"/>	cp7	cp7	Contractor Type-1
<input type="checkbox"/>	cp8	cp8	Contractor Type-1

You can either select particular contractor or can select all the contractors at once.

To select particular contractor, select the check boxes of the desired contractors.

The dialog box titled "Picklist For Contractor" has a green header bar that says "Total Selected: 1 Records". Below this is a search bar with the placeholder text "Search" and a magnifying glass icon, and a "Show Selected" link. A "Select All" checkbox is located below the search bar. The main area contains a table with the following columns: a checkbox, "ID ▲", "Name", and "Type". The table lists 11 records, all of which are "Contractor Type-1". The first record has ID "cp1" and Name "cp4", and its checkbox is checked. The last record has ID "cp8" and Name "cp8". Below the table, it says "1 - 10 of 11 records" and a pagination control showing "1" selected. At the bottom are "OK" and "Cancel" buttons.

<input type="checkbox"/>	ID ▲	Name	Type
<input checked="" type="checkbox"/>	cp1	cp4	Contractor Type-1
<input type="checkbox"/>	cp10	cp10	Contractor Type-1
<input type="checkbox"/>	cp11	cp11	Contractor Type-1
<input type="checkbox"/>	cp2	cp2	Contractor Type-1
<input type="checkbox"/>	cp3	cp3	Contractor Type-1
<input type="checkbox"/>	cp4	cp5	Contractor Type-1
<input type="checkbox"/>	cp5	cp5	Contractor Type-1
<input type="checkbox"/>	cp6	cp6	Contractor Type-1
<input type="checkbox"/>	cp7	cp7	Contractor Type-1
<input type="checkbox"/>	cp8	cp8	Contractor Type-1



OR

To select all the contractors at once, select the **Select All** check box. The contractors on all the pages will be selected.

Picklist For Contractor

Total Selected: 11 Records

Search

Show Selected

☒ Select All

<input checked="" type="checkbox"/>	ID ▲	Name	Type
<input checked="" type="checkbox"/>	cp1	cp4	Contractor Type-1
<input checked="" type="checkbox"/>	cp10	cp10	Contractor Type-1
<input checked="" type="checkbox"/>	cp11	cp11	Contractor Type-1
<input checked="" type="checkbox"/>	cp2	cp2	Contractor Type-1
<input checked="" type="checkbox"/>	cp3	cp3	Contractor Type-1
<input checked="" type="checkbox"/>	cp4	cp5	Contractor Type-1
<input checked="" type="checkbox"/>	cp5	cp5	Contractor Type-1
<input checked="" type="checkbox"/>	cp6	cp6	Contractor Type-1
<input checked="" type="checkbox"/>	cp7	cp7	Contractor Type-1
<input checked="" type="checkbox"/>	cp8	cp8	Contractor Type-1

1 - 10 of 11 records

<<

<

1

2

>

>>

OK

Cancel

Click **OK**.

The selected contractors appear in the grid.

Select Contractors

Randomly

Contractor

ID

Name

Search

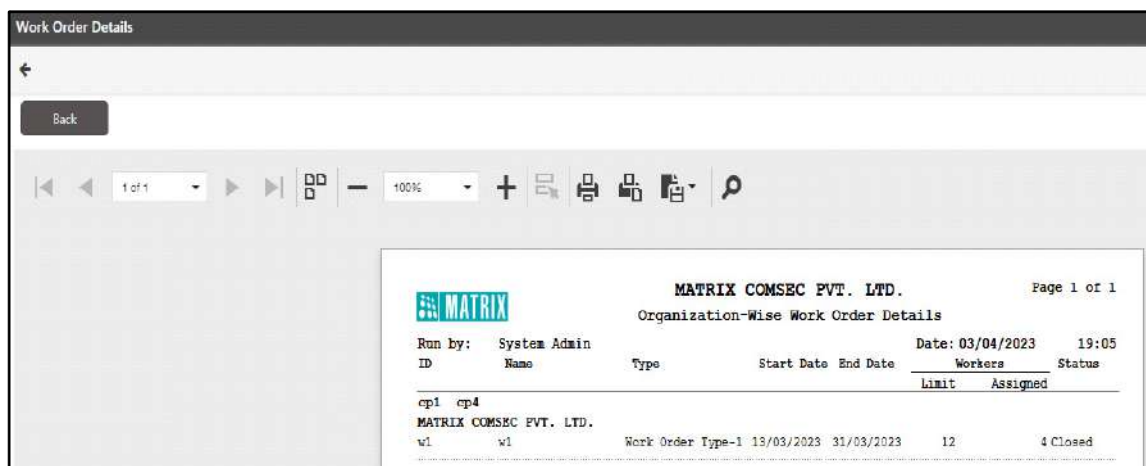
ID ▲	Name	
cp1	Contractor Profile 1	
cp10	Contractor Profile10	
cp11	Contractor Profile 11	
cp2	Contractor Profile 2	

You can also delete the desired contractor. To do so, click **Delete** of the respective contractors.

**Select Work Orders:** Similarly, follow the same steps as **Select Contractors** for the **Select Work Orders**.

Click **Generate Report**.

## Sample Report



Work Order Details

Back

1 of 1

100%

MATRIX COMSEC PVT. LTD. Page 1 of 1

Organization-Wise Work Order Details

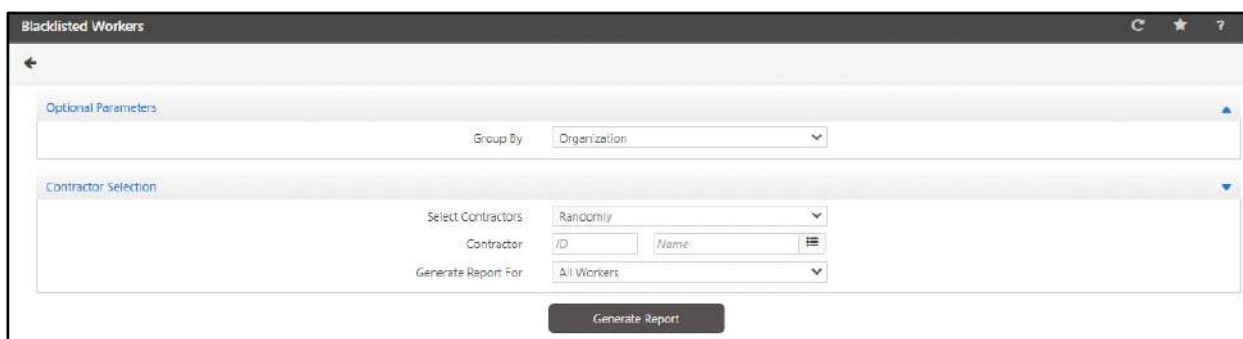
Run by: System Admin Date: 03/04/2023 19:05

ID	Name	Type	Start Date	End Date	Workers	Status
					Limit	Assigned
cp1	cp4					
MATRIX COMSEC PVT. LTD.						
w1	w1	Work Order Type-1	13/03/2023	31/03/2023	12	4 Closed

## Blacklisted Workers

Blacklisted worker detail report provides the detail of workers who are blacklisted from organization against respective work order and contractor.

Set the report filters as per requirement.



Blacklisted Workers

Optional Parameters

Group By: Organization

Contractor Selection

Select Contractors: Randomly

Contractor: ID Name

Generate Report For: All Workers

Generate Report

## Optional Parameter

**Group By:** Select the desired enterprise group from the drop-down list — Organization, Branch, Department, Designation, Custom Group1/2/3.

## Contractor Selection

**Select Contractors:** Select the desired option from the drop down list — **All** or **Randomly**.

If you select **All**, the report will include all the contractors.

If you select **Randomly**, click the **Contractor** picklist. The **Picklist For Contractor** pop-up appears.

Picklist For Contractor

Total Selected: 0 Records

Search 🔍 Show Selected

☐ Select All

<input type="checkbox"/>	ID ▲	Name	Type
<input type="checkbox"/>	cp1	cp4	Contractor Type-1
<input type="checkbox"/>	cp10	cp10	Contractor Type-1
<input type="checkbox"/>	cp11	cp11	Contractor Type-1
<input type="checkbox"/>	cp2	cp2	Contractor Type-1
<input type="checkbox"/>	cp3	cp3	Contractor Type-1
<input type="checkbox"/>	cp4	cp5	Contractor Type-1
<input type="checkbox"/>	cp5	cp5	Contractor Type-1
<input type="checkbox"/>	cp6	cp6	Contractor Type-1
<input type="checkbox"/>	cp7	cp7	Contractor Type-1
<input type="checkbox"/>	cp8	cp8	Contractor Type-1

1 - 10 of 11 records

« < 1 2 > »

OK Cancel

You can either select particular contractor or can select all the contractors at once.

To select particular contractor select the check boxes of the desired contractors.

Picklist For Contractor

Total Selected: 1 Records

Search 🔍 Show Selected

☐ Select All

<input type="checkbox"/>	ID ▲	Name	Type
<input checked="" type="checkbox"/>	cp1	cp4	Contractor Type-1
<input type="checkbox"/>	cp10	cp10	Contractor Type-1
<input type="checkbox"/>	cp11	cp11	Contractor Type-1
<input type="checkbox"/>	cp2	cp2	Contractor Type-1
<input type="checkbox"/>	cp3	cp3	Contractor Type-1
<input type="checkbox"/>	cp4	cp5	Contractor Type-1
<input type="checkbox"/>	cp5	cp5	Contractor Type-1
<input type="checkbox"/>	cp6	cp6	Contractor Type-1
<input type="checkbox"/>	cp7	cp7	Contractor Type-1
<input type="checkbox"/>	cp8	cp8	Contractor Type-1

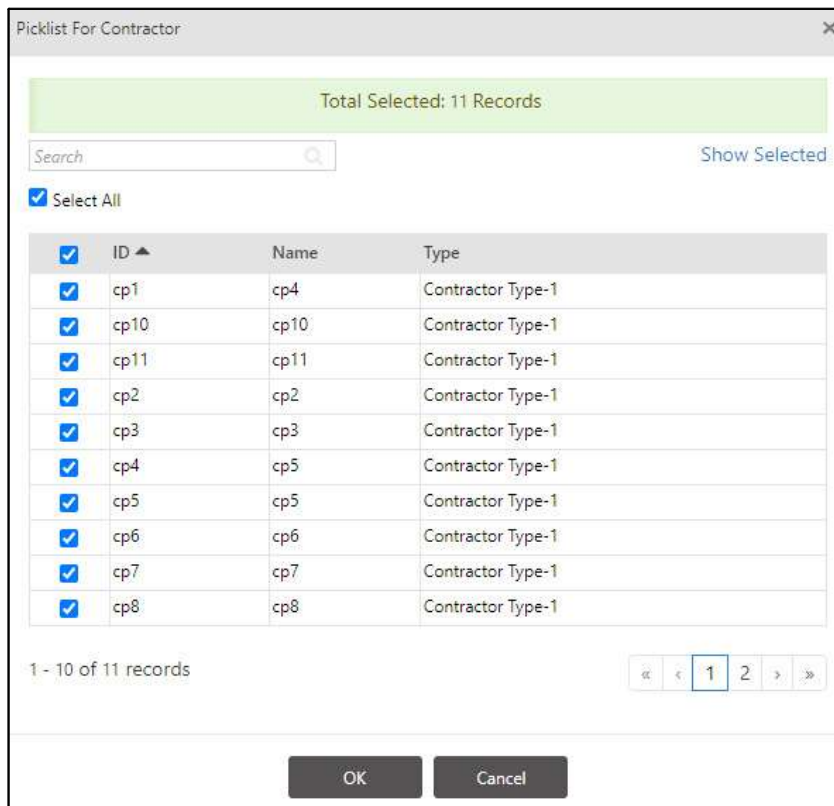
1 - 10 of 11 records

« < 1 2 > »

OK Cancel

OR

To select all the contractor at once, click on the **Select All** check box. The contractors on all the pages will be selected.



Picklist For Contractor

Total Selected: 11 Records

Search  Show Selected

☒ Select All

<input checked="" type="checkbox"/>	ID ▲	Name	Type
<input checked="" type="checkbox"/>	cp1	cp4	Contractor Type-1
<input checked="" type="checkbox"/>	cp10	cp10	Contractor Type-1
<input checked="" type="checkbox"/>	cp11	cp11	Contractor Type-1
<input checked="" type="checkbox"/>	cp2	cp2	Contractor Type-1
<input checked="" type="checkbox"/>	cp3	cp3	Contractor Type-1
<input checked="" type="checkbox"/>	cp4	cp5	Contractor Type-1
<input checked="" type="checkbox"/>	cp5	cp5	Contractor Type-1
<input checked="" type="checkbox"/>	cp6	cp6	Contractor Type-1
<input checked="" type="checkbox"/>	cp7	cp7	Contractor Type-1
<input checked="" type="checkbox"/>	cp8	cp8	Contractor Type-1

1 - 10 of 11 records

« < 1 2 > »

OK Cancel

Click **OK**.

The selected contractors appear in the grid.




Select Contractors Randomly

Contractor ID Name

Search

ID ▲	Name	
cp1	Contractor Profile 1	
cp10	Contractor Profile10	
cp11	Contractor Profile 11	
cp2	Contractor Profile 2	

You can also delete the desired contractor. To do so, click **Delete**  of the respective contractor.

**Generate Report For:** Select the desired option — **All Workers, Active Workers, Inactive Workers**.

Click on **Generate Report**.

## Sample Report

Work Order Details

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100%

MATRIX COMSEC PVT. LTD.

Page 1 of 1

Organization-Wise Work Order Details

Run by: System Admin

Date: 06/12/2023

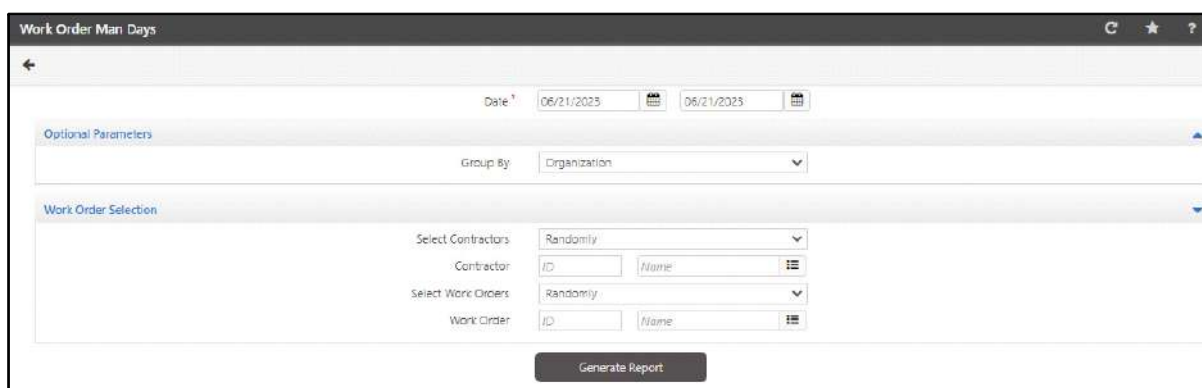
20:29

ID	Name	Type	Start Date	End Date	Workers	Status
					Limit	Assigned
CP12 Contractor Profile 12						
MATRIX COMSEC PVT. LTD.						
W13	W13	Work Order Type -	04/25/2023	06/10/2023	2	0 Closed
CP1 Contractor Profile 1						
MATRIX COMSEC PVT. LTD.						
w6	w6	Work Order Type-1	03/17/2023	03/28/2023	20	6 Closed
w51	w5	Work Order Type-1	02/24/2023	02/27/2023	14	0 Closed
w4	w4	Work Order Type-1	02/24/2023	02/26/2023	12	0 Closed
w3	w3	Work Order Type-1	02/26/2023	02/26/2023	12	0 Closed
w2	w2	Work Order Type-1	02/26/2023	02/26/2023	212	0 Closed
w12	w12	Work Order Type-1	02/27/2023	03/02/2023	19	0 Closed
w11	w11	Work Order Type-1	03/01/2023	03/05/2023	17	0 Closed
w10	w10	Work Order Type-1	02/28/2023	03/02/2023	18	0 Closed

## Work Order Man Days

Work Order Man Days Report displays the Worker Order-wise comparison of Worker Limit, Registered Workers, Approved Workers, Working Days and Man days. It gives an overview of the man days invested in each work order.

Set the report filters as per requirement.



Work Order Man Days

Date: 06/21/2023 to 06/21/2023

Optional Parameters

Group By: Organization

Work Order Selection

Select Contractors: Randomly

Contractor: ID Name

Select Work Orders: Randomly

Work Order: ID Name

Generate Report

**Date:** Select the to and from date for which the report is to be generated.

### Optional Parameter

**Group By:** Select the desired enterprise group from the drop-down list — Organization, Branch, Department,

### Work Order Selection

**Select Contractors:** Select the desired option — All or Randomly.

If you select **All**, the report will include all the contractors.

If you select **Randomly**, click the **Contractor** picklist. The **Picklist For Contractor** pop-up appears.

The dialog box titled "Picklist For Contractor" has a green header bar that says "Total Selected: 0 Records". Below this is a search bar with the placeholder text "Search" and a magnifying glass icon. To the right of the search bar is a blue link that says "Show Selected". Below the search bar is a checkbox labeled "Select All". The main area contains a table with four columns: "ID", "Name", and "Type". The table lists 11 records, each with a checkbox in the "ID" column. The records are: cp1, cp10, cp11, cp2, cp3, cp4, cp5, cp6, cp7, and cp8, all of which are "Contractor Type-1". Below the table, it says "1 - 10 of 11 records". At the bottom right, there are navigation buttons: "<<", "<", "1", "2", ">", and ">>". The "1" button is highlighted. At the bottom of the dialog are two buttons: "OK" and "Cancel".

<input type="checkbox"/>	ID ▲	Name	Type
<input type="checkbox"/>	cp1	cp4	Contractor Type-1
<input type="checkbox"/>	cp10	cp10	Contractor Type-1
<input type="checkbox"/>	cp11	cp11	Contractor Type-1
<input type="checkbox"/>	cp2	cp2	Contractor Type-1
<input type="checkbox"/>	cp3	cp3	Contractor Type-1
<input type="checkbox"/>	cp4	cp5	Contractor Type-1
<input type="checkbox"/>	cp5	cp5	Contractor Type-1
<input type="checkbox"/>	cp6	cp6	Contractor Type-1
<input type="checkbox"/>	cp7	cp7	Contractor Type-1
<input type="checkbox"/>	cp8	cp8	Contractor Type-1

You can either select particular contractor or can select all the contractors at once.

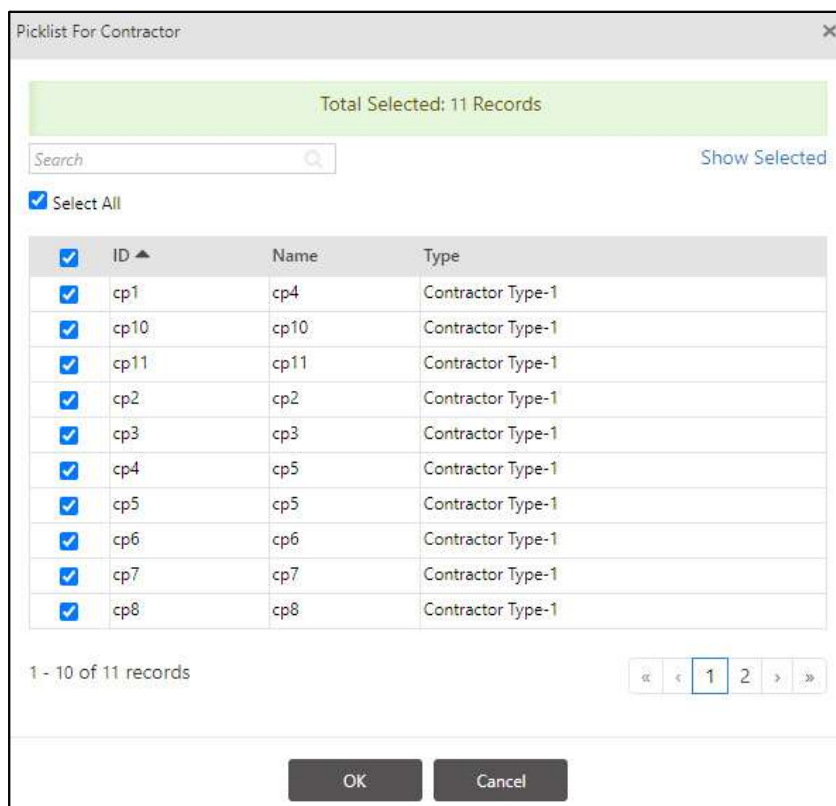
To select particular contractor select the check boxes of the desired contractors.

The dialog box titled "Picklist For Contractor" has a green header bar that says "Total Selected: 1 Records". Below this is a search bar with the placeholder text "Search" and a magnifying glass icon. To the right of the search bar is a blue link that says "Show Selected". Below the search bar is a checkbox labeled "Select All". The main area contains a table with four columns: "ID", "Name", and "Type". The table lists 11 records, each with a checkbox in the "ID" column. The record "cp1" is selected, indicated by a blue checkmark in its checkbox. The other records are "cp10", "cp11", "cp2", "cp3", "cp4", "cp5", "cp6", "cp7", and "cp8", all of which are "Contractor Type-1". Below the table, it says "1 - 10 of 11 records". At the bottom right, there are navigation buttons: "<<", "<", "1", "2", ">", and ">>". The "1" button is highlighted. At the bottom of the dialog are two buttons: "OK" and "Cancel".

<input type="checkbox"/>	ID ▲	Name	Type
<input checked="" type="checkbox"/>	cp1	cp4	Contractor Type-1
<input type="checkbox"/>	cp10	cp10	Contractor Type-1
<input type="checkbox"/>	cp11	cp11	Contractor Type-1
<input type="checkbox"/>	cp2	cp2	Contractor Type-1
<input type="checkbox"/>	cp3	cp3	Contractor Type-1
<input type="checkbox"/>	cp4	cp5	Contractor Type-1
<input type="checkbox"/>	cp5	cp5	Contractor Type-1
<input type="checkbox"/>	cp6	cp6	Contractor Type-1
<input type="checkbox"/>	cp7	cp7	Contractor Type-1
<input type="checkbox"/>	cp8	cp8	Contractor Type-1

OR

To select all the contractor at once, click on the **Select All** check box. The contractors on all the pages will be selected.



Picklist For Contractor

Total Selected: 11 Records

Search  Show Selected

☒ Select All

<input checked="" type="checkbox"/>	ID ▲	Name	Type
<input checked="" type="checkbox"/>	cp1	cp4	Contractor Type-1
<input checked="" type="checkbox"/>	cp10	cp10	Contractor Type-1
<input checked="" type="checkbox"/>	cp11	cp11	Contractor Type-1
<input checked="" type="checkbox"/>	cp2	cp2	Contractor Type-1
<input checked="" type="checkbox"/>	cp3	cp3	Contractor Type-1
<input checked="" type="checkbox"/>	cp4	cp5	Contractor Type-1
<input checked="" type="checkbox"/>	cp5	cp5	Contractor Type-1
<input checked="" type="checkbox"/>	cp6	cp6	Contractor Type-1
<input checked="" type="checkbox"/>	cp7	cp7	Contractor Type-1
<input checked="" type="checkbox"/>	cp8	cp8	Contractor Type-1

1 - 10 of 11 records

OK Cancel

Click **OK**

The selected contractors appear in the grid.




Select Contractors Randomly

Contractor ID Name

Search

ID ▲	Name	
cp1	Contractor Profile 1	<input checked="" type="checkbox"/>
cp10	Contractor Profile 10	<input checked="" type="checkbox"/>
cp11	Contractor Profile 11	<input checked="" type="checkbox"/>
cp2	Contractor Profile 2	<input checked="" type="checkbox"/>

You can also delete the desired contractor. To do so, click **Delete**  of the respective contractor.

**Select Work Orders:** Similarly, for **Select Work Orders** follow the same steps as **Select Contractor**.

Click **Generate Report**.

## Sample Report

Contractor ID	Contractor Name	Work Order ID	Work Order Name	Start Date	End Date	Worker Limit	Registered Workers	Approved Workers	Working Days	Man Days
op1	op1	W01	Work Order 1	02/02/2022	31/05/2022	1000	1	1	425	0.0

## Daily Head Count

Daily Head Count Report displays the work order-wise worker headcount for each date of the work order for the duration of the validity period. From this report the admin can get a daily basis comparison of expected workers and actually present workers.

Set the report filters as per requirement.

Date: 05/21/2023 to 06/21/2023

Optional Parameters

Group By: Organization

Work Order Selection

Select Contractors: Randomly

Contractor: ID Name

Select Work Orders: Randomly

Work Order: ID Name

Generate Report

**Date:** Select the to and from date for which the report is to be generated.

### Optional Parameter

**Group By:** Select the desired enterprise group from the drop-down list — Organization, Branch, Department,

### Work Order Selection

**Select Contractors:** Select the desired option — **All** or **Randomly**.

If you select **All**, the report will include all the contractors.



If you select **Randomly**, click the **Contractor** picklist. The **Picklist For Contractor** pop-up appears.

The dialog box titled "Picklist For Contractor" has a close button (X) in the top right corner. Below the title bar is a green header bar displaying "Total Selected: 0 Records". Underneath is a search bar with the placeholder text "Search" and a magnifying glass icon, followed by a "Show Selected" button. Below the search bar is a checkbox labeled "Select All". The main area contains a table with the following columns: "ID" (with a small upward arrow icon), "Name", and "Type". The table lists 11 records, all of which are "Contractor Type-1". The first record has ID "cp1" and Name "cp4". The last record has ID "cp8" and Name "cp8". Below the table, it says "1 - 10 of 11 records". To the right of this text is a pagination control with buttons for "«", "<", "1", "2", ">", and "»". At the bottom of the dialog are two buttons: "OK" and "Cancel".

ID	Name	Type
cp1	cp4	Contractor Type-1
cp10	cp10	Contractor Type-1
cp11	cp11	Contractor Type-1
cp2	cp2	Contractor Type-1
cp3	cp3	Contractor Type-1
cp4	cp5	Contractor Type-1
cp5	cp5	Contractor Type-1
cp6	cp6	Contractor Type-1
cp7	cp7	Contractor Type-1
cp8	cp8	Contractor Type-1

You can either select particular contractor or can select all the contractors at once.

To select particular contractor select the check boxes of the desired contractors.

This screenshot shows the same "Picklist For Contractor" dialog box, but now "Total Selected: 1 Records" is displayed in the green header bar. The "Select All" checkbox remains unchecked. In the table, the checkbox for the first record (ID "cp1", Name "cp4") is now checked. All other records remain unchecked. The rest of the interface, including the search bar, pagination controls, and "OK/Cancel" buttons, remains the same.

ID	Name	Type
cp1	cp4	Contractor Type-1
cp10	cp10	Contractor Type-1
cp11	cp11	Contractor Type-1
cp2	cp2	Contractor Type-1
cp3	cp3	Contractor Type-1
cp4	cp5	Contractor Type-1
cp5	cp5	Contractor Type-1
cp6	cp6	Contractor Type-1
cp7	cp7	Contractor Type-1
cp8	cp8	Contractor Type-1

OR

To select all the contractor at once, click on the **Select All** check box. The contractors on all the pages will be selected.

Picklist For Contractor

Total Selected: 11 Records

Search  Show Selected

☒ Select All

<input checked="" type="checkbox"/>	ID ▲	Name	Type
<input checked="" type="checkbox"/>	cp1	cp4	Contractor Type-1
<input checked="" type="checkbox"/>	cp10	cp10	Contractor Type-1
<input checked="" type="checkbox"/>	cp11	cp11	Contractor Type-1
<input checked="" type="checkbox"/>	cp2	cp2	Contractor Type-1
<input checked="" type="checkbox"/>	cp3	cp3	Contractor Type-1
<input checked="" type="checkbox"/>	cp4	cp5	Contractor Type-1
<input checked="" type="checkbox"/>	cp5	cp5	Contractor Type-1
<input checked="" type="checkbox"/>	cp6	cp6	Contractor Type-1
<input checked="" type="checkbox"/>	cp7	cp7	Contractor Type-1
<input checked="" type="checkbox"/>	cp8	cp8	Contractor Type-1

1 - 10 of 11 records

OK Cancel

Click **OK**.

The selected contractors appear in the grid.

Select Contractors Randomly

Contractor ID Name

Search

ID ▲	Name	
cp1	Contractor Profile 1	
cp10	Contractor Profile10	
cp11	Contractor Profile 11	
cp2	Contractor Profile 2	

You can also delete the desired contractor. To do so, click **Delete** of the respective contractor.

**Select Work Orders:** Similarly, follow the same steps as **Select Contractor** for **Select Work Orders**.

Click **Generate Report**.

## Sample Report

Daily Head Count

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1 of 1

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## Daily Work Hours

Daily Work Hours Report shows the worker's attendance status for each date against respective work order for respective contractor for selected dates. Work orders can also be filtered based on Enterprise group.

Set the report filters as per requirement.

Date: 06/21/2023 to 06/21/2023

Optional Parameters

Group By: Organization

Organization Name in Header As Per: User Selection

Worker Selection

Select Contractors: Randomly

Contractor: ID Name

Select Work Orders: Randomly

Work Order: ID Name

Select Workers: Randomly

Worker: ID Name

Generate Report

**Date:** Select the to and from date for which the report is to be generated.

### Optional Parameter

**Group By:** Select the desired enterprise group from the drop-down list — Organization, Branch, Department, Section, Category, Grade, Designation, Custom Group1/2/3

**Organization Name in Header as Per:** Select the desired option— **User Selection** or **Customized Selection**.

If you select **Customized Selection**, click Customize Report Header.

You can select the desired option from the drop-down list or can also add a new header according to your choice.

## Worker Selection

**Select Contractors:** Select the desired option — **All** or **Randomly**.

If you select **All**, the report will include all the contractors.

If you select **Randomly**, click the **Contractor** picklist. The **Picklist For Contractor** pop-up appears.

Picklist For Contractor

Total Selected: 0 Records

Search  Show Selected

☐ Select All

<input type="checkbox"/>	ID ▲	Name	Type
<input type="checkbox"/>	cp1	cp4	Contractor Type-1
<input type="checkbox"/>	cp10	cp10	Contractor Type-1
<input type="checkbox"/>	cp11	cp11	Contractor Type-1
<input type="checkbox"/>	cp2	cp2	Contractor Type-1
<input type="checkbox"/>	cp3	cp3	Contractor Type-1
<input type="checkbox"/>	cp4	cp5	Contractor Type-1
<input type="checkbox"/>	cp5	cp5	Contractor Type-1
<input type="checkbox"/>	cp6	cp6	Contractor Type-1
<input type="checkbox"/>	cp7	cp7	Contractor Type-1
<input type="checkbox"/>	cp8	cp8	Contractor Type-1
<input type="checkbox"/>	cp9	cp9	Contractor Type-1

1 - 10 of 11 records

« < 1 2 > »

OK Cancel

You can either select particular contractor or can select all the contractors at once.

To select particular contractor select the check boxes of the desired contractors.

Picklist For Contractor

Total Selected: 1 Records

Search

Show Selected

☐ Select All

<input type="checkbox"/>	ID ▲	Name	Type
<input checked="" type="checkbox"/>	cp1	cp4	Contractor Type-1
<input type="checkbox"/>	cp10	cp10	Contractor Type-1
<input type="checkbox"/>	cp11	cp11	Contractor Type-1
<input type="checkbox"/>	cp2	cp2	Contractor Type-1
<input type="checkbox"/>	cp3	cp3	Contractor Type-1
<input type="checkbox"/>	cp4	cp5	Contractor Type-1
<input type="checkbox"/>	cp5	cp5	Contractor Type-1
<input type="checkbox"/>	cp6	cp6	Contractor Type-1
<input type="checkbox"/>	cp7	cp7	Contractor Type-1
<input type="checkbox"/>	cp8	cp8	Contractor Type-1

1 - 10 of 11 records

<<

<

1

2

>

>>

OK

Cancel

OR

To select all the contractor at once, click the **Select All** check box. The contractors on all the pages will be selected.

Picklist For Contractor

Total Selected: 11 Records

Search  Show Selected

☒ Select All

<input checked="" type="checkbox"/>	ID ▲	Name	Type
<input checked="" type="checkbox"/>	cp1	cp4	Contractor Type-1
<input checked="" type="checkbox"/>	cp10	cp10	Contractor Type-1
<input checked="" type="checkbox"/>	cp11	cp11	Contractor Type-1
<input checked="" type="checkbox"/>	cp2	cp2	Contractor Type-1
<input checked="" type="checkbox"/>	cp3	cp3	Contractor Type-1
<input checked="" type="checkbox"/>	cp4	cp5	Contractor Type-1
<input checked="" type="checkbox"/>	cp5	cp5	Contractor Type-1
<input checked="" type="checkbox"/>	cp6	cp6	Contractor Type-1
<input checked="" type="checkbox"/>	cp7	cp7	Contractor Type-1
<input checked="" type="checkbox"/>	cp8	cp8	Contractor Type-1

1 - 10 of 11 records

« < 1 2 > »

OK Cancel

Click **OK**.

The selected contractors appear in the grid.

Select Contractors Randomly ▼

Contractor ID Name

Search

ID ▲	Name	
cp1	Contractor Profile 1	
cp10	Contractor Profile10	
cp11	Contractor Profile 11	
cp2	Contractor Profile 2	

You can also delete the desired contractor. To do so, click Delete of the respective contractor.

**Select Work Orders:** Similarly, follow the same steps as **Select Contractor** for **Select Work Orders**.

**Select Worker:** Select the desired option— All or Randomly.

If you select **All**, then all the workers will be selected.

If you select **Randomly**, click the **Worker** picklist. The **Picklist For All Workers** pop-up appears.

Picklist For All Workers

Total Selected: 0 Records

Search  Show Selected

<input type="checkbox"/>	Worker ID ▲	Name	Short Name
<input type="checkbox"/>	w1	Worker 1	w1
<input type="checkbox"/>	w10	Worker 10	w10
<input type="checkbox"/>	w11	Worker 11	w11
<input type="checkbox"/>	w12	Worker 12	w12
<input type="checkbox"/>	w14	Worker 14	w14
<input type="checkbox"/>	w2	Worker 2	w2
<input type="checkbox"/>	w3	Worker 3	w3
<input type="checkbox"/>	w4	Worker 4	w4
<input type="checkbox"/>	w5	Worker 5	w5
<input type="checkbox"/>	w6	Worker 6	w6

1 - 10 of 13 records

« < 1 2 > »

OK Cancel

Select the check boxes of the desired workers. Click **OK**.

The selected workers appear in the grid.

Select Workers Randomly ▼

Worker ID Name

Search

ID ▲	Name	
w1	Worker 1	
w10	Worker 10	
w11	Worker 11	
w12	Worker 12	
w14	Worker 14	

Generate Report For All Workers ▼

You can also delete the desired worker. To do so, click **Delete** of the respective worker.

**Generate Report For:** Select the desired option — All Workers, Active Worker or Inactive Worker.

Click **Generate Report**.

## Sample Report

Work Order	Contractor Name	Worker ID	Name	Skill	Category	Department	Shift	In	Out	Work Hours
WO2	cp1	W1	W1	Skill-1	Category-1	Department-1	GS			-
WO2	cp1	W1	W1	Skill-1	Category-1	Department-1	GS			-
WO2	cp1	W1	W1	Skill-1	Category-1	Department-1	GS			-
WO2	cp1	W1	W1	Skill-1	Category-1	Department-1	GS			-

## Status Summary

### Attendance Status Template

This page enables you to define the Output Code for Attendance Status.

Attendance Status Template

ID:

Output Status Length:

Attendance Status:

Output Code:

Description:

The Output Code for different Attendance Status combinations for first and second half can be created. The description for the status code can also be mentioned.

For example: Present for both 1st and 2nd half is given an output code of P.



*The output codes defined here will reflect accordingly in the User-defined Muster Roll reports in the Time & Attendance module.*

## Daily Summary

Daily Summary Report displays the workers Daily Attendance summary against respective work order for respective contractor for selected time period.



Set the filters as per your requirement.

The screenshot shows a web application window titled "Daily Summary". At the top, there is a date range selector with "Date" and two date pickers set to "06/21/2023". Below this is a section titled "Optional Parameters" which contains two dropdown menus: "Group By" (set to "Organization") and "Organization Name in Header As Per" (set to "User Selection"). Underneath is a section titled "Worker Selection" containing three rows of controls. Each row has a dropdown menu and two input fields labeled "ID" and "Name". The first row is for "Select Contractors" (dropdown: "Randomly"), the second for "Select Work Orders" (dropdown: "Randomly"), and the third for "Select Workers" (dropdown: "Randomly"). At the bottom of the form is a "Generate Report" button.

**Date:** Select the to and from date for which the report is to be generated.

### Optional Parameter

**Group By:** Select the desired enterprise group from the drop-down list — Organization, Branch, Department, Section, Category, Grade, Designation, Custom Group1/2/3.

**Organization Name in Header As Per:** Select the desired option — **User Selection** or **Customized Selection**.

If you select **Customized Selection**, click on Customize Report Header. You can select the desired option from the drop down list or can also add a new header according to your choice.

### Worker Selection

**Select Contractors:** Select the desired option — **All** or **Randomly**.

If you select **All**, the report will include all the contractors.

If you select **Randomly**, click the **Contractor picklist**. The **Picklist For Contractor** pop-up appears.

The dialog box titled "Picklist For Contractor" has a close button (X) in the top right corner. Below the title bar is a green header bar displaying "Total Selected: 0 Records". Underneath is a search bar with the placeholder text "Search" and a magnifying glass icon, followed by a "Show Selected" button. Below the search bar is a checkbox labeled "Select All". The main area contains a table with the following columns: "ID" (with a small upward arrow icon), "Name", and "Type". The table lists 11 records, all of which are "Contractor Type-1". The first record has ID "cp1" and Name "cp4". The last record has ID "cp8" and Name "cp8". Below the table, it says "1 - 10 of 11 records". To the right of this text is a pagination control with buttons for "«", "<", "1", "2", ">", and "»", where "1" is highlighted. At the bottom of the dialog are two buttons: "OK" and "Cancel".

<input type="checkbox"/>	ID ▲	Name	Type
<input type="checkbox"/>	cp1	cp4	Contractor Type-1
<input type="checkbox"/>	cp10	cp10	Contractor Type-1
<input type="checkbox"/>	cp11	cp11	Contractor Type-1
<input type="checkbox"/>	cp2	cp2	Contractor Type-1
<input type="checkbox"/>	cp3	cp3	Contractor Type-1
<input type="checkbox"/>	cp4	cp5	Contractor Type-1
<input type="checkbox"/>	cp5	cp5	Contractor Type-1
<input type="checkbox"/>	cp6	cp6	Contractor Type-1
<input type="checkbox"/>	cp7	cp7	Contractor Type-1
<input type="checkbox"/>	cp8	cp8	Contractor Type-1

You can either select particular contractor or can select all the contractors at once.

To select particular contractor select the check boxes of the desired contractors.

The dialog box titled "Picklist For Contractor" is shown in the same state as the previous screenshot, but with "Total Selected: 1 Records" in the green header bar. The "Select All" checkbox remains unchecked. In the table, the first record (ID "cp1", Name "cp4") now has its checkbox checked. All other records remain unchanged. The pagination control and "OK/Cancel" buttons are also present.

<input type="checkbox"/>	ID ▲	Name	Type
<input checked="" type="checkbox"/>	cp1	cp4	Contractor Type-1
<input type="checkbox"/>	cp10	cp10	Contractor Type-1
<input type="checkbox"/>	cp11	cp11	Contractor Type-1
<input type="checkbox"/>	cp2	cp2	Contractor Type-1
<input type="checkbox"/>	cp3	cp3	Contractor Type-1
<input type="checkbox"/>	cp4	cp5	Contractor Type-1
<input type="checkbox"/>	cp5	cp5	Contractor Type-1
<input type="checkbox"/>	cp6	cp6	Contractor Type-1
<input type="checkbox"/>	cp7	cp7	Contractor Type-1
<input type="checkbox"/>	cp8	cp8	Contractor Type-1

OR

To select all the contractors at once, click on the **Select All** check box. The contractors on all the pages will be selected.

Picklist For Contractor

Total Selected: 11 Records

Search

Show Selected

☒ Select All

<input checked="" type="checkbox"/>	ID ▲	Name	Type
<input checked="" type="checkbox"/>	cp1	cp4	Contractor Type-1
<input checked="" type="checkbox"/>	cp10	cp10	Contractor Type-1
<input checked="" type="checkbox"/>	cp11	cp11	Contractor Type-1
<input checked="" type="checkbox"/>	cp2	cp2	Contractor Type-1
<input checked="" type="checkbox"/>	cp3	cp3	Contractor Type-1
<input checked="" type="checkbox"/>	cp4	cp5	Contractor Type-1
<input checked="" type="checkbox"/>	cp5	cp5	Contractor Type-1
<input checked="" type="checkbox"/>	cp6	cp6	Contractor Type-1
<input checked="" type="checkbox"/>	cp7	cp7	Contractor Type-1
<input checked="" type="checkbox"/>	cp8	cp8	Contractor Type-1

1 - 10 of 11 records

1

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OK

Cancel

Click **OK**.

The selected contractors appear in the grid.

Select Contractors

Randomly


Contractor

ID

Name

Search

ID ▲	Name	
cp1	Contractor Profile 1	
cp10	Contractor Profile10	
cp11	Contractor Profile 11	
cp2	Contractor Profile 2	

You can also delete the desired contractor. To do so, click **Delete**  of the respective contractor.

**Select Work Orders:** Similarly, follow the same steps as **Select Contractor** for **Select Work Orders**.

**Select Worker:** Select the desired option— **All** or **Randomly**.

If you select **All**, then all the workers will be selected.

If you select **Randomly**, click the **Worker** picklist. The **Picklist For All Workers** pop-up appears.

Picklist For All Workers

Total Selected: 0 Records

Search  Show Selected

<input type="checkbox"/>	Worker ID ▲	Name	Short Name
<input type="checkbox"/>	w1	Worker 1	w1
<input type="checkbox"/>	w10	Worker 10	w10
<input type="checkbox"/>	w11	Worker 11	w11
<input type="checkbox"/>	w12	Worker 12	w12
<input type="checkbox"/>	w14	Worker 14	w14
<input type="checkbox"/>	w2	Worker 2	w2
<input type="checkbox"/>	w3	Worker 3	w3
<input type="checkbox"/>	w4	Worker 4	w4
<input type="checkbox"/>	w5	Worker 5	w5
<input type="checkbox"/>	w6	Worker 6	w6

1 - 10 of 13 records

« < 1 2 > »

OK Cancel

Select the check boxes of the desired workers. Click **OK**.

The selected workers appear in the grid

Select Workers Randomly

Worker ID Name

Search

ID ▲	Name	
w1	Worker 1	
w10	Worker 10	
w11	Worker 11	
w12	Worker 12	
w14	Worker 14	

Generate Report For All Workers

You can also delete the desired worker. To do so, click **Delete** of the respective worker.

Click **Generate Report**.

## Sample Report

**Daily Summary**

Organization-Wise Daily Summary From 20/04/2010 To 20/04/2023

Page 1 of 6

Run by: Worker ID      System Admin Name      Attendance      Status      Date: 20/04/2023      17:58

Run by: Worker ID	System Admin Name	Attendance	Status
02/02/2022			
W01	W01	cp1	A
W02	W02	A	
03/02/2022			
W01	W01	cp1	
W02	W02	A	
04/02/2022			
W01	W01	cp1	
W02	W02	A	
05/02/2022			
W01	W01	cp1	
W02	W02	A	
06/02/2022			
W01	W01	cp1	
W02	W02	W	
07/02/2022			
W01	W01	cp1	
W02	W02	A	

## Monthly Attendance

Monthly Attendance Report displays the workers Monthly Attendance Summary against respective work order for respective contractor for the Month-Year selected. Work orders can also be filtered based on Enterprise group.

Set the report filters as per requirement.

**Monthly Attendance**

Date: 05/22/2023 to 06/21/2023

Optional Parameters:

Group By: Organization

Organization Name in Header As Per: User Selection

Worker Selection:

Select Contractors: Randomly

Contractor: ID Name

Select Work Orders: Randomly

Work Order: ID Name

Select Workers: Randomly

Worker: ID Name

Generate Report

**Date:** Select the to and from date for which the report is to be generated.

### Optional Parameter

**Group By:** Select the desired enterprise group from the drop-down list — Organization, Branch, Department, Section Category, Grade, Designation, Custom Group1/2/3.

**Organization Name in Header As Per:** Select the desired option — **User Selection** or **Customized Selection**.

If you select **Customized Selection**, click on Customize Report Header. You can select the desired option from the drop down list or can also add header according to your choice.

## Work Order Selection

**Select Contractors:** Select the desired option — **All** or **Randomly**.

If you select **All**, the report will include all the contractors.

If you select **Randomly**, click the **Contractor** picklist. The **Picklist For Contractor** pop-up appears.

Picklist For Contractor

Total Selected: 0 Records

Search  Show Selected

☐ Select All

<input type="checkbox"/>	ID ▲	Name	Type
<input type="checkbox"/>	cp1	cp4	Contractor Type-1
<input type="checkbox"/>	cp10	cp10	Contractor Type-1
<input type="checkbox"/>	cp11	cp11	Contractor Type-1
<input type="checkbox"/>	cp2	cp2	Contractor Type-1
<input type="checkbox"/>	cp3	cp3	Contractor Type-1
<input type="checkbox"/>	cp4	cp5	Contractor Type-1
<input type="checkbox"/>	cp5	cp5	Contractor Type-1
<input type="checkbox"/>	cp6	cp6	Contractor Type-1
<input type="checkbox"/>	cp7	cp7	Contractor Type-1
<input type="checkbox"/>	cp8	cp8	Contractor Type-1

1 - 10 of 11 records

« < 1 2 > »

OK Cancel

You can either select particular contractor or can select all the contractors at once.

To select particular contractor select the check boxes of the desired contractors.

Picklist For Contractor

Total Selected: 1 Records

Search

Show Selected

☐ Select All

<input type="checkbox"/>	ID ▲	Name	Type
<input checked="" type="checkbox"/>	cp1	cp4	Contractor Type-1
<input type="checkbox"/>	cp10	cp10	Contractor Type-1
<input type="checkbox"/>	cp11	cp11	Contractor Type-1
<input type="checkbox"/>	cp2	cp2	Contractor Type-1
<input type="checkbox"/>	cp3	cp3	Contractor Type-1
<input type="checkbox"/>	cp4	cp5	Contractor Type-1
<input type="checkbox"/>	cp5	cp5	Contractor Type-1
<input type="checkbox"/>	cp6	cp6	Contractor Type-1
<input type="checkbox"/>	cp7	cp7	Contractor Type-1
<input type="checkbox"/>	cp8	cp8	Contractor Type-1

1 - 10 of 11 records

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OK

Cancel

OR

To select all the contractor at once, click on the **Select All** check box. The contractors on all the pages will be selected.

Picklist For Contractor

Total Selected: 11 Records

Search

Show Selected

☒ Select All

<input checked="" type="checkbox"/>	ID ▲	Name	Type
<input checked="" type="checkbox"/>	cp1	cp4	Contractor Type-1
<input checked="" type="checkbox"/>	cp10	cp10	Contractor Type-1
<input checked="" type="checkbox"/>	cp11	cp11	Contractor Type-1
<input checked="" type="checkbox"/>	cp2	cp2	Contractor Type-1
<input checked="" type="checkbox"/>	cp3	cp3	Contractor Type-1
<input checked="" type="checkbox"/>	cp4	cp5	Contractor Type-1
<input checked="" type="checkbox"/>	cp5	cp5	Contractor Type-1
<input checked="" type="checkbox"/>	cp6	cp6	Contractor Type-1
<input checked="" type="checkbox"/>	cp7	cp7	Contractor Type-1
<input checked="" type="checkbox"/>	cp8	cp8	Contractor Type-1

1 - 10 of 11 records

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OK

Cancel

Click **OK**.

The selected contractors appear in the grid.

Select Contractors

Randomly


Contractor

ID

Name

Search

ID ▲	Name	
cp1	Contractor Profile 1	
cp10	Contractor Profile 10	
cp11	Contractor Profile 11	
cp2	Contractor Profile 2	

You can also delete the desired contractor. To do so, click **Delete**  of the respective contractor.

**Select Work Orders:** Similarly, follow the same steps as **Select Contractor** for **Select Work Orders**.

**Select Worker:** Select the desired option— All or Randomly.

If you select **All**, then all the workers will be selected.



If you select **Randomly**, click the **Worker** picklist. The **Picklist For All Workers** pop-up appears.

Picklist For All Workers

Total Selected: 2 Records

Search

Show Selected

<input type="checkbox"/>	Worker ID ▲	Name	Short Name
<input checked="" type="checkbox"/>	w1	Worker 1	w1
<input checked="" type="checkbox"/>	w10	Worker 10	w10
<input type="checkbox"/>	w11	Worker 11	w11
<input type="checkbox"/>	w12	Worker 12	w12
<input type="checkbox"/>	w14	Worker 14	w14
<input type="checkbox"/>	w2	Worker 2	w2
<input type="checkbox"/>	w3	Worker 3	w3
<input type="checkbox"/>	w4	Worker 4	w4
<input type="checkbox"/>	w5	Worker 5	w5
<input type="checkbox"/>	w6	Worker 6	w6

1 - 10 of 13 records

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OK

Cancel

Select the check boxes of the desired workers. Click **OK**.

The selected workers appear in the grid.

Select Workers

Randomly

Worker

ID


Name

Search

ID ▲	Name	
w1	Worker 1	
w10	Worker 10	
w11	Worker 11	
w12	Worker 12	
w14	Worker 14	

Generate Report For

All Workers

You can also delete the desired worker. To do so, click **Delete**  of the respective worker.

Click **Generate Report**.

## Sample Report

Monthly Attendance

←

Back

1 of 1

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## Attendance Details

### Shift Schedule

This report displays the configured shifts of different workers under their respective contractors and work order types for each day of the specified month.

Set the report filters as per requirement.

For Month-Year: June, 2023

Optional Parameters: Organization Name in Header As Per: User Selection

Worker Selection:

- Select Contractors: Randomly
- Contractor: ID, Name
- Select Work Orders: Randomly
- Work Order: ID, Name
- Select Workers: Randomly
- Worker: ID, Name
- Generate Report For: All Workers

Generate Report

**For Month Year:** Select the month year for which report is to be generated.

### Optional Parameter

**Organization Name in Header As Per:** Select the desired option — **User Selection** or **Customized Selection**.

If you select **Customized Selection**, click on Customize Report Header. You can select the desired option from the drop down list or can also add header according to your choice.

### Work Order Selection

**Select Contractors:** Select the desired option — **All** or **Randomly**.

If you select **All**, the report will include all the contractors.

If you select **Randomly**, click the **Contractor** picklist. The **Picklist For Contractor** pop-up appears.

The dialog box titled "Picklist For Contractor" has a close button (X) in the top right corner. At the top, a green bar displays "Total Selected: 0 Records". Below this is a search bar with the placeholder text "Search" and a magnifying glass icon, followed by a "Show Selected" link. A "Select All" checkbox is located below the search bar. The main area contains a table with four columns: "ID" (with an upward arrow), "Name", and "Type". The table lists 11 records, each with a checkbox in the "ID" column. The records are as follows:

<input type="checkbox"/>	ID ▲	Name	Type
<input type="checkbox"/>	cp1	cp4	Contractor Type-1
<input type="checkbox"/>	cp10	cp10	Contractor Type-1
<input type="checkbox"/>	cp11	cp11	Contractor Type-1
<input type="checkbox"/>	cp2	cp2	Contractor Type-1
<input type="checkbox"/>	cp3	cp3	Contractor Type-1
<input type="checkbox"/>	cp4	cp5	Contractor Type-1
<input type="checkbox"/>	cp5	cp5	Contractor Type-1
<input type="checkbox"/>	cp6	cp6	Contractor Type-1
<input type="checkbox"/>	cp7	cp7	Contractor Type-1
<input type="checkbox"/>	cp8	cp8	Contractor Type-1

Below the table, it says "1 - 10 of 11 records". To the right is a pagination control with buttons: "«", "<", "1" (highlighted), "2", ">", and "»". At the bottom are "OK" and "Cancel" buttons.

You can either select particular contractor or can select all the contractors at once.

To select particular contractor select the check boxes of the desired contractors.

The dialog box titled "Picklist For Contractor" is shown with "Total Selected: 1 Records" in the green bar at the top. The search bar and "Show Selected" link are present. The "Select All" checkbox is still unchecked. In the table, the checkbox for the first record (ID cp1) is now checked. The rest of the table data remains the same as in the previous screenshot.

<input type="checkbox"/>	ID ▲	Name	Type
<input checked="" type="checkbox"/>	cp1	cp4	Contractor Type-1
<input type="checkbox"/>	cp10	cp10	Contractor Type-1
<input type="checkbox"/>	cp11	cp11	Contractor Type-1
<input type="checkbox"/>	cp2	cp2	Contractor Type-1
<input type="checkbox"/>	cp3	cp3	Contractor Type-1
<input type="checkbox"/>	cp4	cp5	Contractor Type-1
<input type="checkbox"/>	cp5	cp5	Contractor Type-1
<input type="checkbox"/>	cp6	cp6	Contractor Type-1
<input type="checkbox"/>	cp7	cp7	Contractor Type-1
<input type="checkbox"/>	cp8	cp8	Contractor Type-1

The pagination control and "OK" / "Cancel" buttons at the bottom are also present.

OR

To select all the contractor at once, click on the **Select All** check box. The contractors on all the pages will be selected.

Picklist For Contractor

Total Selected: 11 Records

Search  Show Selected

☒ Select All

<input checked="" type="checkbox"/>	ID ▲	Name	Type
<input checked="" type="checkbox"/>	cp1	cp4	Contractor Type-1
<input checked="" type="checkbox"/>	cp10	cp10	Contractor Type-1
<input checked="" type="checkbox"/>	cp11	cp11	Contractor Type-1
<input checked="" type="checkbox"/>	cp2	cp2	Contractor Type-1
<input checked="" type="checkbox"/>	cp3	cp3	Contractor Type-1
<input checked="" type="checkbox"/>	cp4	cp5	Contractor Type-1
<input checked="" type="checkbox"/>	cp5	cp5	Contractor Type-1
<input checked="" type="checkbox"/>	cp6	cp6	Contractor Type-1
<input checked="" type="checkbox"/>	cp7	cp7	Contractor Type-1
<input checked="" type="checkbox"/>	cp8	cp8	Contractor Type-1

1 - 10 of 11 records

OK Cancel

Click **OK**.

The selected contractors appear in the grid.

Select Contractors Randomly

Contractor ID Name

Search

ID ▲	Name	
cp1	Contractor Profile 1	
cp10	Contractor Profile 10	
cp11	Contractor Profile 11	
cp2	Contractor Profile 2	

1 - 4 of 4 records

OK Cancel

You can also delete the desired contractor. To do so, click **Delete** of the respective contractor.

**Select Work Orders:** Similarly, follow the same steps as **Select Contractor** for **Select Work Orders**.

**Select Worker:** Select the desired option— All or Randomly.

If you select **All**, then all the workers will be selected.

If you select **Randomly**, click the **Worker** picklist. The **Picklist For All Workers** pop-up appears.

Picklist For All Workers

Total Selected: 2 Records

Search  Show Selected

<input type="checkbox"/>	Worker ID ▲	Name	Short Name
<input checked="" type="checkbox"/>	w1	Worker 1	w1
<input checked="" type="checkbox"/>	w10	Worker 10	w10
<input type="checkbox"/>	w11	Worker 11	w11
<input type="checkbox"/>	w12	Worker 12	w12
<input type="checkbox"/>	w14	Worker 14	w14
<input type="checkbox"/>	w2	Worker 2	w2
<input type="checkbox"/>	w3	Worker 3	w3
<input type="checkbox"/>	w4	Worker 4	w4
<input type="checkbox"/>	w5	Worker 5	w5
<input type="checkbox"/>	w6	Worker 6	w6

1 - 10 of 13 records

OK Cancel

Select the check boxes of the desired workers. Click **OK**.

The selected workers appear in the grid

Select Workers Randomly

Worker ID Name

Search

ID ▲	Name	
w1	Worker 1	
w10	Worker 10	
w11	Worker 11	
w12	Worker 12	
w14	Worker 14	

Generate Report For All Workers

You can also delete the desired worker. To do so, click **Delete** of the respective worker.

**Generate Report For:** Select the desired option — All Workers, Active Worker or Inactive Worker.

Click **Generate Report**.

## Sample Report

Shift Schedule

Back

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114%

DADB

Page 1 of 1

Shift Schedule For FEBRUARY-2022

Run by: System Admin

Date: 24/04/2023 23:05

	02	03	04	05	06	07	08	09	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28
W1 - W1																											
Shift	03	03	03	03	03	03	03	03	03	03	03	03	03	03	03	03	03	03	03	03	03	03	03	03	03	03	03
Status					WO							WO							WO						WO		

## Muster Roll

This report generates a group-wise monthly muster roll with system-defined attendance status as well as leave status of workers for the specified month and year.

Set the report filters as per requirement.

Muster Roll

For Month-Year: June 2023

Include Archived Data: ☐

Optional Parameters

Organization Name in Header As Per: User Selection

Worker Selection

Select Contractors: Randomly

Contractor: ID Name

Select Work Orders: Randomly

Work Order: ID Name

Select Workers: Randomly

Worker: ID Name

Generate Report For: All Workers

Generate Report

**For Month Year:** Select the month year for which report is to be generated.

**Include Archive Data:** Select this check box if you wish to include data from the Archive.

### Optional Parameter

**Organization Name in Header As Per:** Select the desired option — **User Selection** or **Customized Selection**.

If you select **Customized Selection**, click on Customize Report Header. You can select the desired option from the drop down list or can also add header according to your choice.

### Worker Selection

**Select Contractors:** Select the desired option — **All** or **Randomly**.

If you select **All**, the report will include all the contractors.

If you select **Randomly**, click the **Contractor** picklist. The **Picklist For Contractor** pop-up appears.

Picklist For Contractor

Total Selected: 0 Records

Search  Show Selected

☐ Select All

<input type="checkbox"/>	ID ▲	Name	Type
<input type="checkbox"/>	cp1	cp4	Contractor Type-1
<input type="checkbox"/>	cp10	cp10	Contractor Type-1
<input type="checkbox"/>	cp11	cp11	Contractor Type-1
<input type="checkbox"/>	cp2	cp2	Contractor Type-1
<input type="checkbox"/>	cp3	cp3	Contractor Type-1
<input type="checkbox"/>	cp4	cp5	Contractor Type-1
<input type="checkbox"/>	cp5	cp5	Contractor Type-1
<input type="checkbox"/>	cp6	cp6	Contractor Type-1
<input type="checkbox"/>	cp7	cp7	Contractor Type-1
<input type="checkbox"/>	cp8	cp8	Contractor Type-1

1 - 10 of 11 records

« < 1 2 > »

OK Cancel

You can either select particular contractor or can select all the contractors at once.

To select particular contractor select the check boxes of the desired contractors.

The screenshot shows a dialog box titled "Picklist For Contractor". At the top, a green bar indicates "Total Selected: 1 Records". Below this is a search bar with the text "Search" and a magnifying glass icon, and a "Show Selected" button. A "Select All" checkbox is present and is currently unchecked. The main area contains a table with the following data:

<input type="checkbox"/>	ID ▲	Name	Type
<input checked="" type="checkbox"/>	cp1	cp4	Contractor Type-1
<input type="checkbox"/>	cp10	cp10	Contractor Type-1
<input type="checkbox"/>	cp11	cp11	Contractor Type-1
<input type="checkbox"/>	cp2	cp2	Contractor Type-1
<input type="checkbox"/>	cp3	cp3	Contractor Type-1
<input type="checkbox"/>	cp4	cp5	Contractor Type-1
<input type="checkbox"/>	cp5	cp5	Contractor Type-1
<input type="checkbox"/>	cp6	cp6	Contractor Type-1
<input type="checkbox"/>	cp7	cp7	Contractor Type-1
<input type="checkbox"/>	cp8	cp8	Contractor Type-1

Below the table, it says "1 - 10 of 11 records". To the right of this is a pagination control with buttons for "«", "<", "1", "2", ">", and "»". At the bottom are "OK" and "Cancel" buttons.

OR

To select all the contractor at once, click on the **Select All** check box. The contractors on all the pages will be selected.

The screenshot shows the same "Picklist For Contractor" dialog box, but now the "Select All" checkbox is checked. The green bar at the top now indicates "Total Selected: 11 Records". In the table, all the "ID" checkboxes are also checked. The rest of the interface, including the search bar, pagination, and buttons, remains the same.



Click **OK**.

The selected contractors appear in the grid.

Select Contractors

Randomly


Contractor

ID

Name

Search

ID ▲	Name	
cp1	Contractor Profile 1	
cp10	Contractor Profile10	
cp11	Contractor Profile 11	
cp2	Contractor Profile 2	

You can also delete the desired contractor. To do so, click **Delete**  of the respective contractor.

**Select Work Orders:** Similarly, follow the same steps as **Select Contractor** for **Select Work Orders**.

**Select Worker:** Select the desired option— All or Randomly.

If you select **All**, then all the workers will be selected.

If you select **Randomly**, click the **Worker** picklist. The **Picklist For All Workers** pop-up appears.

Picklist For All Workers

Total Selected: 2 Records

Search

Show Selected

<input type="checkbox"/>	Worker ID ▲	Name	Short Name
<input checked="" type="checkbox"/>	w1	Worker 1	w1
<input checked="" type="checkbox"/>	w10	Worker 10	w10
<input type="checkbox"/>	w11	Worker 11	w11
<input type="checkbox"/>	w12	Worker 12	w12
<input type="checkbox"/>	w14	Worker 14	w14
<input type="checkbox"/>	w2	Worker 2	w2
<input type="checkbox"/>	w3	Worker 3	w3
<input type="checkbox"/>	w4	Worker 4	w4
<input type="checkbox"/>	w5	Worker 5	w5
<input type="checkbox"/>	w6	Worker 6	w6

1 - 10 of 13 records

<< < 1 2 > >>

OK Cancel

Select the desired check boxes. Click **OK**.

The selected workers appear in the grid.


Select Workers Randomly

Worker ID Name

Search

ID	Name	
w1	Worker 1	
w10	Worker 10	
w11	Worker 11	
w12	Worker 12	
w14	Worker 14	

Generate Report For All Workers

You can also delete the desired worker. To do so, click **Delete**  of the respective worker.

**Generate Report For:** Select the desired option — **All Workers**, **Active Worker** or **Inactive Worker**

Click **Generate Report**.

Sample Report

Muster Roll

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DADB

Muster Roll For FEBRUARY-2022

Page 1 of 1

Run by: System Admin

Sr No User ID Name Designation PR WO PH PL TR AB UL

Department-1

1

W2

Designation-1

0.0 4.0 0.0 0.0 0.0 23.0 0.0

Shift	02	03	04	05	06	07	08	09	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28
Stat1	AB	AB	AB	AB	WO	AB	AB	AB	AB	AB	AB	WO	AB	AB	AB	AB	AB	WO	AB	AB	AB	AB	AB	AB	WO	AB	AB
Stat2	AB	AB	AB	AB	WO	AB	AB	AB	AB	AB	AB	WO	AB	AB	AB	AB	AB	WO	AB	AB	AB	AB	AB	AB	WO	AB	AB

## Continuous Absence/Presence

The continuous Absence/Presence report allow you to generate the attendance summary of workers, if he/she is absent or present continuously for many days/hours.

For the Configuration of parameters and related example, [See "Example: Continuous Absence/Presence" on page 416.](#)

Set the report filters as per requirement.

The screenshot shows a web application window titled "Continuous Absence/Presence". At the top, there are date pickers for "Date" with values "06/21/2023" and "06/21/2023". Below this is a section for "Optional Parameters". It includes a "Report Type" dropdown set to "Continuous Absence", a "Continuous Absent Days" input field with the value "1", and a checked checkbox for "Consider Half Day PR as Full Day PR". A "Days to consider as Absent" section contains a table with columns "Days", "Always", and "HRC/MH". The table lists options: AB, WO, PH, Leave, FB, RD, and IN. Each option has a checked checkbox and a dropdown menu set to "Always". At the bottom, there is a "Work Order Selection" section with dropdowns for "Select Contractors" (set to "Randomly"), "Select Work Orders" (set to "Randomly"), and "Generate Report For" (set to "All Workers"). A "Generate Report" button is at the bottom right.

**Date:** Select the to and from date for which the report is to be generated.

## Optional Parameter

**Report Type:** Select the desired option — Continuous Absence, Continuous Presence

If you select **Continuous Absence** set the following report filters as per requirement:

- **Continuous Absent Days:** Enter the number of days after which you wish to consider the user for Continuous Absence.
- **Consider half day PR as Full Day PR:** Select this check box, if you wish to consider any half day having status marked as PR to be marked as present for the full day.
- **Days To Consider as Absent:** Select the check boxes of the desired options — AB, WO, PH, Leave, FB, RD, IN.

For each option enabled, select the desired option from the drop-down list — Always, Skip, Shift-based, Custom Hours as per your requirement. The drop-down options may vary.

If you select **Continuous Presence** set the following report filters as per requirement:

- **Filter Based On:** Select the desired option — Days, Hours.

If you select **Days**, configure the **Continuous Present Days**. Enter the number of days after which you wish to consider the user for Continuous Presence.

If you select **Hours**, configure **Continuous Present Hours**. Enter the Hours in HH:MM format after which you wish to consider the user for Continuous Presence.

- **Consider Half Day PR as Full Day PR:** Select this check box, if you wish to consider any half day having status marked as PR to be marked as present for the full day.

- **Days To Consider as Present:** Select the check boxes of the desired options — AB, WO, PH, Leave, FB, RD, IN.

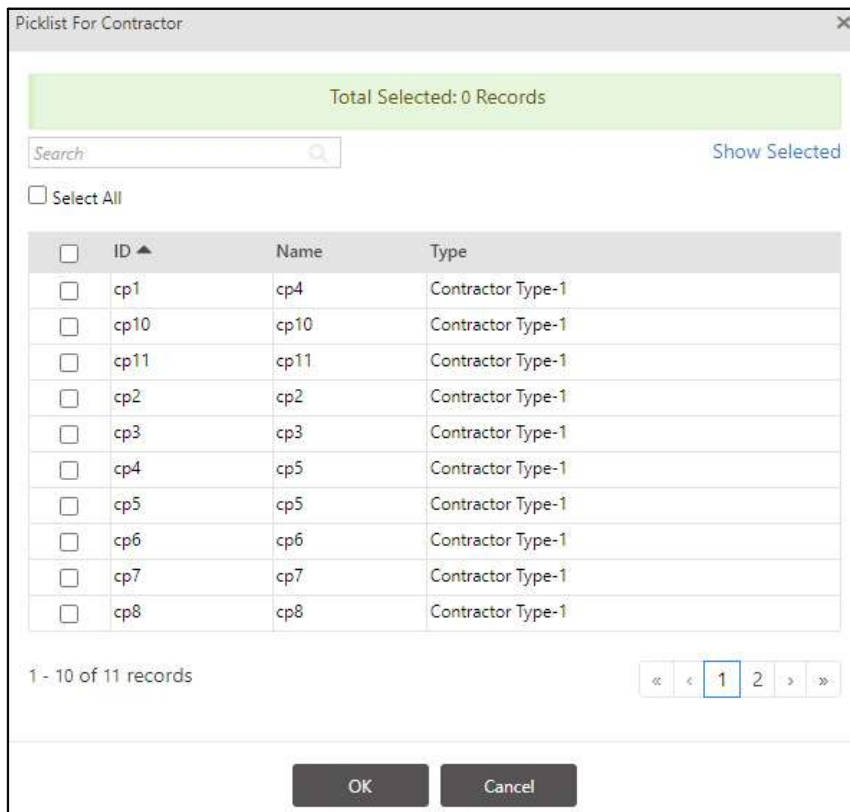
For each option enabled, select the desired option from the drop-down list — Always, Skip, Shift-based, Custom Hours as per your requirement. The drop-down options may vary.

## Work Order Selection

**Select Contractors:** Select the desired option — All or Randomly.

If you select **All**, the report will include all the contractors.

If you select **Randomly**, click the **Contractor** picklist. The **Picklist For Contractor** pop-up appears.



Picklist For Contractor

Total Selected: 0 Records

Search  Show Selected

☐ Select All

<input type="checkbox"/>	ID ▲	Name	Type
<input type="checkbox"/>	cp1	cp4	Contractor Type-1
<input type="checkbox"/>	cp10	cp10	Contractor Type-1
<input type="checkbox"/>	cp11	cp11	Contractor Type-1
<input type="checkbox"/>	cp2	cp2	Contractor Type-1
<input type="checkbox"/>	cp3	cp3	Contractor Type-1
<input type="checkbox"/>	cp4	cp5	Contractor Type-1
<input type="checkbox"/>	cp5	cp5	Contractor Type-1
<input type="checkbox"/>	cp6	cp6	Contractor Type-1
<input type="checkbox"/>	cp7	cp7	Contractor Type-1
<input type="checkbox"/>	cp8	cp8	Contractor Type-1

1 - 10 of 11 records

« < 1 2 > »

OK Cancel

You can either select particular contractor or can select all the contractors at once.

To select particular contractor select the check boxes of the desired contractors.

The screenshot shows a window titled "Picklist For Contractor" with a close button (X) in the top right corner. At the top, a green bar displays "Total Selected: 1 Records". Below this is a search bar with the placeholder text "Search" and a magnifying glass icon, followed by a "Show Selected" link. A checkbox labeled "Select All" is present. The main area contains a table with the following columns: a checkbox, "ID ▲", "Name", and "Type". The table lists 11 records, with the first record (ID: cp1, Name: cp4, Type: Contractor Type-1) selected. The last record (ID: cp8, Name: cp8, Type: Contractor Type-1) is also visible. Below the table, it says "1 - 10 of 11 records" and a pagination control showing "1" selected. At the bottom are "OK" and "Cancel" buttons.

<input type="checkbox"/>	ID ▲	Name	Type
<input checked="" type="checkbox"/>	cp1	cp4	Contractor Type-1
<input type="checkbox"/>	cp10	cp10	Contractor Type-1
<input type="checkbox"/>	cp11	cp11	Contractor Type-1
<input type="checkbox"/>	cp2	cp2	Contractor Type-1
<input type="checkbox"/>	cp3	cp3	Contractor Type-1
<input type="checkbox"/>	cp4	cp5	Contractor Type-1
<input type="checkbox"/>	cp5	cp5	Contractor Type-1
<input type="checkbox"/>	cp6	cp6	Contractor Type-1
<input type="checkbox"/>	cp7	cp7	Contractor Type-1
<input type="checkbox"/>	cp8	cp8	Contractor Type-1

OR

To select all the contractor at once, click on the **Select All** check box. The contractors on all the pages will be selected.


The screenshot shows the same "Picklist For Contractor" window, but now the "Select All" checkbox is checked. The green bar at the top now displays "Total Selected: 11 Records". In the table, all 11 records have their checkboxes selected. The pagination control still shows "1" selected, and the "OK" and "Cancel" buttons remain at the bottom.

<input checked="" type="checkbox"/>	ID ▲	Name	Type
<input checked="" type="checkbox"/>	cp1	cp4	Contractor Type-1
<input checked="" type="checkbox"/>	cp10	cp10	Contractor Type-1
<input checked="" type="checkbox"/>	cp11	cp11	Contractor Type-1
<input checked="" type="checkbox"/>	cp2	cp2	Contractor Type-1
<input checked="" type="checkbox"/>	cp3	cp3	Contractor Type-1
<input checked="" type="checkbox"/>	cp4	cp5	Contractor Type-1
<input checked="" type="checkbox"/>	cp5	cp5	Contractor Type-1
<input checked="" type="checkbox"/>	cp6	cp6	Contractor Type-1
<input checked="" type="checkbox"/>	cp7	cp7	Contractor Type-1
<input checked="" type="checkbox"/>	cp8	cp8	Contractor Type-1

Click **OK**.

The selected contractors appear in the grid.

ID	Name
cp1	Contractor Profile 1
cp10	Contractor Profile 10
cp11	Contractor Profile 11
cp2	Contractor Profile 2

You can also delete the desired contractor. To do so, click **Delete**  of the respective contractor.

**Select Work Orders:** Similarly, follow the same steps as **Select Contractor** for **Select Work Orders**.

**Generate Report For:** Select the desired option — All Workers, Active Worker or Inactive Worker.

Click **Generate Report**.

Sample Report

Continuous Absence/Presence

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125%

DADB

Page 1 of 1

Continuous Absence For 1 Or More Days From  
20/04/2022 To 20/04/2023

Run by: System Admin Date: 20/04/2023 18:43


Sr No	User ID	Name	From	To	No. of Days
1	W1	W1	01/05/2022	04/05/2022	4

Continuous Absence/Presence

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**MATRIX COMSEC FVT. LTD.**  
Continuous Presence For 1 Or More Days From  
06/12/2020 To 06/12/2023

Page 1 of 1

Run by: System Admin

Date: 06/12/2023 23:09

Sr No	User ID	Name	From	To	No. of Days
1	w9	w9	03/01/2023	03/01/2023	1





In large organizations, employees work on various jobs throughout the day and are paid on the basis of the job hours across the job's Cost Centre:

- Creating Projects, Phases, Jobs
- Planning Projects: Declaring hierarchy of phases and jobs under selected Project.
- Mapping Users to various Jobs.
- View invested job hours by users on various jobs/phases/projects.

This system will also be responsible for:

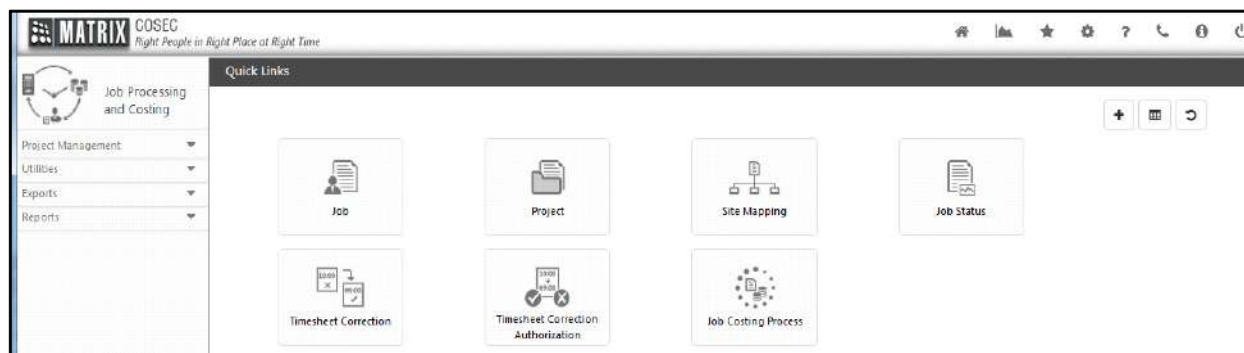
- Maintaining valid methods of mapping users to various jobs.
- Allow user to work on assigned jobs as per selection.
- Maintaining user's work records against different job codes.
- Allow correction/approval of daily Time Sheet.

A Project is divided into Phases. And Phase is divided into Jobs. The user is assigned the Job which he must complete within the estimated time. He can start the work by selecting the job from the assigned device.




*This functionality will be available only with the COSEC **Job Processing and Costing** license.*

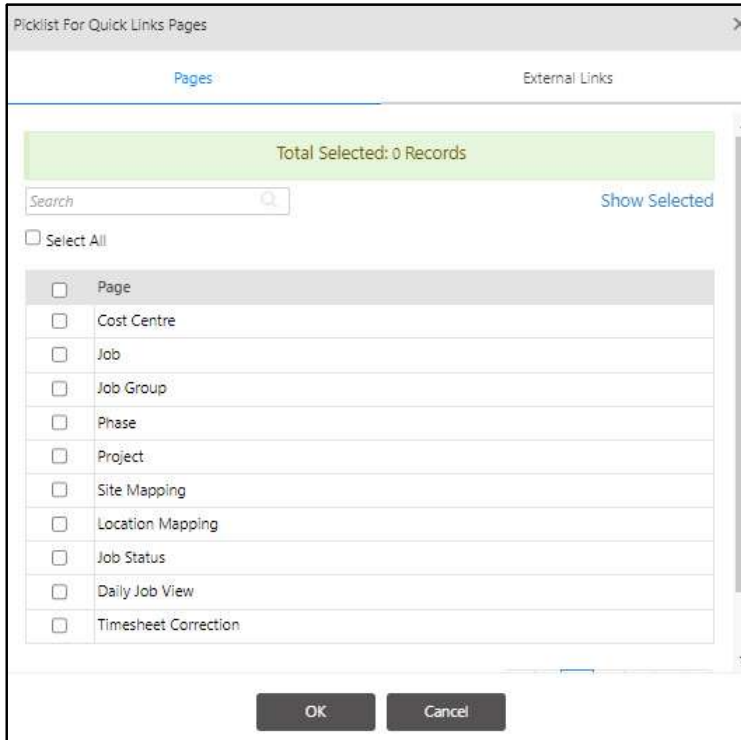
To access the JPC functionality with COSEC Web Application, click on the **JPC** Module on the module selection page. The **JPC** page will open on your screen.



The page displays a menu and **Quick Links** to go to the required page in just one click. Quick Links are shortcuts to reach to a specific page easily. You can configure these options for Quick Links — **Add Quick Link**, **Select Layout** and **Reset to Default**.

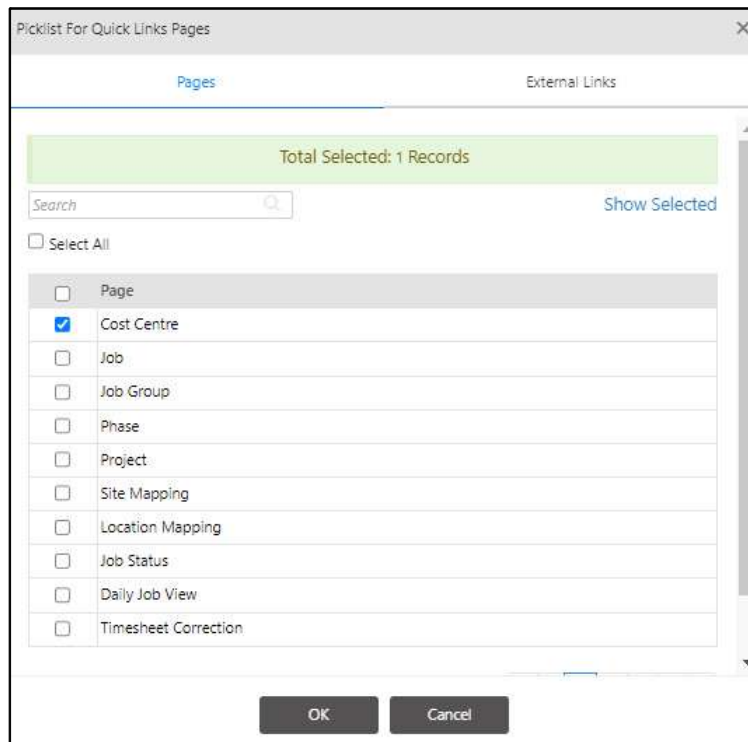
### Add Quick Links

- Click **Add**  . The **Picklist For Quick Links Pages** pop-up appears.



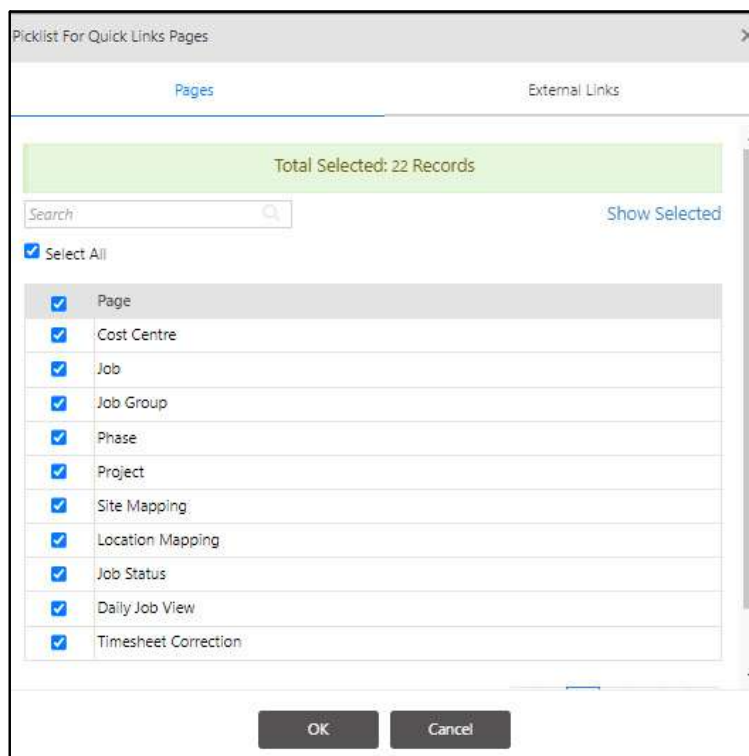
Page
<input type="checkbox"/> Cost Centre
<input type="checkbox"/> Job
<input type="checkbox"/> Job Group
<input type="checkbox"/> Phase
<input type="checkbox"/> Project
<input type="checkbox"/> Site Mapping
<input type="checkbox"/> Location Mapping
<input type="checkbox"/> Job Status
<input type="checkbox"/> Daily Job View
<input type="checkbox"/> Timesheet Correction

- You can either select particular page or can select all the pages at once. Maximum **20** quick links can be displayed.
- To select particular pages, select the check boxes of the desired pages.



OR


- To select all the pages at once, select the **Select All** check box. All the pages will be selected.

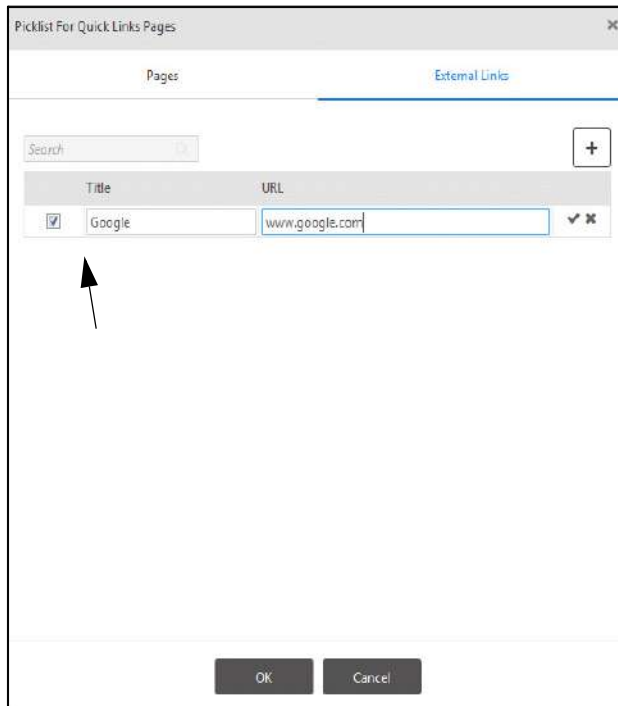


- Click **OK**.



- The Quick Links for selected pages appear on the Quick Link page.

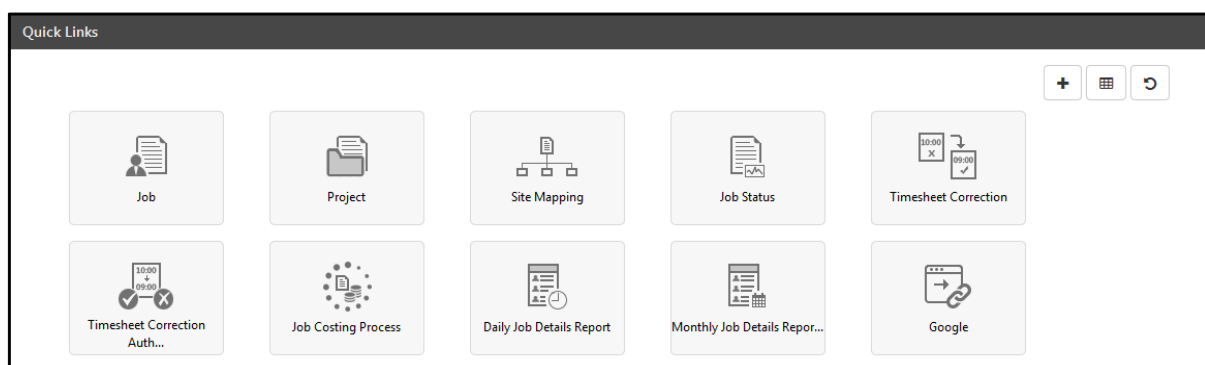
### Adding External Links,

- Select **External Link** tab and click on  button to add new external link.
- Configure the **Title** and **URL** of the external link under the respective fields. Select the checkbox to display the Quick Link for the configured link.




	Title	URL	
<input checked="" type="checkbox"/>	Google	www.google.com	<input checked="" type="checkbox"/>


- Click **Save**  to save the configuration.
- Once you have saved the configuration, you can edit it. Click **Edit**  to edit the saved configuration.
- Click **OK** to save the configuration of the external link. The Quick Link for the external link appears on the Quick Link page.



### Select Layout

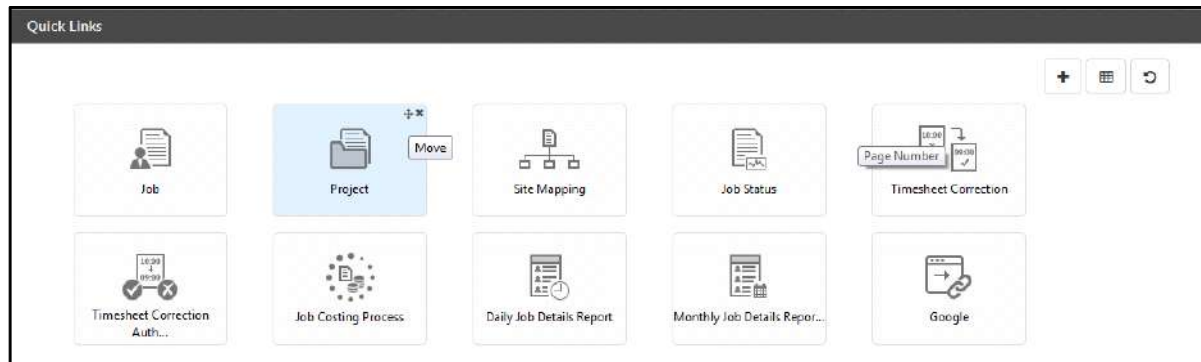
Click **Select Layout**  to select a layout for the quick links. You can select 5x4 or 4x5 layout to manage the quick links.

## Reset To Default

Click **Reset To Default**  to reset the quick links to the default quick links.

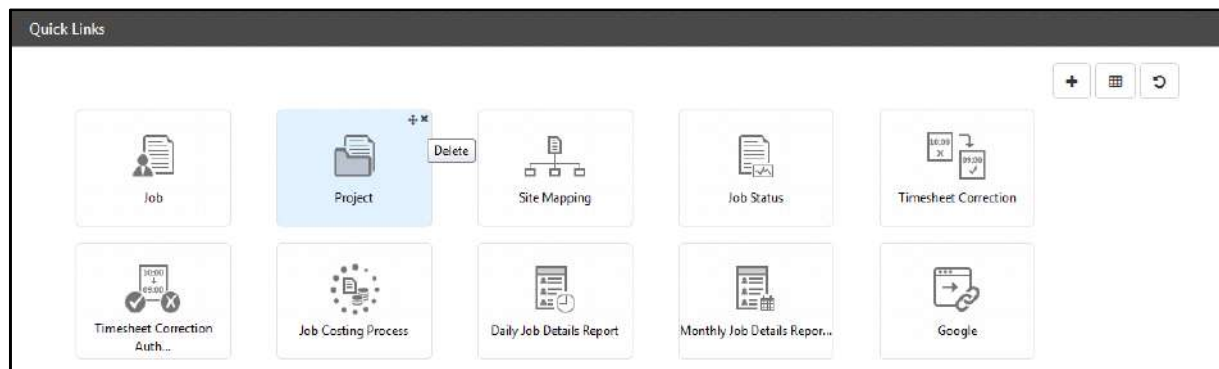
## Move the Link

To move the link from one place to another, hover on the link on top right corner and click **Move** icon as shown below. Then drag the quick link to the desired place. It will be placed at the desired location on the quick links page.



## Delete the Link

To delete a particular link, hover on the link on top right corner and click **Delete** icon as shown below.

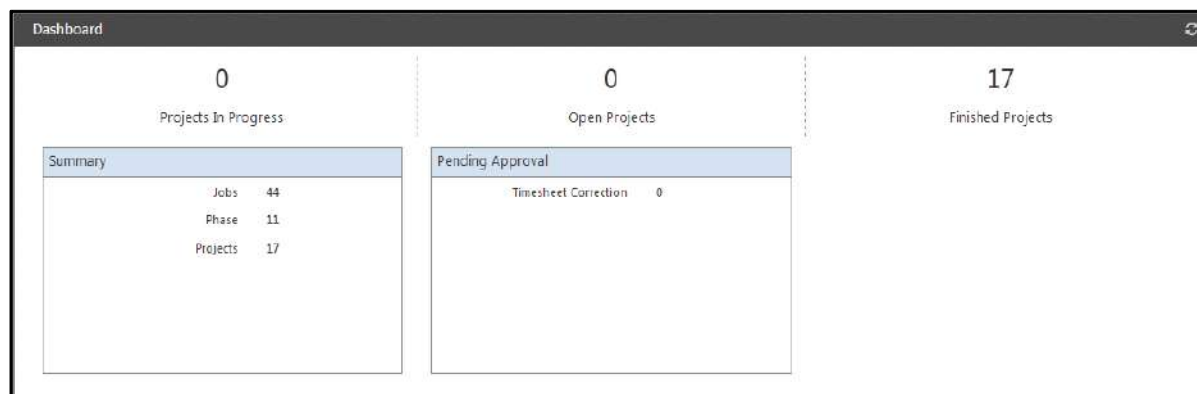


*Quick links are displayed as per rights given to System Account and ESS users.*

## JPC Dashboard

To view the JPC Dashboard, click the Dashboard button  on the **JPC** page.

It displays basic information of the module under the following categories:



The Dashboard displays basic information :


- Projects In Progress - Total number of projects with “In Progress” status.
- Open Projects - Total number of projects with “Open” status.
- Finished Projects - Total number of projects with “Finished” status.

### Summary

- Jobs - Total number of jobs configured in COSEC.
- Phase - Total number of phases configured in COSEC.
- Projects - Total number of projects configured in COSEC.

### Pending Approval

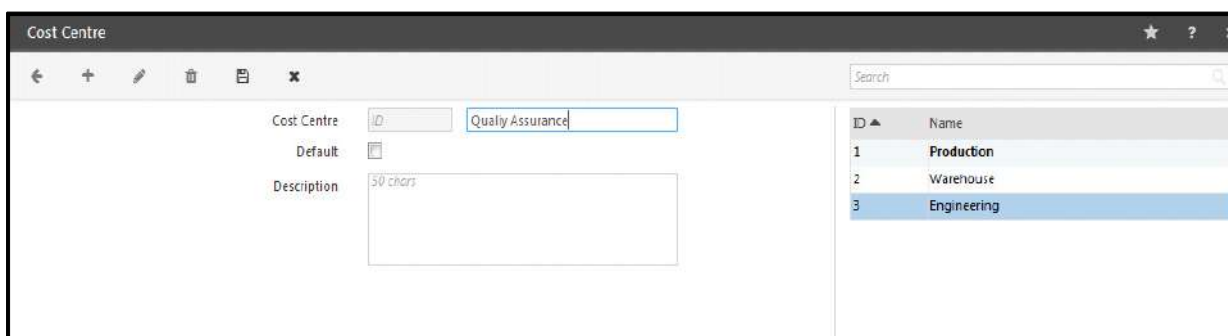
- Timesheet Correction - Total number of timesheet correction requests in pending state.

For more information on the above Dashboard options, click the respective information links on the Dashboard. The Latest values on Dashboard are updated on clicking the Refresh  button.

# Cost Centre

This page allows creating cost centre profiles to identify the man-days or man-hours against a particular project. A Cost Centre can be a defined task, department, division or any other unit in an organization for which costs are collected and reported. Creating cost centres and associating them with a project allows the management to calculate unit-wise investments on the project.

To create a new cost centre, go to **Job Processing and Costing > Project Management > Cost Centre**



The screenshot shows the 'Cost Centre' form. On the left, there are input fields: 'Cost Centre' with a value of 'Quality Assurance', 'Default' with an unchecked checkbox, and 'Description' with a text area containing '50 chars'. On the right, there is a table with columns 'ID' and 'Name'. The table contains three rows: '1 Production', '2 Warehouse', and '3 Engineering'. The '3 Engineering' row is highlighted in blue.

Click the **New** button to create a cost centre.

**Cost Centre:** Enter a user-friendly name for the new cost centre. The ID will be generated by the system automatically when the cost centre is saved.

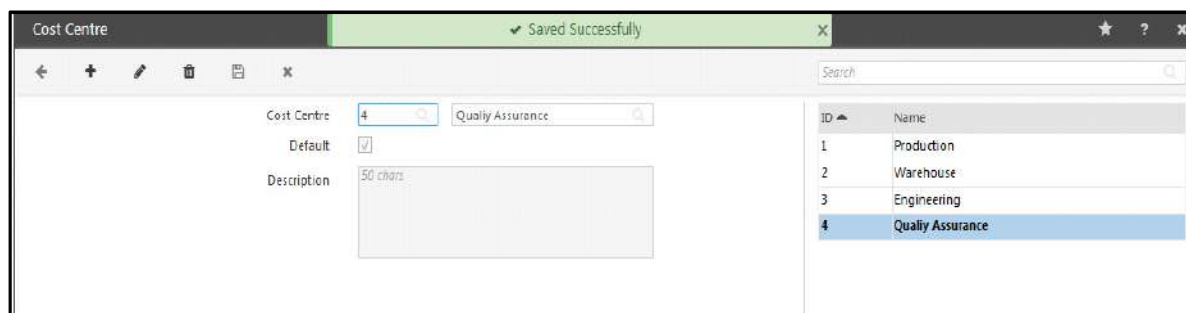
**Default:** To mark the new cost centre as default, enable the Default checkbox.

**Description:** You can also enter an optional description here.

Click **Save** button to save the cost centre. The new cost centre will appear on the grid list on the right hand side of the page.



*The **Cost Centre** entity can also be renamed as per user requirement. To do this, go to **Admin > System Configuration > Rename Group***

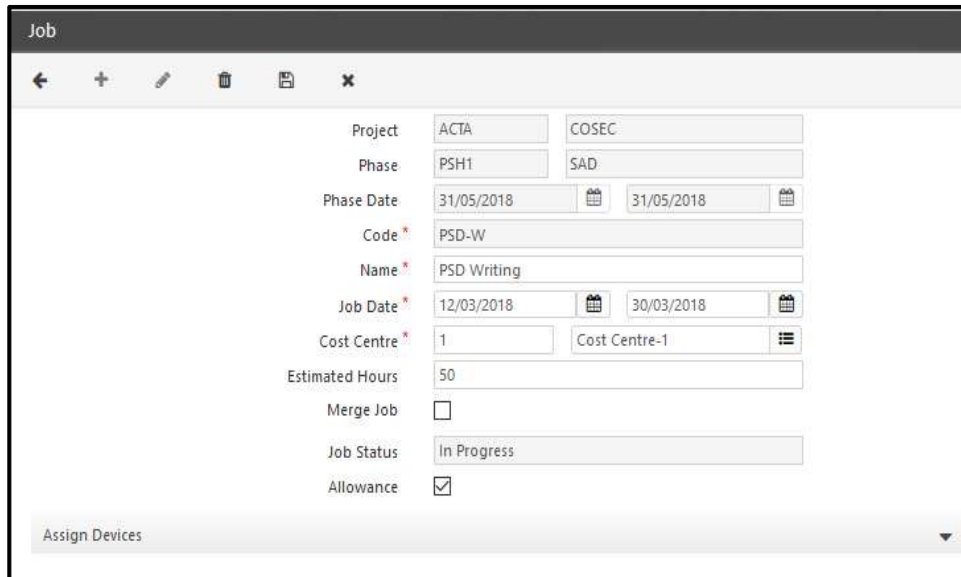


The screenshot shows the 'Cost Centre' form after a successful save. A green banner at the top says 'Saved Successfully'. The 'Cost Centre' field now has a value of '4'. The 'Default' checkbox is checked. The 'Description' field still contains '50 chars'. The table on the right now has four rows: '1 Production', '2 Warehouse', '3 Engineering', and '4 Quality Assurance'. The '4 Quality Assurance' row is highlighted in blue.

# Job

This page enables the user to create new independent jobs which can later be assigned to some phase under a project. This allows a job to be started even before a parent project has been decided. The user can define an estimated duration for the execution of the job and also can also assign the job on selected devices. A maximum of 4294967294 jobs can be created in COSEC. You can also create jobs using Import Data functionality. For details, refer to ["Importing Data"](#).

To create a new job, click **Job Processing and Costing > Project Management > Job**.



- Click the **New** button to create the job.
- Enter a **Job Code** and **Job Name** to identify the job. If the job already exists and has been assigned to a project, details of the corresponding project and phase will also appear.
- Select the Start and End **Job Date**. The Start date can be set to any past dates from the current date whereas the End date can be set to any future dates from the current date.



*The Job Date range cannot be changed once transactions (for example, Cafeteria) are done.*

- Select a **Cost Centre** to be assigned to the job.
- Specify the **Estimated Hours** required to complete the job.
- Check the **Merge Job** box to add the transition time of shifting job in the succeeding or preceding Job.



*The Merge Job option will appear here only if Merging option is selected from Global Policy. You can select the merging option as preceding or succeeding.*

- There can be three status types which denote the completion status of a Job:
  - **Open** - Indicates that the job is yet to be started (as per assigned start date).
  - **In Progress** - Indicates that the job has been started and is yet to end (as per assigned end date).
  - **Finished** - Indicates that the assigned job duration has ended.



- **Allowance:** Check this box if the Allowance is to be given for the selected job. Eg: If food allowance is to be given for a specific Job say PSD-W; then enable the Allowance check-box.

Consider 3 Jobs: JB1, JB2 and JB3 performed by user in a month. Among these jobs JB1 and JB2 have Allowance checkbox as checked.

**Case1:** If Multiple transactions are available for same Job, then Allowance is count once only for single Job.


**Example:** If there is only one Job JB1(Allowance enabled) done on 20/02/2018 & are total 20 transactions; then Allowance = 1.

**Case2:** If Multiple Jobs are available, then Allowance is to be added for those Job which are enabled for Allowance.

**Example:** If there are two Job JB1,JB2 (both enabled for Allowance) done on 20/02/2018 & are total 20 transactions(10 of JB1 & 10 of JB2); then Allowance = 2.



*To generate the Monthly data you must run the Monthly Attendance Process from T&A.*

Click **Save**  . The new job will appear on the grid list on the right hand side of the page.

- Under **Assign Devices**, select one or multiple devices to be assigned using the picklist.
- Click the **Device** picklist. The picklist **Select Device** pop-up appears.

The 'Select Device' dialog box has a title bar with a close button. Below the title bar is a green status bar that reads 'Total Selected: 0 Records'. Underneath is a search bar with the placeholder text 'Search' and a magnifying glass icon. To the right of the search bar is a blue link that says 'Show Selected'. Below the search bar is a checkbox labeled 'Select All'. The main area of the dialog contains a table with three columns: 'MID' (with a sort arrow), 'Name', and 'Type'. The table has three rows of data. At the bottom of the dialog are two buttons: 'OK' and 'Cancel'.

<input type="checkbox"/>	MID ▲	Name	Type
<input type="checkbox"/>	173	VEGA_DD	Vega Controller
<input type="checkbox"/>	169	Argoface_RD4	ARGO FACE
<input type="checkbox"/>	171	Argoface_RD6	ARGO FACE

- You can either select particular device or can select all the devices at once.
- To select particular devices, select the check boxes of the desired devices.

This screenshot shows the 'Select Device' dialog box after two devices have been selected. The green status bar now reads 'Total Selected: 2 Records'. The 'Select All' checkbox remains unchecked. In the table, the checkboxes for the first two rows (MID 173 and 169) are now checked, while the checkbox for the third row (MID 171) remains unchecked. The 'OK' and 'Cancel' buttons are still at the bottom.

<input type="checkbox"/>	MID ▲	Name	Type
<input checked="" type="checkbox"/>	173	VEGA_DD	Vega Controller
<input checked="" type="checkbox"/>	169	Argoface_RD4	ARGO FACE
<input type="checkbox"/>	171	Argoface_RD6	ARGO FACE

**OR**

- To select all the devices at once, select the **Select All** check box. The devices on all the pages will be selected.

Select Device

Total Selected: 3 Records

Search

[Show Selected](#)

☒ Select All

<input checked="" type="checkbox"/>	MID ▲	Name	Type
<input checked="" type="checkbox"/>	169	Argoface_RD4	ARGO FACE
<input checked="" type="checkbox"/>	171	Argoface_RD6	ARGO FACE
<input checked="" type="checkbox"/>	173	VEGA_DD	Vega Controller



OK Cancel


- Click **OK**.
- The selected devices appear in the grid.

Assign Devices

Device:  ID  Name

Search

MID	Name	Type	
173	VEGA_DD	Vega Controller	
169	Argoface_RD4	ARGO FACE	

You can also delete the desired devices. To do so, click **Delete**  of the respective device.



To assign a job on a device, ensure that the **Show Job Menu** check box is enabled on the **Devices > Device Configuration** page for the particular device.

*Jobs which are already in use cannot be deleted.*

# Job Group

This page allows the creation of job groups each of which can consist of multiple jobs. Once a job group has been defined, multiple jobs and devices can be assigned to the job group.

To create a new job group, go to **Job Processing and Costing > Project Management > Job Group**.

The screenshot shows the 'Job Group' window. At the top, there's a 'Job Group' label with a dropdown menu set to 'Project Management group'. Below this is the 'Assign Jobs' section, which includes a search bar and a table of jobs. The table has columns for 'Code' and 'Name'. The jobs listed are: ANA (Analysis), PSD-W (PSD Writing), and SW (Software). To the right of the main window, there's a sidebar with a search bar and a table showing a single record with ID 1 and Name 34.

- Click the **New** button to create new job group.
- Enter a suitable **name** for the job group.
- In the **Assign Jobs** section, you can select particular or multiple jobs from the picklist to be assigned to the job group. Only jobs in “Open” or “In Progress” state (i.e. unfinished jobs) can be assigned to a job group.
- Click the **Assign Job** picklist. The **Picklist for Job** pop-up appears.

The screenshot shows the 'Picklist For Job' pop-up window. It has a search bar at the top and a 'Show Selected' button. Below the search bar is a 'Select All' checkbox. The main part of the window is a table with columns: 'Job Code', 'Name', 'Start', and 'End'. The table contains 12 records, each with a checkbox in the 'Job Code' column. The records are: BOQ (Preparing BOQ), CCall (Conference Call with Customer), CusMeeting (Customer Meeting), Demo (Remote Demo), IntMeeting (Internal Meeting), Onsite (Onsite Demo), OnsitePOC (Onsite POC), RemotePOC (Remote POC), SolDia (Preparing a Solution Diagram), and TenderComp (Tender Compliances). At the bottom of the window, there's a pagination bar showing '1 - 10 of 12 records' and a set of navigation buttons (first, previous, 1, 2, next, last). Below the pagination bar are 'OK' and 'Cancel' buttons.

- You can either select particular jobs or can select all the jobs at once.
- To select particular jobs, select the check boxes of the desired jobs.

The screenshot shows the 'Picklist For Job' dialog box. At the top, a green bar indicates 'Total Selected: 1 Records'. Below this is a search bar and a 'Show Selected' link. A 'Select All' checkbox is unchecked. The main table lists 12 jobs, with the first job, 'BOQ', selected. The table has columns for Job Code, Name, Start, and End. At the bottom, there are 'OK' and 'Cancel' buttons.

<input type="checkbox"/>	Job Code ▲	Name	Start	End
<input checked="" type="checkbox"/>	BOQ	Preparing BOQ	12/06/2018	12/06/2099
<input type="checkbox"/>	CCall	Conference Call with Customer	24/05/2019	24/05/2099
<input type="checkbox"/>	CusMeeting	Customer Meeting	24/05/2019	24/05/2099
<input type="checkbox"/>	Demo	Remote Demo	24/05/2019	01/06/2099
<input type="checkbox"/>	IntMeeting	Internal Meeting	24/05/2019	31/05/2099
<input type="checkbox"/>	Onsite	Onsite Demo	24/05/2019	24/05/2099
<input type="checkbox"/>	OnsitePOC	Onsite POC	24/05/2019	24/05/2099
<input type="checkbox"/>	RemotePOC	Remote POC	24/05/2019	24/05/2099
<input type="checkbox"/>	SolDia	Preparing a Solution Diagram	24/05/2019	24/05/2099
<input type="checkbox"/>	TenderComp	Tender Compliances	24/05/2019	24/05/2099

OR

- To select all the jobs at once, select the **Select All** check box. The jobs on all the pages will be selected.

The screenshot shows the 'Picklist For Job' dialog box with all 12 jobs selected. The green bar at the top now indicates 'Total Selected: 12 Records'. The 'Select All' checkbox is checked. All checkboxes in the first column of the table are also checked. The 'OK' and 'Cancel' buttons are at the bottom.

<input checked="" type="checkbox"/>	Job Code ▲	Name	Start	End
<input checked="" type="checkbox"/>	BOQ	Preparing BOQ	12/06/2018	12/06/2099
<input checked="" type="checkbox"/>	CCall	Conference Call with Customer	24/05/2019	24/05/2099
<input checked="" type="checkbox"/>	CusMeeting	Customer Meeting	24/05/2019	24/05/2099
<input checked="" type="checkbox"/>	Demo	Remote Demo	24/05/2019	01/06/2099
<input checked="" type="checkbox"/>	IntMeeting	Internal Meeting	24/05/2019	31/05/2099
<input checked="" type="checkbox"/>	Onsite	Onsite Demo	24/05/2019	24/05/2099
<input checked="" type="checkbox"/>	OnsitePOC	Onsite POC	24/05/2019	24/05/2099
<input checked="" type="checkbox"/>	RemotePOC	Remote POC	24/05/2019	24/05/2099
<input checked="" type="checkbox"/>	SolDia	Preparing a Solution Diagram	24/05/2019	24/05/2099
<input checked="" type="checkbox"/>	TenderComp	Tender Compliances	24/05/2019	24/05/2099

- Click **OK**.
- The selected jobs appear in the grid.

**Assign Jobs**

Job \*

Search

Code ▲	Name	
BOQ	Preparing BOQ	
CCall	Conference Call with Customer	
CusMeeting	Customer Meeting	
Demo	Remote Demo	
IntMeeting	Internal Meeting	
Onsite	Onsite Demo	
OnsitePOC	Onsite POC	
RemotePOC	Remote POC	
SolDia	Preparing a Solution Diagram	
TenderComp	Tender Compliances	

1 - 10 of 12 records

- You can also delete the desired job. To do so, click **Delete** of the respective jobs.
- In the **Assign Devices** section, you can select particular or multiple devices to be assigned to the job group. The details of any job assigned to this job group will be sent to all the assigned devices.

**Job Group**

Job Group \*

**Assign Jobs**

Job \*

Search

Code ▲	Name	
BOQ	Preparing BOQ	

**Assign Devices**

Device

Search

MID	Name	Type	
No Data			

- Click the **Device** picklist. The picklist for **Select Device** pop-up appears.

The 'Select Device' dialog box has a title bar with a close button. Below the title bar is a green status bar that reads 'Total Selected: 0 Records'. Underneath is a search bar with the placeholder text 'Search' and a magnifying glass icon. To the right of the search bar is a blue link labeled 'Show Selected'. Below the search bar is a checkbox labeled 'Select All'. The main area contains a table with the following data:

<input type="checkbox"/>	MID ▲	Name	Type
<input type="checkbox"/>	173	VEGA_DD	Vega Controller
<input type="checkbox"/>	169	Argoface_RD4	ARGO FACE
<input type="checkbox"/>	171	Argoface_RD6	ARGO FACE

At the bottom of the dialog are two buttons: 'OK' and 'Cancel'.

- You can either select particular devices or can select all the devices at once.
- To select particular devices, select the check boxes of the desired devices.

The 'Select Device' dialog box is shown with the same layout as the first screenshot, but with two records selected. The green status bar now reads 'Total Selected: 2 Records'. The checkboxes for the first two rows are checked.

<input type="checkbox"/>	MID ▲	Name	Type
<input checked="" type="checkbox"/>	173	VEGA_DD	Vega Controller
<input checked="" type="checkbox"/>	169	Argoface_RD4	ARGO FACE
<input type="checkbox"/>	171	Argoface_RD6	ARGO FACE

The 'OK' and 'Cancel' buttons remain at the bottom.

**OR**

- To select all the devices at once, select the **Select All** check box. The devices on all the pages will be selected.

Select Device

Total Selected: 3 Records

Search  [Show Selected](#)

☒ Select All

<input checked="" type="checkbox"/>	MID ▲	Name	Type
<input checked="" type="checkbox"/>	169	Argoface_RD4	ARGO FACE
<input checked="" type="checkbox"/>	171	Argoface_RD6	ARGO FACE
<input checked="" type="checkbox"/>	173	VEGA_DD	Vega Controller



OK Cancel


- Click **OK**.
- The selected devices appears in the grid.

Assign Devices

Device  ID  Name

Search

MID	Name	Type	
173	VEGA_DD	Vega Controller	
169	Argoface_RD4	ARGO FACE	

- You can also delete the desired devices. To do so, click **Delete**  of the respective device.



To assign a job group on a device, ensure that the **Show Job Menu** checkbox is enabled on the **Devices > Device Configuration** page for the particular device.

- Click **Save** button. The new job group will appear on the grid list on the right hand side of the page.



# Phase

A large project may often be divided into multiple phases for better time and resource management. Hence a stage or section of a project may be defined as a Phase, say for example “Production”, which may in turn involve several jobs or tasks such as “Welding”, “Assembly” etc.

To create a new phase, go to **Job Processing and Costing > Project Management > Phase**.

ID	Name
No Data	

- Click the **New** button to create a phase.
- Enter a user-friendly name for the new phase. Example: PMT
- You can also enter an optional description here. Example: Project Management Team
- Click **Save** button. The new phase will appear on the grid list on the right side of the page.

ID	Name
1	PMT



*New Phases can also be created while Project is created from **Job Processing and Costing > Project Management > Project**. Here, a time duration can also be assigned to a phase, based on the project timeline.*


# Project

This page enables the user to add new projects and edit existing ones. A complete project can be designed creating a hierarchy of underlying phases and jobs. This can be done either by adding existing phases and jobs to the new project or by creating new phases and jobs from this page.

To create a new project,

- Click **Job Processing and Costing > Project Management > Project**.

The screenshot shows the 'Project' management interface. On the left, there is a form for creating a new project with fields for ID (PRJ1), Name (COSEC Server), Date (2017/02/24 to 2017/05/31), and Status (6 char Code). Below this is a 'Phase Configuration' section with a table that has columns for Code, Phase, Start Date, and End Date. The table currently shows 'No Data'. To the right of the form is a search bar and a table with columns for Project Code, Name, and Status, also showing 'No Data'. A '+' button is located next to the Phase Configuration table header.

- Click **Add**  to add a new project.
- Enter the **ID** as Project Code and **Name** of the project to identify the project.
- Select a start and end **Date** for the project duration. The Start date can be set to any past dates from the current date whereas the End date can be set to any future dates from the current date.



*If you have Jobs and Phases assigned to a Project, then you can change the Project Date Range such that the Job and Phase Date Ranges fall within the Project Date Range.*

*For Example, Job1 (01/01/2024-05/01/2024) and Phase 1 (01/01/2024-10/01/2024) are assigned to a Project 1 (01/01/2024-31/01/2024), then the Project Start Date can be updated to 01/01/2024 or earlier and the Project End Date can be updated to 31/01/2024 or later.*

- There can be three status types which denote the completion status of a project:
  - **Open** - Indicates that the project is yet to be started (as per assigned start date).
  - **In Progress** - Indicates that the project has been started and is yet to end (as per assigned end date).
  - **Finished** - Indicates that the assigned project duration has ended.

## Phase Configuration

- You can add phase under the project to split the project into multiple phases. To add the phase click **Add** button.
- Select an existing Phase using the picklist icon as shown below.

Code	Phase	Start Date	End Date
Code	ID	2017/02/24	2017/03/31

Phase ID	Name
1	PMT

- If the phase is not available in picklist or if new phase is to be added in the project; then click on **Add** to add New Phases as shown below. The **Add New Phases** window appears from where new phase can be added as described above.

Code	Phase	Start Date	End Date
Code	ID	2017/02/24	2017/03/31

Code	Phase	Start Date	End Date
Code	Name	2017/02/24	2017/03/31

- Once a Phase is selected, assign a Phase **Code** to it. For eg: PMT phase is assigned code as PHS1.
- Select a **Start Date** and **End Date** for the phase within the project time duration.

Code	Phase	Start Date	End Date
PHS1	1	2017/02/24	2017/02/28

- Click **OK** to assign the selected phase to the project. Then click on **Save** button to save the Project as shown below.



*You can change the Phase Start Date and End Date multiple times such that it falls within the Project Date Range.*



If you have Jobs within a Phase, then you can change the Phase Date Range such that the Job Date Ranges fall within the Phase Date Range.

For Example, Job1 (01/01/2024-05/01/2024) and Job 2 (05/01/2024-10/01/2024) are assigned to a Phase 1 (01/01/2024-10/01/2024), then the Phase Start Date can be updated to 01/01/2024 or earlier and the Phase End Date can be updated to 10/01/2024 or later.

Code	Phase	Start Date	End Date
PH51	PMT	2017/02/24	2017/02/28
PH52	SAD	2017/02/27	2017/03/06

Project Code	Name	Status
PRJ1	COSEC Server	In Progress

## Phase

- After selecting the configured Project from the right grid, click the **Phase** tab to view different phases assigned to the project and assign job in the particular phase.

Job	Start Date	End Date	Cost Centre	Estimated Hours
Feasibility	12/02/2018	02/03/2018	COSEC	100

Phase Code	Name
SDT-F	Feasibility
SRS	SRS Phase
UI	UI Phase

- Select a phase from the grid list to which jobs are to be assigned.
- In the **Job Configuration** section, user can add jobs under the phase by clicking Add button. Select an existing job using the picklist.

Job	Start Date	End Date	Cost Centre	Estimated Hours
Feasibility	12/02/2018	02/03/2018	COSEC	100

- You can also create a new job by clicking **Add** button. The **Add New Jobs** window appears as shown below.

Code	Name	Start Date	End Date	Cost Centre	Estimated Hours	Merge Job	Allowance
ANA	Analysis	08/03/2018	12/03/2018	1	COSEC	20	<input checked="" type="checkbox"/> <input checked="" type="checkbox"/>

Add To Phase

- Enter the **Code** and **Name** of Job.
- Select the **Start Date** and **End Date** of job within the phase time duration.
- Select the **Cost Center** applicable for the Job.
- Specify the **Estimated Hours** for job completion.
- Enable the **Merge Job** checkbox to add the transition time of shifting job in the succeeding or preceding Job. The merging into succeeding or preceding is selected from Global policy.
- Enable the **Allowance** checkbox if the Allowance is to be given for the selected job.
- Click **OK** and **Add to Phase** to assign the selected job to the selected phase.

Project: COSCLD COSEC ACTA  
Phase: SDT-F Feasibility  
Phase Date: 12/02/2018 13/03/2018

**Job Configuration**

Job	Start Date	End Date	Cost Centre	Estimated Hours
Analysis	08/03/2018	12/03/2018	COSEC	20
Feasibility	12/02/2018	02/03/2018	COSEC	100

Phase Code Name  
SDT-F Feasibility  
SRS SRS Phase  
UI UI Phase

Once all phases and jobs have been configured under the new project, click **Save** button. The new project will appear in the grid list on the right side of the page.

# Site Mapping

Site mapping refers to the assignment of multiple jobs as default jobs for a site. Default jobs can also be assigned to any specific enterprise group (i.e. organization, department, designation etc.) within the site. Setting a default job ensures that, for a certain day, the day's default job will be assigned to the user, based on the current date.

When a user's *Job Assignment Type* is **Device-based** (*Users module > User Configuration > Job Costing*), the default job for a user for a certain day is decided based on one of the following (in order of priority):

1. Default Job set on Device (*Devices module> Device Configuration > Job Costing*)
2. Default Job set for an Enterprise Group in a Site
3. Default Job set for a Site



Only jobs with status **Open** or **In Progress** can be assigned.

To set default jobs for a site, go to **Job Processing and Costing > Project Management > Site Mapping**.

Job Code	Name	Assignment Start	Assignment End
ANA	Analysis	2017/02/24	2017/02/28

- Select a **Site** using the picklist button. The Site is created from *Devices> Masters> Site*.
- Click the **Edit** button.
- Under **Default Jobs**, Click **Add** button and select a **Job** from the picklist. Then set the **Assignment Date** of the job as required. Multiple default jobs can be assigned with non-overlapping Assignment Date ranges.
- Click **OK**. All added jobs will appear in the Default Jobs grid list.

## Department Specific Jobs

On the **Site Mapping** page, select the **<Enterprise Group> Specific Jobs** tab. The Enterprise Group available for mapping will be decided as per *Global Policy> User> Job Costing* in Admin module.

Default Jobs

Job Code ▲	Name	Assignment Start	Assignment End	
ANA	Analysis	2017/02/24	2017/02/28	

Department Specific Jobs

Department ID	Name	Job Code ▲	Name	Assignment Start	Assignment End	
1	Department-1	PSD-W	PSD Writing	2017/02/24	2017/02/28	

Previous Job Assignment

- Select an <Enterprise Group> (e.g. Department, Designation etc.) using the picklist button. The above example shows a “Department” specific jobs assignment.
- Select a **Job** and set the **Assignment Date** as required. Multiple default jobs can be assigned with non-overlapping *Assignment Date* ranges.
- Click **OK** to save the Department specific jobs assignment.

Click **Save** button to apply the Site Mapping. Once the Assignment Date range for a job expires, the job will be moved to the **Previous Job Assignment** section as shown below.

Department Specific Jobs

Previous Job Assignment

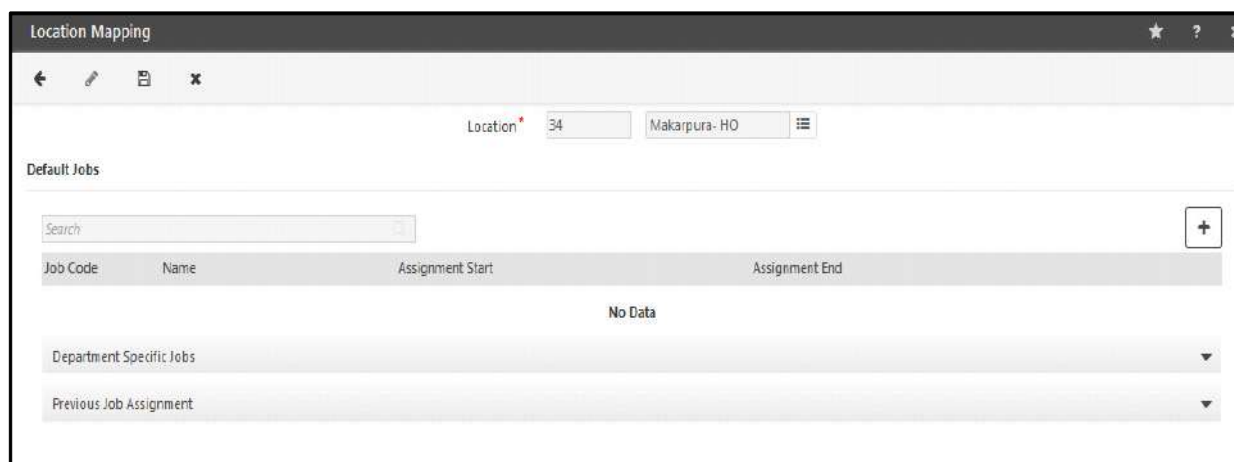
Department ID	Name	Job Code ▲	Name	Assignment Start	Assignment End
1	Department-1	PSD-W	PSD Writing	24/02/2017	24/02/2017

# Location Mapping

Location mapping refers to the assignment of multiple jobs as default jobs for a location. Default jobs can also be assigned to any specific enterprise group (i.e. organization, department, designation etc.) within the location. Setting a default job ensures that, for a certain day, the day's default job will be assigned to the user, based on the current date.

In Location Mapping feature, user will punch using COSEC APTA and on the basis of available location details system will map punch to assigned job code for that configured location.

To set default jobs for a location, go to **Job Processing and Costing > Project Management > Location Mapping**.



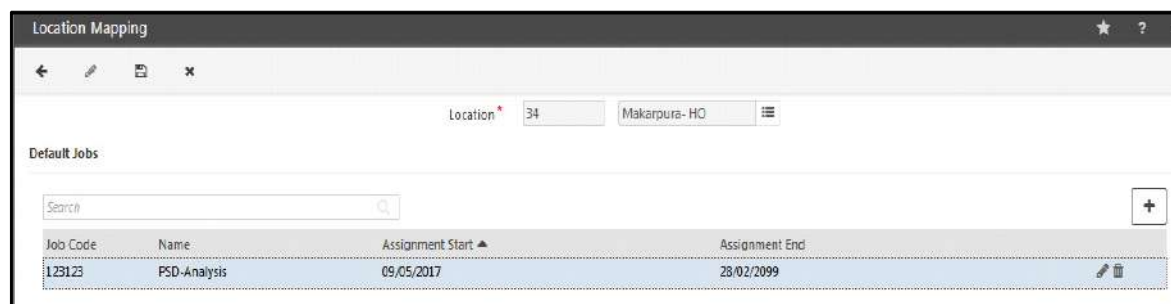
The screenshot shows the 'Location Mapping' window. At the top, there's a header bar with a title and navigation icons. Below the header, there's a section for 'Location' with a dropdown menu showing '34' and a text field with 'Makarpura- HO'. Underneath, the 'Default Jobs' section is visible. It contains a search bar with the placeholder text 'Search' and a '+' button. Below the search bar is a table with the following columns: 'Job Code', 'Name', 'Assignment Start', and 'Assignment End'. The table currently displays 'No Data'. At the bottom of the 'Default Jobs' section, there are two dropdown menus: 'Department Specific Jobs' and 'Previous Job Assignment'.

**Location:** Select the location from the picklist. The location can be based on Bluetooth i.e. BLE- Beacon, BLE- Device, GPS and Wi-Fi as configured from Admin> System Configuration> Location Master.

## Default Jobs

Select the Default Jobs section. Click Add button to select the default job for the selected location.

Select the job from the picklist. This will be the default job assigned to the selected location. The **Assignment Date** will be auto-loaded in the field. You can change the assignment date as required.



The screenshot shows the 'Location Mapping' window. At the top, there's a header bar with a title and navigation icons. Below the header, there's a section for 'Location' with a dropdown menu showing '34' and a text field with 'Makarpura- HO'. Underneath, the 'Default Jobs' section is visible. It contains a search bar with the placeholder text 'Search' and a '+' button. Below the search bar is a table with the following columns: 'Job Code', 'Name', 'Assignment Start', and 'Assignment End'. The table contains one entry: '123123', 'PSD-Analysis', '09/05/2017', and '28/02/2099'. At the bottom of the 'Default Jobs' section, there are two dropdown menus: 'Department Specific Jobs' and 'Previous Job Assignment'.

Click on **Save** button to save the location mapping.



## Department Specific Jobs

Job Code	Name	Assignment Start	Assignment End	
123123	PSD-Analysis	09/05/2017	28/02/2099	

**Department Specific Jobs**

Department ID	Name	Job Code	Name	Assignment Start	Assignment End	
5	PMT Dept	123123	PSD-Analysis	09/05/2017	28/02/2018	

Previous Job Assignment

Select the **Department** and select the **Job** to assign the default job to the department.

# Job Scheduler


Job Scheduler enables you to assign multiple jobs to users using Daily, Weekly or Monthly Schedule at once, easily. When a Job Scheduler is run for the selected jobs, these jobs are assigned automatically to all the selected users according to the set schedule. This saves a lot of time and hassle of individual job assignment to a large number of users.



*Make sure the users are active and Job Costing is enabled for the users to whom you wish to assign Job Schedulers.*

To create a Job Scheduler,

- Click **Job Processing and Costing > Job Scheduler > Job Scheduler**.

- Click **Add**  to add a new Job Scheduler. Maximum 99999 Job Schedulers can be created.



*If the Job Scheduler creation limit is reached, then you need to delete such Schedulers which are not in use or expired.*

- **Job Scheduler:** Configure the desired name you wish to assign to the Job Scheduler. The ID is auto-generated.
- **Active:** Select the check box to activate the Schedule. If disabled, the Job Scheduler will not run at the scheduled date and time.

## Schedule Parameters

- **Schedule Range:** Configure the Start Date and End Date for the schedule. Only those jobs which have their date range within the Schedule Range will be assigned to the users.
- **Schedule Type:** Select the desired Schedule Type from the options — Daily, Weekly, Monthly. The jobs will be assigned based on the selected Schedule Type for the set Schedule Range. For example, the Schedule Range is from 25/03/2024 to 30/03/2024 and the Schedule Type is selected as Weekly. Then the selected jobs will be assigned to the users on the selected days of the selected weeks of a month.
- **Every (Day Of the Month):** Select the desired day of the month when the Job Scheduler should run. For example, if the Day Of the Month is selected as 6, then the Job Scheduler will run from 6th of the month.
- **Schedule Run Time:** Configure the Start Time when the Job Scheduler should run.



*Make sure the Every (Day Of the Month) and Schedule Run Time are a current/future date and time. For example, if the current date is 13/05/2024 and we are configuring Every (Day Of the Month) as 1, then the Scheduler will not run as it is a past date. You need to configure Every (Day Of the Month) either as 13 or any other later date.*

- **Processing Period:** Select the desired Processing Period from the options — Current, Next. The Job Scheduler will run based on the selected Processing Period. If the Processing Period is selected as Current, the Scheduler will run for the current month and if the option is selected as Next, the Scheduler will run for the next month.


Click [“Preview Schedule”](#) once all the schedule configurations are done and the jobs are assigned.


## Job Parameters



*Make sure you add the job with the highest priority first. The priority of the Jobs will be in descending order. For example, when you configure J1, first then J2, followed by J3. In this case J1, will have the highest priority then J2 followed by J3 which has the lowest priority.*

*Make sure the jobs you wish to assign using the Job Scheduler have already been created.*

- Click **Add**  to add a new Job. Maximum 99999 Jobs can be added.



The screenshot shows the 'Job Parameters' window. At the top is a search bar. Below it is a table with three columns: 'Job', 'Repeat Days', and 'Active'. The 'Job' column contains a picklist with 'J1' selected. The 'Repeat Days' column contains a text input with '1-99'. The 'Active' column contains a checkbox that is checked. To the right of the table is an 'Add' button with a plus icon.

- **Job Name:** Click the picklist under **Job Name** to select the desired Jobs. The **Picklist For Job** pop-up appears.

Picklist For Job

Total Selected: 0 Records

Search  Ended Days (1-999)  Active

☐ Select All

<input type="checkbox"/>	Job Code ▲	Name	Start	End
<input type="checkbox"/>	J1	Job 1	24/04/2024	30/04/2024
<input type="checkbox"/>	J2	Job 2	30/04/2024	10/05/2024
<input type="checkbox"/>	J4	Job 4	10/05/2024	30/05/2024

OK Cancel

By default, all the **Active** jobs are displayed. To filter the jobs, click **Active** and select the desired option — **All**, **Active**, **Expired**. The jobs appear as per the set filter.

If you select **Expired**, you can set another filter.

Configure the number of days in Ended Days (1-999). The system will display the expired jobs, derived using the following: Current Date minus Number of days configured in Ended Days.

For example:

Ended Days configured = 2

Current Date= April 25, 2024

All the jobs expired between April 23, 2024 to April 25, 2024 (midnight), will be displayed.

Click to select the desired job from the list. You can also search for the desired job using the search bar.


The selected job appears in the grid.

You can either select particular jobs or can select all the jobs at once.

To select particular jobs, select the check boxes of the desired jobs.

OR

To select all the jobs, select the **Select All** check box. The jobs on all the pages will be selected.

Click **OK**. Hover-over the **Info**  icon to view the number of selected jobs.

Job Parameters

Search

Job		Repeat Days	Active
ID	Name	1-99	<input checked="" type="checkbox"/>

3 Job(s) are selected

Select Users

If you have selected Schedule Type as **Daily**, configure the following parameter:

- **Repeat Days:** Configure the number of days for which the selected job should be repeated in the schedule. For more details, refer to the [“Example for Schedule Type- Daily”](#).

If you have selected Schedule Type as **Weekly**, configure the following parameters:

- **Week of Month:** Select the desired weeks of the month for which you wish the jobs should be assigned. To select all the weeks, select **Check All**. The weeks which are not selected will be denoted by '-' in the grid.
- **Days of Week:** Select the desired days of the week for which you wish the jobs should be assigned. To select all the days, select **Check All**. The days which are not selected will be denoted by '-' in the grid.

For more details, refer to the [“Example for Schedule Type- Weekly”](#).



*If the 4th/5th/6th week of a month is also the Last week of the month and both — 4th/5th/6th week and Last week are selected, then the jobs will be assigned only once for that week.*

Job Parameters

Search

Job		Week of Month	Days of Week	Active
J1	Job 1	Select	Select	<input checked="" type="checkbox"/>

3 Job(s) are selected

Select Users

If you have selected Schedule Type as **Monthly**, configure the following parameters:

- **Month of Year:** Select the desired months of the year for which you wish the jobs should be assigned. To select all the months, select **Check All**. The months which are not selected will be denoted by '-' in the grid.
- **Days of Month:** Configure the From Date and To Date within which the jobs should be assigned within a month.

For more details, refer to the [“Example for Schedule Type- Monthly”](#).

- **Active:** Select the check box to activate the job in the schedule.
- Click **Save** to save the configuration or click **Cancel** to discard. The selected Job appears in the grid.

Job	Repeat Days	Active
J1 - Job 1	1	Yes
J2 - Job 2	1	Yes
J3 - Job 3	1	Yes
J4 - Job 4	1	Yes

- You can also edit the desired Job. To do so, click **Edit** of the respective Job.
- You can also delete the desired Job. To do so, click **Delete** of the respective Job.



If a Job selected in a Job Scheduler expires before the Schedule End Date, then the dates on which the Job is to be assigned according to the **Job Parameters** configuration will be left blank once the job expires. However, the other jobs in the Scheduler will be assigned as per the **Job Parameters** configuration.

For Example, 2 jobs — J1 (01/04/2024-05/04/2024) and J2 (01/04/2024-10/04/2024) are added to the Scheduler for Schedule Type= Daily with Repeat Days= 2 for both jobs. Then, no job will be assigned on 06/04/2024 as J1 expires on 05/04/2024.

If a Job selected in a Job Scheduler has Start Date later than Schedule Start Date and expires before Schedule End Date, then that job will be assigned according to the Job Start and End Dates only.

## Select Users

- **Select Users:** Select the desired option — User Wise, Group Wise, All.



Users include — Users, Workers, Temporary Users and Temporary Workers.

Make sure the users are active and Job Costing is enabled for the users to whom you wish to assign Job Schedulers.

- If you select **User Wise**, click the **User** picklist. The **Picklist for All Users** pop-up appears.

Picklist For All Users

Total Selected: 0 Records

Search

Show Selected

<input type="checkbox"/>	User ID ▲	Name
<input type="checkbox"/>	01	User 6
<input type="checkbox"/>	1	User 1
<input type="checkbox"/>	2	User 2
<input type="checkbox"/>	3	User 3
<input type="checkbox"/>	4	User 4
<input type="checkbox"/>	5	User 5

OK Cancel

- Select check boxes of the desired users. Click **OK**.
- The selected Users appear in the grid.

Select Users

Select Users: User Wise ▼

User: ID Name

Search

ID ▲	Name	
1	User 1	
2	User 2	

- You can also delete the desired User. To do so, click **Delete** of the respective user.
- If you select **Group Wise** option, select the desired enterprise group from the drop-down list— Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1/2/3.

For each enterprise group — Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1/2/3, click the corresponding picklist to select the desired option/s.

The selected users appear in the grid.

Select Users

Select Users

Group Wise

Select Group

Organization


Organization \*

ID

Name

Search

ID ▲	Name	
1	User 1	
2	User 2	

You can also delete particular user. To do so, click **Delete**  of the respective user.

- If you select **All**, then all users will be selected.

All the selected users appear in a grid.

Select Users

Select Users

All

Search

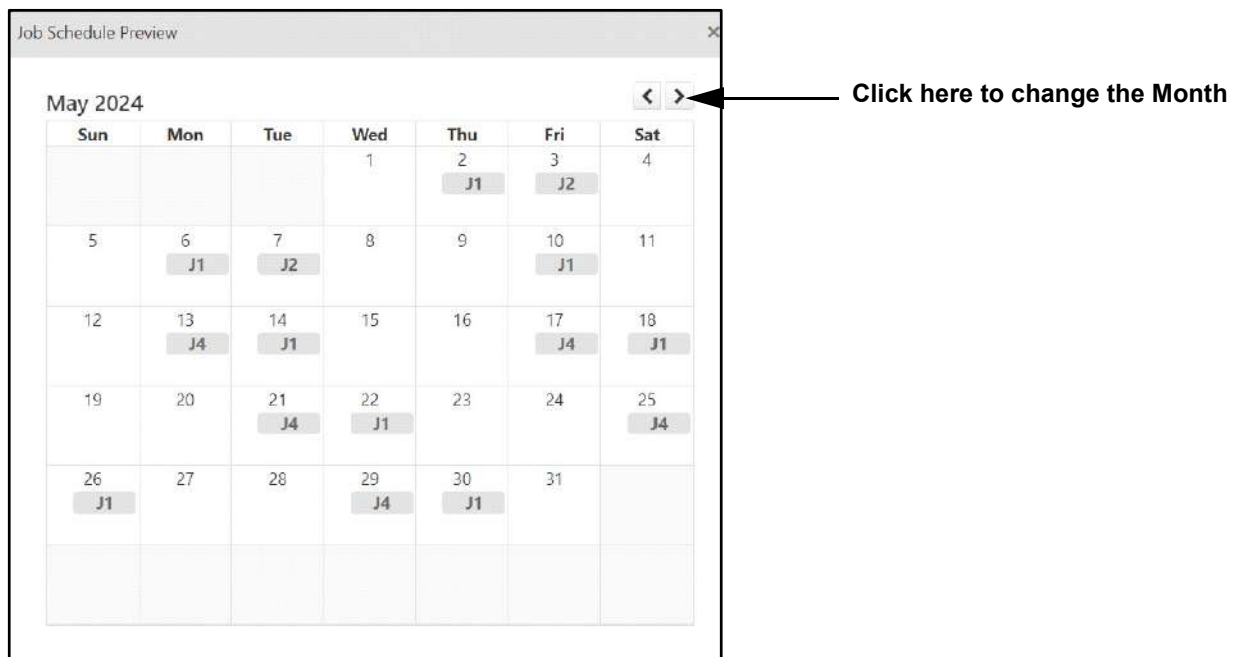
ID ▲	Name	
1	User 1	
2	User 2	

Now you can view the Job Schedule with the selected jobs.

## Preview Schedule

- Click **Preview Schedule**. The **Job Schedule Preview** pop-up appears.





The assigned jobs will appear in the calendar view according to the selected Schedule Type.

- Click **Save** to save the configuration. The new Job Scheduler will appear in the right grid.

Once the Job Scheduler is run, the assigned jobs appear under:

- ["Default Jobs"](#) in ["Job Costing"](#) tab in ["Configuring Users"](#).
- ["Default Jobs"](#) in ["Worker Profile-Job Costing"](#).

If you have added jobs manually and then you run the Job Scheduler, in such cases, the jobs assigned via Job Scheduler will appear above manually assigned jobs in the same sequence as configured in the Job Scheduler.



*Make sure the Alert Service is running for the Job Scheduler to run.*

*If multiple Job Schedulers are scheduled at the same time or if a Job Scheduler and Job Assignment Process is run in parallel, then the Job Schedulers will run in a sequential manner. In this case, the last run Job Scheduler will have the highest priority and the selected jobs in the Scheduler will be at highest priority.*

*If a Job is assigned manually to a user/worker and the same is assigned again via Job Scheduler, following scenarios are possible:*

- *Jobs may have different Job Codes but they have the same Start/End Date, then the system will create a new job.*
- *Jobs may have same Job Codes but they have a different Start/End Date, then the system will create a new job.*
- *Jobs may have same Job Codes and they have the same Start/End Date, then the system will not create a new job.*

*When multiple jobs are assigned for the same date and time, then the job with the highest priority will be displayed in the Preview.*

*Any changes done in the Job Scheduler configurations after the Job Scheduler is run will be applicable only from the next time the Job Scheduler runs.*

If you have assigned different Job Schedulers to different Enterprise Groups, then the Job Scheduler assignment will automatically change if you change the Enterprise Group assigned to the user. Enterprise Groups can be assigned to a user/worker from:

- API - User & Worker
- Multi-Users option
- Import
- Integrate
- Association Mapping

Jobs assigned via Job Schedulers cannot be deleted. However, Job Schedulers assigned to users can be deleted/changed. If jobs have already been assigned using Job Schedulers and then the Job Scheduler is deleted or the Enterprise Group assigned to the user is changed, the jobs already assigned will not be deleted. However, new jobs will not be assigned to users using the same Job Scheduler. New jobs will be assigned to the user via the new Job Scheduler assigned to the users via change of Enterprise Group.

For example,

Enterprise Group - Organization 1, has Job Scheduler J1 and J2

Enterprise Group - Organization 2, has Job Scheduler J3 and J4

Enterprise Group - Organization 3, has no Job Scheduler

- If the Enterprise Group of the user is Organization 1, then Job Schedulers J1 and J2 will be assigned to the user.
- If you change the Enterprise Group of the user to Organization 2, then Job Schedulers J3 and J4 will be assigned to the user and J1/J2 will be removed.
- If you change the Enterprise Group of the user to Organization 3, as there are no Job Schedulers in Organization 3, the assigned Job Schedulers J3 and J4 will be retained.

## Examples for Different Schedule Types

The assignment of Job depends on the selected Schedule Type, the number of jobs selected and the Job Parameters configuration. Let us understand this with the help of examples for each Schedule Type:

- [“Example for Schedule Type- Daily”](#)
- [“Example for Schedule Type- Weekly”](#)
- [“Example for Schedule Type- Monthly”](#)

### Example for Schedule Type- Daily

#### Example 1

Consider a Factory Manager who needs to assign 4 jobs — J1, J2, J3 and J4 to his staff — U1, U2, U3 and U4 on a daily basis for 20 days, starting from 01/04/2024. The configurations for the same will be as follows:

#### Schedule Parameters

- Schedule Range: 01/04/2024 to 20/04/2024.
- Schedule Type: Daily
- Every (Day Of the Month): 1

## Job Parameters

- J1, Repeat Days= 1
- J2, Repeat Days= 1
- J3, Repeat Days= 1
- J4, Repeat Days= 1

Save the Job Scheduler. Click **Preview**. The Preview displays the Job Schedule.

Sun	Mon	Tue	Wed	Thu	Fri	Sat
	1 J1	2 J2	3 J3	4 J4	5 J1	6 J2
7 J3	8 J4	9 J1	10 J2	11 J3	12 J4	13 J1
14 J2	15 J3	16 J4	17 J1	18 J2	19 J3	20 J4
21	22	23	24	25	26	27
28	29	30				

When the Job Scheduler runs as per the defined date and time, the jobs will be assigned to the users. These jobs will appear under the **Default Jobs** section in the User Profile. Refer to, “[Default Jobs](#)” under “[Job Costing](#)” in “[Configuring Users](#)”.

User Configuration

<

Similarly, these jobs will appear under “[Default Jobs](#)” in “[Worker Profile-Job Costing](#)” if these jobs are assigned to the workers.

## Example 2

Consider a Factory Manager who needs to assign 4 jobs — J1, J2, J3 and J4 to his staff — U1, U2, U3 and U4 on a daily basis for 1 day on 01/04/2024. The configurations for the same will be as follows:

### Schedule Parameters

- Schedule Range: 01/04/2024 to 01/04/2024.
- Schedule Type: Daily
- Every (Day Of the Month): 1

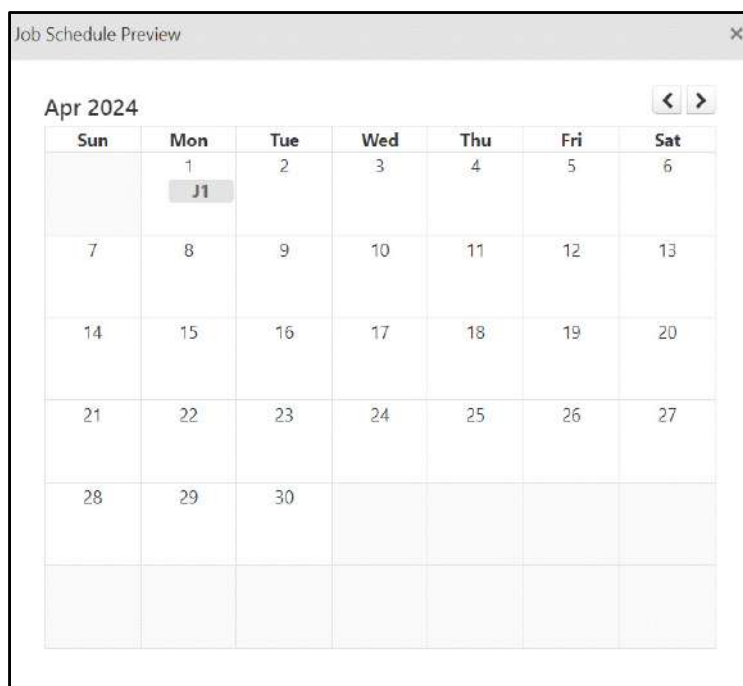
### Job Parameters

- J1, Repeat Days= 1
- J2, Repeat Days= 1
- J3, Repeat Days= 1
- J4, Repeat Days= 1

In this case J1 will be displayed by the system. The system will check for the date range, then will check the first configured Job and will only consider this job.

The other Jobs — J2, J3, J4— configured will be ignored by the system as the Job Scheduler Range is set for one day only that is, 01/04/2024.

Save the Job Scheduler. Click **Preview**. The Preview displays the Job Schedule.

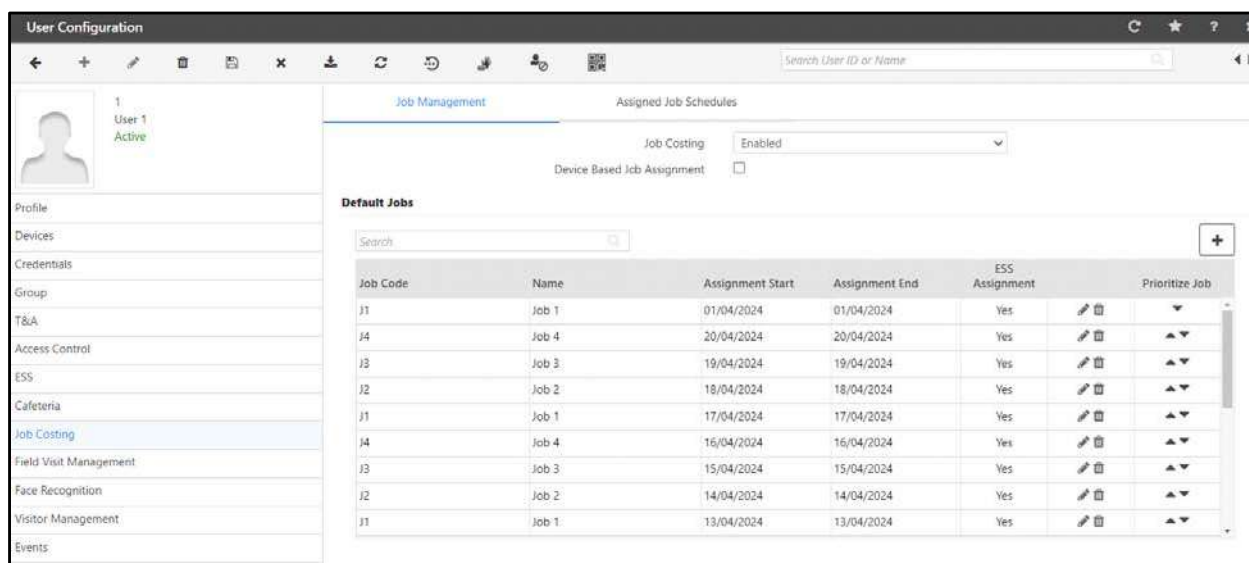


Job Schedule Preview

Apr 2024

Sun	Mon	Tue	Wed	Thu	Fri	Sat
	1 J1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30				

When the Job Scheduler runs as per the defined date and time, the jobs will be assigned to the users. These jobs will appear under the **Default Jobs** section in the User Profile. Refer to, [“Default Jobs”](#) under [“Job Costing”](#) in [“Configuring Users”](#).



Similarly, these jobs will appear under “Default Jobs” in “Worker Profile-Job Costing” if these jobs are assigned to the workers.

## Example for Schedule Type- Weekly

### Example 1

Consider a Hotel Manager who needs to assign 3 jobs — J1 (Catering), J2 (Laundry) and J3 (Housekeeping) to his staff — U1 and U2 on a weekly basis for 6 months, starting from 01/04/2024. These jobs need to be assigned only for the last week of every month, distributed in a week as follows:

- Monday and Wednesday- J1 (Catering)
- Tuesday and Thursday- J2 (Laundry)
- Friday, Saturday and Sunday- J3 (Housekeeping)

The configurations for the same will be as follows:

### Schedule Parameters

- Schedule Range: 01/04/2024 to 01/10/2024.
- Schedule Type: Weekly
- Every (Day Of the Month): 1

### Job Parameters

- J1, Week of Month= Last, Days of Week= Mon and Wed
- J2, Week of Month= Last, Days of Week= Tue and Thur
- J3, Week of Month= Last, Days of Week= Fri, Sat and Sun

Save the Job Scheduler. Click **Preview**. The Preview displays the Job Schedule.

Job Schedule Preview						
Apr 2024						
Sun	Mon	Tue	Wed	Thu	Fri	Sat
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29 J1	30 J2				

When the Job Scheduler runs as per the defined date and time, the jobs will be assigned to the users. These jobs will appear under the **Default Jobs** section in the User Profile. Refer to, “[Default Jobs](#)” under “[Job Costing](#)” in “[Configuring Users](#)”.

User Configuration

3

User 3

Active

Profile

Devices

Credentials

Group

T&A

Access Control

ESS

Cafeteria

Job Costing

Field Visit Management

Face Recognition

Visitor Management

Events

Job Management

Assigned Job Schedules

Job Costing

Enabled

Device Based Job Assignment

☐

Default Jobs

Search

+

Job Code	Name	Assignment Start	Assignment End	ESS Assignment	Prioritize Job
J1	Job 1	30/09/2024	01/09/2024	Yes	<div><div></div><div></div><div></div></div>
J3	Job 3	30/08/2024	31/08/2024	Yes	<div><div></div><div></div><div></div></div>
J2	Job 2	29/08/2024	29/08/2024	Yes	<div><div></div><div></div><div></div></div>
J2	Job 2	27/08/2024	27/08/2024	Yes	<div><div></div><div></div><div></div></div>
J1	Job 1	28/08/2024	28/08/2024	Yes	<div><div></div><div></div><div></div></div>
J1	Job 1	26/08/2024	26/08/2024	Yes	<div><div></div><div></div><div></div></div>
J2	Job 2	30/07/2024	30/07/2024	Yes	<div><div></div><div></div><div></div></div>
J1	Job 1	31/07/2024	31/07/2024	Yes	<div><div></div><div></div><div></div></div>
J1	Job 1	29/07/2024	29/07/2024	Yes	<div><div></div><div></div><div></div></div>

Similarly, these jobs will appear under “[Default Jobs](#)” in “[Worker Profile-Job Costing](#)” if these jobs are assigned to the workers.

## Example 2

Consider a Hotel Manager who needs to assign 3 jobs — J1 (Catering), J2 (Laundry) and J3 (Housekeeping) to his staff — U1 and U2 on a weekly basis for 6 months, starting from 01/04/2024. These jobs need to be assigned only for the last week of every month, distributed in a week as follows:

- Monday and Wednesday- J1 (Catering), J2 (Laundry) and J3 (Housekeeping)

The configurations for the same will be as follows:

### Schedule Parameters

- Schedule Range: 01/04/2024 to 01/10/2024.
- Schedule Type: Weekly
- Every (Day Of the Month): 1

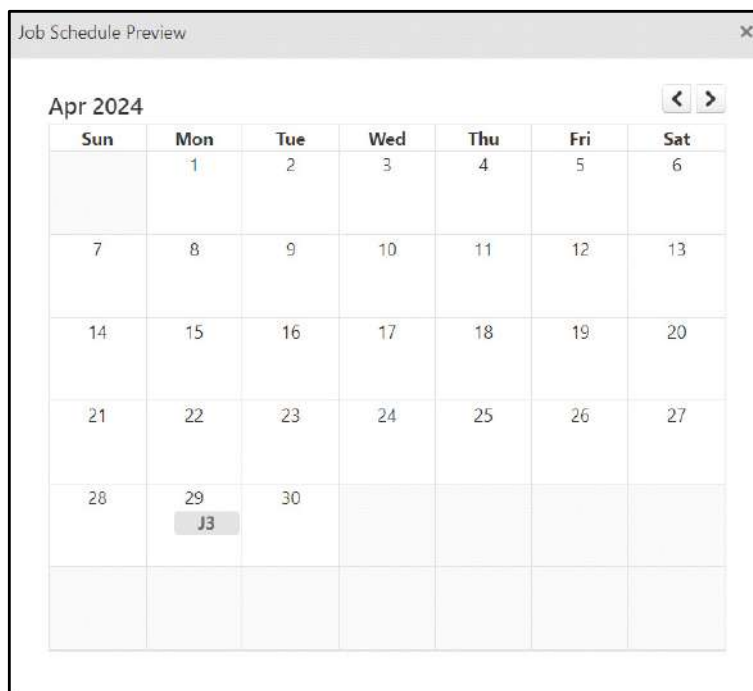
### Job Parameters

- J1, Week of Month= Last, Days of Week= Mon and Wed
- J2, Week of Month= Last, Days of Week= Mon and Wed
- J3, Week of Month= Last, Days of Week= Mon and Wed

In this case J3 will be displayed as this is the Job with highest priority.

All the Jobs are for the same days of the week as well as week of month, but the assignment needs to be done individually. Hence J1 will be assigned first, followed by J2 and J3. The last assigned Job, that is J3 will be displayed in the Preview.

Save the Job Scheduler. Click **Preview**. The Preview displays the Job Schedule.

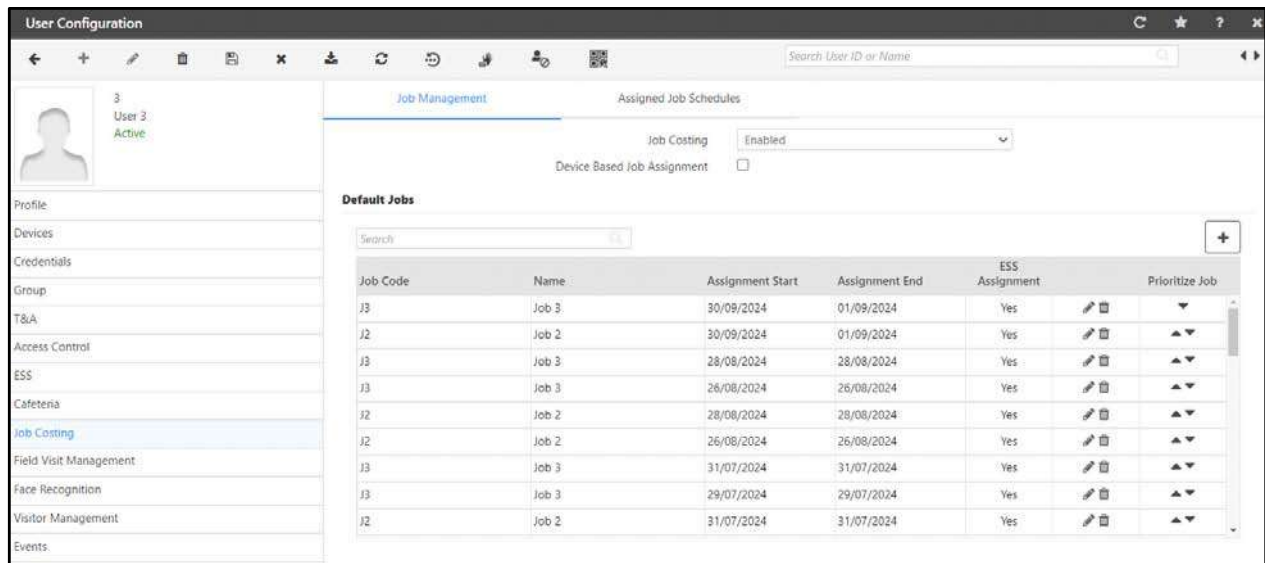


Job Schedule Preview

Apr 2024

Sun	Mon	Tue	Wed	Thu	Fri	Sat
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29 J3	30				

When the Job Scheduler runs as per the defined date and time, the jobs will be assigned to the users. These jobs will appear under the **Default Jobs** section in the User Profile. Refer to, [“Default Jobs”](#) under [“Job Costing”](#) in [“Configuring Users”](#).



Similarly, these jobs will appear under “Default Jobs” in “Worker Profile-Job Costing” if these jobs are assigned to the workers.

## Example for Schedule Type- Monthly

### Example 1

Consider an Airport Ground Staff Manager who needs to assign 3 jobs — J1 (Passenger Inquiry), J2 (Cabin Cleaning) and J3 (Airline Operations) to his staff — U1, U2 and U3 on a monthly basis for 3 months, starting from 01/04/2024. These jobs need to be distributed in a month as follows:

- 1st- 10th- J1 (Passenger Inquiry)
- 11th - 20th- J2 (Cabin Cleaning)
- 21st to End of the Month- J3 (Airline Operations)

The configurations for the same will be as follows:

### Schedule Parameters

- Schedule Range: 01/04/2024 to 01/06/2024.
- Schedule Type: Monthly
- Every (Day Of the Month): 1

### Job Parameters

- J1, Month of Year= Apr to June, Days of Month= 1-10
- J2, Month of Year= Apr to June, Days of Month= 11-20
- J3, Month of Year= Apr to June, Days of Month= 21-31

Save the Job Scheduler. Click **Preview**. The Preview displays the Job Schedule.



Job Schedule Preview						
Apr 2024						
Sun	Mon	Tue	Wed	Thu	Fri	Sat
	1 J1	2 J1	3 J1	4 J1	5 J1	6 J1
7 J1	8 J1	9 J1	10 J1	11 J2	12 J2	13 J2
14 J2	15 J2	16 J2	17 J2	18 J2	19 J2	20 J2
21 J3	22 J3	23 J3	24 J3	25 J3	26 J3	27 J3
28 J3	29 J3	30 J3				

When the Job Scheduler runs as per the defined date and time, the jobs will be assigned to the users. These jobs will appear under the **Default Jobs** section in the User Profile. Refer to, “[Default Jobs](#)” under “[Job Costing](#)” in “[Configuring Users](#)”.

User Configuration

Similarly, these jobs will appear under “[Default Jobs](#)” in “[Worker Profile-Job Costing](#)” if these jobs are assigned to the workers.

## Example 2

Consider an Airport Ground Staff Manager who needs to assign 3 jobs — J1 (Passenger Inquiry), J2 (Cabin Cleaning) and J3 (Airline Operations) to his staff — U1, U2 and U3 on a monthly basis for 3 months, starting from 01/04/2024. These jobs need to be distributed in a month as follows:

- 1st- 10th- J1 (Passenger Inquiry), J2 (Cabin Cleaning) and J3 (Airline Operations)

The configurations for the same will be as follows:

### Schedule Parameters

- Schedule Range: 01/04/2024 to 01/06/2024.
- Schedule Type: Monthly
- Every (Day Of the Month): 1

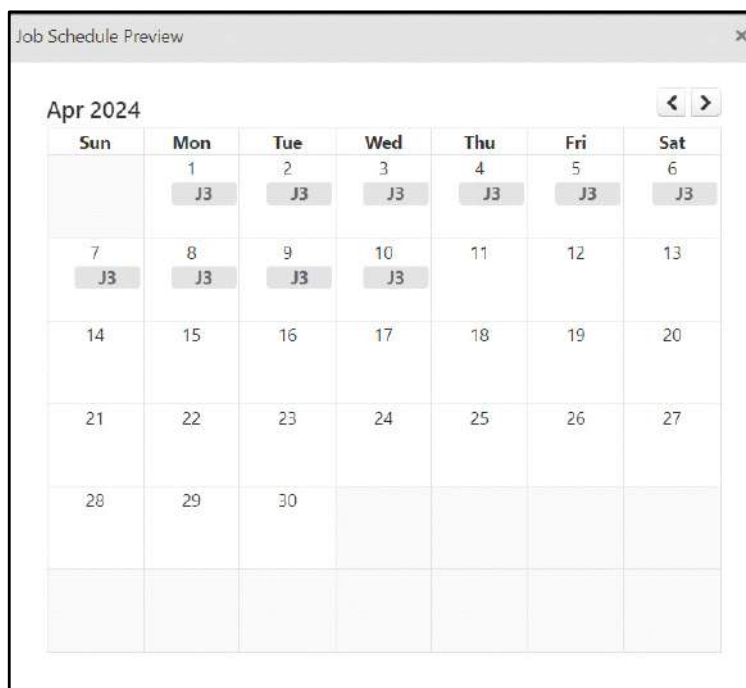
### Job Parameters

- J1, Month of Year= Apr to June, Days of Month= 1-10
- J2, Month of Year= Apr to June, Days of Month= 1-10
- J3, Month of Year= Apr to June, Days of Month= 1-10

In this case J3 will be displayed as this is the Job with highest priority.

All the Jobs are for the same month of the year as well as days of month, but the assignment needs to be done individually. Hence J1 will be assigned first, followed by J2 and J3. The last assigned Job, that is J3 will be displayed in the Preview.

Save the Job Scheduler. Click **Preview**. The Preview displays the Job Schedule.



The screenshot shows a 'Job Schedule Preview' window for April 2024. The calendar grid displays job assignments for J3 on the following dates: April 1st (Monday), 2nd (Tuesday), 3rd (Wednesday), 4th (Thursday), 5th (Friday), 6th (Saturday), 7th (Sunday), 8th (Monday), 9th (Tuesday), and 10th (Wednesday). The days of the week are listed as headers: Sun, Mon, Tue, Wed, Thu, Fri, Sat. Navigation arrows are visible at the top right of the calendar area.

Sun	Mon	Tue	Wed	Thu	Fri	Sat
	1 J3	2 J3	3 J3	4 J3	5 J3	6 J3
7 J3	8 J3	9 J3	10 J3	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30				

When the Job Scheduler runs as per the defined date and time, the jobs will be assigned to the users. These jobs will appear under the **Default Jobs** section in the User Profile. Refer to, [“Default Jobs”](#) under [“Job Costing”](#) in [“Configuring Users”](#).

User Configuration

5

User 5

Active

Profile

Devices

Credentials

Group

T&A

Access Control

ESS

Cafeteria

Job Costing

Field Visit Management

Face Recognition

Visitor Management

Events

Job Management

Assigned Job Schedules

Job Costing

Enabled



































Device Based Job Assignment

☐

Default Jobs

Search

+

Job Code	Name	Assignment Start	Assignment End	ESS Assignment		Prioritize Job
J3	Job 3	01/06/2024	01/06/2024	Yes	 	
J2	Job 2	01/06/2024	01/06/2024	Yes	 	 
J1	Job 1	01/06/2024	01/06/2024	Yes	 	 
J3	Job 3	01/05/2024	10/05/2024	Yes	 	 
J2	Job 2	01/05/2024	10/05/2024	Yes	 	 
J1	Job 1	01/05/2024	10/05/2024	Yes	 	 
J3	Job 3	01/04/2024	10/04/2024	Yes	 	 
J2	Job 2	01/04/2024	10/04/2024	Yes	 	 
J1	Job 1	01/04/2024	10/04/2024	Yes	 	

Similarly, these jobs will appear under “Default Jobs” in “Worker Profile-Job Costing” if these jobs are assigned to the workers.

# Job Assignment Process

Job Assignment Process enables you to manually assign multiple jobs to multiple users based on the configured Job Schedulers at once. When a Job Assignment Process is done for the selected users, the jobs configured in the Job Scheduler are assigned automatically to all the selected users according to the set schedule. This saves a lot of time and hassle of individual job assignment to a large number of users.

If multiple Job Schedulers are scheduled at the same time or if a Job Scheduler and Job Assignment Process is run in parallel, then the Job Schedulers will run in a sequential manner. In this case, the last run Job Scheduler will have the highest priority and the jobs in the scheduler will be at highest priority.

The status of the Job Scheduler Assignment can be viewed from "[Scheduler Logs](#)".



*Make sure Job Costing is enabled for the users to run the Job Scheduler.*

To execute the Job Assignment Process,

- Click **Job Processing and Costing > Job Scheduler > Job Assignment Process**.

- **Month-Year:** Select the desired month and year for which the Job Scheduler should run. All the Job Schedulers that fall within the selected month and year will run in a sequential manner.
- **Select Users:** Select the desired option — User Wise, Group Wise, All.



*All the active Job Schedulers assigned to the selected user will be executed. Hence, jobs will be assigned as configured in each Job Scheduler.*

- If you select **User Wise**, click the **User** picklist. The **Picklist for All Users** pop-up appears.

Picklist For All Users

Total Selected: 0 Records

Search

Show Selected

<input type="checkbox"/>	User ID ▲	Name
<input type="checkbox"/>	01	User 6
<input type="checkbox"/>	1	User 1
<input type="checkbox"/>	2	User 2
<input type="checkbox"/>	3	User 3
<input type="checkbox"/>	4	User 4
<input type="checkbox"/>	5	User 5

OK Cancel

- Select check boxes of the desired users. Click **OK**.
- The selected Users appear in the grid.

Job Assignment Process

Month-Year April 2024

User Selection

Select Users: User Wise

User \* ID Name

Search

User ID ▲	Name	
1	User 1	
2	User 2	

Process

- You can also delete the desired User. To do so, click **Delete** of the respective user.
- If you select **Group Wise** option, select the desired enterprise group from the drop-down list—Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1/2/3.

For each enterprise group — Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1/2/3, click the corresponding picklist to select the desired option/s.

The selected Groups appear in the grid.

Month-Year: April 2024

User Selection


Select Users: Group Wise

Select Group: Organization

Organization: ID Name

ID	Name	Group
1	Organization-1	Organization

Process

You can also delete particular group. To do so, click **Delete**  of the respective group.

- If you select **All**, then all users will be selected.

Month-Year: April 2024

User Selection

Select Users: All

Process

- Click **Process**. The Job Schedulers will run and the jobs will be assigned to the users.

The jobs will appear under the **Default Jobs** section in the User Profile. Refer to, [“Default Jobs”](#) under [“Job Costing”](#) in [“Configuring Users”](#).

Similarly, the jobs will appear under [“Default Jobs”](#) in [“Worker Profile-Job Costing”](#) if the jobs are assigned to the workers.



*Make sure the Alert Service is running for the Job Scheduler to run.*

*If a Job Scheduler is run after the Scheduler Start Date then also the jobs will be assigned according to the configured Job Parameters in Job Scheduler.*

# Scheduler Logs

Scheduler Logs enables you to view the details of all the Job Scheduler Assignments for a defined date range. These details include the completion status of all the Job Scheduler Assignments.



*Scheduler Logs will display logs of the Job Schedulers that are run as per the set schedule and not manually.*

To view the Scheduler Logs,

- Click **Job Processing and Costing > Job Scheduler > Scheduler Logs**.

The screenshot shows the 'Scheduler Logs' window with the following filters: Date (03/05/2024 to 10/05/2024), Scheduler (All), and Status (Both). A 'View' button is at the bottom.

- Date:** Configure the Start Date and End Date for which you wish to view the logs.
- Scheduler:** Select the desired Job Scheduler whose logs you wish to view or select All to view logs of all the Schedulers.
- Status:** Select the desired option — Succeed, Failed, Both — according to which you wish to filter the logs.
- Click **View** to view the logs. All the logs appear in the grid below.

The screenshot shows the 'Scheduler Logs' window with the same filters as above. Below the filters is a search bar and a table with the following data:

Scheduler Name	Scheduled Date-Time	Completion Date-Time	Status
Job Scheduler 8	11/05/2024 16:54	11/05/2024 16:54	Succeed

- You can also export the logs if required. Click **Export**  to export the logs.

# Job Status

This page enables the user to view and monitor Jobs based on their current status. To view a job status, go to **Job Processing and Costing > Utilities > Job Status**.

The Job status page appears.

The screenshot shows the 'Job Status' page. At the top, there's a header bar with a back arrow, a star, and a question mark. Below the header, there are four filter sections: 'Project' with 'ID' and 'Name' input fields and a picklist icon; 'Phase' with 'ID' and 'Name' input fields, a picklist icon, and a status '0 Phase(s) selected'; 'Job' with 'ID' and 'Name' input fields, a picklist icon, and a status '0 Job(s) selected'; and 'Job Status' with a dropdown menu set to 'All'. A 'View' button is positioned below these filters. To the left of the filters is a search bar labeled 'Search'. Below the filters and search bar is a table with columns: 'Job', 'Start Date', 'End Date', 'User Count', 'Job Hours', 'Estimated Hours', and 'Job Status'. The table currently displays 'No Data'.

Configure the parameters as per your requirement:

**Project:** Click the **Project** picklist. The **Picklist For Project** pop-up appears. Select the desired Project.

**Phase:** Click the **Phase** picklist. The **Picklist For Phase** pop-up appears.

- You can select particular or multiple Phases of the Project for which records are to be viewed.



Picklist For Phase

Total Selected: 0 Records

Search  Show Selected

☐ Select All

<input type="checkbox"/>	Phase Code ▲	Name
<input type="checkbox"/>	100	Phase11
<input type="checkbox"/>	111	Phase12
<input type="checkbox"/>	12	Phase2
<input type="checkbox"/>	13	Phase3
<input type="checkbox"/>	1333	Phase14
<input type="checkbox"/>	155	Phase16
<input type="checkbox"/>	222	Phase13
<input type="checkbox"/>	410	Phase10
<input type="checkbox"/>	45	Phase9
<input type="checkbox"/>	457	Phase5

1 - 10 of 15 records

« < 1 2 > »

OK Cancel

- To select particular phase, select the check boxes of the desired phases.

Picklist For Phase

Total Selected: 2 Records

Search  Show Selected

☐ Select All

<input type="checkbox"/>	Phase Code ▲	Name
<input checked="" type="checkbox"/>	100	Phase11
<input checked="" type="checkbox"/>	111	Phase12
<input type="checkbox"/>	12	Phase2
<input type="checkbox"/>	13	Phase3
<input type="checkbox"/>	1333	Phase14
<input type="checkbox"/>	155	Phase16
<input type="checkbox"/>	222	Phase13
<input type="checkbox"/>	410	Phase10
<input type="checkbox"/>	45	Phase9
<input type="checkbox"/>	457	Phase5

1 - 10 of 15 records

« < 1 2 > »

OK Cancel

OR

- To select all the phases at once, select the **Select All** check box. The phases on all the pages will be selected.

Picklist For Phase

Total Selected: 15 Records


Search  Show Selected


☒ Select All

<input checked="" type="checkbox"/>	Phase Code ▲	Name
<input checked="" type="checkbox"/>	100	Phase11
<input checked="" type="checkbox"/>	111	Phase12
<input checked="" type="checkbox"/>	12	Phase2
<input checked="" type="checkbox"/>	13	Phase3
<input checked="" type="checkbox"/>	1333	Phase14
<input checked="" type="checkbox"/>	155	Phase16
<input checked="" type="checkbox"/>	222	Phase13
<input checked="" type="checkbox"/>	410	Phase10
<input checked="" type="checkbox"/>	45	Phase9
<input checked="" type="checkbox"/>	457	Phase5

1 - 10 of 15 records

OK Cancel

- Click **OK**. Hover over the **Info**  icon. It displays the number of phases selected.

**Job:** Similarly, follow the same steps as Phases for selecting the **Job**. Hover over the **Info**  icon. It displays the number of jobs selected.

**Job Status:** Select the desired options from the drop-down list— **All, In Progress, Open or Finished**.

The User Count and Job Hours are displayed if the user who is assigned the job has worked. The Job Hours are calculated based on the Attendance period and Shift assigned to the user.

Click **View**. The jobs status appear as per the configured parameters.

Job Status

Project: PRJ1 COSEC Server project

Phase: ID Name 3 Phase(s) selected

Job: ID Name 3 Job(s) selected

Job Status: All

View

Search

Job ▲	Start Date	End Date	User Count	Job Hours	Estimated Hours	Job Status
ANA-Analysis232	02/24/2017	02/28/2017	0		20:00	Finished
PSD-W-PSD Writing	02/24/2017	02/28/2017	0		11:00	Finished
SW-D-Soft development	03/10/2017	03/31/2017	1	12:58	20:00	In Progress

# Daily Job View

This page displays information on total number of jobs performed on a day, number of users performing these jobs, details of Total Jobs, User Count, Job Hours, Un-Assigned Hours, OUT Time and Break Hours for a selected date range. User can view data for a date range of maximum 60 days.

To view daily job details, go to **Job Processing and Costing > Utilities > Daily Job View**.

Date	Total Jobs	User Count	Job Hours	Un-Assigned Hours	Out Time	Break Hours
22/05/2017	4	5	22:54	06:01	00:50	00:24

**Date:** Select a start and end Date using the date selection buttons.

Click the **View** button to view daily job details for the selected date range.

**Total Jobs:** It displays total number of jobs done on the selected date.

**User Count:** It displays the number of users performing the job on selected date.

**Job Hours:** It displays the total hours spent in doing the assigned job.

**Un- Assigned Hours:** It displays the total hours spent on the selected date on un-assigned work.

Example: The user is doing job from 09:01 to 09:20 hrs. At 09:20 hrs user punches IN with Job code None. Then at 09:40 hrs user punches OUT with job code Continue. So the time between 09:20 to 09:40 is marked as Un-assigned hours.

Again at 09:50, user punches OUT with code None. And punches IN with code None. Hence this transaction is marked as Un-assigned hours.

Job Code	Phase Code	Project Code	Start Date	Start Time	End Date	End Time	Transaction Type	Hours	Job Count
PSD-R	PSD-A	CLD	22/05/2017	09:01	22/05/2017	09:15	Job Hours	00:14	1
PSD-R	PSD-A	CLD	22/05/2017	09:15	22/05/2017	09:20	Job Hours	00:05	1
			22/05/2017	09:20	22/05/2017	09:40	Un-Assigned Hours	00:20	
SAD			22/05/2017	09:40	22/05/2017	09:50	Job Hours	00:10	1
			22/05/2017	09:50	22/05/2017	09:55	Un-Assigned Hours	00:05	

**Out Time:** It displays the total hours for which users working on the job went outside.



You can enable the “OUT punch from Exit reader” in Attendance Policy of user to consider the punch for Out Time.

**Break hours:** It displays the total hours for which the users working on the job availed as break. It will be calculated based on the punches for Break Start and Break End.



The configuration for break hours is done from the Shift configuration assigned to the user.

Daily Job View

Date: 03/05/2017 03/05/2017

View

Search

Date	Total Jobs	User Count	Job Hours	Un-Assigned Hours	Out Time	Break Hours
03/05/2017	0	1		08:24		01:01

Timesheet Correction

User: 1690 Priyank Eora

Date: 03/05/2017

Search

Job Code	Phase Code	Project Code	Start Date	Start Time	End Date	End Time	Transaction Type	Hours	Count				
			03/05/2017	09:10	03/05/2017	13:29	Un-Assigned Hours	04:19					25
			03/05/2017	13:29	03/05/2017	14:30	Break Hours	01:01					25
			03/05/2017	14:30	03/05/2017	18:35	Un-Assigned Hours	04:05					25

# Time Sheet Correction

Time Sheet Correction helps in modifying job codes and split the transactions. So SA with appropriate rights can split the transactions by adding new punches between the transactions and apply job code to them if required.

The Time Sheet Correction can be made by:

- System Account User
- On Behalf System Account User
- Using the ESS Self Service Module (For more details refer COSEC Employee Self Service User Manual)

COSEC Web enables all *System Account users* with appropriate page rights to make Time Sheet Correction using the *Job Processing and Costing* module. All applications made by the System Account user are *pre-approved* by default.

COSEC Web also enables all On Behalf System Account User with appropriate page rights to make Time Sheet Correction using the *Job Processing and Costing* module. All applications made by the On Behalf System Account User are *pre-approved* by default. For creating and assigning the roles and rights to the On Behalf System Account User. Refer to “[On Behalf System Account User](#)”.

To do the Time Sheet Correction, go to **Job Processing and Costing > Utilities > Time Sheet Correction**

The screenshot shows the 'Timesheet Correction' web application. At the top, there's a title bar with a star icon and a question mark. Below it, a navigation bar contains a back arrow, a pencil icon, a folder icon, and a close 'x' icon. The main form area has two input fields: 'User' with a dropdown menu showing 'ID' and 'Name', and 'Date' with a calendar icon and the value '22/05/2017'. Below these is a section titled 'Timesheet Correction' with a search bar. Underneath is a table with columns: Job Code, Phase Code, Project Code, Start Date, Start Time, End Date, End Time, Transaction Type, Hours, and Count. The table currently displays 'No Data'. At the bottom, there is a 'Job Summary' section with a dropdown arrow.

**User:** Select the User from the picklist. Ensure that the users are enabled for Job costing from the User module.

**Date:** Select the date from the calendar for which correction is to be done.

The transactions will be displayed as shown below.

Timesheet Correction

User: JCP5 Nitin

Date: 22/05/2017

Search

Job Code	Phase Code	Project Code	Start Date	Start Time	End Date	End Time	Transaction Type	Hours	Job Count				
PSD-R	PSD-A	CLD	22/05/2017	09:05	22/05/2017	13:05	Job Hours	04:00	1				
PSD-R	PSD-A	CLD	22/05/2017	13:05	22/05/2017	13:29	Break Hours	00:24					
PSD-R	PSD-A	CLD	22/05/2017	13:29	22/05/2017	13:50	Job Hours	00:21	1				
INV	PAC	CLD	22/05/2017	13:50	22/05/2017	15:30	Out Time	01:40					
			22/05/2017	15:30	22/05/2017	17:30	Un-Assigned Hours	02:00					

1 - 5 of 6 records

Job Summary

**Job Code:** When the user punches on the device by selecting a job code, then that job code is displayed here.

**Phase Code:** When the selected job has been assigned to the phase of a project; then the respective Phase Code will be shown in this field.

**Project Code:** The Project Code for the selected job will be shown in this field.

Click on **Edit** button in the row where correction is to be made.

Timesheet Correction

Search

Job Code	Phase Code	Project Code	Start Date	Start Time	End Date	End Time	Transaction Type	Hours	Job Count				
PSD-R	PSD-A	CLD	22/05/2017	09:05	22/05/2017	13:05	Job Hours	04:00	1				
PSD-R	PSD-A	CLD	22/05/2017	13:05	22/05/2017	13:29	Break Hours	00:24					
PSD-R	PSD-A	CLD	22/05/2017	13:29	22/05/2017	13:50	Job Hours	00:21	1				
INV	PAC	CLD	22/05/2017	13:50	22/05/2017	15:30	Out Time	01:40					
			22/05/2017	15:30	22/05/2017	17:30	Un-Assigned Hours	02:00					

1 - 5 of 6 records

## Corrections

- The **Job code** can be changed by selecting the option from the drop down list. If Job code is selected as **None**, then transaction type will be set as **Un-assigned**.
- The **Start Date** can be edited for only 1st transaction of the day by using left-right arrows.
- The **Start Time** can be edited for only 1st transaction of the day by specifying the time in hh:mm format.
- The **End Date** and **End Time** can be edited for all the transactions.
- The **Transaction type** can also be corrected. If some transaction is of **Un-assigned** type, then assigning some job code to the transaction will change the transaction type to **Job Hours** as shown below. Similarly if None is selected for any Job type transaction then its transaction type will get convert from Job to Unassigned.

Timesheet Correction										
Search										
Job Code	Phase Code	Project Code	Start Date ▲	Start Time	End Date	End Time	Transaction Type	Hours	Split	
COSCLD			03/09/2017	10:55	03/09/2017	14:55	Job Hours	04:00	P	

- The **Job Count** can be changed by editing the existing value.

## Adjustment

Adjustment


Adjustment Type: Award

Hours: 00:10

Remark: 50 chars

OK Cancel


Adjustment icon is visible against all transactions except the ones of 'Un-Assigned', 'Break Hours' and 'Out Time' transaction.

Click on **Adjustment**  button to assign either award or penalty. Both cannot be assigned simultaneously. Adjustment Hours (Penalty) should be less than or equal to corresponding Job Hours.



*If some adjustment has been done against some transaction and user wishes to revert it back then he/she should enter 00:00 value in 'Hours' and click 'OK'.*

## Overtime

Click on Overtime  button to view the overtime details between start punch date time and end punch date time.

Overtime Within 22/05/2017 17:30:49 and 22/05/2017 19:30:27

OT1: HH:MM

OT2: 01:00

OT3: HH:MM

OT4: HH:MM

OT5: HH:MM

Close

## Merged Jobs

Click on **Merged Jobs** to view the Merged transactions.

Code	Project Code	Start Date	Start Time	End Date	End Time	Transaction Type	Hours	Job Count	Edit	Adjustment	Overtime	Merged Jobs	Split
	V9r5	2016/04/11	09:00	2016/04/11	11:00	Job Hours	02:00	1					
		2016/04/11	11:00	2016/04/11	11:30	Job Hours	00:30	1					
		2016/04/11	11:30	2016/04/11	13:00	Job Hours	01:30	1					

**Actual Transaction** details show the transactions that are to be merged. **Merged Transaction** shows the resultant transaction after merging.

Merged Transaction Details (Succeeding)													
Actual Transactions													
Job code	Phase Code	Project Code	Start Date	Start Time	End Date	End Time	Transaction Type	Hours	Job Count	Adjustment Type	Adjustment Time	Overtime	
004	344	V9r5	2016/04/11	09:00	2016/04/11	11:00	Job Hours	02:00	1				
0029			2016/04/11	11:00	2016/04/11	11:30	Job Hours	00:30	1				
Merged Transactions													
Job code	Phase Code	Project Code	Start Date	Start Time	End Date	End Time	Transaction Type	Hours	Job Count	Adjustment Type	Adjustment Time	Overtime	
0029			2016/04/11	09:00	2016/04/11	11:30	Job Hours	02:30	2				



1) Say, an X transaction has to be merged in a destination transaction Y (Succeeding/Preceding) which is not a "Job Hours" type transaction, in such a case, the Merged Jobs icon for X transaction should be visible but disabled to be clicked.

2) An X transaction has to be merged (Succeeding/Preceding) in a destination transaction Y, which does not have Job Code.

In such a case, icon should be visible in front of X transaction, but disabled to be clicked.

3) An X transaction has to be merged in a Succeeding/Preceding transaction, but, there is no, next/previous transaction available, respectively. In such a case, the icon should be visible but disabled in front of X transaction.

## Split

Click on Split button to split the transaction and add new punches between the transaction. Split will be disabled if the transaction type is of "Out Time" and "Break". The Split Timesheet will appear as shown below:

Job Code	Phase Code	Project Code	Start Date	Start Time	End Date	End Time	Transaction Type	Hours	Job Count	
PSD-R	PSD-A	CLD	22/05/2017	09:05	22/05/2017	13:05	Job Hours	04:00	1	

OK Cancel

Click on **Edit** button and specify the new End time between existing start and end time to insert the new transaction as shown below:



Split Timesheet

Search

Job Code	Phase Code	Project Code	Start Date	Start Time	End Date	End Time	Transaction Type	Hours	Job Count	
PSD-R	PSD-A	CLD	22/05/2017	09:05	22/05/2017	10:00	Job Hours	04:00	1	✓ ✕ ⓘ

OK Cancel

Split Timesheet

Search

Job Code	Phase Code	Project Code	Start Date	Start Time	End Date	End Time	Transaction Type	Hours	Job Count	
PSD-R	PSD-A	CLD	22/05/2017	09:05	22/05/2017	10:00	00:55	1		✎ ⓘ
PSD-R	PSD-A	CLD	22/05/2017	10:00	22/05/2017	13:05	03:05	1		✎ ⓘ

OK Cancel



Whenever transaction of "Un-Assigned Hours" or "Job Hours" is tried to split and If the transaction's punches are "IN-IN" or "IN-OUT" then the newly added punch will have IO type as "IN".

If the transaction's punches are "OUT-OUT" then the newly added punches will have IO type as "OUT".

After all the corrections click on OK. Then click on Save button on the Menu bar to save the correction in Time sheet.

**Job Summary displays the following details:**

Timesheet Correction

User\* JCP5 Nitin ⓘ

Date\* 22/05/2017 ⓘ

Timesheet Correction

Job Summary

Total Job Hours-Count	06:21	3	ⓘ
Total Un-Assigned Hours	02:00		
Total Out Time	01:40		ⓘ
Total Award Hours	00:10		
Total Penalty Hours	HH:MM		
Overtime Hours	01:00		ⓘ

**Total Job Hours- Count:** Total job hours for the day are displayed and the details can be viewed by clicking ⓘ

Job Details For 22/05/2017

Job-PSD-R Hours-Count	06:21	3
Total Job Hours-Count	06:21	3

Close

**Total Un-Assigned Hours:** Total hours of the day when no job is assigned to the user, is displayed as un-assigned hours.

**Total Out Time:** Total hours of the day for which user has availed overtime, is displayed as Outtime. Also the Outtime details can be viewed.

Out Time Details For 22/05/2017

Out Time For Job-INV	01:40
Total Out Time	01:40

Close

**Award Hours:** Total hours given to user as an award which will be added in overtime hours.

**Penalty Hours:** Total hours given to user as the penalty which will be subtracted from the overtime hours.

**Overtime Hours:** Total hours of the day for which user has worked overtime, is displayed as Overtime hours. Also the Overtime hour details can be viewed as shown below.

Overtime Details For 22/05/2017

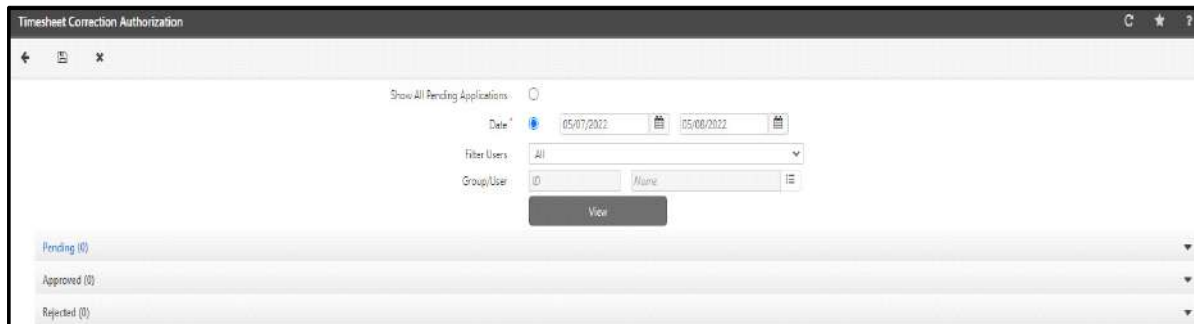
Job	PSD-R-PSD Review
OT1	HH:MM
OT2	01:00
OT3	HH:MM
OT4	HH:MM
OT5	HH:MM

Close

# Timesheet Correction Authorization

Timesheet Correction Authorization helps in approving or rejecting an application of “Timesheet Correction” of ESS user.

To authorize Time Sheet Correction, click **Job Processing and Costing > Utilities > Timesheet Correction Authorization**.



The authorization is dependent on the number of Reporting In-charge in the Reporting Group, the Authorization Mode as well as the Approval Policy assigned by the system administrator. For details refer to [“Reporting In-Charge”](#), [“Approval Policy”](#) and [“Configuring Users”](#).

You can either:

- view all the pending Timesheet Correction Authorizations
- set the filters — Date, Filter Users — to view the desired applications

## All Pending Applications

To view only Pending Applications,

- **Show All Pending Applications:** Select this option to enable the pending application filter.
- Click the **Pending** collapsible panel. All the applications in pending state appear.

To approve the application, select the **Approve** check box of the desired entry.

To reject the application, select the **Reject** check box of the desired entry.

To know more, refer to [“Pending Application”](#).



*The population on this page depends on the server's database. It might take time to load all pending applications.*

## Applications according to Set Filters

To Set the Filters,

- **Date:** Select this option to enable the date filter. Select the From and To date from the calendar to view the pending applications of time sheet correction.
- **Filter Users:** You can filter records according to the desired Enterprise Group, All or for an Individual.

Select **All**, to view authorization status of the applications of all the active users on the system.

Select **Individual**, to view authorization status of the applications of a single user. Click the picklist to select the desired User ID/Name.

Select the desired Enterprise Group — Organization, Branch, Department, Section, Category, Grade, Designation, Custom Group1/2/3 and then click the picklist to select the desired group's ID/Name, to view authorization status of these applications.

Click on **View** to view the Pending, Approved and Rejected applications.

## Pending Application

Click the **Pending** collapsible panel. The Pending Application with Job Hours, Un-Assigned Hours and Reason while applying for correction will be shown in the grid.




User ID	Name	Attendance Date	Job Hours	Un-Assigned Hours	Reason	Approve	Reject	Remark	Details
apjpc	apjpc	15/11/2017	14:30	00:00		<input checked="" type="checkbox"/>	<input type="checkbox"/>	Authorized Timesheet Corredt	

When any application is in the Pending state it can be authorized by the Admin or RIC.

- To approve/reject applications selectively, click the respective application check box against the user.
- To approve/reject all the applications simultaneously, click the Approve /Reject check box in the header column.

Once the Admin approves/ rejects the application, the record will be moved from the **Pending** section to the **Approved/ Rejected** section respectively.

The default **Remark** for the Approved and Rejected application will appear in the respective fields. You can enter any customized Remark while authorizing the application.

To view the details of the time sheet correction application, click **Details** . The **All Job Costing Punches** window appears as shown below.

User: JB1

Date: 14/03/2022

Job Hours: 06:32

Un-assigned Hours: 00:30

Transaction Values: On Application

Reason: Applied Timesheet Correction

Search:

Project Code	Phase Code	Job Details	Start Date	Start Time	End Date	End Time	Transaction Type	Hours	Job Count
P1	Phase1	J2-Job2	14/03/2022	09:00	14/03/2022	09:00	Job Hours	00:00	1
			14/03/2022	09:00	14/03/2022	09:30	Un-Assigned Hours	00:30	
P1	Phase1	J1-Job1	14/03/2022	09:30	14/03/2022	13:00	Job Hours	03:30	1
P1	Phase1	J1-Job1	14/03/2022	13:00	14/03/2022	14:00	Break Hours	01:00	
P1	Phase1	J1-Job1	14/03/2022	14:00	14/03/2022	14:23	Job Hours	00:23	1
P1	Phase1	J1-Job1	14/03/2022	14:23	14/03/2022	14:34	Job Hours	00:11	1

**Approval Details**

In-charge	Status	Remark
J82 - RIC/J82	(X)	

**All Job Costing Punches** window displays the time sheet correction details.

**Transaction Values** has the following options:

- **On Application:** The transaction values shown are the values at the time of the application being done.
- **Applied:** The transaction values after the correction is being made.
- **Current:** The current transaction values are same as On Application values.

This window also displays the status of the user's application under **Approval Details**. The application's status is displayed in the **Status** column.

System can auto approve / reject an application if the Reporting In-charge or SA fails to authorize it as per the Approval Policy assigned to the Reporting Groups. To know more about the Approval Policy, refer ["Approval Policy"](#).

**Remark** displays the comments provided by the Admin/ RIC/ System.

Click **Save** to save the authorization.

## Approved Applications

Click the **Approved** collapsible panel.

The **Approved** section displays all the applications that have been approved by the RIC or the System Administrator.

The following screen displays the **Approved** section with approved Time Sheet Correction applications:

Pending (1)

Approved (1)

User ID	Name	Attendance Date	Job Hours	Un-Assigned Hours	Reason	Approve	Reject	Details
JCF3	Rahul	22/05/2017	00:34	04:27		<input checked="" type="checkbox"/>	<input type="checkbox"/>	

Rejected (0)

Click the **Details** icon to view the attendance details of the corresponding user.

**All Job Costing Punches** window appears as shown below:

All Job Costing Punches

User

J/B1

Date

14/03/2022

Job Hours

06:52

Un-assigned Hours

00:30

Transaction Values

On Application

Reason

Applied Timesheet Correction

Project Code	Phase Code	Job Details	Start Date	Start Time	End Date	End Time	Transaction Type	Hours	Job Count
P1	Phase1	J2-Job2	14/03/2022	09:00	14/03/2022	09:00	Job Hours	00:00	1
			14/03/2022	09:00	14/03/2022	09:30	Un-Assigned Hours	00:30	
P1	Phase1	J1-Job1	14/03/2022	09:30	14/03/2022	13:00	Job Hours	03:30	1
P1	Phase1	J1-Job1	14/03/2022	13:00	14/03/2022	14:00	Break Hours	01:00	
P1	Phase1	J1-Job1	14/03/2022	14:00	14/03/2022	14:23	Job Hours	00:23	1
P1	Phase1	J1-Job1	14/03/2022	14:23	14/03/2022	14:34	Job Hours	00:11	1

Approval Details

Incharge	Status	Remark
SA - System Admin	(16/03/2022 09:26)	Authorized Timesheet Correction

**All Job Costing Punches** window displays the time sheet correction details.

**Transaction Values** has the following options:

- **On Application:** The transaction values shown are the values at the time of the application being done.
- **Applied:** The transaction values after the correction is being made.
- **Current:** The current transaction values are same as On Application values.

This window also displays the status of the user's application under **Approval Details**. The application's status is displayed in the **Status** column.

System can auto approve / reject an application if the Reporting In-charge or SA fails to authorize it as per the Approval Policy assigned to the Reporting Groups. To know more about the Approval Policy, refer "[Approval Policy](#)".

**Remark** displays the comments provided by the Admin/ RIC/ System.

Click **Save** to save the authorization.

## Rejected Applications

Click the **Rejected** collapsible panel.

The **Rejected** section displays all the applications that have been rejected by the RIC or the System Administrator.

The following screen displays the **Rejected** section with rejected Time Sheet Correction applications:

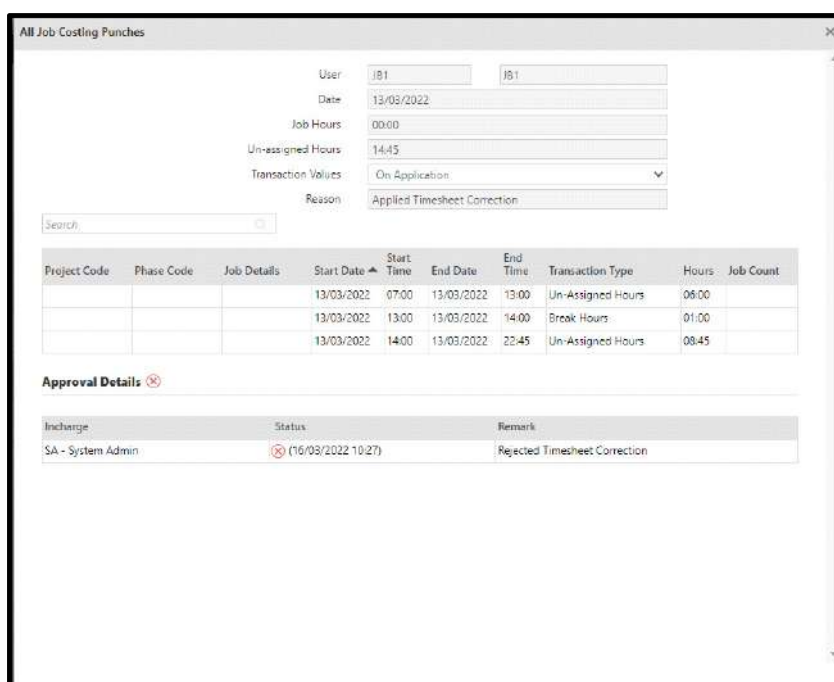


The screenshot shows a window titled "Rejected (1)" with a search bar and a table of rejected applications. The table has columns for User ID, Name, Attendance Date, Job Hours, Un-assigned Hours, Reason, Approve, Reject, Remark, and Details. A single row is visible for User4 on 21/06/2021, with Job Hours 00:00 and Un-assigned Hours 00:00. The Reason is "Applied Timesheet Correction" and the Remark is "Rejected Timesheet Correction".

User ID	Name	Attendance Date	Job Hours	Un-assigned Hours	Reason	Approve	Reject	Remark	Details
U4	User4	21/06/2021	00:00	00:00	Applied Timesheet Correction	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Rejected Timesheet Correction	

Click the **Details**  icon to view the attendance details of the corresponding user.

**All Job Costing Punches** window appears as shown below:



The screenshot shows the "All Job Costing Punches" window. It includes input fields for User (J81), Date (13/03/2022), Job Hours (00:00), Un-assigned Hours (14:45), Transaction Values (On Application), and Reason (Applied Timesheet Correction). Below these is a search bar and a table of punches. The table has columns for Project Code, Phase Code, Job Details, Start Date, Start Time, End Date, End Time, Transaction Type, Hours, and Job Count. Three rows are shown for 13/03/2022: Un-Assigned Hours (07:00-13:00, 06:00), Break Hours (13:00-14:00, 01:00), and Un-Assigned Hours (14:00-22:45, 08:45). Below the table is an "Approval Details" section with a table showing the application's status.

Project Code	Phase Code	Job Details	Start Date	Start Time	End Date	End Time	Transaction Type	Hours	Job Count
			13/03/2022	07:00	13/03/2022	13:00	Un-Assigned Hours	06:00	
			13/03/2022	13:00	13/03/2022	14:00	Break Hours	01:00	
			13/03/2022	14:00	13/03/2022	22:45	Un-Assigned Hours	08:45	

Inchange	Status	Remark
SA - System Admin	(16/03/2022 10:27)	Rejected Timesheet Correction

**All Job Costing Punches** window displays the time sheet correction details.

**Transaction Values** has the following options:

- **On Application:** The transaction values shown are the values at the time of the application being done.
- **Applied:** The transaction values after the correction is being made.
- **Current:** The current transaction values are same as On Application values.

It also displays the status of the user's application under **Approval Details**. The application's status is displayed in the **Status** column.

System can auto approve / reject an application if the Reporting In-charge or SA fails to authorize it as per the Approval Policy assigned to the Reporting Groups. To know more about the Approval Policy, refer [“Approval Policy”](#).

**Remarks** displays the comments provided by the Admin / RIC / System.

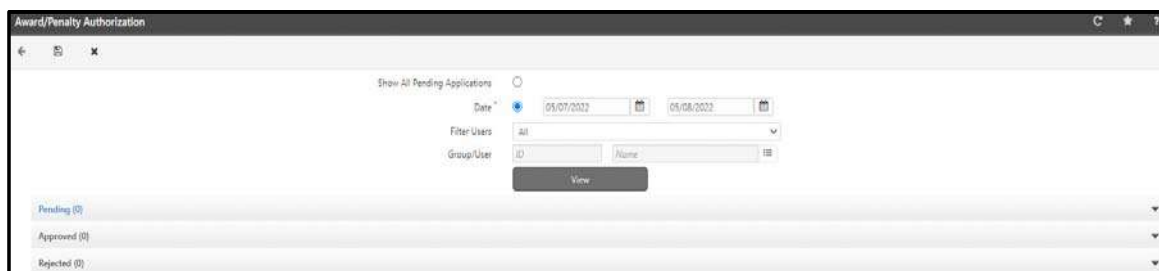
Click **Save** button to save the changes.



# Award Penalty Authorization

Award Penalty Authorization helps in approving or rejecting an application of award/penalty hours assignment to the user.

To authorize Award Penalty, click **Job Processing and Costing > Utilities > Award Penalty Authorization**.



The authorization is dependent on the number of Reporting In-charge in the Reporting Group, the Authorization Mode as well as the Approval Policy assigned by the system administrator. For details refer to [“Reporting In-Charge”](#), [“Approval Policy”](#) and [“Configuring Users”](#).

You can either:

- view all the pending Award/ Penalty Authorizations
- set the filters — Date, Filter Users — to view the desired applications

## All Pending Applications

To view only Pending Applications,

- **Show All Pending Applications:** Select this option to enable the pending application filter.
- Click the **Pending** collapsible panel. All the applications in pending state appear.

To approve the application, select the **Approve** check box of the desired entry.

To reject the application, select the **Reject** check box of the desired entry.

To know more, refer to [“Pending Application”](#).



*The population on this page depends on the server's database. It might take time to load all pending applications.*

## Applications according to Set Filters

To Set the Filters,

- **Date:** Select this option to enable the date filter. Select the From and To date from the calendar to view the pending applications of Award/ Penalty assignment.
- **Filter Users:** You can filter records according to the desired Enterprise Group, All or for an Individual.

Select **All**, to view authorization status of the applications of all the active users on the system.


Select **Individual**, to view authorization status of the applications of a single user. Click the picklist to select the desired User ID/Name.

Select the desired Enterprise Group — Organization, Branch, Department, Section, Category, Grade, Designation, Custom Group1/2/3 and then click the picklist to select the desired group's ID/Name, to view authorization status of these applications.

Click on **View** to view the Pending, Approved and Rejected applications.

## Pending Application

Click the **Pending** collapsible panel. The **Pending** section displays all the applications that have are yet to be authorized by the RIC or the System Administrator.



In-Charge ID	User ID	Name	Application Date	Attendance Date	Award Hours	Penalty Hours	Reason	Approve	Reject	Remark	Details
m_u6	m_botn2	m_botn2	14/07/2022	23/06/2022	01:00	00:00	Applied Award/Penalty Hours	<input type="checkbox"/>	<input type="checkbox"/>		
m_u6	m_botn2	m_botn2	14/07/2022	23/06/2022	00:00	01:00	Applied Award/Penalty Hours	<input type="checkbox"/>	<input type="checkbox"/>		
m_u6	m_botn1	m_botn1	14/07/2022	23/06/2022	00:00	01:00	Applied Award/Penalty Hours	<input type="checkbox"/>	<input type="checkbox"/>		
m_u6	m_botn1	m_botn1	14/07/2022	23/06/2022	01:00	00:00	Applied Award/Penalty Hours	<input type="checkbox"/>	<input type="checkbox"/>		
m_u5	m_12	m_12	14/07/2022	23/06/2022	00:00	01:00	Applied Award/Penalty Hours	<input type="checkbox"/>	<input type="checkbox"/>		


1 - 5 of 16 records

When any application is in the Pending state it can be authorized by the Admin or RIC.

- To approve/reject applications selectively, click the respective application check box against the user.
- To approve/reject all the applications simultaneously, click the Approve /Reject check box in the header column.

Once the Admin approves/ rejects the application, the record will be moved from the **Pending** section to the **Approved/ Rejected** section respectively.

The default **Remark** for the Approved and Rejected application will appear in the respective fields. You can enter any customized Remark while authorizing the application.

To view the details of the time sheet correction application, click **Details** . The **All Job Costing Punches** window appears as shown below.

All Job Costing Punches

User: Test1 Test1

Attendance Date: 14/06/2021

Transaction Values: On Application

Reason: Applied Award/Penalty Hours

Search

Project Code	Phase Code	Job Code	Start Date	Start Time	End Date	End Time	Transaction Type	Hours	Job Count	Adjustment Type	Adjustment Time
		J1	14/06/2021	00:00	14/06/2021	01:00	Job Hours	01:00	2	Award	10:01
		J1	14/06/2021	01:00	14/06/2021	13:00	Job Hours	12:00	1	Award	01:02
		J1	14/06/2021	13:00	14/06/2021	13:00	Job Hours		1	Award	01:00
		JOE	14/06/2021	13:00	14/06/2021	13:00	Job Hours		1	Award	01:02
		JOE	14/06/2021	13:00	14/06/2021	13:00	Job Hours		1	Award	02:00

1 - 5 of 14 records

Approval Details ⓘ

Incharge	Status	Remark
RG2		

All Job Costing Punches window displays the time sheet correction details.

Transaction Values has the following options:

- **On Application:** The transaction values shown are the values at the time of the application being done.
- **Applied:** The transaction values after the correction is being made.
- **Current:** The current transaction values are same as On Application values.

It also displays the status of the user's application under **Approval Details**. The application's status is displayed in the **Status** column.

System can auto approve / reject an application if the Reporting In-charge or SA fails to authorize it as per the Approval Policy assigned to the Reporting Groups. To know more about the Approval Policy, refer ["Approval Policy"](#).

**Remark** displays the comments provided by the Admin/ RIC/ System.

Click **Save** to save the authorization.



*The pending applications can not be authorized if the attendance period is closed while doing monthly attendance process and "Attendance Correction in Closed Period" checkbox is disabled from Time and Attendance > Policies > Attendance Policy > Event Authorization.*


*Even though; the period is closed but if "Attendance Correction in Closed Period" check-box in Policy is enabled then authorization can be made.*

## Approved Applications

Click the **Approved** collapsible panel. The **Approved** section displays all the applications that have been approved by the RIC or the System Administrator.

The following screen displays the **Approved** section with approved Award Penalty applications:

Approved (13)										
Search										
In-Charge ID	User ID	Name	Application Date	Attendance Date	Award Hours	Penalty Hours	Reason	Approve	Reject	Remark
U1	Test1	Test1	14/06/2021	14/06/2021	21:11	00:00	Applied Award/Penalty Hours	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Authorized Award/Penalty
U2	Test1	Test1	14/06/2021	14/06/2021	20:10	00:00	Applied Award/Penalty Hours	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Authorized Award/Penalty
U2	Test1	Test1	14/06/2021	14/06/2021	20:09	00:00	Applied Award/Penalty Hours	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Authorized Award/Penalty
U2	Test1	Test1	14/06/2021	14/06/2021	20:11	00:00	Applied Award/Penalty Hours	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Authorized Award/Penalty
U1	Test1	Test1	14/06/2021	14/06/2021	20:10	00:00	Applied Award/Penalty Hours	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Authorized Award/Penalty

Click the **Details**  icon to view the details of the corresponding user.

**All Job Costing Punches** window appears as shown below:

All Job Costing Punches

User

Test1

Test1

Attendance Date

14/06/2021

Transaction Values

On Application

Reason

Applied Award/Penalty Hours

Search

Project Code	Phase Code	Job Code	Start Date	Start Time	End Date	End Time	Transaction Type	Hours	Job Count	Adjustment Type	Adjustment Time
		J1	14/06/2021	00:00	14/06/2021	01:00	Job Hours	01:00	2	Award	10:01
		J1	14/06/2021	01:00	14/06/2021	13:00	Job Hours	12:00	1	Award	01:02
		J1	14/06/2021	13:00	14/06/2021	13:00	Job Hours		1	Award	01:00
		JOB	14/06/2021	13:00	14/06/2021	13:00	Job Hours		1	Award	01:02
		JOB	14/06/2021	13:00	14/06/2021	13:00	Job Hours		1	Award	02:00

1 - 5 of 14 records

1

2

3

Approval Details

Incharge	Status	Remark
RIC - RICOFRIC	<input checked="" type="checkbox"/> (14/06/2021 16:44)	Authorized Award/Penalty

**All Job Costing Punches** window displays the time sheet correction details.

**Transaction Values** has the following options:

- **On Application:** The transaction values shown are the values at the time of the application being done.
- **Applied:** The transaction values after the correction is being made.
- **Current:** The current transaction values are same as On Application values.

It also displays the status of the user's application under **Approval Details**. The application's status is displayed in the **Status** column.

System can auto approve / reject an application if the Reporting In-charge or SA fails to authorize it as per the Approval Policy assigned to the Reporting Groups. To know more about the Approval Policy, refer [“Approval Policy”](#).

**Remark** displays the comments provided by the Admin/ RIC/ System.

Click **Save** to save the authorization.

## Rejected Applications

Click the **Rejected** collapsible panel. The **Rejected** section displays all the applications that have been rejected by the RIC or the System Administrator.

The following screen displays the **Rejected** section with rejected applications:

Rejected (7)

Search

In-Charge ID	User ID	Name	Application Date	Attendance Date	Award Hours	Penalty Hours	Reason	Approve	Reject	Remark	Details
U2	Test1	Test1	17/06/2021	17/06/2021	01:02	00:00	Applied Award/Penalty Hours	<input type="checkbox"/>	<input checked="" type="checkbox"/>	System Auto Rejected	
U2	Test1	Test1	14/06/2021	14/06/2021	20:11	00:00	Applied Award/Penalty Hours	<input type="checkbox"/>	<input checked="" type="checkbox"/>	System Auto Rejected	
U2	Test1	Test1	14/06/2021	14/06/2021	20:11	00:00	Applied Award/Penalty Hours	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Rejected Award/Penalty	
U1	Test1	Test1	14/06/2021	14/06/2021	20:13	00:00	Applied Award/Penalty Hours	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Rejected Award/Penalty	
U1	Test1	Test1	14/06/2021	14/06/2021	10:11	00:00	Applied Award/Penalty Hours	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Rejected Award/Penalty	

Click the **Details**  icon to view the details of the corresponding user.

**All Job Costing Punches** window appears as shown below:

[illegible]

**All Job Costing Punches** window displays the time sheet correction details.

**Transaction Values** has the following options:

- **On Application:** The transaction values shown are the values at the time of the application being done.
- **Applied:** The transaction values after the correction is being made.
- **Current:** The current transaction values are same as On Application values.

It also displays the status of the user's application under **Approval Details**. The application's status is displayed in the **Status** column.

System can auto approve / reject an application if the Reporting In-charge or SA fails to authorize it as per the Approval Policy assigned to the Reporting Groups. To know more about the Approval Policy, refer "[Approval Policy](#)".

**Remarks** displays the comments provided by the Admin / RIC / System.

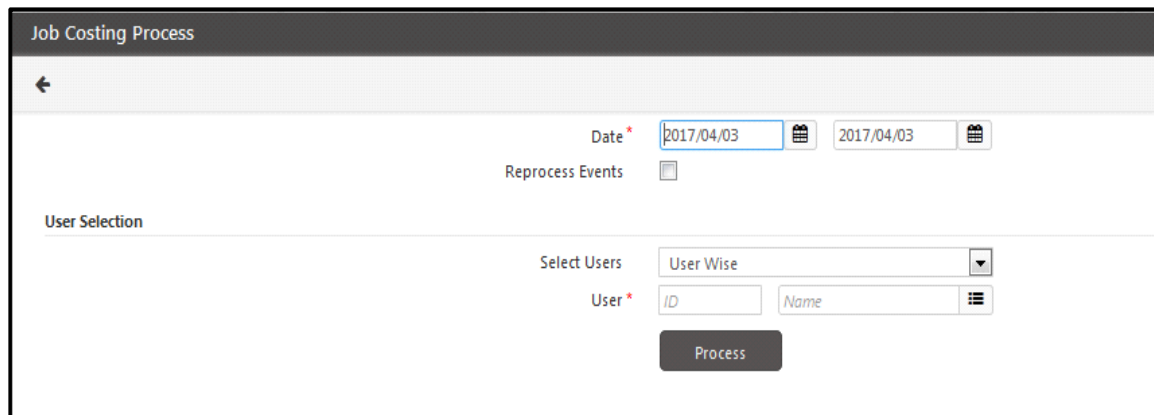
Click **Save** button to save the changes.

# Job Costing Process

This page helps in processing attendance punches to generate accurate Job Costing data of users for a specified date range. Any changes in configuration made for a user on the *Job Processing and Costing* module requires the administrator to process the user's data first using this functionality.

“Job Costing Process” maps job code to the event on the basis of user/ device/ site/ location mapping configuration.

To process job costing data, go to **Job Processing and Costing > Utilities > Job Costing Process**



The screenshot shows the 'Job Costing Process' interface. At the top, there's a title bar and a back arrow. Below that, the 'Date' field is set to 2017/04/03. The 'Reprocess Events' checkbox is unchecked. Under 'User Selection', the 'Select Users' dropdown is set to 'User Wise'. The 'User' field has 'ID' and 'Name' sub-fields. A 'Process' button is located at the bottom.

Select a date range for which data is to be processed.

Select the **Reprocess Events** checkbox to enable the system to do the following:

- Reprocess all attendance events based on any new policy settings.
- Revert all attendance event related changes made through manual correction.



*When job code is not assigned to user and user punches with that job code using Special function from door; then Reprocess Events should be enabled during Job Costing process.*

Select the **Users** from the filter options of User Wise, Group Wise or all for whom the data is to be processed.

Click the **Process** button to start processing job data for all selected users.

# Importing Data

The COSEC application has an inbuilt utility for enabling users to import job data from excel files with predefined format. This would thus save the end user a lot of time and effort in having to make individual job data entries at the application level.




*Make sure you have **View** and **Edit** rights for the Import Data page to import the jobs.*

To import jobs,

Click **Job Processing and Costing > Utilities > Import Data**.

Configure the following parameters:

- **Import Data For:** To download sample import file, click **Download Sample Import file** . The downloaded import sheet displays the details required for importing data. Enter the details to be imported in the **Job** sheet in this sample file and save the file at the desired location.
- **File Format:** Select the desired option from the drop-down list options — XLS or CSV.
- **Import File:** Browse the saved file path from where you wish to import the file. Click **Choose File**. It displays all folders which are in the drive. Select the desired file from the folder.
- Click **Upload** to upload the data. The file will be saved and you can preview the data.

- Click **Preview Data** to preview the data before importing. The data in the uploaded file is displayed as follows.



Import Data

Import Data For: Job

File Format: XLS

Import File: Choose File | Import Data (1).xls

Preview Data | Import Data

Code	Name	Start Date	End Date	Cost Centre ID	Estimated Hours	Merge Job	Allowance
J1	Job 1	25/12/2023	31/12/2023	1	23:59	0	0
J2	Job 2	25/12/2023	31/12/2023	1	23:59	0	0
J3	Job 3	25/12/2023	31/12/2023	1	23:59	0	0
J4	Job 4	25/12/2023	31/12/2023	1	23:59	0	0
J5	Job 5	25/12/2023	31/12/2023	1	23:59	0	0
J6	Job 6	25/12/2023	31/12/2023	1	23:59	0	0
J7	Job 7	25/12/2023	31/12/2023	1	23:59	0	0
J8	Job 8	25/12/2023	31/12/2023	1	23:59	0	0
J9	Job 9	25/12/2023	31/12/2023	1	23:59	0	0
J#S#	Job31	04/01/2024	08/01/2024	1	23:59	0	0
J16	J16	07/01/2024	07/01/2024	1	0:00	0	0
J17	J17	07/01/2024	07/01/2024	1	99999:60	0	0



Administrator needs to ensure that the user has full rights on the folder containing the Excel or CSV file for the import data operation.

- Click **Import Data** to import the Jobs. The result of import is shown as Success or Failure along with Result Description.

You can also filter the result records.

- Result:** Select the desired option from the drop-down list — Both, Success or Failure— to view the import result.

Import Data

Import Data For: Job

File Format: XLS

Import File: Choose File | Import Data (1).xls

Preview Data | Import Data

Result: Both

Code	Name	Start Date	End Date	Cost Centre ID	Estimated Hours	Merge Job	Allowance	Result	Result Description
J1	Job 1	25/12/2023	31/12/2023	1	23:59	0	0	Failure	Job Date-Range cannot be changed for statically assigned Job(s)
J2	Job 2	25/12/2023	31/12/2023	1	23:59	0	0	Success	
J3	Job 3	25/12/2023	31/12/2023	1	23:59	0	0	Success	
J4	Job 4	25/12/2023	31/12/2023	1	23:59	0	0	Success	
J5	Job 5	25/12/2023	31/12/2023	1	23:59	0	0	Success	
J6	Job 6	25/12/2023	31/12/2023	1	23:59	0	0	Success	
J7	Job 7	25/12/2023	31/12/2023	1	23:59	0	0	Success	
J8	Job 8	25/12/2023	31/12/2023	1	23:59	0	0	Success	
J9	Job 9	25/12/2023	31/12/2023	1	23:59	0	0	Success	
J#S#	Job31	04/01/2024	08/01/2024	1	23:59	0	0	Failure	Enter Valid Job Code
J16	J16	07/01/2024	07/01/2024	1	0:00	0	0	Failure	Enter Valid Estimated Hours
J17	J17	07/01/2024	07/01/2024	1	99999:60	0	0	Failure	Enter Valid Estimated Hours

Once the data is imported successfully, data will be added or updated in “Job”.

# Daily Timesheet

To export Daily Timesheet, go to **Job Processing and Costing > Export > Daily Timesheet**.

The Daily Timesheet page appears as shown below:

The screenshot shows the 'Daily Timesheet' export configuration interface. On the left, there is a sidebar with 'Export' (highlighted in blue) and 'Configuration' options. The main area contains the following fields:

- Date \***: Two date pickers showing '09/05/2017'.
- File Name \***: A text input field.
- Select Users**: A dropdown menu set to 'User Wise'.
- User \***: Two input fields for 'ID' and 'Name'.
- Generate Export For**: A dropdown menu set to 'All Users'.
- Export**: A dark button at the bottom right.

Before exporting the Daily Timesheet data, you must do the ["Configuration"](#).

## Export

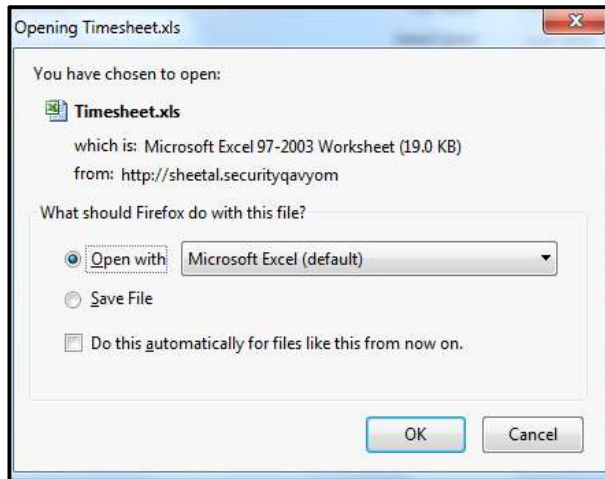
- Select the **date** range for which daily timesheet is to be exported.
- Specify the **filename** and the **file format** as Excel.
- You can filter the users by selecting users based on **User Wise, Group Wise or All**.
- You can **Generate Export for All Users, Active Users or Inactive Users**.

This screenshot shows the 'Daily Timesheet' export configuration page with an additional user list. The fields are similar to the previous screenshot, but with the following updates:

- Date \***: Date range from '22/05/2017' to '28/05/2017'.
- File Name \***: Set to 'Timesheet'.
- Select Users**: Still 'User Wise'.
- User \***: 'ID' and 'Name' fields.
- Generate Export For**: Still 'All Users'.
- Export**: A dark button at the bottom right.
- User List**: A table below the 'User' fields showing a list of users with their IDs and names, and a search bar above it.

User ID	Name
JCP1	Vinit
JCP2	Piyush
JCP3	Rahul
JCP4	Hiren
JCP5	Nitin

Click on **Export** button. The daily timesheet can be opened or saved at desired location.



The export timesheet file will be generated as per the configuration as shown below:

Sr No	User ID	User Name	Attendance Date	Start Date-Time	End Date-Time	Project Code	Project Name	Phase Code	Job Code	Job Name	Job Hours	Actual OT1	Actual OT2	Actual OT3	Job Count
1	JCP1	Vinit	22/05/2017	22/05/2017 09:16:40	22/05/2017 09:22:07	CLD	COSEC Cloud	PSD-A	PSD-S	PSD Study	00:06	00:00	00:00	00:00	1
				22/05/2017 09:22:07	22/05/2017 12:57:29	CLD	COSEC Cloud	PSD-A	PSD-S	PSD Study	03:35	00:00	00:00	00:00	1
				22/05/2017 12:57:29	22/05/2017 14:02:16	CLD	COSEC Cloud	PSD-A	PSD-S	PSD Study	01:05	00:00	00:00	00:00	1
				22/05/2017 14:02:16	22/05/2017 14:40:37	CLD	COSEC Cloud	PSD-A	PSD-S	PSD Study	00:38	00:00	00:00	00:00	1
				22/05/2017 14:40:37	22/05/2017 14:45:21				SAD	SAD study	00:05	00:00	00:00	00:00	1
				22/05/2017 14:45:21	22/05/2017 14:47:50				SAD	SAD study	00:02	00:00	00:00	00:00	1
				22/05/2017 14:47:50	22/05/2017 17:05:27				SAD	SAD study	02:18	00:00	00:00	00:00	1
				22/05/2017 17:05:27	22/05/2017 20:05:27				SAD	SAD study	03:00	00:00	01:35	00:00	1
2	JCP2	Piyush	22/05/2017	22/05/2017 09:22:29	22/05/2017 09:22:45	CLD	COSEC Cloud	PAC	LAB	Labelling	00:00	00:00	00:00	00:00	1
				22/05/2017 09:22:45	22/05/2017 09:22:47	CLD	COSEC Cloud	PAC	LAB	Labelling	00:00	00:00	00:00	00:00	1
				22/05/2017 09:22:47	22/05/2017 09:26:59	CLD	COSEC Cloud	PAC	LAB	Labelling	00:04	00:00	00:00	00:00	1
				22/05/2017 09:26:59	22/05/2017 12:56:46	CLD	COSEC Cloud	PAC	LAB	Labelling	03:30	00:00	00:00	00:00	1
				22/05/2017 12:56:46	22/05/2017 14:36:49	CLD	COSEC Cloud	PAC	LAB	Labelling	01:40	00:00	00:00	00:00	1
3	JCP3	Rahul	22/05/2017	22/05/2017 09:01:21	22/05/2017 09:15:13	CLD	COSEC Cloud	PSD-A	PSD-R	PSD Review	00:14	00:00	00:00	00:00	1
				22/05/2017 09:15:13	22/05/2017 09:20:19	CLD	COSEC Cloud	PSD-A	PSD-R	PSD Review	00:05	00:00	00:00	00:00	1
				22/05/2017 09:20:19	22/05/2017 09:40:20						00:20	00:00	00:00	00:00	1
				22/05/2017 09:40:20	22/05/2017 09:50:18				SAD	SAD study	00:10	00:00	00:00	00:00	1
				22/05/2017 09:50:18	22/05/2017 09:55:16	CLD	COSEC Cloud	PAC	INV	Inventory	00:05	00:00	00:00	00:00	1
				22/05/2017 09:55:16	22/05/2017 13:11:12						03:16	00:00	00:00	00:00	1
				22/05/2017 13:11:12	22/05/2017 14:02:23						00:51	00:00	00:00	00:00	1
4	JCP4	Hiren	22/05/2017	22/05/2017 09:10:24	22/05/2017 10:30:45	CLD	COSEC Cloud	PSD-A	PSD-S	PSD Study	01:20	00:00	00:00	00:00	1
				22/05/2017 10:30:45	22/05/2017 10:40:25	CLD	COSEC Cloud	PSD-A	PSD-S	PSD Study	00:10	00:00	00:00	00:00	1
				22/05/2017 10:40:25	22/05/2017 10:50:23						00:10	00:00	00:00	00:00	1
				22/05/2017 10:50:23	22/05/2017 11:00:20						00:10	00:00	00:00	00:00	1

## Configuration

You can select the fields to be exported by checking the respective box. Click on Save button to save the configuration for export.

Daily Timesheet

Export
Configuration

Select Fields To Export

Search

Fields
☐
Project Name
☒
Phase Code
☒
Phase Name
☐
Job Code
☒
Job Name
☒

21 - 25 of 39 records

1
5
8

Save

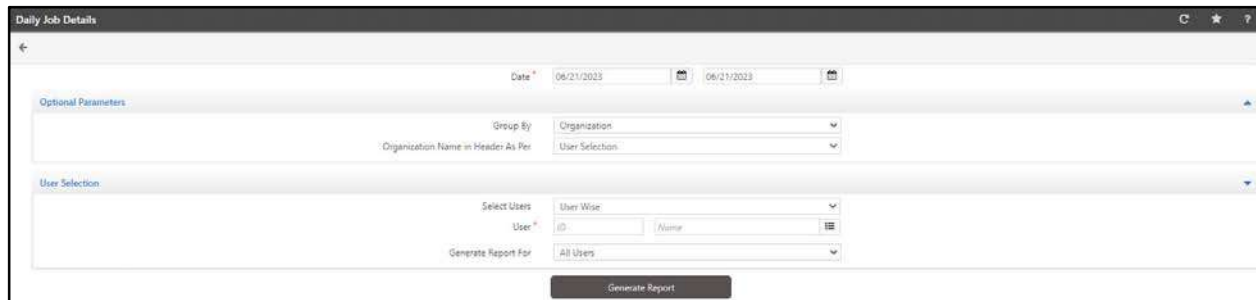
# Job Processing and Costing Reports

These reports can be obtained using the **Reports** section under the **Job Processing and Costing** add-on module. The Reports can be categorized as follows:

- “Daily Job Details”
- “Monthly Job Details”
- “Job Transactions”
- “User Job Details”
- “Transaction-Wise Hours Summary”
- “Work Summary”

## Daily Job Details

This report displays the selected users' daily work details against various jobs and across multiple projects.

The screenshot shows the 'Daily Job Details' report configuration window. At the top, there are date pickers for 'Date' with values '06/21/2023' and '06/21/2023'. Below this is the 'Optional Parameters' section, which includes a 'Group By' dropdown set to 'Organization' and a 'Organization Name in Header As Per' dropdown set to 'User Selection'. The 'User Selection' section contains a 'Select Users' dropdown set to 'User Wise', a 'User' field with 'ID' and 'Name' sub-fields, and a 'Generate Report For' dropdown set to 'All Users'. A 'Generate Report' button is located at the bottom center.

Configure the following parameters:

- **Date:** Select the **To** and **From** date for which the report is to be generated.

### Optional Parameters

- **Group By:** Select the desired enterprise group from the drop-down list — Organization, Branch, Department, Section, Category, Grade, Designation, Association Maps, Custom 2/3.
- **Organization Name in Header As Per:** Select the desired option — **User Selection** or **Customized Selection**.
  - If you select **Customized Selection**, click on **Customize Report Header**.

You can select the desired option from the drop-down list or can also add header according to your choice.

### User Selection

- **Select User:** Select the desired option — **User Wise**, **Group Wise**, or **All**.
  - If you select **User Wise**,
    - Click the **User** picklist. The **Picklist for All Users** pop-up appears.

Picklist For All Users

Total Selected: 0 Records

Search  Show Selected

<input type="checkbox"/>	User ID ▲	Name
<input type="checkbox"/>	1	SALIM ANSARI
<input type="checkbox"/>	10	RAJENDRA GOSWAMI
<input type="checkbox"/>	1001	ANKITKUMAR SOHLIYA
<input type="checkbox"/>	1002	MEGHA H SHUKLA
<input type="checkbox"/>	1003	UMESH M TALANPURI
<input type="checkbox"/>	1004	DARSHAK B PATEL
<input type="checkbox"/>	1007	DHAVAL I PATEL
<input type="checkbox"/>	1008	MAYANK K KORAT
<input type="checkbox"/>	1009	DIPTI K RATHWA
<input type="checkbox"/>	1010	RAHUL S SHAH

1 - 10 of 2469 records

« < 1 2 3 ... 247 > »

OK Cancel

- Select the desired check boxes of the desired profiles. Click **OK**.
- The selected profiles appear in the grid.


Select Users

User Wise

User\* ID  Name

Search

User ID ▲	Name	
1	SALIM ANSARI	
10	RAJENDRA GOSWAMI	

- You can also delete the desired profile. To do so, click **Delete**  of the respective profile.
- If you select **Group Wise** option,
- Select the desired enterprise group — Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1(Association Maps), Custom Group /2/3.

For each enterprise group — Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1/2/3, click the corresponding picklist to select the desired option/s.

The selected groups appear in the grid.

Select Users Group Wise ▼

Select Group Organization ▼

Organization\* ID  Name

ID	Name	Group ▲	
1	MATRIX COMSEC PVT. LTD.	Organization	
5	TECH SERVICES	Organization	
6	CONSULTANT	Organization	
7	CANTEEN	Organization	
8	APPRENTICE	Organization	

- You can also delete particular group. To do so, click **Delete** of the respective group.
- If you select **All** option, then all the profiles will be selected.
- **Generate Report For:** Select the desired option— **All Users, Active Users or Inactive Users**.

Click **Generate Report**.

Sample Report

Daily Job Details
Page 1 of 2

← Back

1 of 2
◀ ▶
80%
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DADB						Page 1 of 2			
Organization-Wise Daily Job Details From 11/04/2010 To 11/04/2023									
Run by:	System Admin	Project	Job	Date:	11/04/2023	23:49			
User ID	Name			Job	Out Time	Break	Un-Assigned		
					Hours	Hours	Hours		
24/04/2017	JPC user					00:20	09:00		
JPC	JPC user					00:20	09:00		
JPCdefaultcenter	Job covering user with default job of enterprise		Job3:Cosec Devices			00:00	02:00		
JPCdefaultjob	JPC default job		Job3:Cosec Vyon			00:00	01:00		
JPCdevicebased	JPC user with device based	CO	Job1:Cosec Centre			00:00	01:00		
JPCdevicebased	JPC user with device based		Job2:Cosec Vyon			00:00	01:00		
JPCdevicebased	JPC user with device based		Job3:Cosec Devices			00:00	01:00		
JPCmergejob	JPC merged Job	CV	CS:COSECYON			00:00	00:00		
JPCmergejob	JPC merged Job		Job4:Saratya IP Camera			00:00	00:00		
JPCsitedefaultj	JPC user with sitewise default job		Job4:Saratya IP Camera			00:00	00:00		
JPCsplitNO	JPC split timesheet normal shift	CV	CS:COSECYON			00:00	00:00		
JPCsplitNO	JPC split timesheet normal shift	CO	Job1:Cosec Centre			00:00	00:00		
JPCsplitNO	JPC split timesheet normal shift		Job2:Cosec Vyon			00:00	00:00		
JPCsplitNO	JPC split timesheet normal shift		Job3:Cosec Devices			00:00	00:00		
JPCsplitNS	JPC split timesheet night shift CV	CV	CS:COSECYON			00:00	00:00		
JPCsplitNS	JPC split timesheet night shift CO	CO	Job1:Cosec Centre			00:00	00:00		
JPCsplitNS	JPC split timesheet night shift		Job2:Cosec Vyon			00:00	00:00		
JPCsplitNS	JPC split timesheet night shift		Job4:Saratya IP Camera			00:00	00:00		
OBG2	award a penalty		Job2:Cosec Vyon			00:00	00:00		
award a penalty	award a penalty		Job3:Cosec Devices			00:00	00:00		

## Monthly Job Details

This report displays the selected users' monthly attendance summary against their jobs under the respective projects.

The screenshot shows the 'Monthly Job Details' report configuration window. At the top, there's a title bar with standard window controls. Below it, the 'For Month-Year' is set to 'June' and '2023'. The 'Optional Parameters' section includes 'Group By' set to 'Organization' and 'Organization Name in Header As Per' set to 'User Selection'. The 'User Selection' section shows 'Select Users' set to 'User Wise', with input fields for 'ID' and 'Name'. The 'Generate Report For' dropdown is set to 'All Users'. A 'Generate Report' button is at the bottom.

Configure the following parameters:

- **For Month-Year:** Select the **To** and **From** date for which the report is to be generated.

### Optional Parameters

- **Group By:** Select the desired enterprise group from the drop-down list — Organization, Branch, Department, Section, Category, Grade, Designation, Custom group 1 (Association Maps), Custom Group 2/3.
- **Organization Name in Header As Per:** Select the desired option — **User Selection** or **Customized Selection**.
  - If you select **Customized Selection**, click on **Customize Report Header**.

You can select the desired option from the drop-down list or can also add header according to your choice.

### User Selection

- **Select User:** Select the desired option — **User Wise**, **Group Wise**, or **All**.
  - If you select **User Wise**,

- Click the **User** picklist. The **Picklist for All Users** pop-up appears.

Picklist For All Users

Total Selected: 0 Records

Search  Show Selected

<input type="checkbox"/>	User ID ▲	Name
<input type="checkbox"/>	1	SALIM ANSARI
<input type="checkbox"/>	10	RAJENDRA GOSWAMI
<input type="checkbox"/>	1001	ANKITKUMAR SOHLIYA
<input type="checkbox"/>	1002	MEGHA H SHUKLA
<input type="checkbox"/>	1003	UMESH M TALANPURI
<input type="checkbox"/>	1004	DARSHAK B PATEL
<input type="checkbox"/>	1007	DHAVAL I PATEL
<input type="checkbox"/>	1008	MAYANK K KORAT
<input type="checkbox"/>	1009	DIPTI K RATHWA
<input type="checkbox"/>	1010	RAHUL S SHAH

1 - 10 of 2469 records

« < 1 2 3 ... 247 > »

OK Cancel

- Select the desired check boxes of the desired profiles. Click **OK**.
- The selected profiles appear in the grid.

Select Users

User Wise

User ID  Name

Search

User ID ▲	Name	
1	SALIM ANSARI	
10	RAJENDRA GOSWAMI	

1 - 2 of 2 records

« < 1 2 > »

OK Cancel

- You can also delete the desired profile. To do so, click **Delete** of the respective profile.
- If you select **Group Wise** option,
  - Select the desired enterprise group—Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1/2/3.

For each enterprise group — Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1/2/3, click the corresponding picklist to select the desired option/s.



The selected groups appear in the grid.

Select Users

User Wise


User\*

ID

Name

Search

User ID	Name	
1	SALIM ANSARI	
10	RAJENDRA GOSWAMI	

- You can also delete particular group. To do so, click **Delete**  of the respective group.
- If you select **All** option, then all the profiles will be selected.
- Generate Report For:** Select the desired option— **All Users**, **Active Users** or **Inactive Users**.

Click **Generate Report**.

Sample Report

Monthly Job Details

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62%

Run by: System Admin

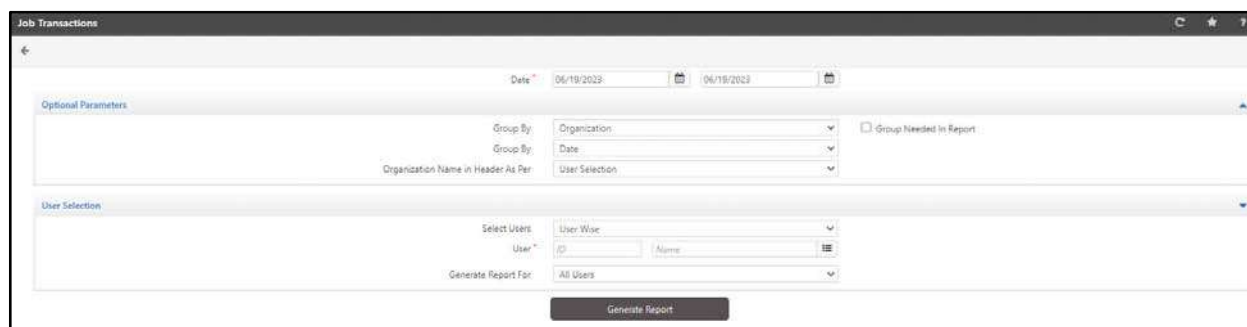
Organization-Wise Monthly Job Details For APRIL-2017

Date: 11/04/2023 23:56

User ID	Name	Job	Project	Job Hours	Out Time	Break Hours	Unassigned Hours
JPC	JPC user	0	0	00:00	00:00	00:00	09:00
<div> <div>24 Mon</div> <div>Total Jobs: 0</div> <div>Total Projects: 0</div> <div>Job Hours: -</div> <div>OutTime Hours: -</div> <div>Break Hours: 00:00</div> <div>Unassigned Hours: 09:00</div> </div>							
Jpcdefaultenter	Job creating user with default job of enterpr	1	0	08:00	00:00	02:00	00:00
<div> <div>24 Mon</div> <div>Total Jobs: 1</div> <div>Total Projects: 0</div> <div>Job Hours: 08:00</div> <div>OutTime Hours: -</div> <div>Break Hours: 02:00</div> <div>Unassigned Hours: -</div> </div>							
JPCdefaultjob	JPC default job	1	0	09:00	00:00	01:00	00:00
<div> <div>24 Mon</div> <div>Total Jobs: 1</div> <div>Total Projects: 0</div> <div>Job Hours: 09:00</div> <div>OutTime Hours: -</div> <div>Break Hours: 01:00</div> <div>Unassigned Hours: -</div> </div>							

## Job Transactions

This report displays the transaction details of selected users against their respective jobs.

The screenshot shows a web application window titled "Job Transactions". At the top, there is a "Date" field with two date pickers, both set to "06/19/2023". Below this is a section titled "Optional Parameters" which contains three dropdown menus: "Group By" (set to "Organization"), "Group By" (set to "Date"), and "Organization Name in Header As Per" (set to "User Selection"). To the right of these dropdowns is a checkbox labeled "Group Needed in Report". Below the "Optional Parameters" section is a section titled "User Selection" which contains a "Select Users" dropdown (set to "User Wise"), a "User" field with a search icon, and a "Generate Report For" dropdown (set to "All Users"). At the bottom center of the "User Selection" section is a "Generate Report" button.

Configure the following parameters:

- **Date:** Select the **To** and **From** date for which the report is to be generated.

### Optional Parameters

- **Group By:** Select the desired enterprise group from the drop-down list — Organization, Branch, Department, Section, Category, Grade, Designation, Custom group 1 (Association Maps), Custom Group 2/3.
- **Group By:** You can sort the Job Transaction report by selecting the desired option— **User** or **Date**.
- **Group Needed in Report:** Select the check box to display the name of the selected group in the generated report.
- **Organization Name in Header As Per:** Select the desired option — **User Selection** or **Customized Selection**.
  - If you select **Customized Selection**, click on **Customize Report Header**.

You can select the desired option from the drop-down list or can also add header according to your choice.

### User Selection

- **Select User:** Select the desired option — **User Wise**, **Group Wise**, or **All**.
  - If you select **User Wise**,

- Click the **User** picklist. The **Picklist for All Users** pop-up appears.

Picklist For All Users

Total Selected: 0 Records

Search:  Show Selected

<input type="checkbox"/>	User ID ▲	Name
<input type="checkbox"/>	1	SALIM ANSARI
<input type="checkbox"/>	10	RAJENDRA GOSWAMI
<input type="checkbox"/>	1001	ANKITKUMAR SOHLIYA
<input type="checkbox"/>	1002	MEGHA H SHUKLA
<input type="checkbox"/>	1003	UMESH M TALANPURI
<input type="checkbox"/>	1004	DARSHAK B PATEL
<input type="checkbox"/>	1007	DHAVAL I PATEL
<input type="checkbox"/>	1008	MAYANK K KORAT
<input type="checkbox"/>	1009	DIPTI K RATHWA
<input type="checkbox"/>	1010	RAHUL S SHAH

1 - 10 of 2469 records

« < 1 2 3 ... 247 > »

OK Cancel

- Select the desired check boxes of the desired profiles. Click **OK**.
- The selected profiles appear in the grid.

Select Users

User Wise

User\* ID Name

Search:

User ID ▲	Name	
1	SALIM ANSARI	
10	RAJENDRA GOSWAMI	

OK Cancel

- You can also delete the desired profile. To do so, click **Delete** of the respective profile.
- If you select **Group Wise** option,
- Select the desired enterprise group—Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1/2/3.

For each enterprise group — Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1/2/3, click the corresponding picklist to select the desired option/s.

The selected groups appear in the grid.


Select Users: Group Wise

Select Group: Organization

Organization \* ID Name ≡

Q

ID	Name	Group ▲	🗑
1	MATRIX COMSEC PVT. LTD.	Organization	🗑
5	TECH SERVICES	Organization	🗑
6	CONSULTANT	Organization	🗑
7	CANTEEN	Organization	🗑
8	APPRENTICE	Organization	🗑

- You can also delete particular group. To do so, click **Delete**  of the respective group.
- If you select **All** option, then all the profiles will be selected.
- **Generate Report For:** Select the desired option— **All Users, Active Users or Inactive Users**.

Click **Generate Report**.

Sample Report

Job Transactions
←

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**DADB** Page 1 of 4  
**Job Transactions From 12/04/2000 To 12/04/2023**

Run by: User ID	System Admin Name	Project	Job	Start	End	Hours	Type	Hours
<b>24/04/2017</b>								
JPC	JPC user			09:00	13:00	UnAssigned		04:00
JPC	JPC user			13:00	13:30	Break		00:30
JPC	JPC user			13:30	18:30	UnAssigned		05:00
<b>Total Hours: Job</b>				00:00				
<b>Un-Assigned</b>				09:00				
<b>Break</b>				00:30				
<b>Out Time</b>				00:00				
Jpcdefaultenter	Job coseting user with default job of enterpr		Job3:Cosac Devices	09:00	15:00	Job		06:00
Jpcdefaultenter	Job coseting user with default job of enterpr		Job3:Cosac Devices	15:00	17:00	Break		02:00
Jpcdefaultenter	Job coseting user with default job of enterpr		Job3:Cosac Devices	17:00	19:00	Job		02:00
<b>Total Hours: Job</b>				08:00				
<b>Un-Assigned</b>				00:00				
<b>Break</b>				02:00				
<b>Out Time</b>				00:00				
JPCdefaultjob	JPC default job		Job2:Cosac Vyom	09:00	15:00	Job		06:00
JPCdefaultjob	JPC default job		Job2:Cosac Vyom	15:00	16:00	Break		01:00
JPCdefaultjob	JPC default job		Job2:Cosac Vyom	16:00	18:00	Job		02:00
JPCdefaultjob	JPC default job		Job2:Cosac Vyom	18:00	19:00	Job		01:00
<b>Total Hours: Job</b>				09:00				
<b>Un-Assigned</b>				00:00				
<b>Break</b>				01:00				
<b>Out Time</b>				00:00				
Jpodevicebaaed	JPC user with device based	CO	Job1:Cosac Centra	09:00	11:00	Job		02:00
Jpodevicebaaed	JPC user with device based		Job2:Cosac Vyom	11:00	13:00	Break		04:00
Jpodevicebaaed	JPC user with device based		Job3:Cosac Devices	15:00	16:00	Job		01:00
Jpodevicebaaed	JPC user with device based		Job3:Cosac Devices	16:00	18:00	Job		02:00
Jpodevicebaaed	JPC user with device based		Job3:Cosac Devices	18:00	19:00	Job		01:00

## User Job Details

This report displays the users' work details based on their enterprise group, project, job, phase and cost center.

The screenshot shows the 'User Job Details' report configuration window. It includes a date range selector at the top with 'To' and 'From' dates set to 06/19/2023. Below this is the 'Optional Parameters' section with three dropdown menus: 'Group By' (set to Organization), 'Group By' (set to Project), and 'Organization Name in Header As Per' (set to User Selection). There is also a checkbox for 'Group Needed in Report'. The 'User Selection' section includes a 'Select Users' dropdown (set to User Wise), a 'User' field with 'ID' and 'Name' sub-fields, and a 'Generate Report For' dropdown (set to All Users). A 'Generate Report' button is located at the bottom center.

Configure the following parameters:

- **Date:** Select the **To** and **From** date for which the report is to be generated.

### Optional Parameters

- **Group By:** Select the desired enterprise group from the drop-down list — Organization, Branch, Department, Section, Category, Grade, Designation, Custom group 1 (Association Maps), Custom Group 2/3.
- **Group Needed in Report:** Select the check box to display the name of the selected group in the generated report.
- **Group By:** Select the desired option from the drop-down list— **Project, Phase, Job, Cost Center, User**.
- **Organization Name in Header As Per:** Select the desired option — **User Selection or Customized Selection**.
  - If you select **Customized Selection**, click on **Customize Report Header**.

You can select the desired option from the drop-down list or can also add header according to your choice.

### User Selection

- **Select User:** Select the desired option — **User Wise, Group Wise, or All**.
  - If you select **User Wise**,

- Click the **User** picklist. The **Picklist for All Users** pop-up appears.

Picklist For All Users

Total Selected: 0 Records

Search  Show Selected

<input type="checkbox"/>	User ID ▲	Name
<input type="checkbox"/>	1	SALIM ANSARI
<input type="checkbox"/>	10	RAJENDRA GOSWAMI
<input type="checkbox"/>	1001	ANKITKUMAR SOHLIYA
<input type="checkbox"/>	1002	MEGHA H SHUKLA
<input type="checkbox"/>	1003	UMESH M TALANPURI
<input type="checkbox"/>	1004	DARSHAK B PATEL
<input type="checkbox"/>	1007	DHAVAL I PATEL
<input type="checkbox"/>	1008	MAYANK K KORAT
<input type="checkbox"/>	1009	DIPTI K RATHWA
<input type="checkbox"/>	1010	RAHUL S SHAH

1 - 10 of 2469 records

« < 1 2 3 ... 247 > »

OK Cancel

- Select the desired check boxes of the desired profiles. Click **OK**.
- The selected profiles appear in the grid.

Select Users

User Wise

User\* ID Name

Search

User ID ▲	Name	
1	SALIM ANSARI	
10	RAJENDRA GOSWAMI	

1 - 2 of 2469 records

- You can also delete the desired profile. To do so, click **Delete** of the respective profile.
- If you select **Group Wise** option,
  - Select the desired enterprise group—Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1/2/3.

For each enterprise group — Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1/2/3, click the corresponding picklist to select the desired option/s.

The selected groups appear in the grid.

Select Users

Group Wise

Select Group

Organization


Organization \*

ID

Name

Search

ID	Name	Group	
1	MATRIX COMSEC PVT. LTD.	Organization	
5	TECH SERVICES	Organization	
6	CONSULTANT	Organization	
7	CANTEEN	Organization	
8	APPRENTICE	Organization	

- You can also delete particular group. To do so, click **Delete**  of the respective group.
- If you select **All** option, then all the profiles will be selected.
- Generate Report For:** Select the desired option— **All Users, Active Users or Inactive Users**.

Click **Generate Report**.

Sample Report

User Job Details

Back

1 of 1

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DADE				Page 1 of 1
User Job Details From 12/04/2017 To 12/04/2023				
Run by: System Admin			Date: 12/04/2023	00:03
Sr No	User ID	Name	Job Hours	
<b>24/04/2017</b>				
CO	COSEC			
1	Jpcdevicebased	JPC user with device based		02:00
2	JPCsplitHO	JPC split timesheet normal shift		01:00
3	JPCsplitNS	JPC split timesheet night shift		02:00
			<b>Total:</b>	<b>05:00</b>
CV	COSEC CENTRA			
1	JPCmergejob	JPC merged Job		08:30
2	JPCsplitHO	JPC split timesheet normal shift		01:30
3	JPCsplitNS	JPC split timesheet night shift		04:00
			<b>Total:</b>	<b>14:00</b>
<b>25/04/2017</b>				
CO	COSEC			
1	JPCsplitHO	JPC split timesheet normal shift		08:00
			<b>Total:</b>	<b>08:00</b>
CV	COSEC CENTRA			
1	JPCmergejob	JPC merged Job		07:07
2	JPCsplitHO	JPC split timesheet normal shift		02:00
			<b>Total:</b>	<b>09:07</b>
CO	COSEC			
1	Awardandpenalty	award n penalty		02:00
			<b>Total:</b>	<b>02:00</b>

## Transaction-Wise Hours Summary

This report displays the user's time sheet transactions on daily basis. Also, the report displays transaction wise overtime or adjustments. It is applicable only if you have selected Daily2 as the Daily Overtime option in the Overtime Policy.

The screenshot shows the 'Transaction-Wise Hours Summary' configuration window. At the top, there are date pickers for 'Date' (06/19/2023) and 'To' (06/19/2023), and a checkbox for 'Show As Per Merged Transactions'. Below this is the 'Optional Parameters' section. It includes a 'Group By' dropdown set to 'Organization', a 'Group Needed in Report' checkbox, a 'New Page For Each User' checkbox, and an 'Include Overtime' section with checkboxes for OT1, OT2, OT3, OT4, and OT5 (all checked). There are also checkboxes for 'Include Adjustment Section' and 'Add Custom Footer'. A text field for 'Organization Name in Header As Per' is followed by a 'User Selection' dropdown. The 'User Selection' section at the bottom has a 'Select Users' dropdown set to 'User Wise', a 'User' field with 'ID' and 'Name' sub-fields, and a 'Generate Report For' dropdown set to 'All Users'. A 'Generate Report' button is at the bottom center.

Configure the following parameters:

- **Date:** Select the **To** and **From** date for which the report is to be generated.
- **Show As Per Merged Transactions:** Select the check box if you wish the details of transactions to be displayed as merged with overtime and adjustments.

### Optional Parameters

- **Group By:** Select the desired enterprise group from the drop-down list — Organization, Branch, Department, Section, Category, Grade, Designation, Custom group 1 (Association Maps), Custom Group 2/3.
- **Group Needed in Report:** Select the check box to display the name of the selected group in the generated report.
- **New Page For Each User:** Select this check box if you wish the report to start from a new page for every user.
- **Include Overtime:** There are five Overtime options available—OT1, OT2, OT3, OT4, and OT5. By default, all the options are selected. Clear the check box to disable.
- **Include Adjustment Section:** Select this check box if you wish to include adjustment section to overtime.
- **Add Custom Footer:** Select this check box if you wish to add a customized footer and specify the desired footer text.
- **Organization Name in Header As Per:** Select the desired option — **User Selection** or **Customized Selection**.
  - If you select **Customized Selection**, click on **Customize Report Header**.



You can select the desired option from the drop-down list or can also add header according to your choice.

## User Selection

- **Select User:** Select the desired option — **User Wise, Group Wise, or All.**
- If you select **User Wise**,
  - Click the **User** picklist. The **Picklist for All Users** pop-up appears.

Picklist For All Users

Total Selected: 0 Records

Search  Show Selected

<input type="checkbox"/>	User ID ▲	Name
<input type="checkbox"/>	1	SALIM ANSARI
<input type="checkbox"/>	10	RAJENDRA GOSWAMI
<input type="checkbox"/>	1001	ANKITKUMAR SOHLIYA
<input type="checkbox"/>	1002	MEGHA H SHUKLA
<input type="checkbox"/>	1003	UMESH M TALANPURI
<input type="checkbox"/>	1004	DARSHAK B PATEL
<input type="checkbox"/>	1007	DHAVAL I PATEL
<input type="checkbox"/>	1008	MAYANK K KORAT
<input type="checkbox"/>	1009	DIPTI K RATHWA
<input type="checkbox"/>	1010	RAHUL S SHAH

1 - 10 of 2469 records

« < 1 2 3 ... 247 > »

OK Cancel

- Select the desired check boxes of the desired profiles. Click **OK**.
- The selected profiles appear in the grid.

Select Users

User Wise

User\* ID Name

Search

User ID ▲	Name	
1	SALIM ANSARI	
10	RAJENDRA GOSWAMI	

- You can also delete the desired profile. To do so, click **Delete** of the respective profile.
- If you select **Group Wise** option,

- Select the desired enterprise group—Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1/2/3.

For each enterprise group — Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1/2/3, click the corresponding picklist to select the desired option/s.

The selected groups appear in the grid.

Select Users

Group Wise

Select Group

Organization


Organization \*

ID

Name

Search

ID	Name	Group	
1	MATRIX COMSEC PVT. LTD.	Organization	
5	TECH SERVICES	Organization	
6	CONSULTANT	Organization	
7	CANTEEN	Organization	
8	APPRENTICE	Organization	

- You can also delete particular group. To do so, click **Delete**  of the respective group.
- If you select **All** option, then all the profiles will be selected.
- **Generate Report For:** Select the desired option— **All Users, Active Users or Inactive Users.**

Click **Generate Report**.

Sample Report

Transaction-Wise Hours Summary

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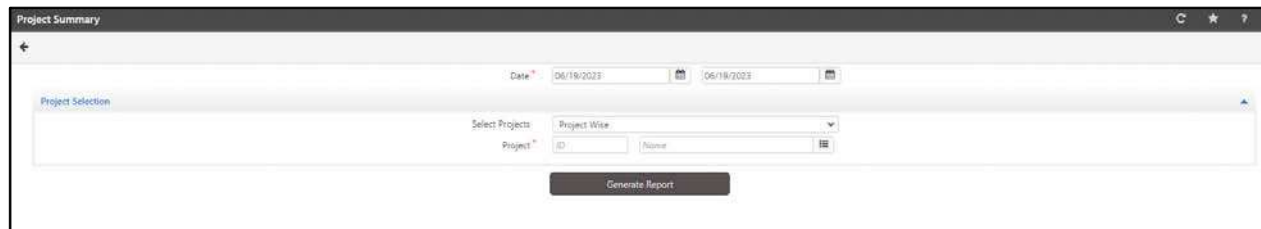
DD

## Work Summary

The Work Summary reports display the detailed job costing summary for selected jobs, phases or projects.

## Project Summary

This report displays the detailed project summary with phase count, user count, job hours and job count details.

The screenshot shows a web application window titled "Project Summary". At the top, there are date pickers for "Date" with values "06/19/2023" and "06/19/2023". Below this is a "Project Selection" section. It contains a "Select Projects" label, a dropdown menu currently set to "Project Wise", and a table with columns "ID" and "Name". At the bottom of the form is a "Generate Report" button.

Configure the following parameters:

- **Date:** Select the **To** and **From** date for which the report is to be generated.

### Project Selection

- **Select Project:** Select the desired option from the drop-down list— **All** or **Project Wise**.
- If you select **All**, then click on **Generate Report**.

The Project Summary report will be generated for all the Projects.

- If you select **Project Wise**,

- Click the **Project** picklist. The **Picklist For Project** pop-up appears.

Picklist For Project

Total Selected: 0 Records

Search  Show Selected

<input type="checkbox"/>	ID ▲	Name
<input type="checkbox"/>	CO	COSEC
<input type="checkbox"/>	CV	COSEC CENTRA

OK Cancel

- Select the desired check boxes of the desired projects. Click **OK**.
- The selected projects will appear in the grid.

Select Projects Project Wise

Project ID Name

Search

ID	Name	Group ▲	
CO	COSEC	Project	
CV	COSEC CENTRA	Project	

- You can also delete the desired project. To do so, click **Delete** of the respective project.

Click **Generate Report**.

## Sample Report

Project Summary

←

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DADB

Project Summary From 12/04/2017 To 12/04/2023

Page 1 of 1

Run by:	System Admin	Date:	12/04/2023	00:08		
Project Code	Name	Date	Phase Count	User Count	Job Hours	Job Count
CO	COSEC	24/04/2017	1	3	05:00	3
		25/04/2017	1	2	10:00	9
		Summary	4	5	15:00	12
CV	COSEC CENTRA	24/04/2017	1	3	14:00	9
		25/04/2017	1	2	09:07	5
		Summary	4	5	23:07	14

## Phase Summary

This report displays the detailed phase summary with project count, user count and job hours details.

Date: 06/19/2023 to 06/19/2023

Phase Selection

Select Phases: Phase Wise

Phase ID: Name:

Generate Report

Configure the following parameters:

- **Date:** Select the **To** and **From** date for which the report is to be generated.

### Phase Selection

- **Select Phase:** Select the desired option from the drop-down list— **All** or **Phase Wise**.
- If you select **All**, then click on **Generate Report**.

The Phase Summary report will be generated for all the phases.

- If you select **Phase Wise**,

- Click the **Phase** picklist. The **Picklist For Phase** pop-up appears.

Picklist For Phase

Total Selected: 0 Records

Search  [Show Selected](#)

<input type="checkbox"/>	ID ▲	Name
<input type="checkbox"/>	1	Feasibility
<input type="checkbox"/>	2	Development
<input type="checkbox"/>	3	Design
<input type="checkbox"/>	4	Test
<input type="checkbox"/>	5	Beta Testing
<input type="checkbox"/>	6	Production release

OK Cancel

- Select the desired check boxes of the desired phases. Click **OK**.
- The selected phases will appear in the grid.

Select Phases Phase Wise

Phase\* ID Name

Search

ID	Name	Group ▲	
1	Feasibility	Phase	
2	Development	Phase	
3	Design	Phase	

- You can delete the desired phase. To do so, click **Delete** of the respective phase.

Click **Generate Report**.

## Sample Report

Phase Summary

←

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DADB

Page 1 of 1

Phase Summary From 12/04/2017 To 12/04/2023

Run by: System Admin

Date: 12/04/2023

00:10

Phase ID	Name	Project Count	User Count	Job Hours
1	Feasibility	<a href="#">1</a>	4	15:00
3	Design	<a href="#">1</a>	3	23:07

## Job Summary

This report displays the detailed job summary with projects, phases, user count and job hours details.



Configure the following parameters:

- **Date:** Select the **To** and **From** date for which the report is to be generated.

### Job Selection

- **Select Jobs:** Select the desired option from the drop-down list— **All** or **Job Wise**.
  - If you select **All**, then click on **Generate Report**.

The Job Summary report will be generated for all the jobs.

- If you select **Job Wise**,

- Click the **Job** picklist. The **Picklist For Job** pop-up appears.

Picklist For Job

Total Selected: 0 Records

Search  [Show Selected](#)

<input type="checkbox"/>	ID ▲	Name
<input type="checkbox"/>	CS	COSECVYOM
<input type="checkbox"/>	Job1	Cosec Centra
<input type="checkbox"/>	Job2	Cosec Vyom
<input type="checkbox"/>	Job3	Cosec Devices
<input type="checkbox"/>	Job4	Satatya IP Camera

OK Cancel

- Select the desired check boxes of the desired jobs. Click **OK**.
- The selected jobs will appear in the grid.

Select Jobs: Job Wise

Job \* ID Name

Search

ID	Name	Group ▲	
CS	COSECVYOM	Job	
Job1	Cosec Centra	Job	
Job2	Cosec Vyom	Job	

- You can delete the desired job. To do so, click **Delete** of the respective job.

Click **Generate Report**.



## Sample Report


Job Summary					
←					
Back					
1 of 1					
117%					
DADB					
Page 1 of 1					
Job Summary From 12/04/2017 To 12/04/2023					
Run by:	System Admin		Date:	12/04/2023	00:12
Job Code	Name	Project Code	Phase Code	User Count	Job Hours
CS	COSECVIOM	CV	3	3	23:07
Job1	Cosec Centra	CO	1	4	15:00
Job2	Cosec Vyom			4	25:30
Job3	Cosec Devices			4	26:00
Job4	Satatya IP Camera			4	16:23
Total:					106:00

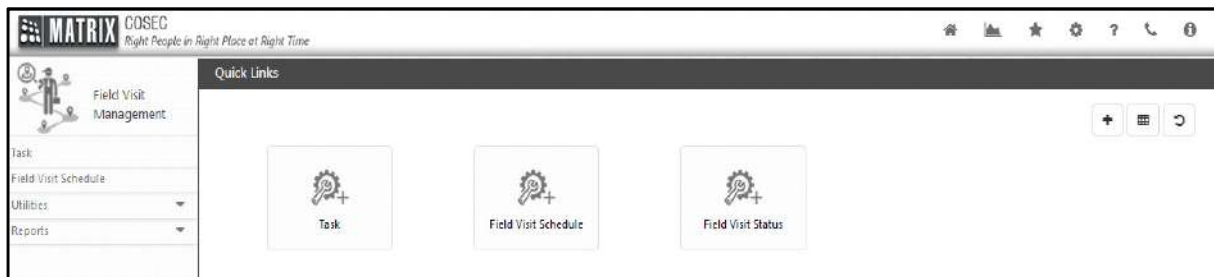


The Field Visit Management (FVM) involves management of user's activities working on field. It allows management of Field Tasks done by users under various Field Schedules. The module shall facilitate viewing of locations and time of visit for the user and ease of punch marking for schedules (as per the rights assigned to them).

With this Module, you can:

- Assign Daily Field Schedules and Add Locations and Tasks to it.
- Monitor User's Field activities across assigned Field Schedule.

To use the Field Visit Management functions, select the **FVM** module  icon. The **FVM** page appears as shown below.



The page displays a menu and **Quick Links** to go to the required page in just one click. Quick Links are shortcuts to reach to a specific page easily. You can configure these options for Quick Links — **Add Quick Link**, **Select Layout** and **Reset to Default**.

#### **Add Quick Links**

- Click **Add** . The **Picklist For Quick Links Pages** pop-up appears.

Picklist For Quick Links Pages

Pages External Links

Total Selected: 0 Records

Search  [Show Selected](#)

☐ Select All

<input type="checkbox"/>	Page
<input type="checkbox"/>	Task
<input type="checkbox"/>	Field Visit Schedule
<input type="checkbox"/>	Field Visit Status
<input type="checkbox"/>	Field Visit Correction
<input type="checkbox"/>	Field Visit Correction Authorization
<input type="checkbox"/>	Schedule Status Summary Report
<input type="checkbox"/>	Field Visit Summary Report

OK Cancel

- You can either select particular page or can select all the pages at once. Maximum **20** quick links can be displayed.
- To select particular pages, select the check boxes of the desired pages.

Picklist For Quick Links Pages

Pages External Links

Total Selected: 1 Records

Search  [Show Selected](#)

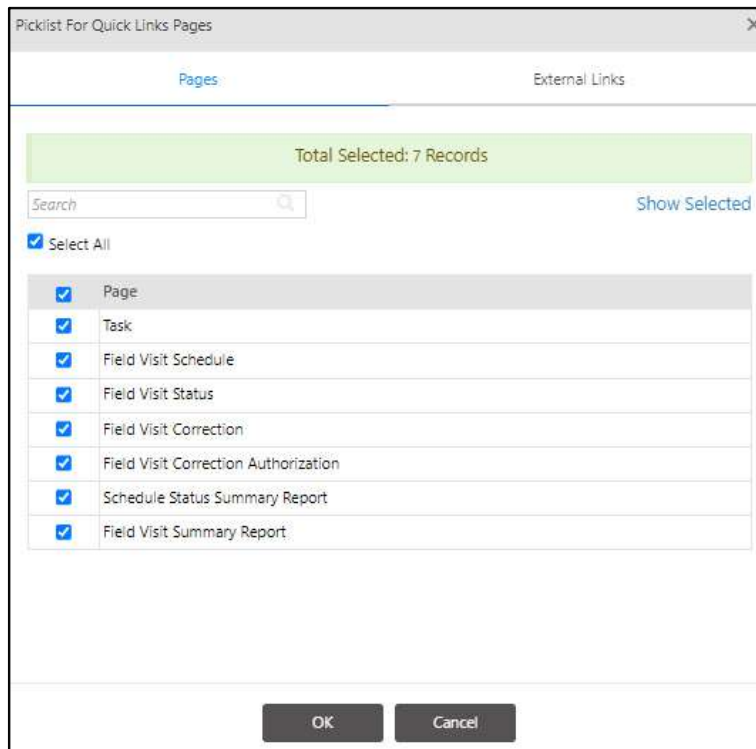
☐ Select All

<input type="checkbox"/>	Page
<input checked="" type="checkbox"/>	Task
<input type="checkbox"/>	Field Visit Schedule
<input type="checkbox"/>	Field Visit Status
<input type="checkbox"/>	Field Visit Correction
<input type="checkbox"/>	Field Visit Correction Authorization
<input type="checkbox"/>	Schedule Status Summary Report
<input type="checkbox"/>	Field Visit Summary Report

OK Cancel


OR

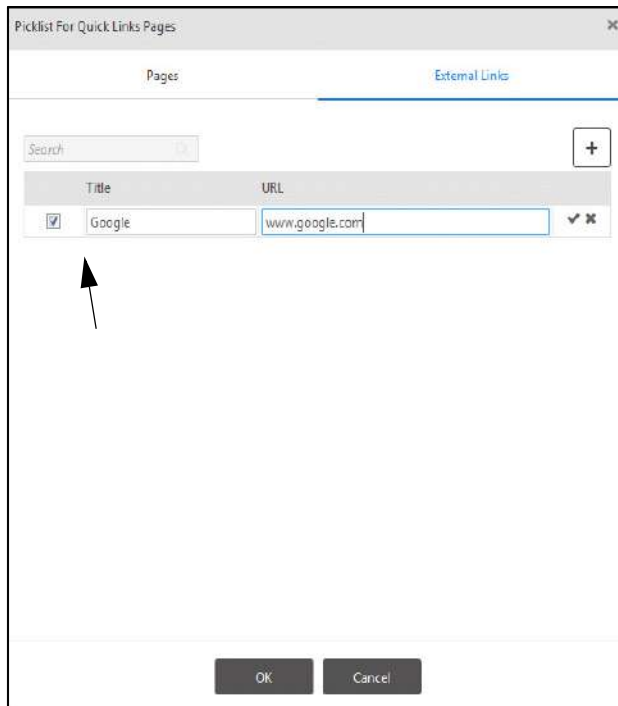
- To select all the pages at once, select the **Select All** check box. All the pages will be selected.





- Click **OK**.
- The Quick Links for selected pages appear on the Quick Link page.

#### Adding External Links,


- Select **External Link** tab and click on  button to add new external link.
- Configure the **Title** and **URL** of the external link under the respective fields. Select the check box to display the Quick Link for the configured link.




- Click **Save**  to save the configuration.
- Once you have saved the configuration, you can edit it. Click **Edit**  to edit the saved configuration.
- Click **OK** to save the configuration of the external link. The Quick Link for the external link appears on the Quick Link page.



## Select Layout

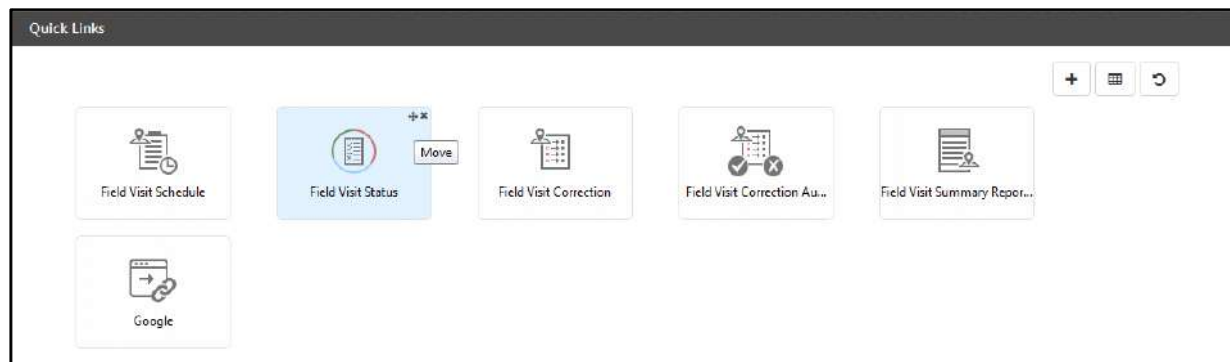
Click **Select Layout**  to select a layout for the quick links. You can select 5x4 or 4x5 layout to manage the quick links.

## Reset To Default

Click **Reset To Default**  to reset the quick links to the default quick links.

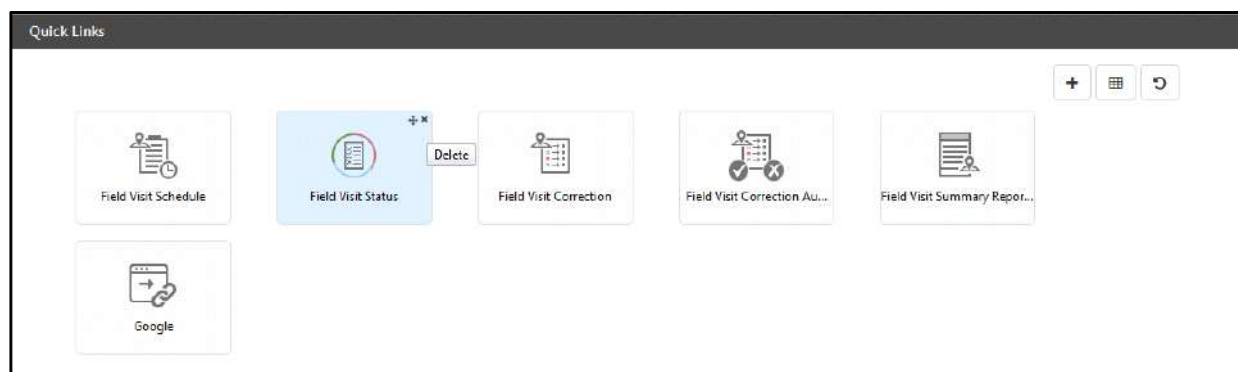
## Move the Link

To move the link from one place to another, hover on the link on top right corner and click **Move** icon as shown below. Then drag the quick link to the desired place. It will be placed at the desired location on the quick links page.



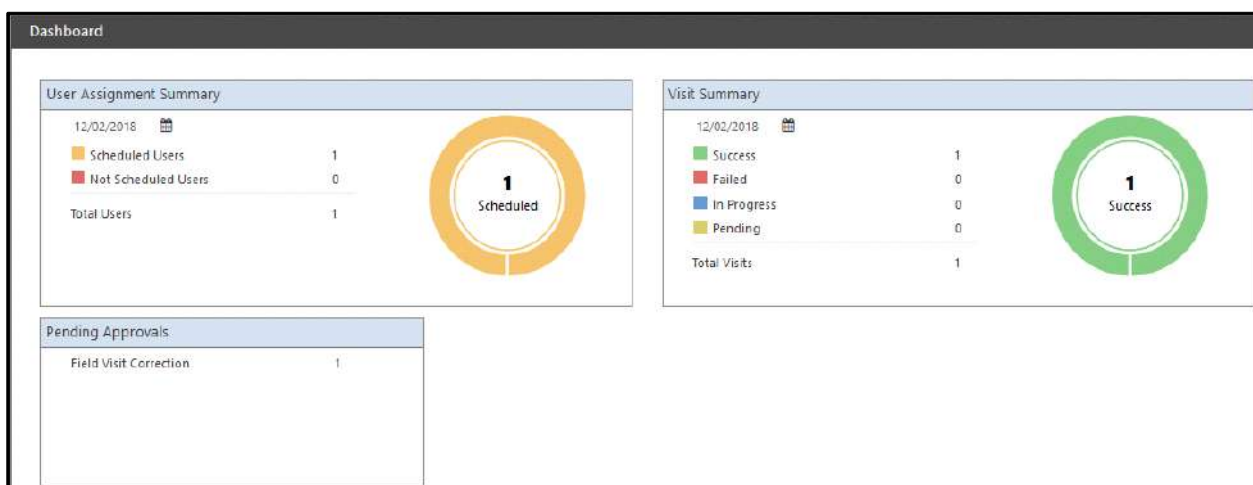
## Delete the Link

To delete a particular link, hover on the link on top right corner and click **Delete** icon as shown below.



## Field Visit Management Dashboard

To view the **FVM** Dashboard, click the Dashboard button  on the **FVM** page and the following screen appears.



The Dashboard displays the basic information on Field Visit Management module relating to the COSEC Software under the following groups:

#### **User Assignment Summary**


- Scheduled Users - Total number of FVM enabled users having schedules assigned to them on the current date.
- Not Scheduled Users - Total number of FVM users without any assigned schedules on the current date.

#### **Visit Summary**

- Success- Shows the count of the FVM users with successfully completed schedules for the current date.
- Failed- Shows the count of the FVM users with the failed schedules for the current date.
- In Progress- Shows the count of the FVM users with the schedules in progress for the current date.
- Pending- Shows the count of the FVM users with pending schedules for the current date.

#### **Pending Approvals**

- Field Visit Correction - Shows the count of pending Field Visit Correction requests between current date and the previous year of all the users with login rights.

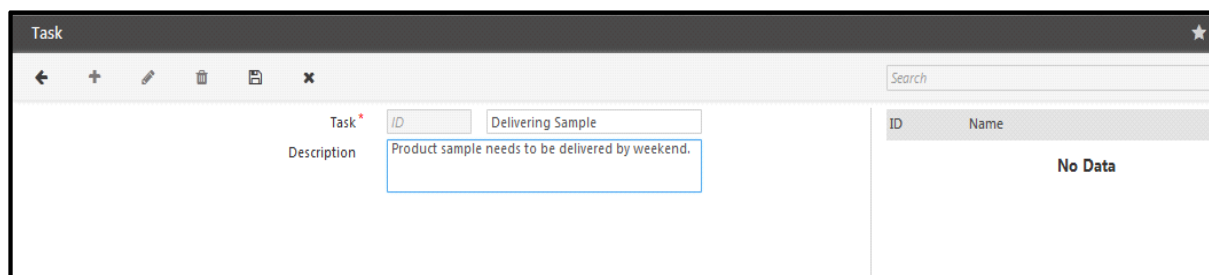
For more information on the above Dashboard options, click the respective information links on the Dashboard. The latest values on Dashboard are updated on clicking the Refresh  button.



# Task

Task page enables to create a list of tasks to be performed by the user. Once the task is created, it is then assigned to the Schedule. Schedule assigned to the user includes various tasks along with the respective locations and time durations.

To create a Task, click **Field Visit Management module >Task**.



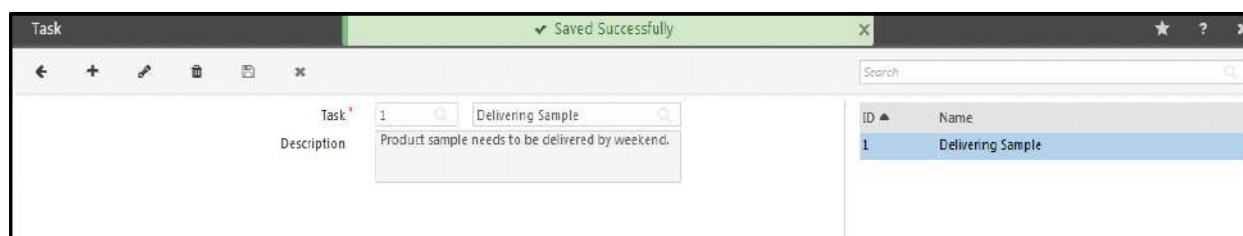
ID	Name
No Data	

Click **New** button to create a new task.

**Task:** Specify the name of a task to be done by the user. The ID will be auto-generated by the system after the task is saved.

**Description:** You can give a description for the task that allows the user to know the activities to be performed in the schedule for the day.

Click on **Save** button. The task will be listed in the grid with auto-generated ID.



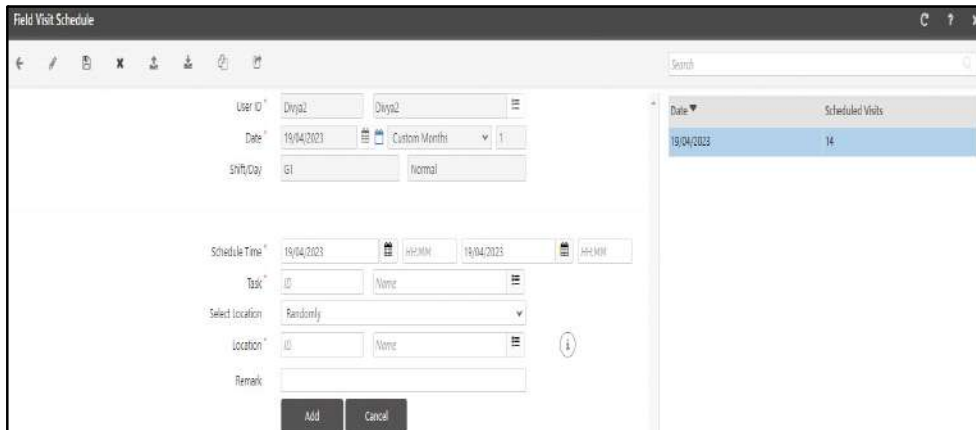
ID	Name
1	Delivering Sample

The tasks which are created here, will be assigned in the **"Field Visit Schedule"** of the user.

# Field Visit Schedule

Field Visit Schedule is the daily activity of assigning field tasks to each user. The users in return are supposed to accomplish the task as per their field schedule.

- Click **Field Visit Management module > Field Visit Schedule**. The Field Visit Schedule page appears as shown below:



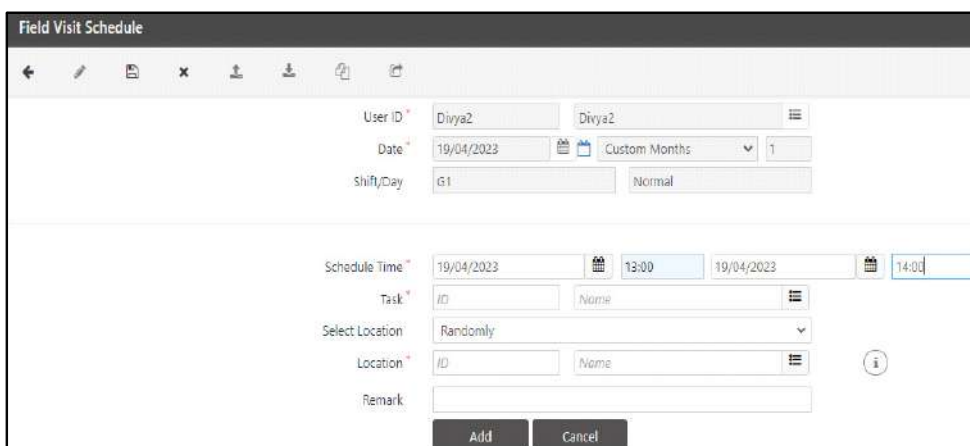
- User:** Select the user from the picklist for whom the field visit is to be scheduled. Only the active users for whom the FVM is enabled from User Configuration, appears here in the picklist.
- Date:** Select the attendance date on which the field schedule is to be configured. The selection can be done in view mode only. You can also customize the selection by selecting the weekly or monthly option from drop down list.



*Before assigning the field schedule, you must process the shift schedule of the FVM user.*

- Shift/Day:** It displays the user's Working Shift on Schedule Date and Assigned Day on Schedule Date. The assigned day can be either Normal, WO, PH or WO/PH.
- Schedule Time:** Select the From- Date, Time and To-Date, Time to assign the schedule. Time is in HH:MM format.

Eg: In below schedule; 13:00 to 14:00 hours is set as schedule time.



- **Task:** Select the task from the picklist which is to be assigned to the selected user.
- **Select Location:** Select the desired option from the drop-down list—**Randomly** or **Location Group**.
  - If you select **Randomly**, click the **Location** picklist. The **Picklist For location** pop-up appears.

Picklist For Location

Total Selected: 0 Records

Search  Show Selected

☐ Select All

<input type="checkbox"/>	Code ▼	Name
<input type="checkbox"/>	RnDGPS	RnD1 GPS
<input type="checkbox"/>	RnD2GP	RnD2 GPS
<input type="checkbox"/>	I9	Location 7
<input type="checkbox"/>	I8	Location 6
<input type="checkbox"/>	I7	Location 5
<input type="checkbox"/>	I6	Location 4
<input type="checkbox"/>	I13	Location 3
<input type="checkbox"/>	I12	Location 2
<input type="checkbox"/>	I11	Factory 2
<input type="checkbox"/>	I10	RnD 2

1 - 10 of 14 records

« < 1 2 > »

OK Cancel

You can select particular locations or can select all the locations at once.

- To select particular location, select the check boxes of the desired locations.

Picklist For Location

Total Selected: 1 Records

Search  Show Selected

☐ Select All

<input type="checkbox"/>	Code ▼	Name
<input checked="" type="checkbox"/>	RnDGPS	RnD1 GPS
<input type="checkbox"/>	RnD2GP	RnD2 GPS
<input type="checkbox"/>	I9	Location 7
<input type="checkbox"/>	I8	Location 6
<input type="checkbox"/>	I7	Location 5
<input type="checkbox"/>	I6	Location 4
<input type="checkbox"/>	I13	Location 3
<input type="checkbox"/>	I12	Location 2
<input type="checkbox"/>	I11	Factory 2
<input type="checkbox"/>	I10	RnD 2

1 - 10 of 14 records

« < 1 2 > »

OK Cancel

OR

- To select all the location at once, select the **Select All** check box. The location on all the pages will be selected.

Picklist For Location

Total Selected: 14 Records

Search  Show Selected


☒ Select All


<input checked="" type="checkbox"/>	Code	Name
<input checked="" type="checkbox"/>	RnDGPS	RnD1 GPS
<input checked="" type="checkbox"/>	RnD2GP	RnD2 GPS
<input checked="" type="checkbox"/>	I9	Location 7
<input checked="" type="checkbox"/>	I8	Location 6
<input checked="" type="checkbox"/>	I7	Location 5
<input checked="" type="checkbox"/>	I6	Location 4
<input checked="" type="checkbox"/>	I13	Location 3
<input checked="" type="checkbox"/>	I12	Location 2
<input checked="" type="checkbox"/>	I11	Factory 2
<input checked="" type="checkbox"/>	I10	RnD 2

1 - 10 of 14 records

« < 1 2 > »

OK Cancel

- Click **OK**. Hover over the **Info**  icon. It displays the number of locations selected.

You can delete the desired location. To do so, click **Delete**  of the respective location.

Field Visit Schedule

User ID \* Divya2 Divya2

Date \* 30/04/2023 1 Week

Shift/Day G1 WO

Schedule Time \* 30/04/2023 HH:MM 30/04/2023 HH:MM

Task \* ID Name






Select Location Randomly

Location \* ID Name

Remark

Add Cancel

Search

Schedule Time	Task	Location/Location Group	
30/04/2023 13:00 - 30/04/2023 17:00	TASK3	RnD 1	
30/04/2023 13:00 - 30/04/2023 17:00	TASK3	Factory	
30/04/2023 13:00 - 30/04/2023 17:00	TASK3	HO GPS	
30/04/2023 13:00 - 30/04/2023 17:00	TASK3	RnD 2	
30/04/2023 13:00 - 30/04/2023 17:00	TASK3	Factory 2	

1 - 5 of 5 records

« < 1 2 > »



Location and Location groups can be configured from Admin module > System Configuration > Location Master & Location Group.



You must ensure that the location being assigned for the task is already assigned to the user from User Configuration > ESS > Settings > Location Assignment.

**Remark:** You can specify the Remark while assigning the schedule.

Click **Add** to add the Field Visit Schedule. The schedule will be listed in the grid on the right.

Click **Save** to save the configured schedule.

If **Blue tooth** based location is selected then it will appear as shown below:

The screenshot shows the 'Field Visit Schedule' form. The 'User' field is set to '2192' and 'chirag Shah'. The 'Date' is '2017/09/01' with a 'Custom Month' dropdown set to '1'. The 'Shift/Day' is 'GS' and 'Normal'. The 'Schedule Time' is from '2017/09/01 18:00' to '2017/09/01 19:00'. The 'Task' is '1' and 'task 1'. The 'Select Location' is 'Randomly'. The 'Location' is 'BLE' and 'BLE'. The 'Remark' field is empty. There are 'Update' and 'Cancel' buttons. Below the form is a search bar and a table with the following data:

Schedule Time	Task	Location/Location Group
2017/09/01 18:00 - 2017/09/01 19:00	task 1	BLE

## Export

You can export the field schedule of selected user.

The screenshot shows the 'Field Visit Schedule' form with the 'Export' button highlighted. The 'Date' is '04/27/2017' with a 'Custom Months' dropdown set to '1'. The 'Shift/Day' is 'GS' and 'Normal'. The 'Schedule Time' is from '04/27/2017 HH:MM' to '04/27/2017 HH:MM'. The 'Task' is 'ID' and 'Name'. The 'Select Location' is 'Randomly'. The 'Location' is 'ID' and 'Name'. The 'Remark' field is empty. There are 'Add' and 'Cancel' buttons. Below the form is a search bar and a table with the following data:

Schedule Time	Task	Location/Location Group
04/27/2017 13:00 - 04/27/2017 14:00	Delivering Sample	Head Office

Select the Field Schedule from the right side which is to be exported.

Then click on **Export** button as shown above. Open or Save the Schedule by specifying the location on your computer.

The exported field schedule is shown as below:

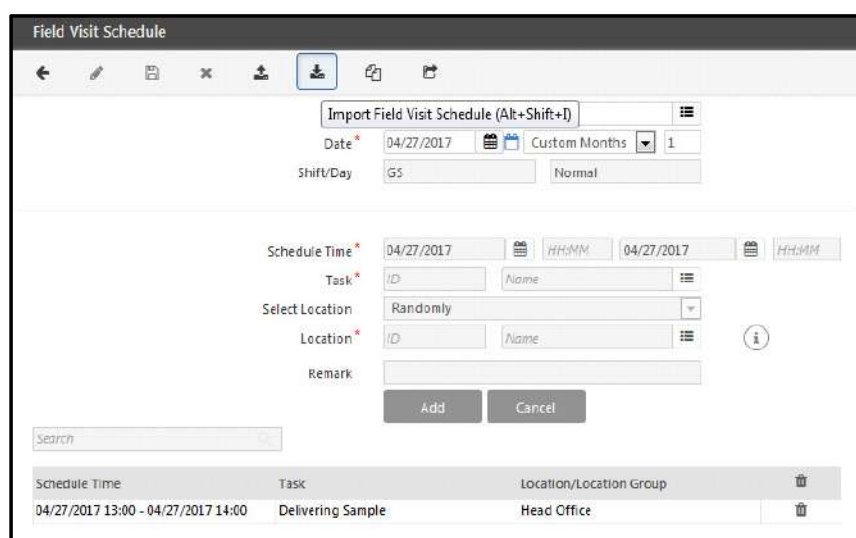


FieldSchedule [Read-Only] [Compatibility Mode] - Microsoft Excel

	A	B	C	D	E	F	G	H
	User ID	Schedule Date	Start Date Time	End Date Time	Task ID	Location/Location	Location Code/Location Group ID	Remark
1	FVM1	04/27/2017	04/27/2017 13:00	04/27/2017 14:00	1	0	HO	Deliver the parcel to HO
2								
3								

## Import

The field schedule maintained in your record can be imported here.



**Field Visit Schedule**

Import Field Visit Schedule (Alt+Shift+I)

Date: 04/27/2017 Custom Months 1

Shift/Day: GS Normal

Schedule Time: 04/27/2017 HH:MM 04/27/2017 HH:MM

Task: ID Name

Select Location: Randomly

Location: ID Name

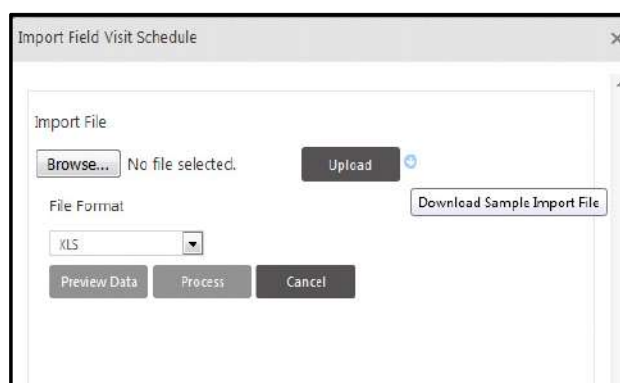
Remark:

Add Cancel

Search

Schedule Time	Task	Location/Location Group
04/27/2017 13:00 - 04/27/2017 14:00	Delivering Sample	Head Office

You can download sample import file and fill the data of multiple user.



**Import Field Visit Schedule**

Import File

Browse... No file selected. Upload

File Format: XLS

Download Sample Import File

Preview Data Process Cancel

Selecting the **File Format** from the options of XLS,CSV, XLSX. Then **Browse** the file. Click **Upload**. The file will be saved.

Import Field Visit Schedule

File saved successfu... X

Import File

Browse...

ImportData.csv

Upload

File Format

CSV

Preview Data

Process

Cancel

To view the preview of data click **Preview Data**. The data will be shown as below. Now you can click **Process** to import the file. The success of import will be shown in the success column.

Import Field Visit Schedule

X

Import File

Browse...

ImportData.csv

Upload

File Format

CSV

Preview Data

Process

Cancel

Process Error Description

▼

Search

User ID	Schedule Date	Start Date Time	End Date Time	Task ID	Location/Location Group Filter	Location Code/Location Group ID	Remark
FVMI	10/3/2016	4/5/2017 9:00	4/5/2017 11:00	1	0	HO	Deliver to HO
U1	10/3/2016	10/3/2016 13:00	10/3/2016 19:00	2	1	1	
U2	10/3/2016	10/3/2016 9:00	10/3/2016 13:00	1	0	LOC2	


## Copy Field Schedule

You can copy/transfer field schedule from one user to multiple users using Copy Field Schedule.

The screenshot shows the 'Field Visit Schedule' window with a 'Copy Field Visit Schedule (Alt+ Shift+W)' dialog box open. The dialog includes fields for User, Date (05/04/2017), Shift/Day (GS), Schedule Time (05/04/2017 09:00 - 05/04/2017 10:00), Task (Pickup Enclosure), and Location (Head Office). A table on the right shows scheduled visits for various dates. The main window also displays a table of scheduled visits.

Date	Scheduled Visits
05/05/2017	1
05/04/2017	1
05/03/2017	1
04/27/2017	1

Schedule Time	Task	Location/Location Group
05/04/2017 09:00 - 05/04/2017 10:00	Pickup Enclosure	Head Office

- Select the Field Visit Schedule to be copied.
- Click **Copy** . The **Copy Task** pop-up appears. The name of the pop-up varies according to the User ID of the Field Visit Schedule.

The screenshot shows the 'Copy Task of 1' window. It includes a search bar, a date field (15/06/2023), and a table of tasks. Below the table is a 'Copy To' section with fields for Date, User ID, and a table for selecting the target user and date range. A 'Process' button is at the bottom.

Schedule Time	Task	Location/Location Group	Remark
15/06/2023 18:00 - 15/06/2023 20:00	TASK 1	LOCATION 1	
16/06/2023 18:00 - 16/06/2023 20:00	TASK 2	LOCATION 1	

User ID	Name	From Date	To Date
No Data			

- You can either select particular schedules or can select all the schedules at once.
- To select particular schedules, select the check boxes of the desired schedules.



Copy Task of 1

Date: 15/06/2023

Search

☐ Select All

<input type="checkbox"/>	Schedule Time	Task	Location/Location Group	Remark
<input checked="" type="checkbox"/>	15/06/2023 18:00 - 15/06/2023 20:00	TASK 1	LOCATION 1	
<input type="checkbox"/>	16/06/2023 18:00 - 16/06/2023 20:00	TASK 2	LOCATION 1	

**Copy To**

Date: 16/06/2023 16/06/2023

User ID: ID Name

Search

User ID	Name	From Date	To Date
No Data			

Process

OR

- To select all the schedules at once, select the **Select All** check box. All the schedules will be selected.

Copy Task of 1

Date: 15/06/2023

Search

☒ Select All

<input checked="" type="checkbox"/>	Schedule Time	Task	Location/Location Group	Remark
<input checked="" type="checkbox"/>	15/06/2023 18:00 - 15/06/2023 20:00	TASK 1	LOCATION 1	
<input checked="" type="checkbox"/>	16/06/2023 18:00 - 16/06/2023 20:00	TASK 2	LOCATION 1	

**Copy To**

Date: 16/06/2023 16/06/2023

User ID: ID Name

Search

User ID	Name	From Date	To Date
No Data			

Process

- In **Copy To**, select the **Date** and **User** to whom the schedule is to be copied.

Copy Task of 1

Date: 15/06/2023

Search

☒ Select All

<input checked="" type="checkbox"/>	Schedule Time	Task	Location/Location Group	Remark
<input checked="" type="checkbox"/>	15/06/2023 18:00 - 15/06/2023 20:00	TASK 1	LOCATION 1	
<input checked="" type="checkbox"/>	16/06/2023 18:00 - 16/06/2023 20:00	TASK 2	LOCATION 1	

**Copy To**

Date: 16/06/2023 16/06/2023

User ID\* ID Name

Search

User ID	Name	From Date	To Date
2	User 2	16/06/2023	16/06/2023

Process

- Click **Process** to copy the schedule.

Now click on **Process** button to initiate the copy process.

Copy Task of 1

✓ Copied Successfully

Date: 15/06/2023

Search

☒ Select All

<input checked="" type="checkbox"/>	Schedule Time	Task	Location/Location Group	Remark
<input checked="" type="checkbox"/>	15/06/2023 18:00 - 15/06/2023 20:00	TASK 1	LOCATION 1	
<input checked="" type="checkbox"/>	16/06/2023 18:00 - 16/06/2023 20:00	TASK 2	LOCATION 1	

**Copy To**

Date: 16/06/2023 16/06/2023

User ID\* ID Name

Search

User ID	Name	From Date	To Date
2	User 2	16/06/2023	16/06/2023

Process

## Reassign Field Visit Schedule

You can reassign field schedule from one user to another user using Reassign Field Schedule.

**Field Visit Schedule**

User: FVM1 **Reassign Field Visit Schedule (Alt+Shift+M)**

Date: 05/04/2017 Custom Months 1

Shift/Day: GS Normal

Schedule Time: 05/04/2017 HH:MM 05/04/2017 HH:MM

Task: ID Name

Select Location: Randomly

Location: ID Name

Remark:

Add Cancel

Schedule Time	Task	Location/Location Group
05/04/2017 09:00 - 05/04/2017 10:00	Pickup Enclosure	Head Office

Date	Scheduled Visits
05/05/2017	1
05/04/2017	1
05/03/2017	1
04/27/2017	1

- Select the Field Visit Schedule to be reassigned.
- Click **Reassign Field Visit Schedule** . The **Reassign Task** pop-up appears. The name of the pop-up varies according to the User ID of the Field Visit Schedule.

**Reassign Task of 1**

Date: 15/06/2023

Search

☐ Select All

<input type="checkbox"/>	Schedule Time	Task	Location/Location Group	Remark
<input type="checkbox"/>	15/06/2023 18:00 - 15/06/2023 20:00	TASK 1	LOCATION 1	
<input type="checkbox"/>	16/06/2023 18:00 - 16/06/2023 19:00	TASK 2	LOCATION 2	
<input type="checkbox"/>	16/06/2023 18:00 - 16/06/2023 20:00	TASK 2	LOCATION 1	

**Assign To**

Date: 16/06/2023

User ID: ID Name

Process

- You can either select particular schedules or can select all the schedules at once.
- To select particular schedules, select the check boxes of the desired schedules.

Reassign Task of 1

Date: 15/06/2023

Search

☐ Select All

<input type="checkbox"/>	Schedule Time ▲	Task	Location/Location Group	Remark
<input checked="" type="checkbox"/>	15/06/2023 18:00 - 15/06/2023 20:00	TASK 1	LOCATION 1	
<input type="checkbox"/>	16/06/2023 18:00 - 16/06/2023 19:00	TASK 2	LOCATION 2	
<input type="checkbox"/>	16/06/2023 18:00 - 16/06/2023 20:00	TASK 2	LOCATION 1	

**Assign To**

Date: 16/06/2023

User ID:  ID  Name

**Process**

OR

- To select all the schedules at once, select the **Select All** check box. All the schedules will be selected.

Reassign Task of 1

Date: 15/06/2023

Search

☒ Select All

<input checked="" type="checkbox"/>	Schedule Time ▲	Task	Location/Location Group	Remark
<input checked="" type="checkbox"/>	15/06/2023 18:00 - 15/06/2023 20:00	TASK 1	LOCATION 1	
<input checked="" type="checkbox"/>	16/06/2023 18:00 - 16/06/2023 19:00	TASK 2	LOCATION 2	
<input checked="" type="checkbox"/>	16/06/2023 18:00 - 16/06/2023 20:00	TASK 2	LOCATION 1	

**Assign To**

Date: 16/06/2023

User ID:  ID  Name

**Process**

- In **Assign To**, select the **Date** and **User** to whom the schedule is to be copied.

Reassign Task of 1

Date: 15/06/2023

Search

☐ Select All

<input type="checkbox"/>	Schedule Time	Task	Location/Location Group	Remark
<input checked="" type="checkbox"/>	15/06/2023 18:00 - 15/06/2023 20:00	TASK 1	LOCATION 1	
<input type="checkbox"/>	16/06/2023 18:00 - 16/06/2023 19:00	TASK 2	LOCATION 2	
<input type="checkbox"/>	16/06/2023 18:00 - 16/06/2023 20:00	TASK 2	LOCATION 1	

**Assign To**

Date: 16/06/2023

User ID: 1 User 1

Process

- Click **Process** to assign the schedule.

Reassign Task of 1

✓ Reassigned Successfully

Date: 15/06/2023

Search

☒ Select All

<input checked="" type="checkbox"/>	Schedule Time	Task	Location/Location Group	Remark
<input checked="" type="checkbox"/>	16/06/2023 18:00 - 16/06/2023 19:00	TASK 2	LOCATION 2	
<input checked="" type="checkbox"/>	16/06/2023 18:00 - 16/06/2023 20:00	TASK 2	LOCATION 1	

**Assign To**

Date: 16/06/2023

User ID: 1 User 1

Process



Whenever any change is made in Field Schedule records then Tx\_Schedule status, 1st IN and Last OUT punch should be reset to NULL. They will be updated once user executes daily process for the date after making changes in field schedule.

# Field Visit Status

The users are supposed to accomplish the task as per their field schedule on daily basis. According to the punches from field, user's field records are considered as completed or not completed.

You can use COSEC APTA, ESS Module or Device for marking punch.

Field Visit Status page enables admin or reporting in-charge to view field status of selected user in a calendar view.

Click **Field Visit Management module > Utilities> Field Visit Status**. The Field Visit Status page appears as shown below:

The screenshot shows the 'Field Visit Status' page. On the left is a sidebar with 'Field Visit Management' and a 'Task' section containing 'Field Visit Schedule', 'Utilities' (with 'Field Visit Status' selected), 'Field Visit Correction', 'Field Visit Correction Authorization', and 'Reports'. The main area has a header 'Field Visit Status' with a search icon. Below the header are fields for 'User' (with a dropdown showing 'Jinu') and 'Attendance Period' (with dropdowns for 'May' and '2017'). The main content is a calendar grid with columns for days of the week (MON to SUN) and rows for dates (1 to 31). The calendar is currently empty.

Select the **User** from the picklist whose field visit status is to be viewed.

Select the **Attendance period** as Month and Year for which field visit status is to be viewed.

You can select the option to view as **Schedule Status** or **Visited Location**.

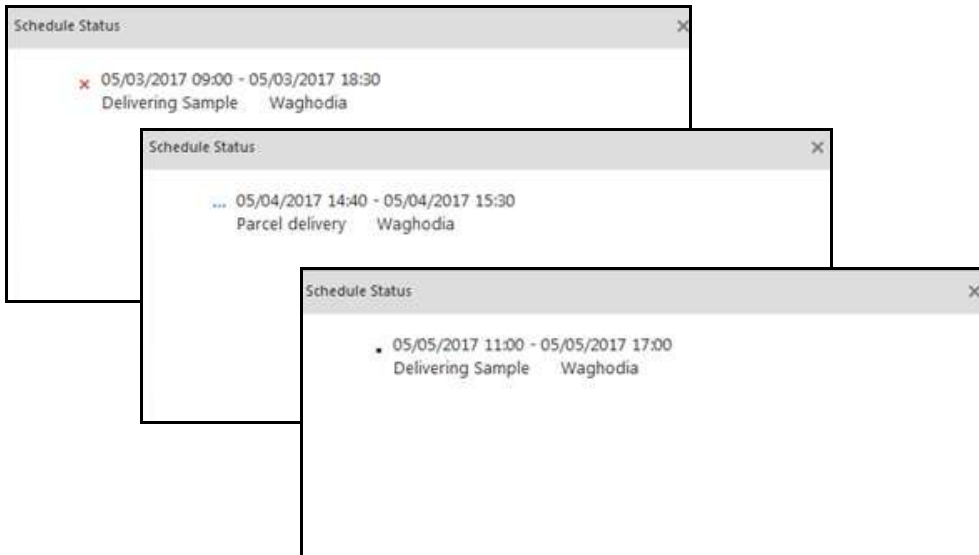
The screenshot shows the 'Field Visit Status' page with the same sidebar and header as the previous image. The 'Attendance Period' is set to 'May' and '2017'. The calendar grid shows dates from 1 to 31. A 'Schedule Status' dropdown is visible in the top right corner of the calendar area. The calendar displays task status indicators: 'G5' for completed tasks, 'G1' for not completed tasks, 'PR-PROG' for on-going tasks, and 'WD' for future tasks. An arrow points to the 'Future task' label, which is positioned over the 'G5' indicator for the date 1st of May.

**Schedule Status:** The status of completed, not completed, on-going and future task is shown in the calendar.

**Visited Location:** The visited location count will be shown for the respective date in the calendar.

- The green circular ring shows that task is completed.
- Partial green and remaining red shows partially completed task.
- Full red shows incomplete task.
- A number in the grid of future date shows future days task count.

Clicking on the window will show the task details. Tick displays completed task and Cross displays incomplete task. On going task are displayed by dotted. 2/3 shows that 2 task out of 3 are completed.



Once the user completes the field visit schedule and punches into COSEC APTA from the scheduled location then the field visit status will be marked as green as shown below.

User: VP Vivek		Attendance Period: May 2017		Schedule Status: [Settings] [Dropdown]		
MON	TUE	WED	THU	FRI	SAT	SUN
	2	3	4	5	6	7
	GS	GS	PR-PRGS	PR-PRGS	GS	WO
	9	10	11	12	13	14

If the user has visited the location, then the number will be shown on that date. In below figure 1 indicates that user Vivek has visited 1 location on 4th May 2017.

User: VP Vivek		Attendance Period: May 2017		Visited Locations: [Settings] [Dropdown]		
	WED	THU	FRI	SAT		
	3	4	5	6	7	
	GS	PR-PRGS	PR-PRGS	GS	WO	
	10	11	12	13	14	



You can use COSEC API to mark the user punches from the desired location.

The schedule based on **Bluetooth based location** is shown as below.

MON	TUE	WED	THU	FRI	SAT	SUN
				1 GS 1/1	2	3
4 GS	5 WO	6 GS	7 GS	8 GS	9 GS	10 WO
11 IWO	12 GS	13 WO	14 GS	15 GS	16 GS	17 GS

To know the status of the schedule click on the circle shown above and the schedule status appears as shown below.

Schedule Status		
<b>User:</b> 2192	<b>Date:</b> 2017/09/01	<b>Shift:</b> GS
<p>✓ 2017/09/01 18:00 - 2017/09/01 19:00 - task 1 - BLE</p>		



# Field Visit Correction

The punches marked from COSEC APTA may require correction in some cases.

Suppose If user was scheduled for some task at some location and couldn't go because of any reason. So changing punch date-time and adding or modifying its comment would be possible from the Field Visit Correction page. Also the Location can be added or updated from this page.

The Field Visit Correction can be made by:

- System Account User
- On Behalf System Account User
- Using the ESS Self Service Module (For more details refer COSEC Employee Self Service User Manual)

COSEC Web enables all System Account users with appropriate page rights to make Field Visit Correction using the Field Visit Management module. All applications made by the System Account user are pre-approved by default.

COSEC Web also enables all On Behalf System Account User with appropriate page rights to make Field Visit Correction using the Field Visit Management module. All applications made by the On Behalf System Account User are pre-approved by default. For creating and assigning the roles and rights to the On Behalf System Account User. Refer to ["On Behalf System Account User"](#).

Click **Field Visit Management module > Utilities > Field Visit Correction**. The Field Visit Correction page appears as shown below:

**User:** Select the User from the picklist for whom field visit correction is to be applied.

**Attendance Date:** Select the **Date** from the grid for which attendance correction is to be done or select the date from the calendar button. You can also select week or month filter to view the punches accordingly.

You can edit the punches by clicking on **Edit** button in the attendance details row where the correction is to be done.

Click **Event** if you desire viewing events of the respective user.

To add the new punches click **Add** button.

Enter the **Time** and select the **Location** from the pick-list. The Bluetooth based location is selected in following example.

You can mention the **comment**. Then click on OK and Save to save the correction.



If Map is not loaded; check the network connection of your PC or check the value of Google API Key from Admin Module > System Configuration > Global Policy > Basic tab.

The Field Visit Correction application will be authorized by the Reporting In-charge or Administrator.

See [“Field Visit Correction Authorization” on page 2994.](#)

The Schedule Status will show **Success** when the scheduled task is complete.

Date	Shift	1st Half	2nd Half	Work Hours	Schedule Status
2016/10/18	GS				
2016/10/17	GS				
2016/10/16	GS	AB	AB		
2016/10/15	GS	IN			Success
2016/10/14	GS	AB	AB		Success
2016/10/13	GS	IN			Success
2016/10/12	GS	AB	AB		
2016/10/11	GS	AB	AB		
2016/10/10	GS	AB	AB		

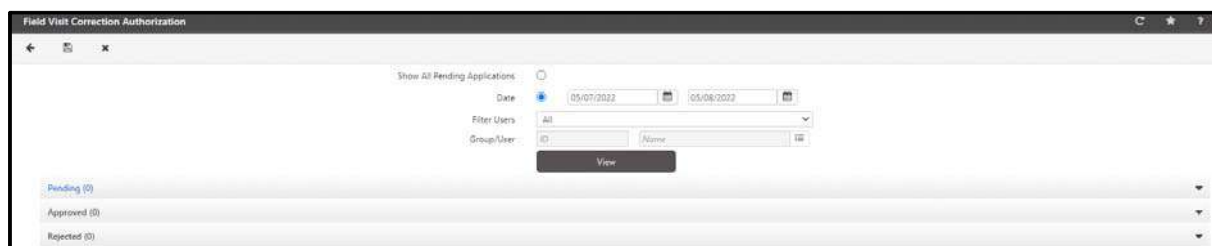
The FVM user punches within shift can also be viewed from Daily Attendance View of T&A module.

# Field Visit Correction Authorization

ESS user have provision to add/edit punch date, time, IO type, location and add comment for each of the punches. Such corrections are required to be authorized. So the administrator can approve/reject field visit correction applications.

The authorization is dependent on the number of Reporting In-charge in the Reporting Group, the Authorization Mode as well as the Approval Policy assigned by the system administrator. For details refer to [“Reporting In-Charge”](#), [“Approval Policy”](#) and [“Configuring Users”](#).

To authorize field visit correction application, click **Field Visit Management > Utilities > Field Visit Correction Authorization**. The Field Visit Correction Authorization page appears as shown below:



You can either:

- view all the pending Field Visit Correction Authorizations
- set the filters — Date, Filter Users — to view the desired applications

## All Pending Applications

To view only Pending Applications,

- **Show All Pending Applications:** Select this option to enable the pending application filter.
- Click the **Pending** collapsible panel. All the applications in pending state appear.

To approve the application, select the **Approve** check box of the desired entry.

To reject the application, select the **Reject** check box of the desired entry.

To know more, refer to [“Pending Application”](#).



*The population on this page depends on the server's database. It might take time to load all pending applications.*

## Applications according to Set Filters

To Set the Filters,

- **Date:** Select this option to enable the date filter. Select the date range for which the Field Visit Correction Applications are to be viewed.
- **Filter Users:** You can filter records according to the desired Enterprise Group, All or for an Individual.

Select **All**, to view authorization status of the applications of all the active users on the system.

Select **Individual**, to view authorization status of the applications of a single user. Click the picklist to select the desired User ID/Name.

Select the desired Enterprise Group — Organization, Branch, Department, Section, Category, Grade, Designation, Custom Group1/2/3 and then click the picklist to select the desired group's ID/Name, to view authorization status of these applications.

Click on **View** to view the Pending, Approved and Rejected applications.

## Pending Application

Click the **Pending** collapsible panel. The **Pending** section displays all the applications that yet to be authorized by the RIC or the System Administrator.

The following screen displays the **Pending** section.




User ID ▲	Name	Application Date	Attendance Date	Reason	Approve	Reject	Remark	Details
U1	User1	22/06/2021	21/06/2021	Applied Field Visit Correction	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>	

When any application is in the Pending state it can be authorized by the Admin or RIC.

- To approve/reject applications selectively, click the respective application check box against the user.
- To approve/reject all the applications simultaneously, click the Approve /Reject check box in the header column.

Once the Admin approves/ rejects the application, the record will be moved from the **Pending** section to the **Approved/ Rejected** section respectively.

The default **Remark** for the Approved and Rejected application will appear in the respective fields. You can enter any customized Remark while authorizing the application.

To view the details of the application, click **Details** . The **All Field Punches** window appears as shown below.

The screenshot shows a window titled "All Field Punches" with a close button (X) in the top right corner. The window contains the following fields and sections:

- User:** Two input fields containing "U1" and "User1".
- Attendance Date:** A date picker showing "21/06/2021".
- Shift/Day:** Two dropdown menus. The first shows "GS" and the second shows "Normal".
- Attendance Status:** Two dropdown menus. The first shows "TO" and the second shows "TO".
- Attendance Values:** A dropdown menu showing "On Application".
- Schedule Status:** An empty dropdown menu.
- Reason:** A text input field containing "Applied Field Visit Correction".
- Search:** A search bar with a magnifying glass icon.
- Table:** A table with 5 columns: Date, Time, IO Type, Location, and Comment. It contains one row with the following data:
 

Date	Time	IO Type	Location	Comment
11/06/2021	11:14	In		
- Approval Details:** A section header with a clock icon.
- Table:** A table with 3 columns: Incharge, Status, and Remark. It contains one row with the following data:
 

Incharge	Status	Remark
SA - System Admin		

**All Field Punches** window displays the attendance details.

**Attendance Values** has the following options:

- **On Application:** The transaction values shown are the values at the time of the application being done.
- **Applied:** The transaction values after the correction is being made.
- **Current:** The current transaction values are same as On Application values.

It also displays the status of the user's application under **Approval Details**. The application's status is displayed in the **Status** column.

System can auto approve / reject an application if the Reporting In-charge or SA fails to authorize it as per the Approval Policy assigned to the Reporting Groups. To know more about the Approval Policy, refer "[Approval Policy](#)".

**Remark** displays the comments provided by the Admin/ RIC/ System.

Click **Save** to save the authorization.

## Approved Applications

Click the **Approved** collapsible panel. The **Approved** section displays all the applications that have been approved by the RIC or the System Administrator.

The following screen displays the **Approved** section with approved applications:

Approved (5)								
Search								
User ID ▲	Name	Application Date	Attendance Date	Reason	Approve <input checked="" type="checkbox"/>	Reject <input type="checkbox"/>	Remark	Details
U1	User1	22/06/2021	21/06/2021	Applied Field Visit Correction	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Approved Field Visit Correction	
U1	User1	11/06/2021	10/06/2021	Applied Field Visit Correction	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Approved Field Visit Correction RG1	
U4	User4	10/06/2021	02/06/2021	Applied Field Visit Correction	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Approved Field Visit Correction RG2	
U4	User4	10/06/2021	07/06/2021	Applied Field Visit Correction	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Approved Field Visit Correction RG2	
U5	User5	14/06/2021	11/06/2021	Applied Field Visit Correction	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Approved Field Visit Correction SA	

Click the **Details** icon to view the attendance details of the corresponding user.

**All Field Punches** window appears as shown below:

All Field Punches

User

U5

User5

Attendance Date

11/06/2021

Shift/Day

GS

Normal

Attendance Status

AB

AB

Attendance Values

On Application

Schedule Status

Reason

Applied Field Visit Correction

Search

Date	Time	IO Type	Location	Comment
11/06/2021	11:14	In		

Approval Details

Incharge	Status	Remark
SA - System Admin	(14/06/2021 11:26)	Approved Field Visit Correction SA

**All Field Punches** window displays the attendance details.

**Attendance Values** has the following options:

- **On Application:** The transaction values shown are the values at the time of the application being done.
- **Applied:** The transaction values after the correction is being made.

- **Current:** The current transaction values are same as On Application values.

It also displays the status of the user's application under **Approval Details**. The application's status is displayed in the **Status** column.

System can auto approve / reject an application if the Reporting In-charge or SA fails to authorize it as per the Approval Policy assigned to the Reporting Groups. To know more about the Approval Policy, refer "[Approval Policy](#)".

**Remark** displays the comments provided by the Admin/ RIC/ System.

Click **Save** to save the authorization.

## Rejected Applications

Click the **Rejected** collapsible panel. The **Rejected** section displays all the applications that have been rejected by the RIC or the System Administrator.

The following screen displays the **Rejected** section with rejected applications:

Rejected (2)								
Search								
User ID ▲	Name	Application Date	Attendance Date	Reason	Approve	Reject	Remark	Details
U1	User1	22/06/2021	21/06/2021	Applied Field Visit Correction	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Rejected Field Visit Correction	
U4	User4	10/06/2021	10/06/2021	Applied Field Visit Correction	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Rejected Field Visit Correction RG1	

Click the **Details**  icon to view the attendance details of the corresponding user.

**All Field Punches** window appears as shown below:



The screenshot shows the 'All Field Punches' window. It contains a form with the following fields:

- User: U1 (selected), User1 (available)
- Attendance Date: 21/06/2021
- Shift/Day: GS (selected), Normal (available)
- Attendance Status: TO (selected), TO (available)
- Attendance Values: On Application (selected)
- Schedule Status: (empty)
- Reason: Applied Field Visit Correction

Below the form is a search bar and a table with the following data:

Date	Time	IO Type	Location	Comment
21/06/2021	09:00	In	HO	

Below the table is the 'Approval Details' section, which includes a table with the following data:

Incharge	Status	Remark
SA - System Admin	⊗ (22/06/2021 10:58)	Rejected Field Visit Correction

**All Field Punches** window displays the attendance details.

**Attendance Values** has the following options:

- **On Application:** The transaction values shown are the values at the time of the application being done.
- **Applied:** The transaction values after the correction is being made.
- **Current:** The current transaction values are same as On Application values.

It also displays the status of the user's application under **Approval Details**. The application's status is displayed in the **Status** column.

System can auto approve / reject an application if the Reporting In-charge or SA fails to authorize it as per the Approval Policy assigned to the Reporting Groups. To know more about the Approval Policy, refer "[Approval Policy](#)".

**Remarks** displays the comments provided by the Admin / RIC / System.

Click **Save** button to save the changes.

# Field Visit Management Reports

These reports can be obtained using the **Reports** section under the **Field Visit Management** add-on module. The Reports can be categorized as follows:

[“Schedule Status Summary”](#)

[“Field Visit Summary Report”](#)

## Schedule Status Summary

This report displays the status of field visit schedules of the selected users.



*Daily Attendance Process must be done to get correct information in the report.*

Configure the following parameters:

- **Date:** Select the **To** and **From** date for which the report is to be generated.

### Optional Parameters

- **Group By:** Select the desired option — **User** or **Device**.
- **Organization Name in Header As Per:** Select the desired option — **User Selection** or **Customized Selection**.
  - If you select **Customized Selection**, click **Customize Report Header**.

You can select the desired option from the drop-down list or can also add a new header as per your choice.

### User Selection

- **Select User:** Select the desired option — **User Wise**, **Group Wise**, or **All**.
  - If you select **User Wise**,
    - Click the **User** picklist. The **Picklist For All Users** pop-up appears.

Picklist For All Users

Total Selected: 0 Records

Search  Show Selected

<input type="checkbox"/>	User ID ▲	Name
<input type="checkbox"/>	1	SALIM ANSARI
<input type="checkbox"/>	10	RAJENDRA GOSWAMI
<input type="checkbox"/>	1001	ANKITKUMAR SOHLIYA
<input type="checkbox"/>	1002	MEGHA H SHUKLA
<input type="checkbox"/>	1003	UMESH M TALANPURI
<input type="checkbox"/>	1004	DARSHAK B PATEL
<input type="checkbox"/>	1007	DHAVAL I PATEL
<input type="checkbox"/>	1008	MAYANK K KORAT
<input type="checkbox"/>	1009	DIPTI K RATHWA
<input type="checkbox"/>	1010	RAHUL S SHAH

1 - 10 of 2479 records

< < 1 2 3 ... 248 > >>






OK Cancel


- Select the desired check boxes of the desired profiles. Click **OK**.
- The selected profiles appear in the grid.

Select Users User Wise ▼

User\* ID  Name

Search

User ID ▲	Name	
1	SALIM ANSARI	
10	RAJENDRA GOSWAMI	
1001	ANKITKUMAR SOHLIYA	
1002	MEGHA H SHUKLA	

- You can also delete the desired profile. To do so, click **Delete**  of the respective profile.
- If you select **Group Wise** option,
- Select the desired enterprise group — Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1(Association Maps) Custom Group /2/3.

For each enterprise group — Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1/2/3, click the corresponding picklist to select the desired option/s.

The selected groups appear in the grid.

Select Users

Group Wise

Select Group

Organization


Organization\*

ID

Name

Search

ID	Name	Group	
1	MATRIX COMSEC PVT. LTD.	Organization	
5	TECH SERVICES	Organization	
6	CONSULTANT	Organization	
7	CANTEEN	Organization	
8	APPRENTICE	Organization	

- You can also delete particular group. To do so, click **Delete**  of the respective group.
- If you select **All** option, then all the profiles will be selected.
- Generate Report For:** Select the desired option — **All Users**, **Active Users** or **Inactive Users**.

Click **Generate Report**.

Sample Report

Schedule Status Summary

Back

1 of 1

100%

MATRIX

MATRIX COMSEC PVT. LTD.

Organization-Wise Schedule Status Summary From 06/01/2023 To 06/18/2023

Page 1 of 1

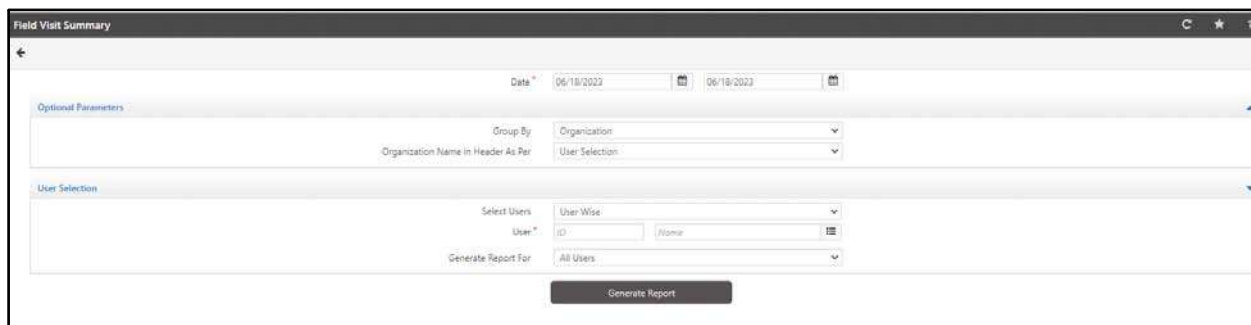
Run by: System Admin

Date: 06/18/2023 23:35

Schedule Start	Schedule End	Task	Schedule Location	Transaction Status	IN Punch	OUT Punch	Time Spent
MATRIX COMSEC PVT. LTD.							
Divya Divya							
06/15/2023 Schedule Status:							
06/15/2023-18:00	06/15/2023-19:00	3-TASK3	5-RnD 1				

## Field Visit Summary Report

This report displays the field visit summary of the selected users.

The screenshot shows a web application window titled "Field Visit Summary". It features a date range selector at the top with "To" and "From" fields, both set to "06/18/2022". Below this is a section titled "Optional Parameters" containing two dropdown menus: "Group By" (set to "Organization") and "Organization Name in Header As Per" (set to "User Selection"). Underneath is a "User Selection" section with a "Select Users" dropdown (set to "User-Wise"), a "User\*" field with "ID" and "Name" input options, and a "Generate Report For" dropdown (set to "All Users"). A "Generate Report" button is located at the bottom center.

Configure the following parameters:

- **Date:** Select the **To** and **From** date for which the report is to be generated.

### Optional Parameters

- **Group By:** Select the desired option — **User** or **Device**.
- **Organization Name in Header As Per:** Select the desired option — **User Selection** or **Customized Selection**.
  - If you select **Customized Selection**, click **Customize Report Header**.

You can select the desired option from the drop-down list or can also add a new header as per your choice.

### User Selection

- **Select User:** Select the desired option — **User Wise**, **Group Wise**, or **All**.
  - If you select **User Wise**,
    - Click the **User** picklist. The **Picklist For All Users** pop-up appears.

Picklist For All Users

Total Selected: 0 Records

Search  Show Selected

<input type="checkbox"/>	User ID ▲	Name
<input type="checkbox"/>	1	SALIM ANSARI
<input type="checkbox"/>	10	RAJENDRA GOSWAMI
<input type="checkbox"/>	1001	ANKITKUMAR SOHLIYA
<input type="checkbox"/>	1002	MEGHA H SHUKLA
<input type="checkbox"/>	1003	UMESH M TALANPURI
<input type="checkbox"/>	1004	DARSHAK B PATEL
<input type="checkbox"/>	1007	DHAVAL I PATEL
<input type="checkbox"/>	1008	MAYANK K KORAT
<input type="checkbox"/>	1009	DIPTI K RATHWA
<input type="checkbox"/>	1010	RAHUL S SHAH

1 - 10 of 2479 records

<< < 1 2 3 ... 248 > >>

OK Cancel





- Select the desired check boxes of the desired profiles. Click **OK**.
- The selected profiles appear in the grid.


Select Users

User Wise

User  ID  Name

Search

User ID ▲	Name	
1	SALIM ANSARI	
10	RAJENDRA GOSWAMI	
1001	ANKITKUMAR SOHLIYA	
1002	MEGHA H SHUKLA	

- You can also delete the desired profile. To do so, click **Delete**  of the respective profile.
- If you select **Group Wise** option,
- Select the desired enterprise group — Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1(Association Maps), Custom Group /2/3.

For each enterprise group — Organization, Branch, Department, Designation, Section, Category, Grade, Custom Group1/2/3, click the corresponding picklist to select the desired option/s.

The selected groups appear in the grid.

Select Users

Group Wise

Select Group

Organization


Organization\*

ID

Name

Search

ID	Name	Group ▲	
1	MATRIX COMSEC PVT. LTD.	Organization	
5	TECH SERVICES	Organization	
6	CONSULTANT	Organization	
7	CANTEEN	Organization	
8	APPRENTICE	Organization	

- You can also delete particular group. To do so, click **Delete**  of the respective group.
- If you select **All** option, then all the profiles will be selected.
- **Generate Report For:** Select the desired option — **All Users**, **Active Users** or **Inactive Users**.

Click **Generate Report**.






Report Builder helps the users to design their own report template, format the fields as per their expectations and generate reports as and when required.

After designing the Reports; it can be deployed in desired module.

With this Module, you can:

- Design new reports
- Define Calculated fields
- Enrich reports with various formatting styles
- Import/Export report templates

To use the Report Builder, select the **Report Builder** module . The **Report Builder** page appears as shown below.




*Multi-language is not supported in Reports generated via Report Builder.*

To configure the report parameters, refer to [“Report Configuration”](#).

After configuring the report parameters you can design the report as per your requirements, refer to [“Designing Report”](#).

The reports you create and design appear in the respective modules as per your requirement. For details refer to [“Customized Report Page”](#).

## Example of Report Designs

### Event Type Report

Report Builder

IN/OUT Punch Posting Report

Run By: User Name Current Date and Time

Sr No.	User ID	User Name	Designation	Department	Punch Date	Punch Time	Punch Delay	Entry/Exit Type	Device Name	Site Name
--------	---------	-----------	-------------	------------	------------	------------	-------------	-----------------	-------------	-----------

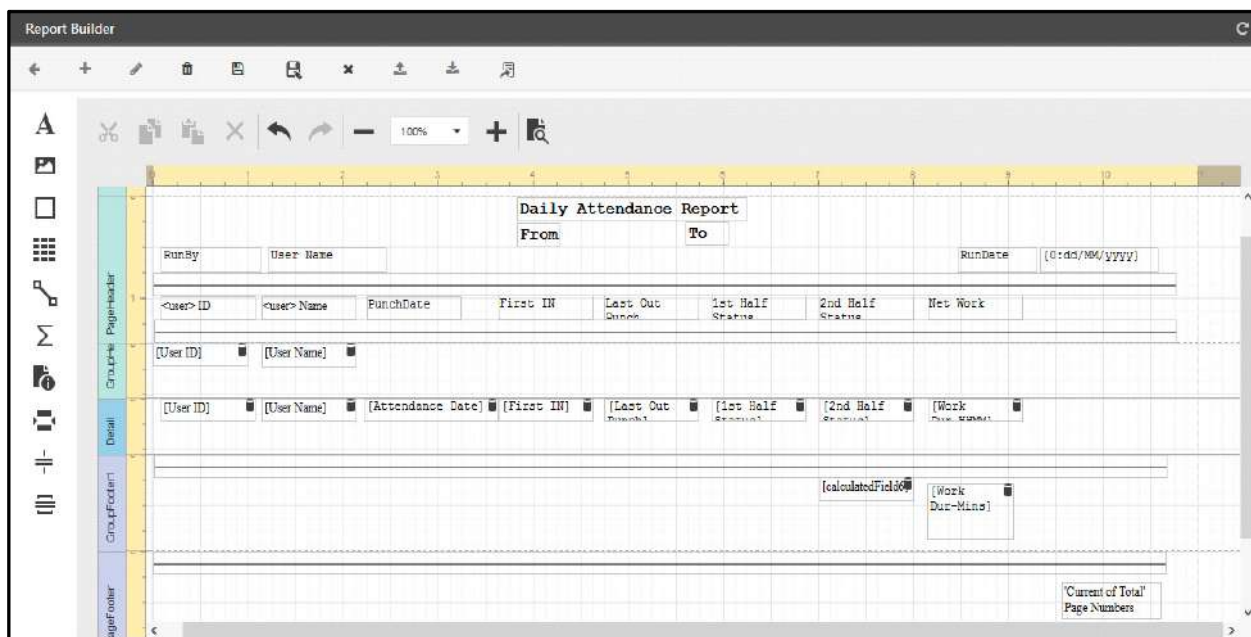
[Department ID] [Department Name]

tableCol [User ID] [User Name] [Designation] [Department] [Punch date] [event time] [event delay] [event type] [Device Name] [Site Name]

### Preview of Report

IN/OUT Punch Posting Report										
Run By:		System Admin				31 January 2018				
Sr.No.	User ID	User Name	Designation	Department	Punch Date	Punch Time	Punch Delay	Entry/Exit Type	Device Name	Site Name
1		Department1								
1	1	User 1	Designation1	Department1	01/11/2017	9:0	0:30		Main Entrance	Site-1
2	1	User 1	Designation1	Department1	01/11/2017	18:30	0:5		Main Entrance	Site-1

## Daily Attendance Details type Report




## Preview of Report

Daily Attendance Report							
RunBy	System Admin	From		To		RunDate	31/01/2018
<user> ID	<user> Name	PunchDate	First IN	Last Out Punch	1st Half Status	Ind Half Status	Net Work
1	User 1						
1	User 1	01/11/2017 00:00:00	31/01/2018 09:00:00	31/01/2018 18:30:00	PR	PR	09:30
1	User 1	02/11/2017 00:00:00	31/01/2018 09:30:00	31/01/2018 18:30:00	PR	PR	19:00
1	User 1	03/12/2017 00:00:00			WO	WO	00:00
						199.17	1110
10	User 10						
10	User 10	10/10/2015 00:00:00	31/01/2018 09:00:00	31/01/2018 22:00:00	PR	PR	19:30

# Report Configuration

The Report Configuration page appear. There are two tabs — Customized Reports and Sample Templates.



The screenshot shows the 'Report Builder' application window. The 'Report Configurations' section on the left contains the following fields: 'Report' with sub-fields 'ID' and 'Name', 'Report Type' set to 'Events', and 'Filtering Range' set to 'Date'. A 'Design Report' button is located below these fields. On the right, there are two tabs: 'Customized Reports' and 'Sample Templates'. Below the tabs is a table with columns 'ID' and 'Report', which currently displays 'No Data'.

You can create new reports using the Sample Templates or using the Add option.

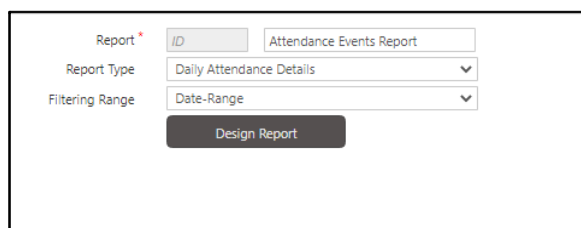
For creating reports using the Sample Templates, refer to [“Sample Templates and Creating Reports from Sample Templates”](#)

For creating reports using the **Add** option, refer to [“Add New Customized Report”](#).

## Add New Customized Report

To add a new report format, click **New**  and configure the following:

- **Report:** Enter the Name you wish to assign to the report template. The ID is auto-generated by the system when the report is saved.



This screenshot shows the 'Report Configuration' form with the following values: 'Report' ID is empty, 'Name' is 'Attendance Events Report', 'Report Type' is 'Daily Attendance Details', and 'Filtering Range' is 'Date-Range'. The 'Design Report' button is at the bottom.

- **Report Type:** Select the type of Report from the options — Events, Daily Attendance Details, Monthly Summary, Monthly Details and Custom.



*Report Type depends on available license. Daily Attendance Details, Monthly Summary & Monthly Details will be available only if T&A license is available.*

If you select **Report Type** as **Events, Daily Attendance Details, Monthly Summary, Monthly Details** — configure the Filtering Range.

If you select the **Report Type** as **Custom**, for details refer to [“Custom”](#).

- **Filtering Range:** The Filtering Range for report depends on the selected Report Type.

If you have selected Report Type as **Events/Daily Attendance** then you can select **Filtering Range** as **Date** or **Date-Range**.

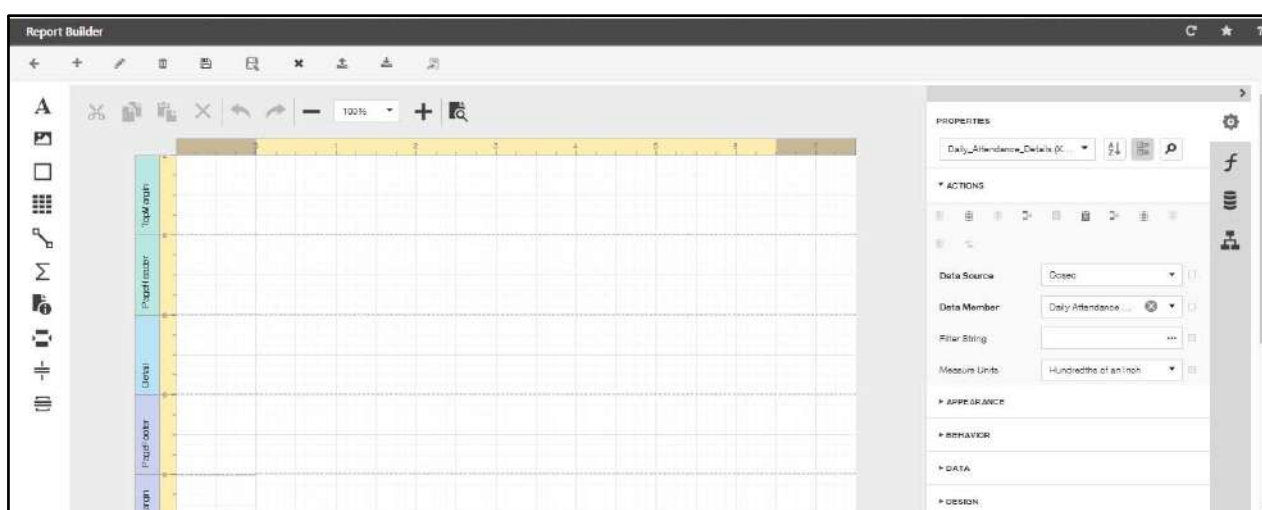
If you have selected Report Type as **Monthly Summary/Monthly Details** then you can select **Filtering Range** as **Month** or **Month-Range**.

If **Date** is selected; then only single date selection will appear in report. If **Date-Range** is selected; then From-To Date range selection will appear in the report.

If **Month** is selected; then only single date selection will appear in report. If **Month-Range** is selected; then From-To Month range selection will appear in the report.

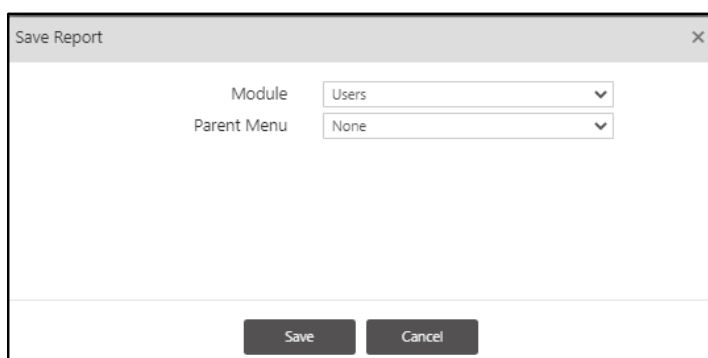
Select the desired options as per your requirement.

- Click **Design Report**. The report Designer window appears from where you can design the report.



For details regarding designing the report, refer to [“Designing Report”](#).


- After designing the report, click **Save**. The **Save Report** pop-up appears. You can select the Module and the Parent Menu wherein this new report should appear.

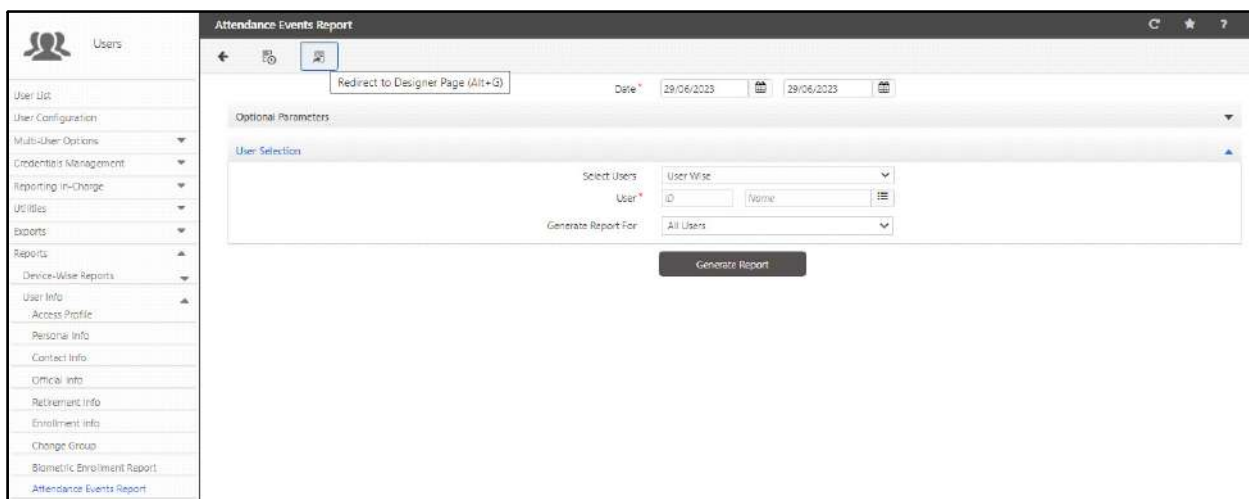
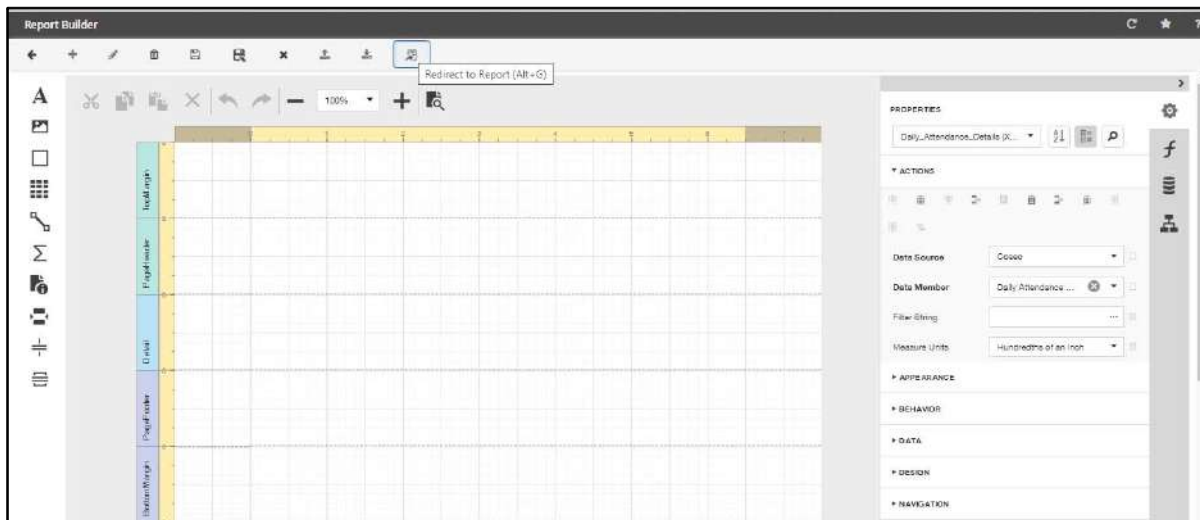



- **Module:** Select the desired COSEC Module — Access Control, Cafeteria Management, Contract Worker Management, Devices, Enterprise Structure, Filed Visit Management, Job Processing and Costing, Leave Management, Shifts and Schedules, Time and Attendance, Users, Visitor Management. The report will be placed under the selected Module. For example Users is selected.

- **Parent Menu:** Select the desired Parent Menu. The report will be placed under the selected Parent Menu in the selected Module. For example, the report will be placed under User Events in the User module.

If you wish that the report should be placed under a new Parent Menu in the selected module, then select **Customized Reports**.

- Click **Save**. The report Designer page appears.
- Click **Redirect to Report** , you will directly reach the module page where the report is placed.



You can click **Redirect to Designer Page**  to switch back to Designer page. For more details refer to [“Customized Report Page”](#).


The created reports appears on the **Report Builder** page under **Customized Reports** tab on the right.

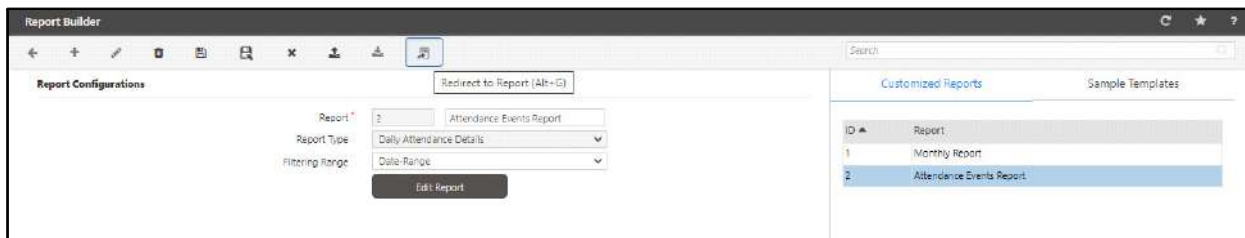
You can click **Redirect to Report** ,

- from the **Designer** page.

OR

- from the **Report Builder** page. To do so, click  on the report **Designer** page and you return to the **Report Builder** page.

On the Report Builder page, select the desired report from the list under **Customized Reports** tab on the right. Click **Redirect to Report** .



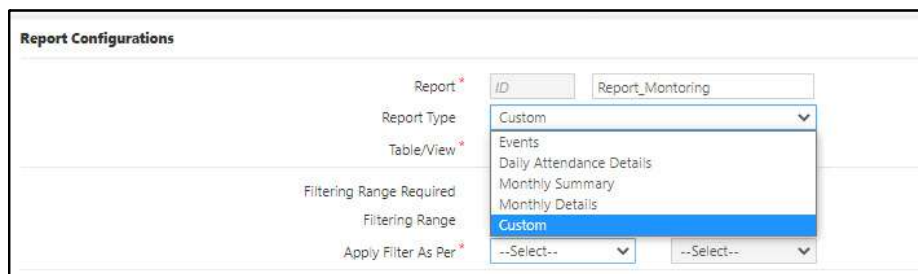
You can also edit the created reports. To do so, on the **Report Builder** page select the desired report from the list under **Customized Reports** tab on the right.

The Report parameters appear on the left. Click **Edit Report**.

The report Designer page appears. Now you can edit the design as per your requirement. For details regarding designing, refer to [“Designing Report”](#).

## Custom

- Report Type:** If you wish to design the report as per your requirement, select **Custom**.



- Table/View:** Select the desired (database) Table from the drop-down list as per your requirement. For example: Mx\_AtdHoliday, Mx\_AppNotificationLog, Mx\_HolidaySchDet etc.



The below mentioned History tables have been removed from the system. If you have used these tables in your report configurations, then those reports will not work. You must re-configure these reports.

Removed History tables: Mx\_ADVVSTRTrnHistory, Mx\_AtdCorrectionHistory, Mx\_ATDEventAuthHistory, Mx\_DATDAuthHistory, Mx\_DATDShtLVOclHistory, Mx\_FVMFieldCorrHistory, Mx\_JPCAwrdPenHistory, Mx\_JPCTimeSheetCorrHistory, Mx\_LeaveTrnHistory and Mx\_OTAdvanceHistory.

- **Filtering Range Required:** Select the check box to enable and configure Filtering Range and Apply Filter As Per.

- **Filtering Range:** Select the desired option — Date, Date-Range, Month, Month-Range — from the drop-down list.

If **Date** is selected; then only single date selection will appear in report. If **Date-Range** is selected; then From-To Date range selection will appear in the report.



If **Month** is selected; then only single date selection will appear in report. If **Month-Range** is selected; then From-To Month range selection will appear in the report.

Filtering Range Required ☒

Filtering Range: Date

Apply Filter As Per \*  
Date-Range  
Month  
Month-Range

Optional Parameters Required

- **Apply Filter As Per:** Select the desired option from the drop-down list. These options depend on the Table/View you select. For example: if you have selected Table/View as Mx\_HolidaySchDet and have selected Date as the Filtering Range, then Apply Filter As Per options are — HLDDT and HLDDTEND.

Filtering Range Required ☒

Filtering Range: Date

Apply Filter As Per \*  
--Select--  
--Select--  
HLDDT  
HLDDTEND

Optional Parameters Required

User Selection Required ☒

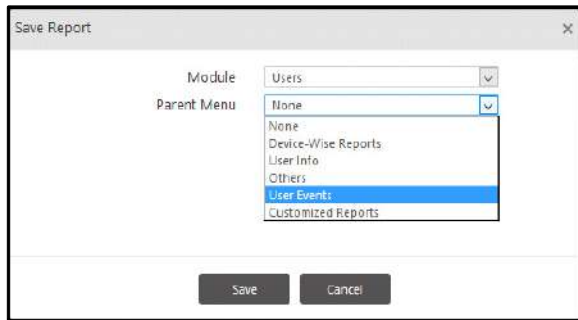
- **Optional Parameters Required:** Select the check box to enable, that is allow the optional parameter to be included in the report.
- **User Selection Required:** Select the check box to enable. You can select user on the basis of User Wise, Group Wise or All.


Map each **Field** with the desired option from the **Select Column** drop-down list.

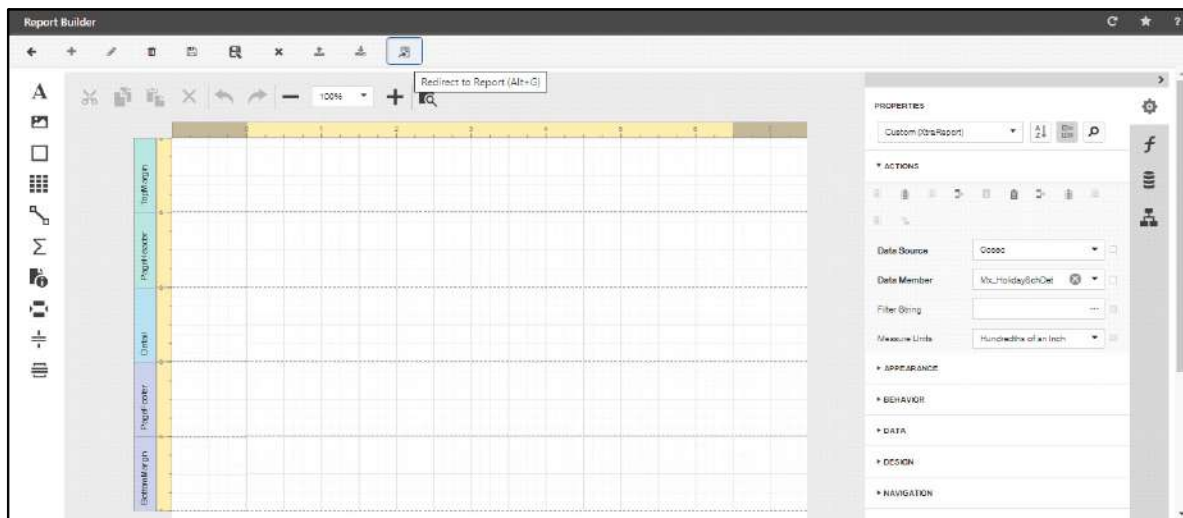
User1 Selection Required ☒

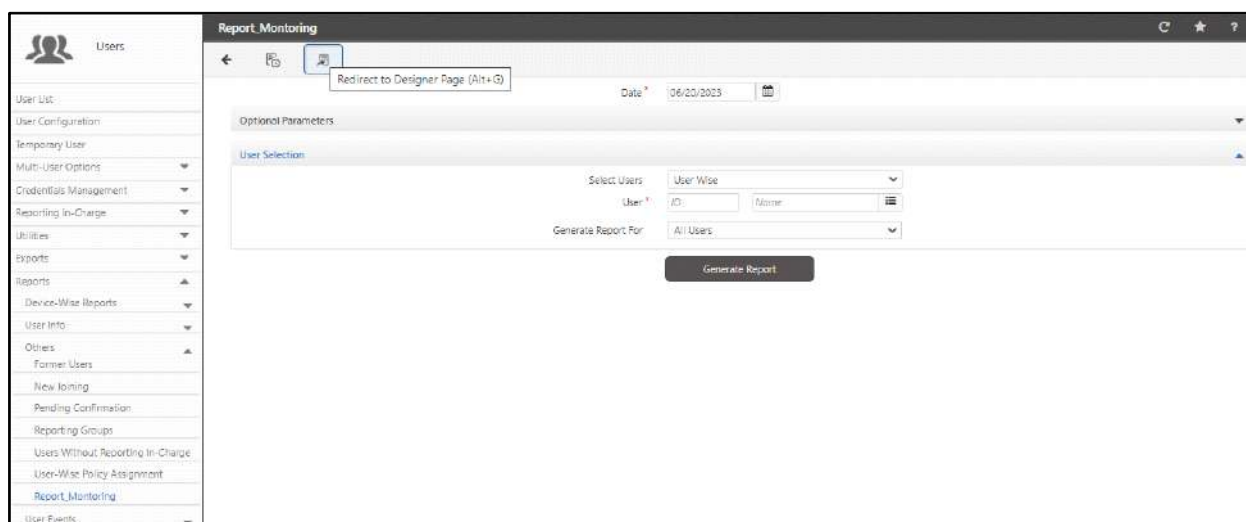
Field	Select Column
User1 *	--Select--
Organization	--Select--
Branch1	--Select--
Department2	--Select--
Section3	--Select--
Category4	--Select--
Grade5	--Select--
Designation6	--Select--
Custom Group 11	--Select--
Custom Group 22	--Select--
Custom Group 33	--Select--


- Click **Design Report**. For details regarding designing the report, refer to [“Designing Report”](#).
- After designing the report, click **Save**. The **Save Report** pop-up appears. You can select the Module and the Parent Menu wherein this new report will be placed.



- **Module:** Select the desired COSEC Module — Access Control, Cafeteria Management, Contract Worker Management, Devices, Enterprise Structure, Filed Visit Management, Job Processing and Costing, Leave Management, Shifts and Schedules, Time and Attendance, Users, Visitor Management. It is the selection of the COSEC Module where the report will be placed. For example Users is selected.
- **Parent Menu:** Select the desired Parent Menu. The report will be placed under the selected parent menu. For example, the report will appear under User Events in the User module. If you wish that the report should appear under a new Parent Menu in the selected module, then select **Customized Reports**.
- Click **Save**. The report Designer page appears.
- Click **Redirect to Report** , you will directly reach the module page where the report is placed.






You can click **Redirect to Designer Page**  to switch back to Designer page. For more details refer to [“Customized Report Page”](#).


The created reports appears on the **Report Builder** page under **Customized Reports** tab on the right.

You can click **Redirect to Report** ,

- from the **Designer** page.

**OR**

- from the **Report Builder** page. To do so, click  on the report **Designer** page and you return to the **Report Builder** page.

On the Report Builder page, select the desired report from the list under **Customized Reports** tab on the right. Click **Redirect to Report** .



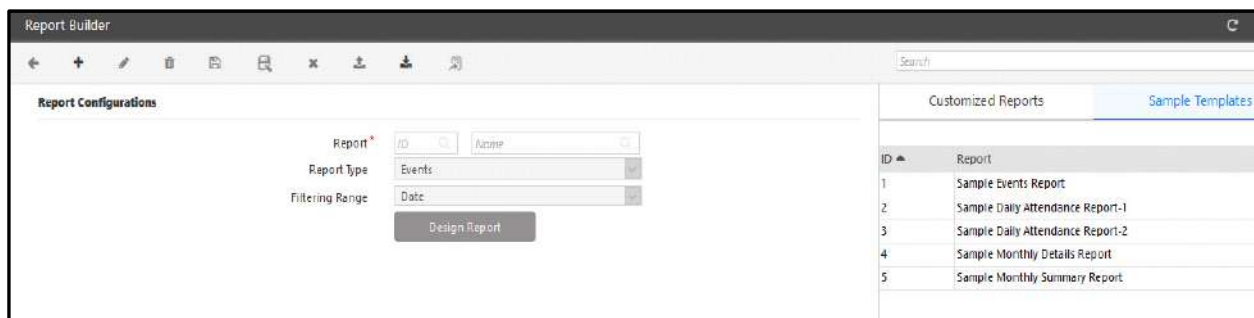
You can also edit the created reports. To do so, on the **Report Builder** page select the desired report from the list under **Customized Reports** tab on the right.

The Report parameters appear on the left. Click **Edit Report**.

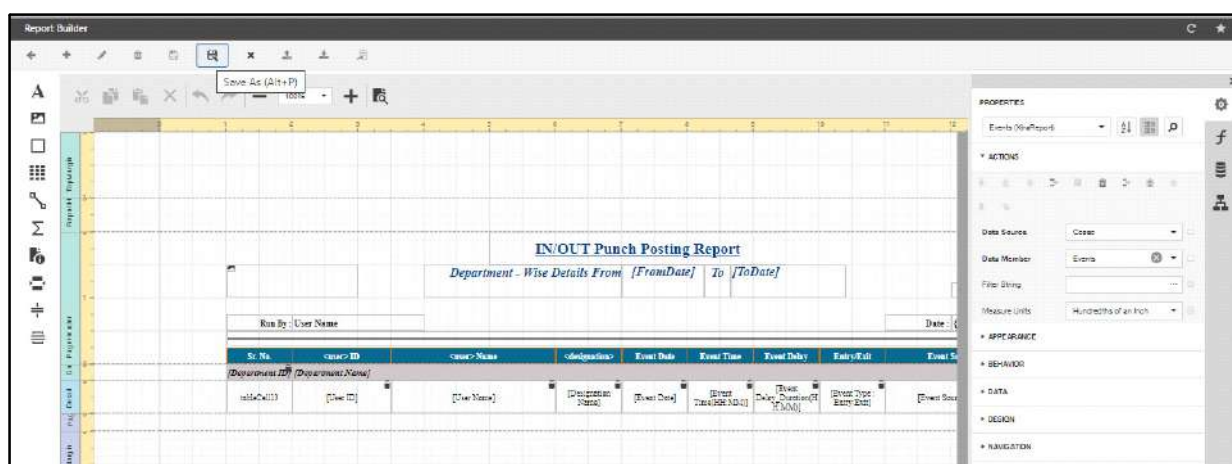
The report Designer page appears. Now you can edit the design as per your requirement. For details regarding designing, refer to [“Designing Report”](#).

## Sample Templates and Creating Reports from Sample Templates

Click the **Sample Templates** tab to view the sample report templates.



- Click on the desired sample template. The report Designer page appears.



- You can save a copy of the sample template. To do so, click **Save As**.
- The **Save As Report** pop-up appears.

The screenshot shows a 'Save As Report' dialog box. It has a title bar with the text 'Save As Report' and a close button (X). The dialog contains four input fields: 'Report Name' with the text 'Report Monitoring', 'Filtering Range' with a dropdown menu showing 'Date', 'Module' with a dropdown menu showing 'Users', and 'Parent Menu' with a dropdown menu showing 'Others'. At the bottom are 'Save' and 'Cancel' buttons.


- **Report Name:** Enter the desired name of the report.
- **Filtering Range:** Select the option — Date or Date-Range

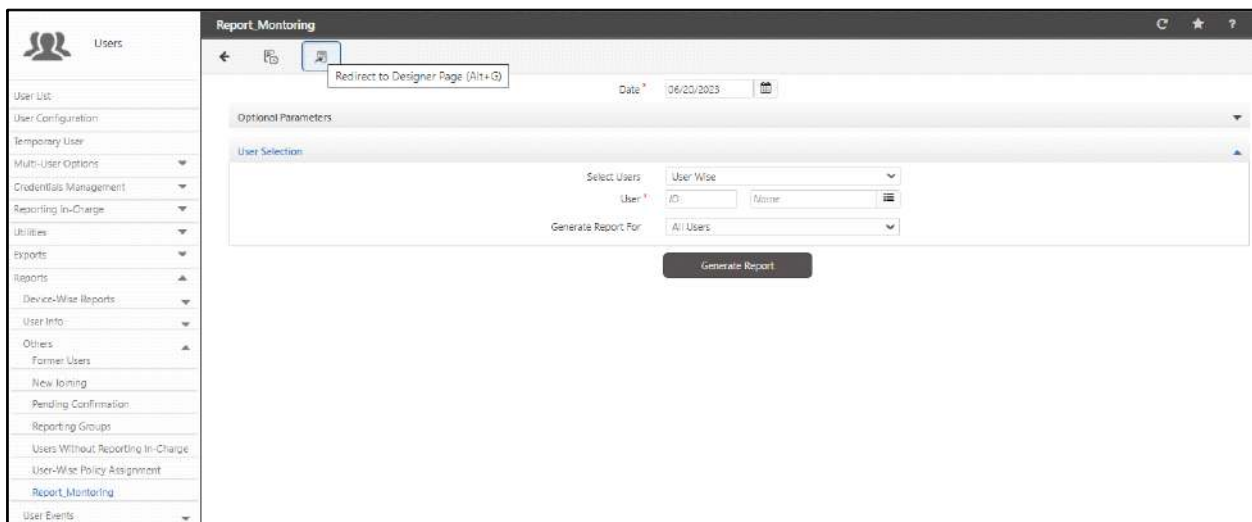
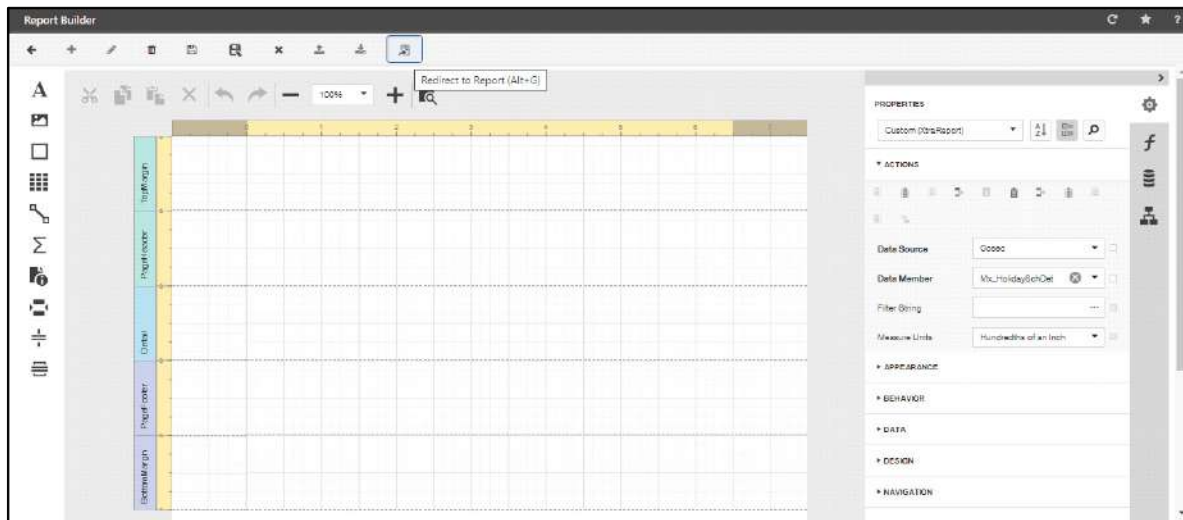
If **Date** is selected; then only single date selection will appear in report. If **Date-Range** is selected; then From-To Date range selection will appear in the report.


If **Month** is selected; then only single date selection will appear in report. If **Month-Range** is selected; then From-To Month range selection will appear in the report.

- **Module:** Select the desired COSEC Module — Access Control, Cafeteria Management, Contract Worker Management, Devices, Enterprise Structure, Filed Visit Management, Job Processing and Costing, Leave Management, Shifts and Schedules, Time and Attendance, Users, Visitor Management. It is the selection of the COSEC module where the report is to be placed. For example Users is selected.
- **Parent Menu:** Select the desired Parent Menu. The report will be placed under the selected parent menu. For example, the report will appear under User Events in the User module. If you wish that the report should appear under a new Parent Menu in the selected module, then select **Customized Reports**.
- Click **Save**. The report Designer page appears.

You can make changes in the design if required. For details, refer to [“Designing Report”](#).

- Click **Redirect to Report**  , you will directly reach the module page where the report is placed.




- You can click **Redirect to Designer Page**  to switch back to Designer page. For more details refer to [“Customized Report Page”](#).


The created reports appears on the **Report Builder** page under **Customized Reports** tab on the right.

You can click **Redirect to Report**  ,

- from the **Designer** page.

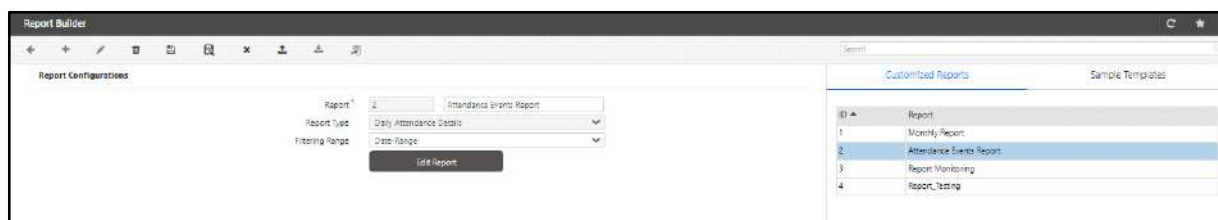
**OR**

- from the **Report Builder** page. To do so, click  on the **Designer** page and you return to the **Report Builder** page.

On the Report Builder page, select the desired report from the list under **Customized Reports** tab on the right. Click **Redirect to Report**  .


You can also edit the created reports. To do so, on the **Report Builder** page select the desired report from the list under **Customized Reports** tab on the right.

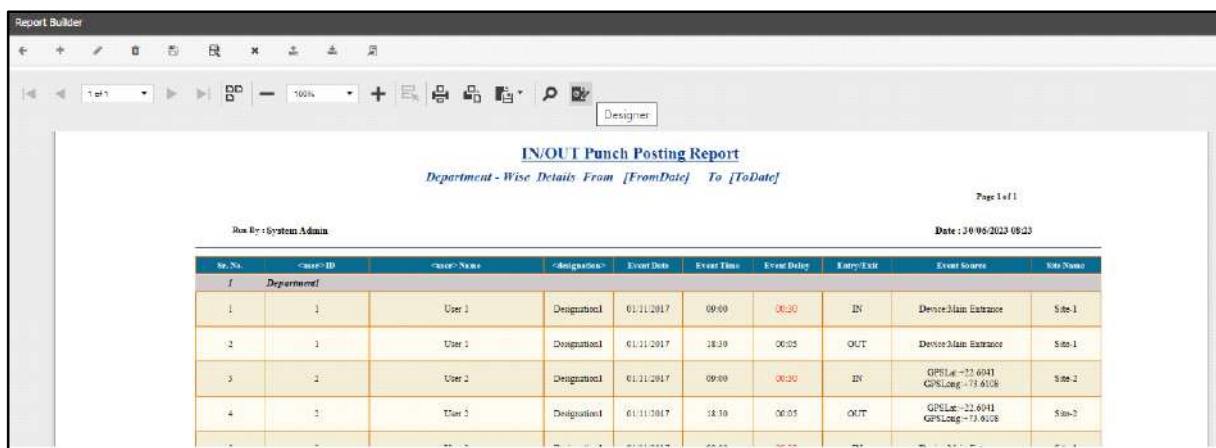
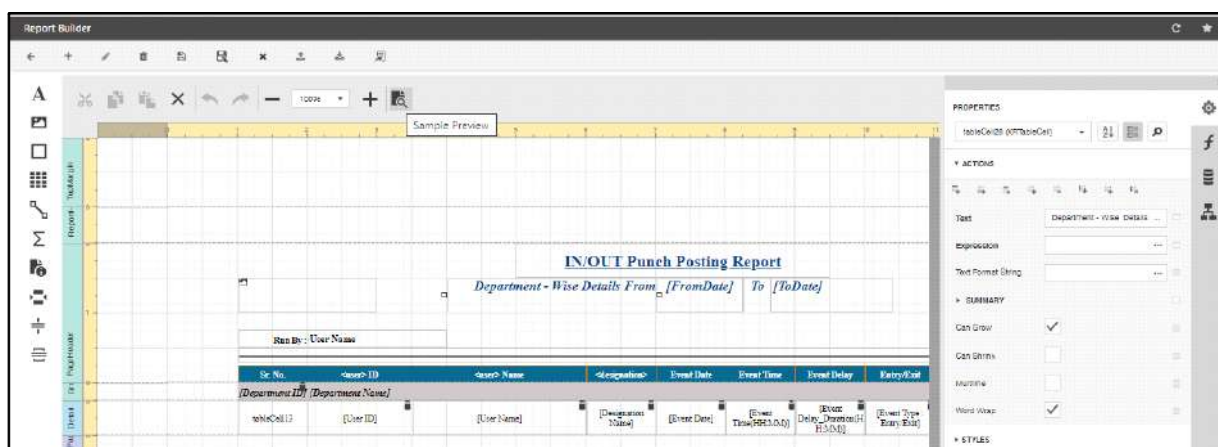
The Report parameters appear on the left. Click **Edit Report**.



The report Designer page appears. Now you can edit the design as per your requirement. For details regarding designing, refer to ["Designing Report"](#).


## Sample Preview

If the report template is modified, to view the report preview, click **Sample Preview** .



To go back to the report Designer page click **Designer** .

## Export To

While viewing the preview; if you wish to export the report preview then you can click **Export To** . The different export format options will be displayed. You can select the desired option.



If the check-box in Global Policy > Reports > Report Export Output in PDF only is enabled; then here only PDF option will visible for export.

Report Builder

1 of 1

100%

Export To

**IN/OUT Punch Posting Report**  
Department - Wise Details From [FromDate] To [ToDate]

Page 1 of 1

Run By: System Admin Date: 30/06/2023 08:23

Sr. No.	Department	User ID	User Name	Designation	Event Date	Event Time	Event Delay	Entry/Exit	Event Source	Site Name
1	Department	1	User 1	Designation	01/11/2017	09:00	00:30	IN	Device:Main Entrance	Site-1
2	Department	1	User 1	Designation	01/11/2017	18:30	00:05	OUT	Device:Main Entrance	Site-1
3	Department	2	User 2	Designation	01/11/2017	09:00	00:30	IN	GPSLat:-22.6041 GPSLong:-73.8108	Site-2
4	Department	2	User 2	Designation	01/11/2017	18:30	00:05	OUT	GPSLat:-22.6041 GPSLong:-73.8108	Site-2

If you wish to export this report preview in **XLS** format, click the Export To button and from the list select the XLS option.

Report Builder

1 of 1

100%

Export To

**IN/OUT Punch Posting Report**  
Department - Wise Details From [FromDate] To [ToDate]

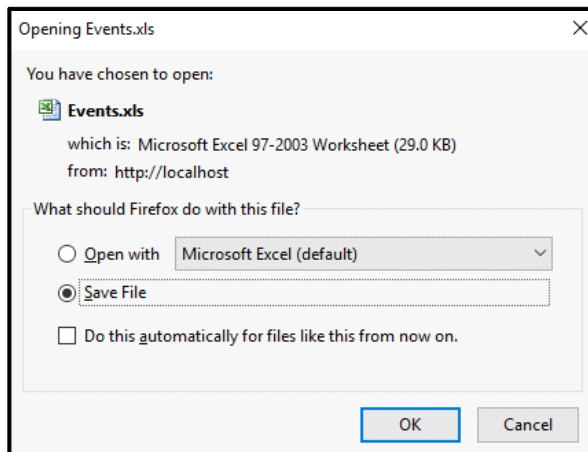
Page 1 of 1

Run By: System Admin Date: 30/06/2023 08:23

Sr. No.	Department	User ID	User Name	Designation	Event Date	Event Time	Event Delay	Entry/Exit	Event Source	Site Name
1	Department	1	User 1	Designation	01/11/2017	09:00	00:30	IN	Device:Main Entrance	Site-1
2	Department	1	User 1	Designation	01/11/2017	18:30	00:05	OUT	Device:Main Entrance	Site-1
3	Department	2	User 2	Designation	01/11/2017	09:00	00:30	IN	GPSLat:-22.6041 GPSLong:-73.8108	Site-2
4	Department	2	User 2	Designation	01/11/2017	18:30	00:05	OUT	GPSLat:-22.6041 GPSLong:-73.8108	Site-2



The file can be opened or saved in XLS format.



Events.xls [Compatibility Mode] - Microsoft Excel

**IN/OUT Punch Posting Report**  
*Department - Wise Details From [FromDate] To [ToDate]*

Page 1 of 1

Run By : System Admin Date : 30/06/2023 08:35

Sr. No.	User ID	User Name	Designation	Event Date	Event Time	Event Delay	Entry/Exit	Event Source	Site Name
1	1	User 1	Designation1	01-11-2017	09:00	00:30	IN	Device/Main Entrance	Site-1
2	1	User 1	Designation1	01-11-2017	18:30	00:05	OUT	Device/Main Entrance	Site-1
3	2	User 2	Designation1	01-11-2017	09:00	00:30	IN	GPSLat=22.6041 GPSLong=73.6108	Site-2
4	2	User 2	Designation1	01-11-2017	18:30	00:05	OUT	GPSLat=22.6041 GPSLong=73.6108	Site-2
5	3	User 3	Designation1	01-11-2017	09:00	00:30	IN	Device/Main Entrance	Site-1
6	3	User 3	Designation1	01-11-2017	18:30	00:05	OUT	Device/Main Entrance	Site-1
7	4	User 4	Designation1	01-11-2017	09:00	00:30	IN	GPSLat=22.6041 GPSLong=73.6108	Site-2
8	4	User 4	Designation1	01-11-2017	18:30	00:05	OUT	GPSLat=22.6041 GPSLong=73.6108	Site-2
9	5	User 5	Designation1	01-11-2017	09:00	00:30	IN	Device/Main Entrance	Site-1
10	5	User 5	Designation1	01-11-2017	18:30	00:05	OUT	Device/Main Entrance	Site-1



Save button will be disabled if any of the sample templates are selected.

## Import

It enables you to import a new report design template format and add the report template to the specified location in the particular module.

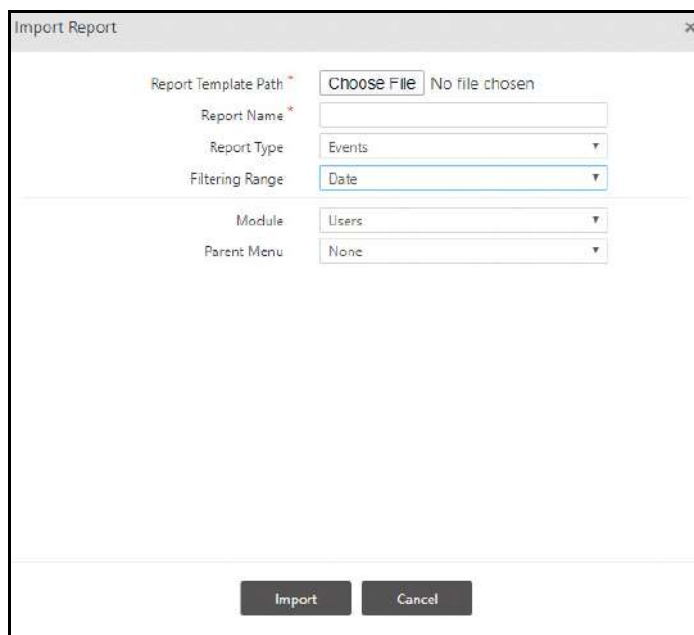
- Click **Import** .



- The **Import Report** pop-up appears. Configure the following parameters:



*The type of Repx file imported and Report Type selected must always match.*



- **Report Template Path:** Browse and select the template file (.repx file) for importing.
- **Report Name:** Configure the name you wish to assign to the report. The report will be appear with this name.
- **Report Type:** Select the desired option — Events, Daily Attendance Details, Monthly Summary, Monthly Details and Custom.

If you select **Report Type** as **Events, Daily Attendance Details, Monthly Summary, Monthly Details** — configure the Filtering Range.

- **Filtering Range:** The Filtering Range for report depends on the selected Report Type.

If you have selected Report Type as **Events/Daily Attendance** then you can select **Filtering Range** as **Date** or **Date-Range**.

If you have selected Report Type as **Monthly Summary/Monthly Details** then you can select **Filtering Range** as **Month** or **Month-Range**.

If **Date** is selected; then only single date selection will appear in report. If **Date-Range** is selected; then From-To Date range selection will appear in the report.

If **Month** is selected; then only single date selection will appear in report. If **Month-Range** is selected; then From-To Month range selection will appear in the report.

If you select the **Report Type** as **Custom**,

Field	Select Column
User	--Select--
Organization	--Select--
Branch	--Select--
Department	--Select--

- **Table/View:** Select the desired (database) Table from the drop-down list as per your requirement. For example: 'Mx\_AtdHoliday', Mx\_AppNotificationLog, Mx\_HolidaySchDet etc.



The below mentioned History tables have been removed from the system. If you have used these tables in your report configurations, then those reports will not work. You must re-configure these reports.

Removed History tables: Mx\_ADVSTRTTrnHistory, Mx\_AtdCorrectionHistory, Mx\_ATDEventAuthHistory, Mx\_DATDAuthHistory, Mx\_DATDShrtLVOclHistory, Mx\_FVMFieldCorrHistory, Mx\_JPCAwrdPenHistory, Mx\_JPCTimeSheetCorrHistory, Mx\_LeaveTrnHistory and Mx\_OTAdvanceHistory.

- **Filtering Range Required:** Select the check box to enable and configure Filtering Range and Apply Filter As Per.

Filtering Range Required ☐

Filtering Range

Apply Filter As Per

Filtering Range Required ☒

Filtering Range

Apply Filter As Per \*

- **Filtering Range:** Select the desired option — Date, Date-Range, Month, Month-Range — from the drop-down list for filtering range of the report.

If **Date** is selected; then only single date selection will appear in report. If **Date-Range** is selected; then From-To Date range selection will appear in the report.

If **Month** is selected; then only single date selection will appear in report. If **Month-Range** is selected; then From-To Month range selection will appear in the report.

Filtering Range Required ☒

Filtering Range

Apply Filter As Per \*

Optional Parameters Required

- Date
- Date-Range
- Month
- Month-Range

- **Apply Filter As Per:** Select the desired option from the drop-down list. These options depend on the Table/View you select. For example: if you have selected Table/View as Mx\_HolidaySchDet and have selected Date as the Filtering Range, then Apply Filter As Per options are — HLDDT and HLDDTEND.

Filtering Range Required ☒

Filtering Range

Apply Filter As Per \*

Optional Parameters Required

User Selection Required ☒

- Select--
- HLDDT
- HLDDTEND

- **Optional Parameters Required:** Select the check box to enable, that is to allow the optional parameters to be included into the report.
- **User Selection Required:** Select the check box to enable. The user filter options — User Wise, Group Wise, All— will be displayed in the report.


Map each **Field** with the desired option from the **Select Column** drop-down list.

User Selection Required ☒

Field	Select Column
User *	--Select--
Organization	--Select--
Branch	--Select--
Department	--Select--
Section	--Select--
Category	--Select--
Grade	--Select--
Designation	--Select--
Custom Group 1	--Select--
Custom Group 2	--Select--
Custom Group 3	--Select--

- **Module:** Select the desired COSEC Module — Access Control, Cafeteria Management, Contract Worker Management, Devices, Enterprise Structure, Filed Visit Management, Job Processing and Costing, Leave Management, Shifts and Schedules, Time and Attendance, Users, Visitor Management. It is the selection of the COSEC Module where the report is to be placed. For example Users is selected.
- **Parent Menu:** Select the desired Parent Menu. The report will be placed under the selected parent menu. For example, the report will be placed under User Events in the User module. If you wish that the report should appear under a new Parent Menu in the selected module, then select **Customized Reports**.
- Click **Import**. The report appears on the **Report Builder** page under **Customized Reports** tab on the right.
- You can also edit the imported report. To do so, on the Report Builder page select the report you imported from the list under **Customized Reports** tab on the right.

The Report parameters appear on the left. Click **Edit Report**. The report Designer page appears. For details, refer to [“Designing Report”](#).

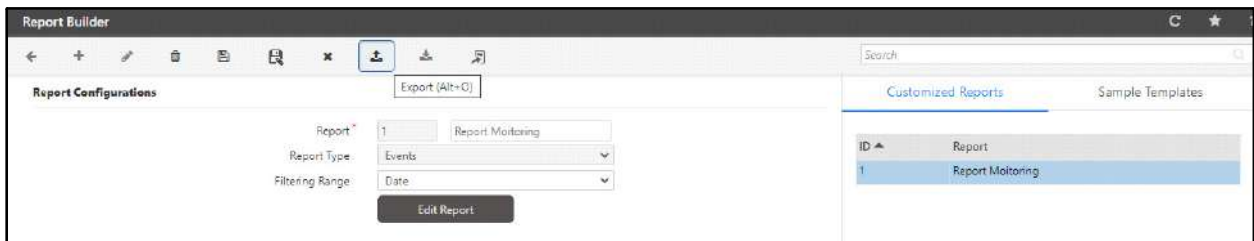
- To view the page where the report will be placed, on the Report Builder page, select the report you imported from the list under **Customized Reports** tab on the right. Click **Redirect to Report** .you will directly reach the module page where the report is placed.

You can click **Redirect to Designer** to switch back to Designer page. For more details refer to [“Customized Report Page”](#).

## Export

It enables to export the selected report template format. The file will be exported in .repx format. You can check the Downloads folder in your computer to view the exported file. This file can be used for importing in some other COSEC Server.

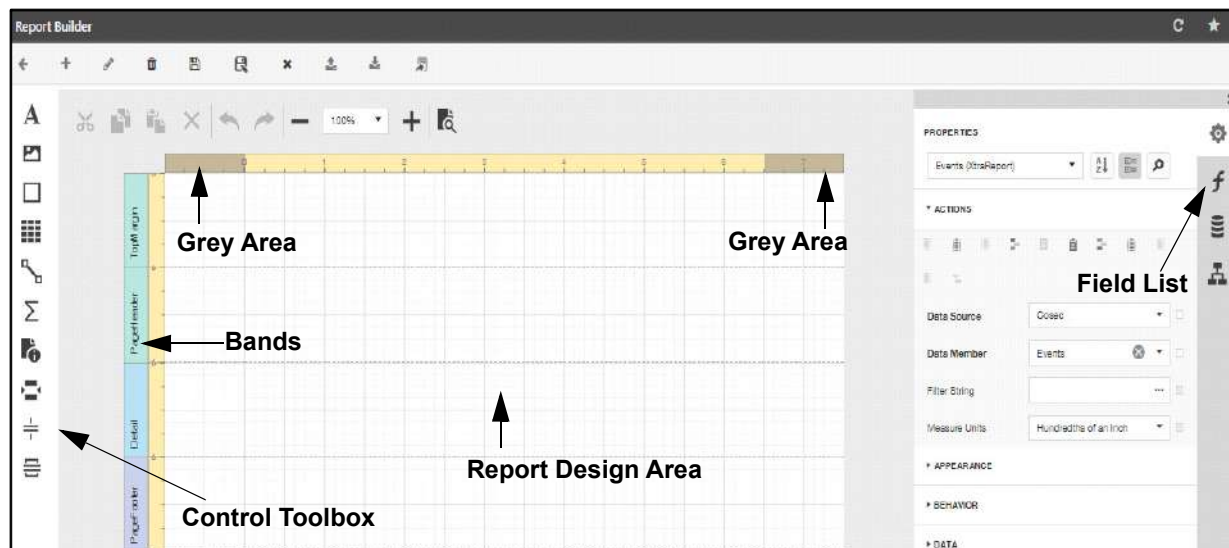
Click **Export** .



The report is downloaded.

# Designing Report

The Report Designer page has the Control Toolbox on the left, Properties and Field List on the right and Report Design section in center.



To understand how you can design the report, refer to the following:

["Binding Report Elements to Data"](#)

["Filter String \(Filter Editor\)"](#)

["Table Report"](#)

- ["Styles"](#)
- ["Conditional Appearance \(Conditional formatting\)"](#)

["Multi-Column Report"](#)

["Cross-tab Report \(Pivot Grid\)"](#)

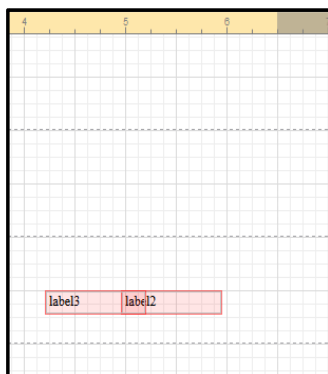
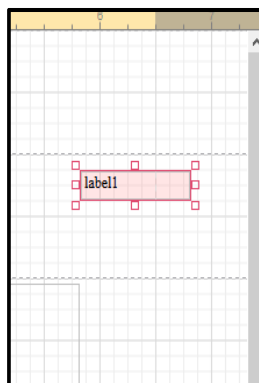
["Calculated field"](#)

["Adding Page Numbers and System information to Report"](#)

["Page Setting"](#)

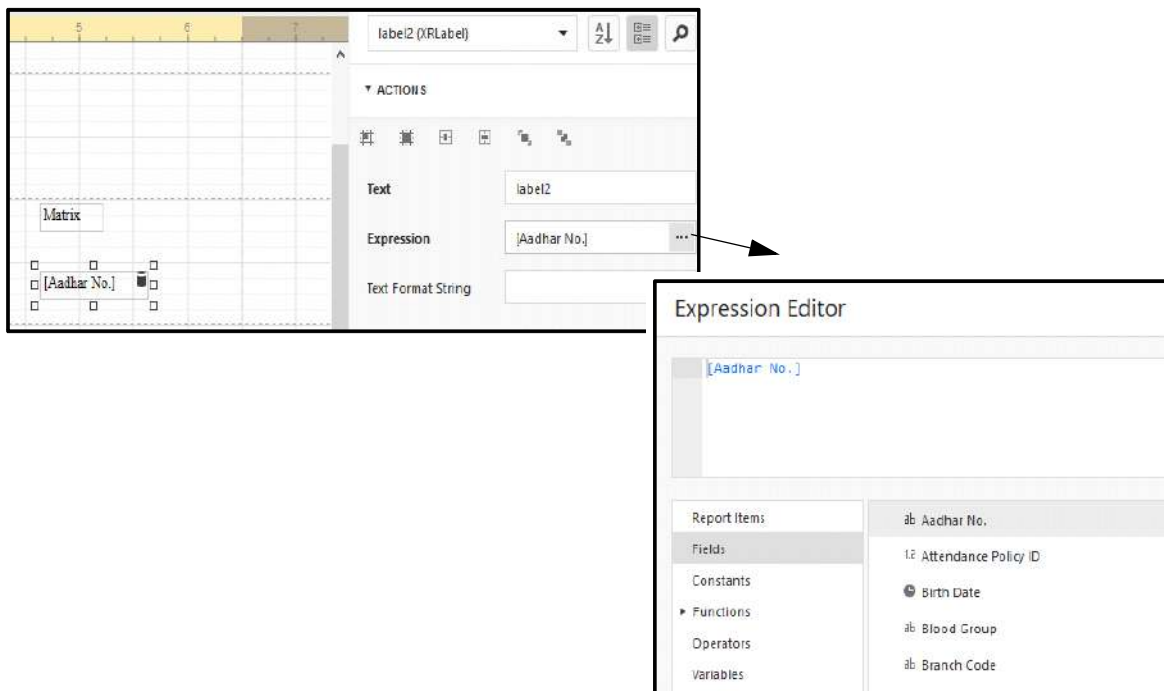
## Red Color Indication

The red color of the control is the warning that the control is outside the page margin, and this will cause extra pages to be printed. So you must align the controls in the Report Design Area excluding the Grey Area. Also this warning appear when the controls are overlapping. So place the controls accordingly.




## Create/Insert Report Control

To add a control to the current report, drag and drop the control from the Control Toolbox on the appropriate report band. For example: Custom Field control is placed on Detail band as shown below.



Following are the different controls which can be added to the report from the Control Toolbox:

1. **Custom Field**  : It is used to display text. For example: Text can be entered that will remain fixed such as name of the company. You can also bind custom field with the database field from Expression, to display the actual data. Example: Aadhaar No. field is bound to display actual Aadhaar Number of the user as shown in above screenshot.

### Static and Dynamic Elements

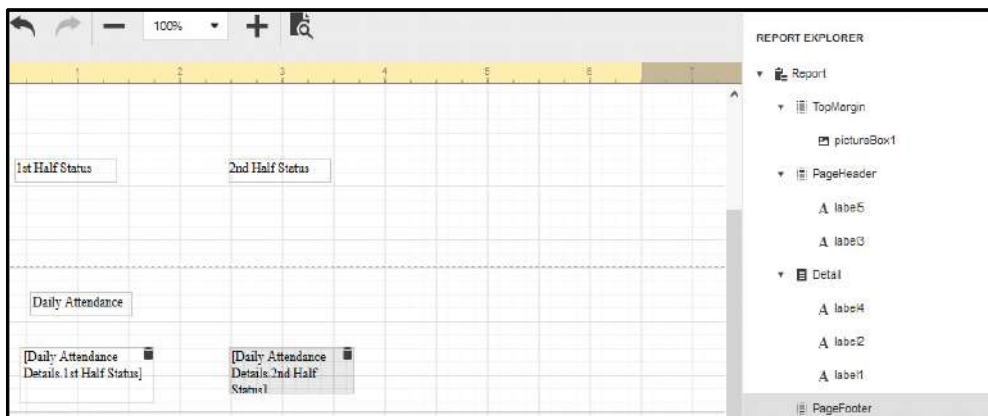
In a report, static and dynamic information is displayed using appropriate controls.










**Dynamic information** changes through a report, such as values from a database (which comprise the main report data) or service information (such as current user name or page numbers).

**Static information** is text or images that are not obtained from a data source, and therefore do not change through the report, and do not depend on the current computer. Static information can be printed only once (for example: Report Header) or can repeated on each page (for example, in a Page Header) or can repeat with every entry in your report's data source (a data-bound label, which is placed onto the Detail band).

Data-bound controls are indicated by a database icon in their top-right corner, both in the Design Panel and Report Explorer.





2. **Image**  : To display image in the report. An image can be selected from an external file or from a web location using the specified Image URL.
3. **Panel**  : It is a box that includes separate controls to allow them to be easily moved, copied and pasted, and visually unite them in the report's preview. (with borders or a uniform color background).
4. **Table**  : It is used for tabular based report. It consist of rows comprised of individual cells. Both rows and cells can be selected and customized individually.
5. **Line**  : It is used for drawing a line of a specified direction, style, width and color. It can be used for both decoration and visual separation of report sections within report bands.
6. **Pivot Grid**  : It represents dynamic data obtained from a data source in cross-tab form. Column headers display unique values from one data field, and row headers from another field. Each cell displays a summary for the corresponding row and column values. By specifying different data fields, you can see different totals. This allows you to get a compact layout for a complex data analysis.
7. **Page Info**  : It is intended to add page numbers and system information (the current date and time or the current user name) into your report.
8. **Page Break**  : Its purpose is to insert a page delimiter at any point within a report.
9. **Cross Band Line**  : It allows you to draw a line through several report bands.
10. **Cross Band Box**  : It allows you to draw a rectangle through several report bands.

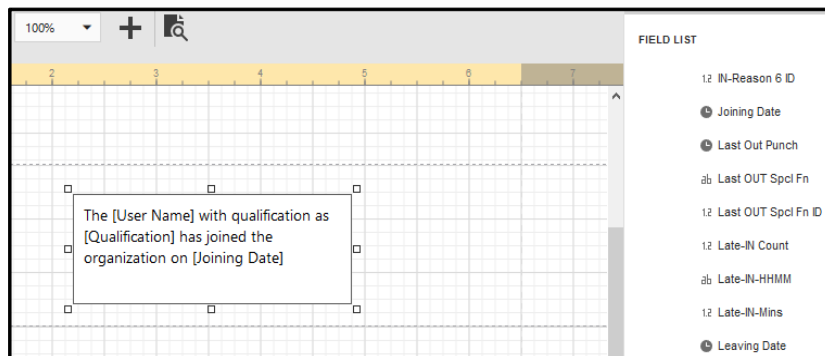
Report controls of appropriate types are created automatically, after you drag items from the **Field List** on the report surface.

After creating a report element, you can bind it to data, customize element layout and appearance.

## Merging of Static and Dynamic field

Static and Dynamic content can be combined within the same control (for example: append some text prefix or postfix to a value obtained from a database), or even a control can be bound to multiple data fields at one time.

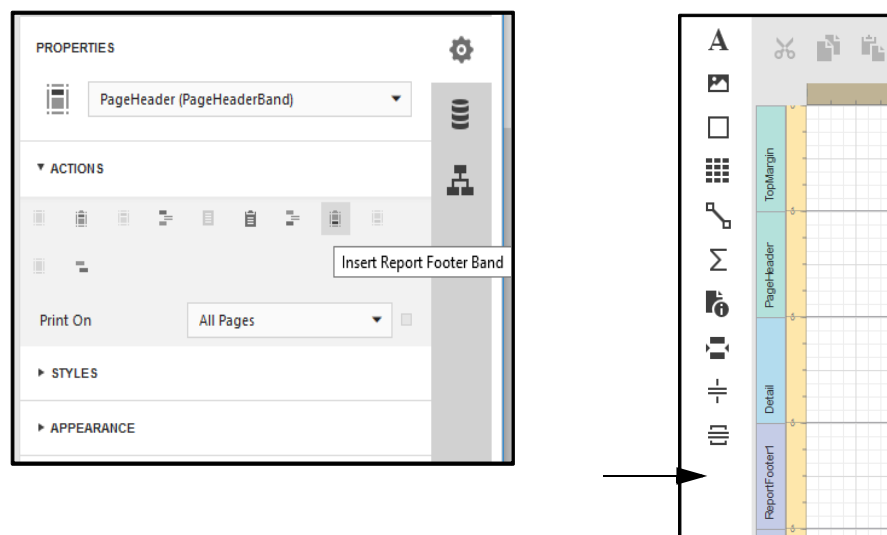
To embed dynamic data into a control's static content, type in the data field names surrounded by [square brackets] as shown below.



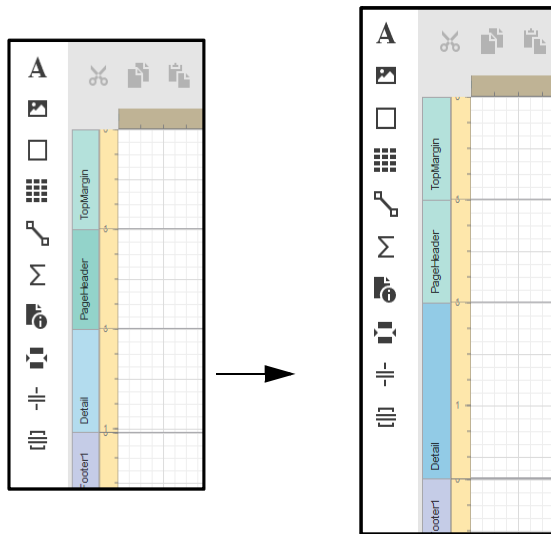
## Create/Insert Report Band


To insert the Report bands; under **Properties** section on right side, click the **Action** collapsible panel and select the desired report band.

For example: select **Insert Report Footer Band** as shown below. The Report Footer band will appear in the bands as shown below.



To resize a band, drag its header strip.



Select the **Custom Field**  from the Control Toolbox. Under **Properties** section on right side, click the **Data** collapsible panel and enter the **Tag**. You need to take care of the following while entering values in the Tag for different functions:

- Rename Group can be applied to Custom Field/Table Cell by enclosing Text within '<' and '>'.
- Rename Group can be applied to Pivot Grid field by enclosing Caption within '<' and '>'.
- Avoid use of Backspace, when not editing any content. Browser may load previous page without saving changes.
- Mention following values of Tag in Data Section, if you wish to include them:
  - **Company\_Logo**: to include Company Logo in "Insert Image"
  - **Date**: to include selected Date in "Custom Field/Table Cell"
  - **From\_Date**: to include selected Start Date in "Custom Field/Table Cell"
  - **To\_Date**: to include selected End Date in "Custom Field/Table Cell"
  - **Month**: to include selected Month-Year in "Custom Field/Table Cell"
  - **From\_Month**: to include selected Start Month-Year in "Custom Field /Table Cell"
  - **To\_Month**: to include selected End month-year in "Custom Field /Table Cell"

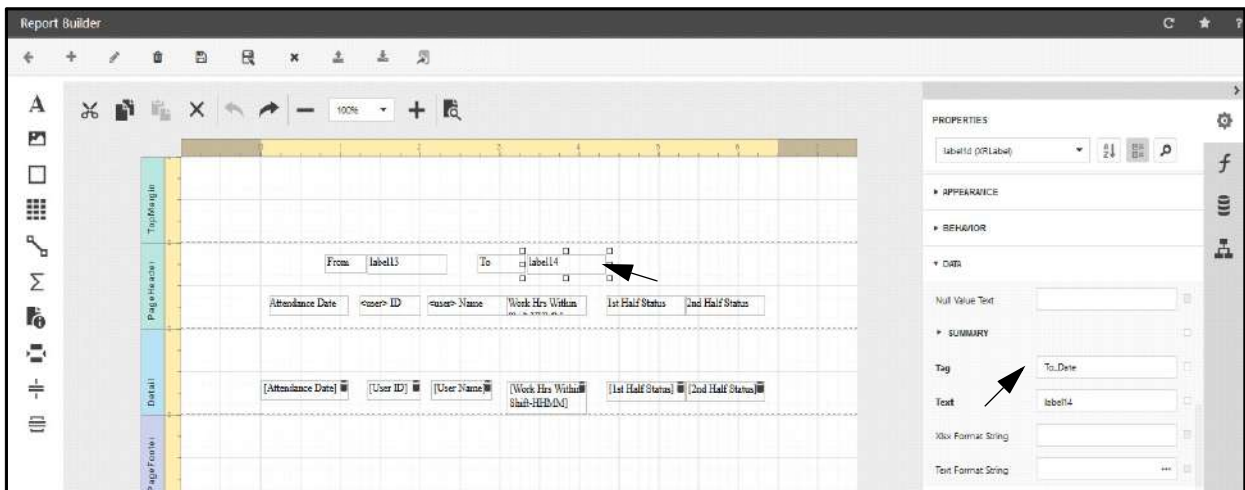
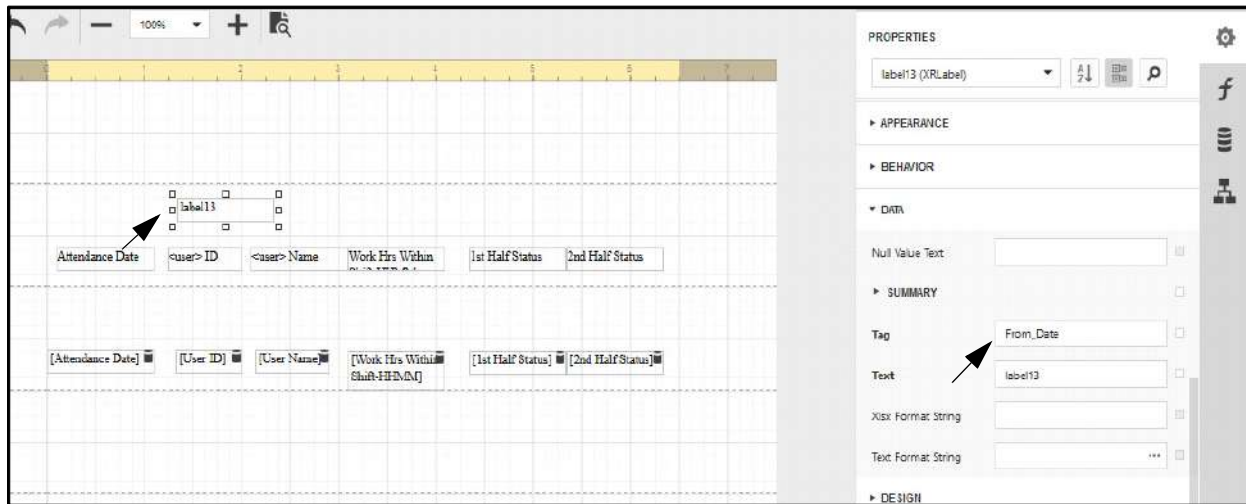
**Example:** Consider a report whose filtering range is selected as Date-Range as shown below.

Now the custom field is selected. The label13 is given the Tag **From\_Date** and label14 as Tag **To\_Date** as shown in below screen-shots.



*If Filtering range is selected as Date; then the custom field should be tagged as **Date**. So in the generated report selected Date will be displayed.*

*Similarly for Report type as Monthly Summary and Monthly details you can select the filtering range as Month or Month-Range. Depending on this you can give **From\_Month**, **To\_Month** or **Month** tag to the custom fields.*



These labels with Tag will display the actual From Date and To Date as selected from the filtering range in the report.

In Sample Preview the tagged label will be displayed as label only.

Attendance Date	<user> ID	<user> Name	Work Hrs Within Shift-HEB(M)	1st Half Status	2nd Half Status
01/11/2017 00:00:00	1	User 1	08:00	PR	PR
02/11/2017 00:00:00	1	User 1	09:00	PR	PR
03/12/2017 00:00:00	1	User 1	00:00	WO	WO

Attendance Details

Date \* 01/01/2018 02/01/2018

Optional Parameters

User Selection

Select Users All

Generate Report For All Users

Generate Report

When the report is re-directed to report page in module and From Date and To Date are selected as shown above. Then the report will be generated as shown below. The tagged label displays the selected date. You can select the format of the date in report Designer page.


Attendance Details

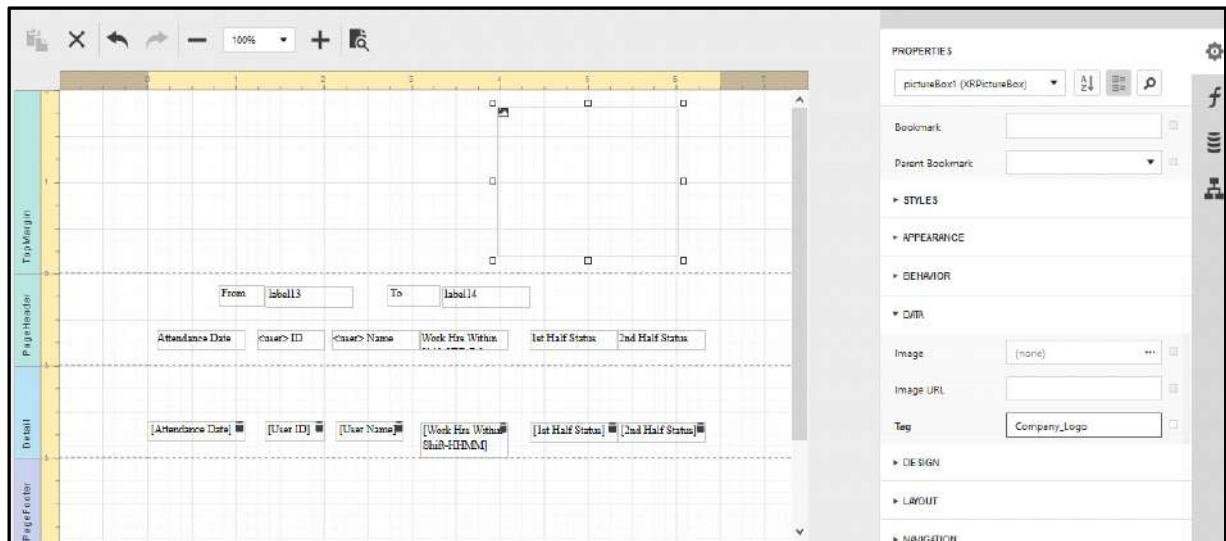
Back

1 of 1 100%

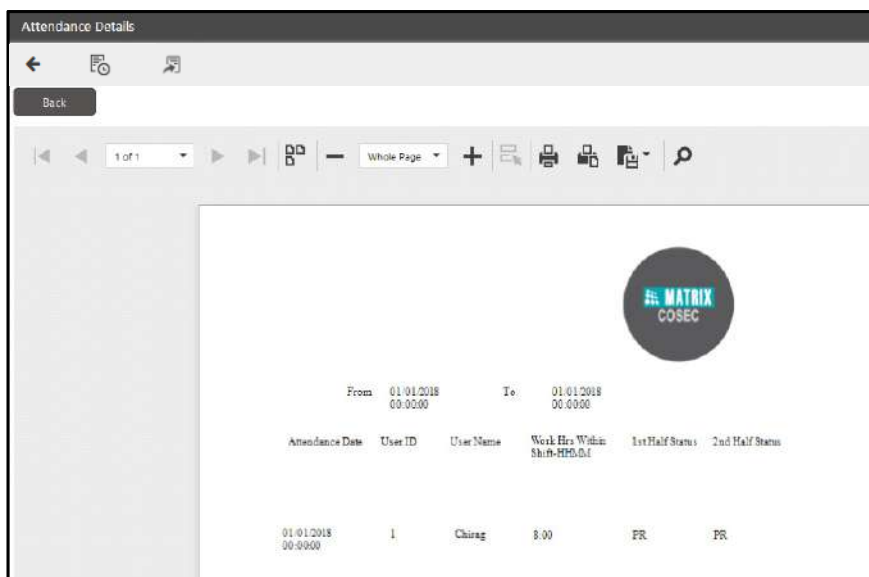
Attendance Date	User ID	User Name	Work Hrs Within Shift-HH:MM	1st Half Status	2nd Half Status
01/01/2018 00:00:00	1	Chirag	8:00	PR	PR
02/01/2018 00:00:00	1	Chirag	7:45	PR	PR
01/01/2018 00:00:00	101	Khushbu	0:00	AB	AB

## For Company Logo

For displaying the Company Logo in the report, select the **Insert Image**  control and give the tag as **Company\_Logo**



This will display the logo image as uploaded in Admin module> System Configuration> Enterprise Profile.

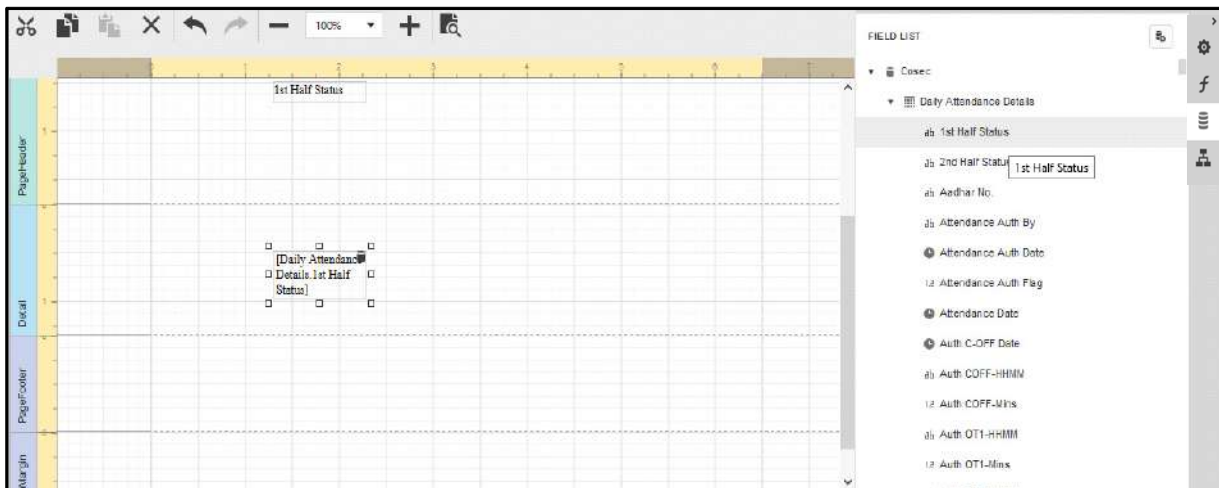


## Binding Report Elements to Data

To embed dynamic information into the report, if this information is contained in the report's data source, this can easily be done using one of the following approaches.

### 1. Using the Field List

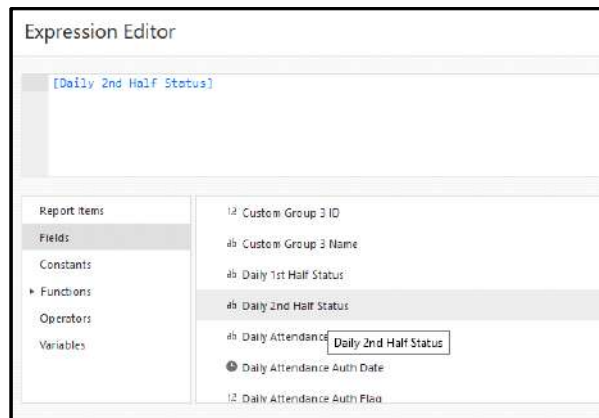
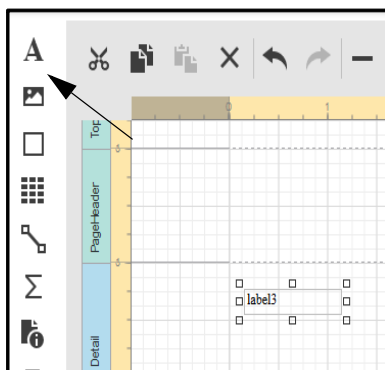
To bind an existing report control to a data field, click the required field item in the Field List, and then drag and drop it onto the control. The database icon inside it will indicate that it is successfully bound.



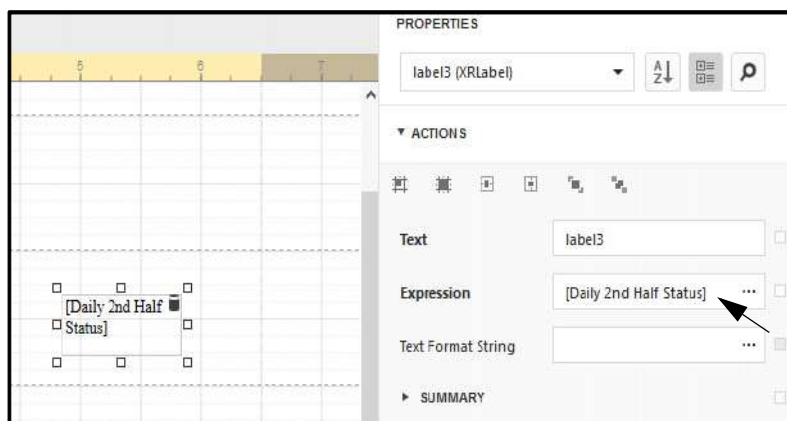
Example: 1st Half Status field from the Field list is dropped in Details band as shown above. Its associated header “1st Half Status” will automatically appear in the header which will remain a static label in the generated report and the dropped field will change as per the database values.

## 2. Using the Property Grid

Select a control from left side. under the **Properties** section at right, click **Actions** collapsible panel and click **...**. In the **Expression Editor**, select the field to be mapped for control.



The selected field for example: Daily 2nd Half Status will appear in Expression as shown below.

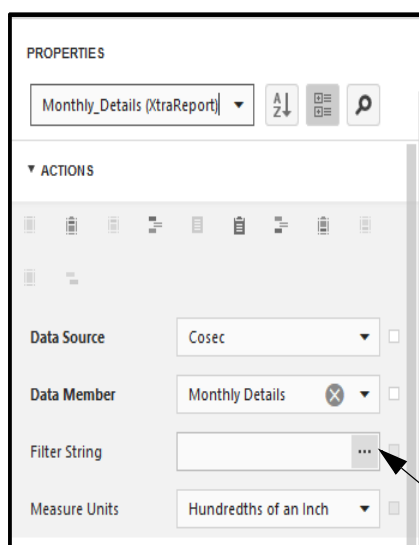


## Filter String (Filter Editor)

You can apply filter to the report based on which report preview will be generated. If a condition is always to be applied before generating the report then that condition can be set in the report builder filter string.

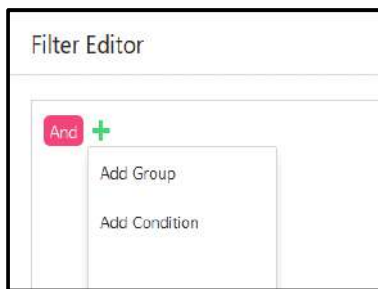
For Example: If data of users between User ID 1000 to 2000 is required then this condition can be set in the filter string. Based on this filter, sample preview will be displayed.

Then in Report page, if data (for example: attendance details) of users belonging to specific department (for example: QA Dept) is required then again filters can be set for the ID of the users.



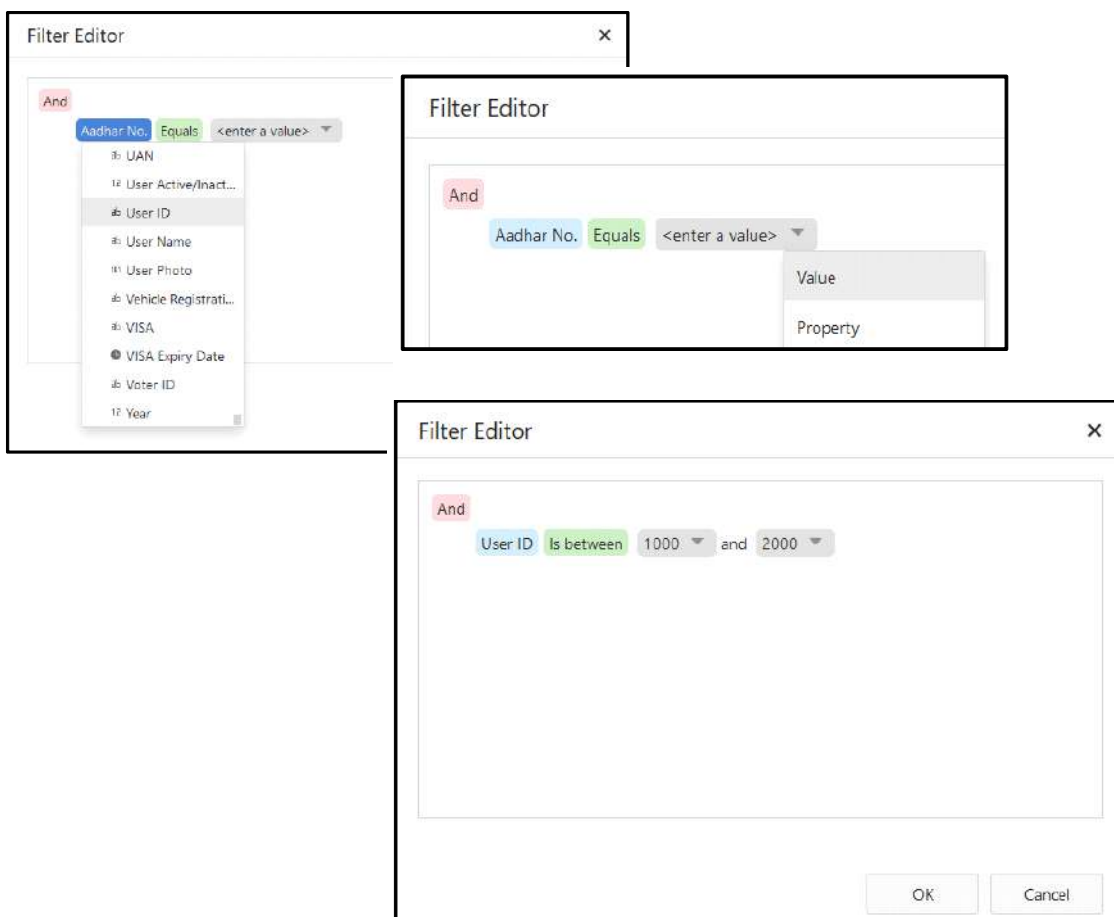
Select the Report under Properties section on the right. Click Filter String \*\*\*. The Filter Editor page will appear as shown above. Place the cursor on **And**. The + sign will appear. Then click on + to add **Group** or **Condition**. You can click on **And** to change the group to **Or**, **Not And**, **Not Or**.





**Add Group:** This will add the logical groups **Add**, **Or**, **Not And**, **Not Or**.

**Add Condition:** This will add the condition to be applied in the filter.



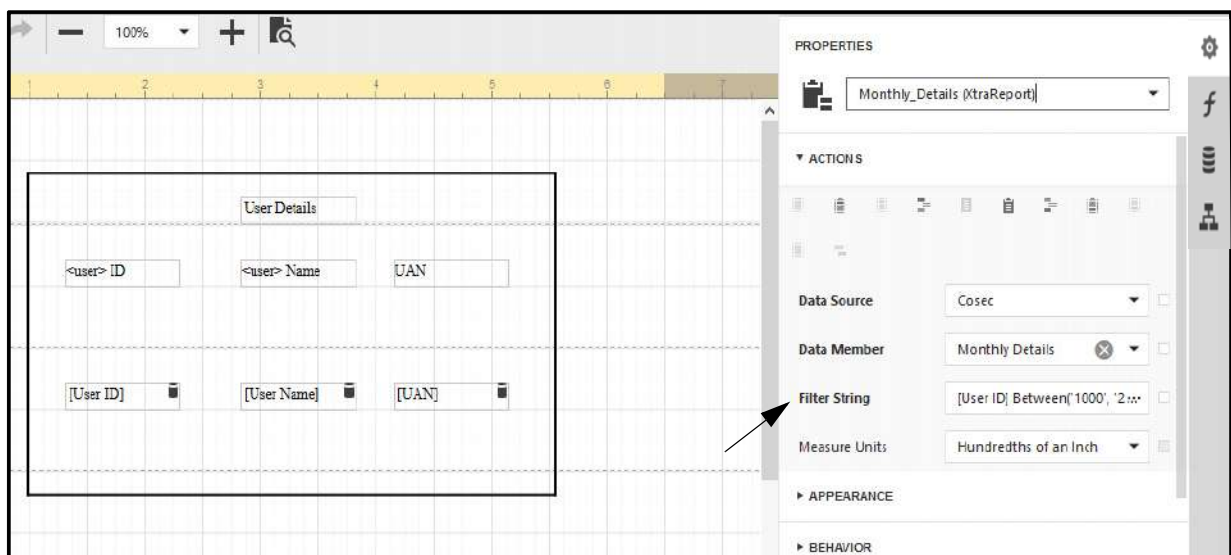
You can select **Value** or **Property** for comparing in the condition. The field will be compared to value or property in the condition to hold true.

If 2 conditions are required, then click **+** and specify condition again.



So Filter will be applied when Condition1 **And** Condition2 are satisfied.


The filter string will be updated with the expression as shown below.



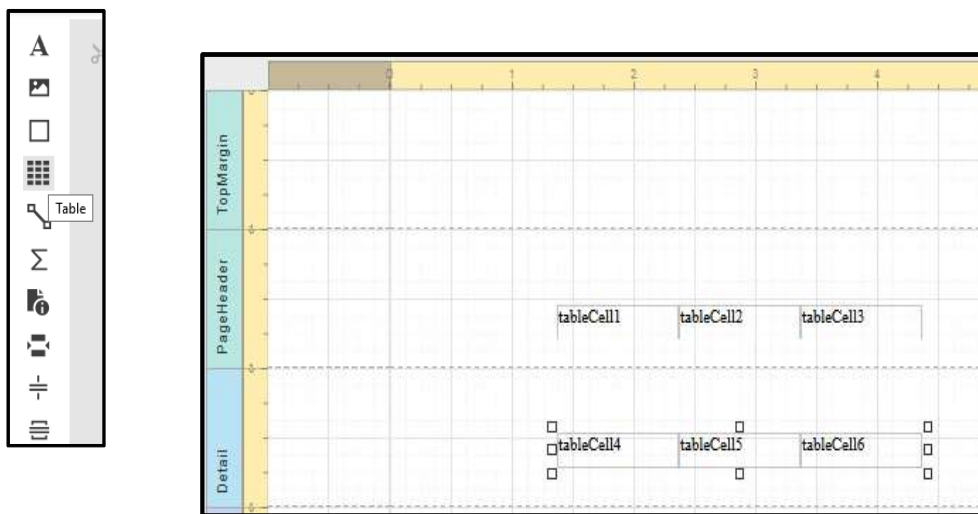
The Sample Preview will display the data after applying the conditions.

User Details		
<user> ID	<user> Name	UAN
2	User 2	99876543211
2	User 2	99876543211

## Table Report

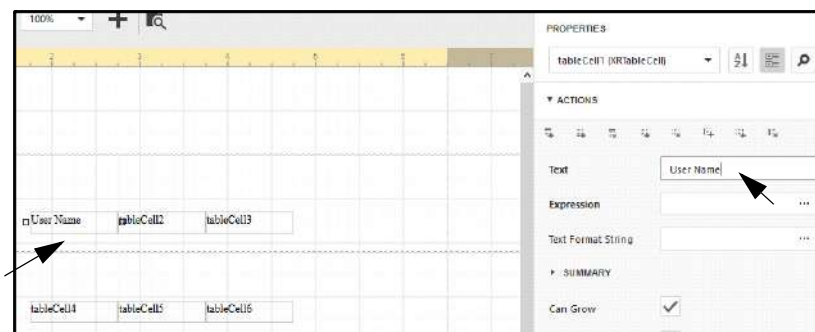
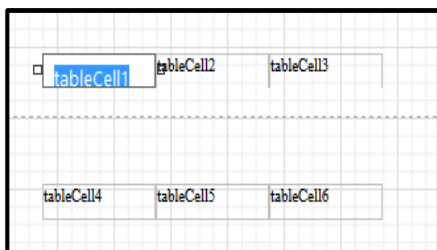
For creating Table Report drag the Table Report  from the Control Toolbox and drop it on the report Designer page.

Place two Table controls to the report's Page Header and Detail band as shown below.



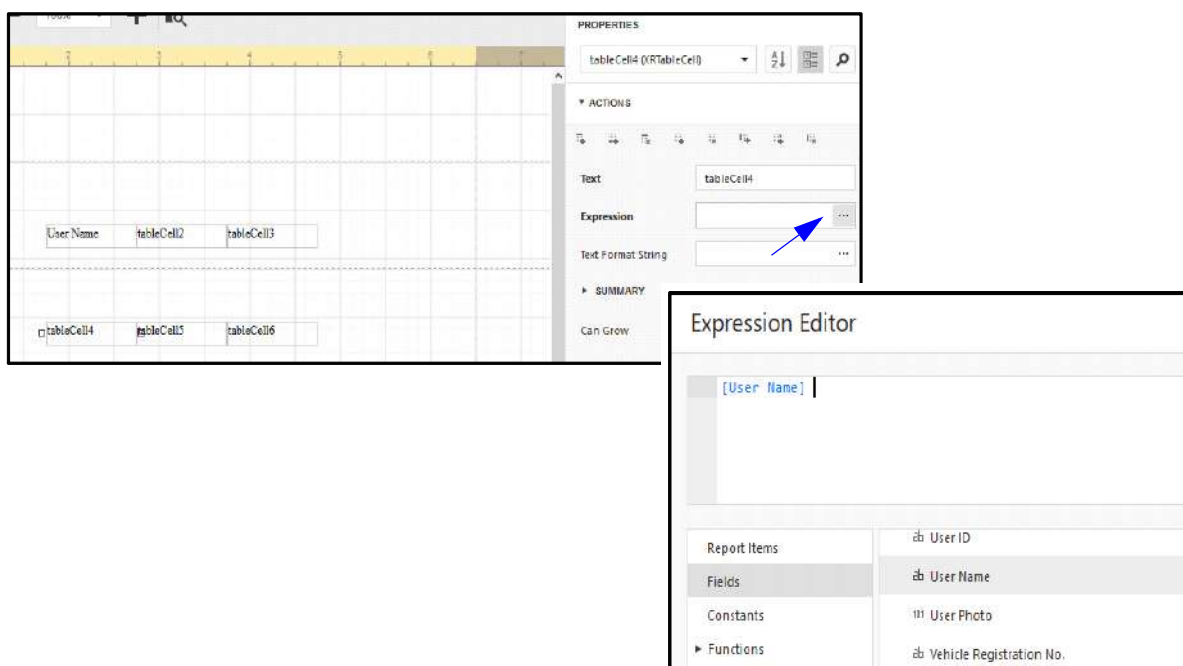
One table will be used as a header, and the other one for the report's detail information.

Type the headers into the upper table's cells. for example: tableCell1 is edited with text User Name. You can also enter the text in Properties grid which will be reflected in the cells in Design Area.

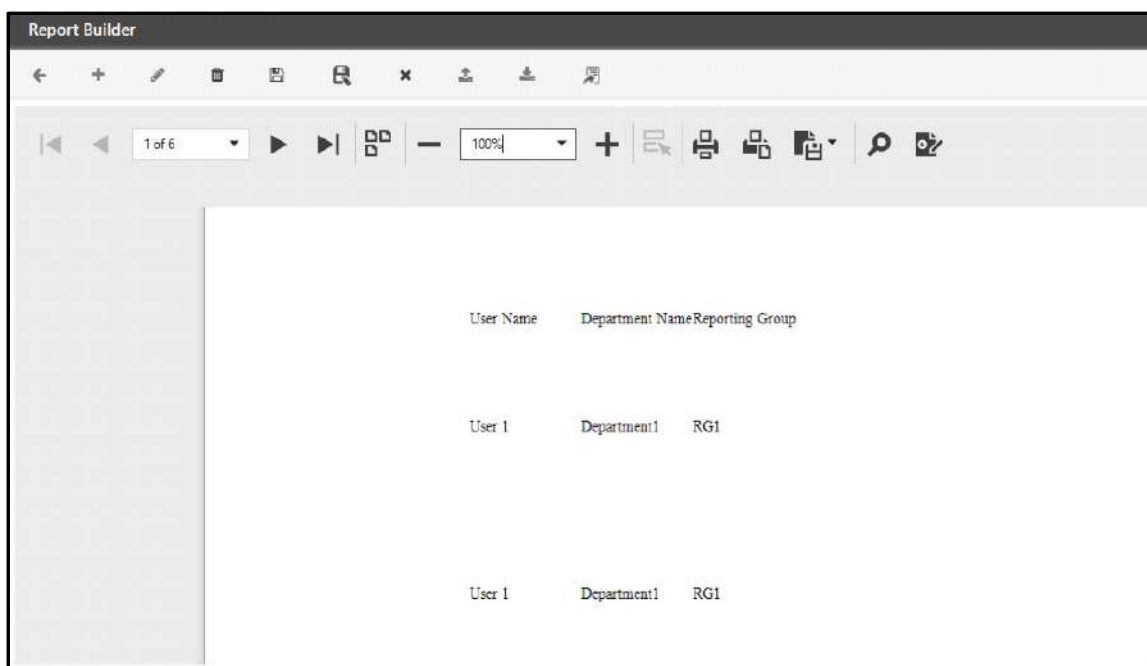
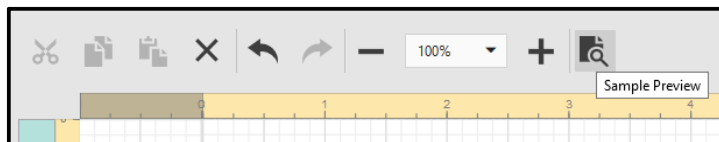


Then bind the corresponding cells in the detail section to the appropriate data fields. To do this, select a table cell and set its Data Field in the Expression as shown below.

Example: Cell4 is bound with User Name; Cell5 with Department Name, Cell6 with Reporting Group Name.

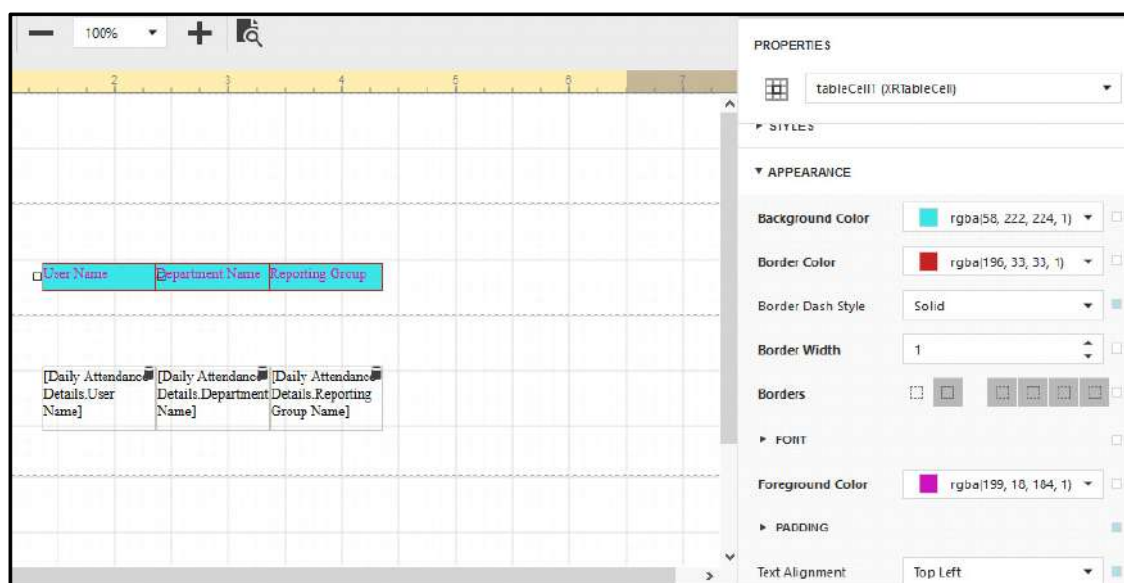


Now you can view the preview of the designed report by clicking **Sample Preview** .



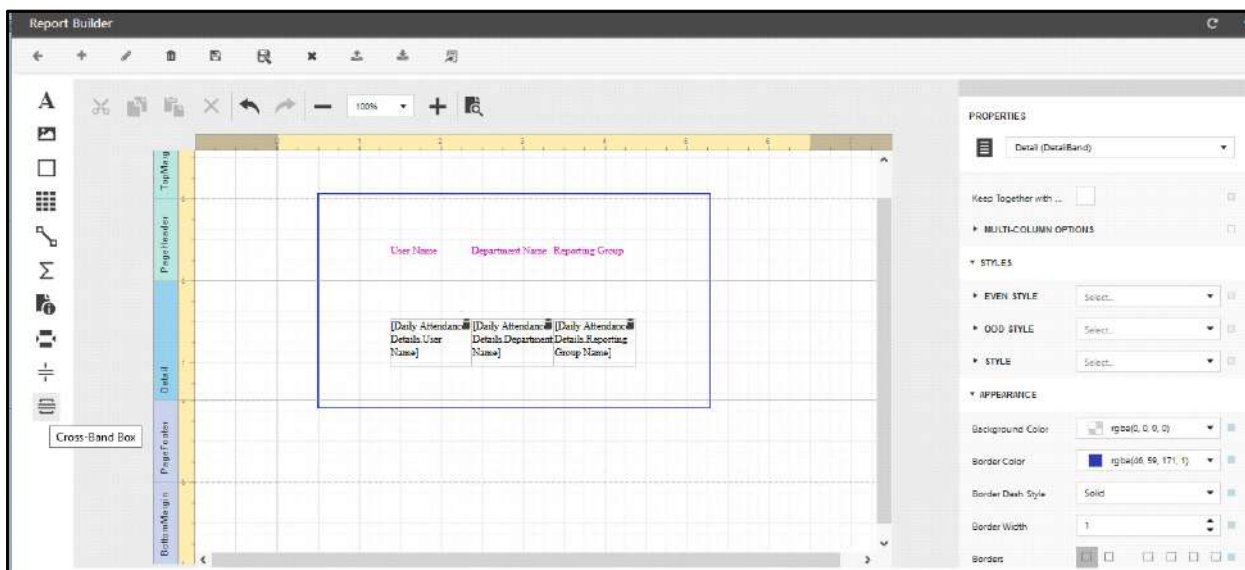
To switch back to the Designer page, click **Designer** .


Finally, you can customize various properties of the tables to improve their appearance. For example, click the **Appearance** collapsible panel under **Properties**, to define the Border property as well as the Background Color property. To customize cell text options, specify the **Font** Property. You can also specify **odd-even** styles for the detail table.



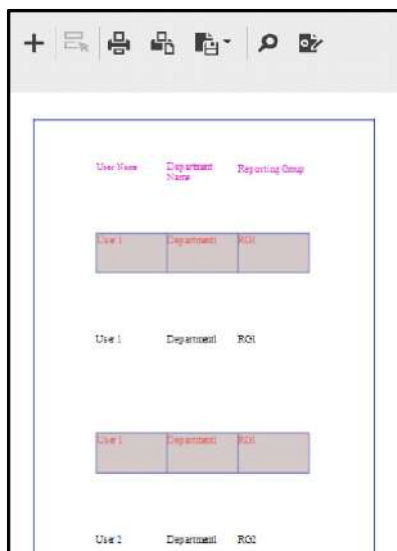
## Cross-Band Box

The Cross-band Box control allows you to draw a rectangle through several bands of report. This is useful if border is required in a report.



For this drag the Cross-Band Box  from the Control Toolbox on the report Designer page. Stretch the corners of the box through the bands to make it a border of the report. You can also change the color of the border from **Appearance**.

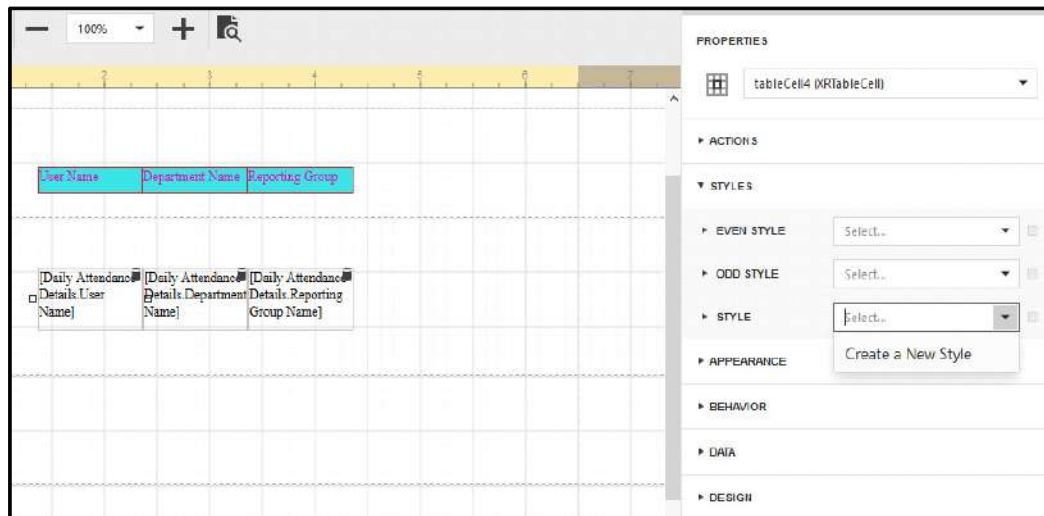
Then click **Sample Preview**  to view the report preview.



## Styles

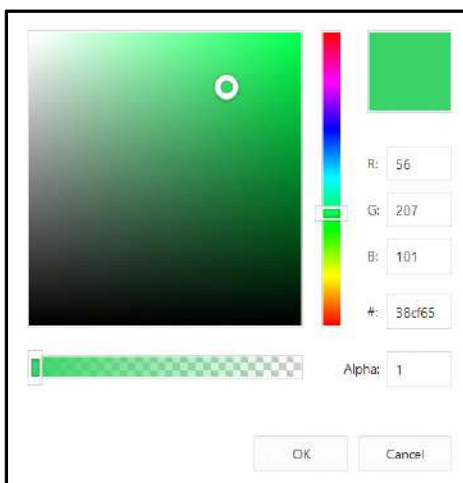
A style that is assigned to a band applies to all controls in that band.

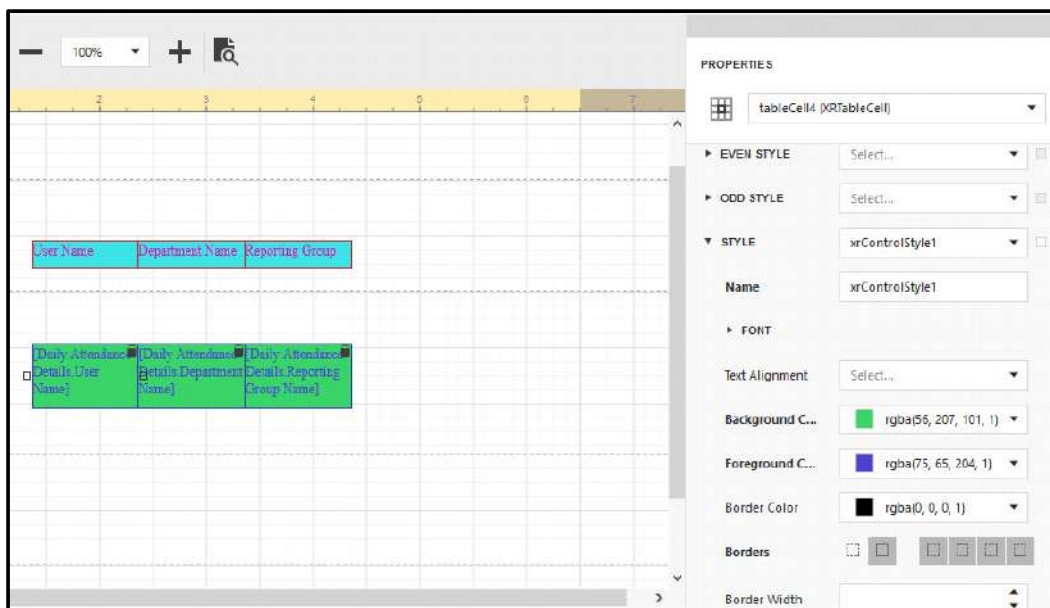
To assign a particular style to a control, select the desired control and click **Styles** collapsible panel under **Properties**.



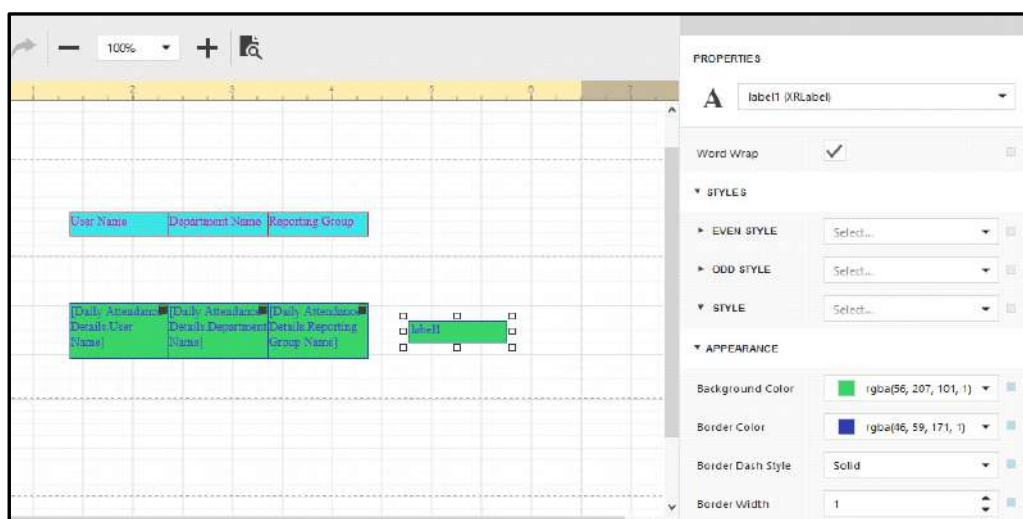
Click the drop-down list for the **Style** property and click **Create New Style** or select an existing style.

Select the desired Background Color. The foreground color, that is the color for the text can be selected in the same way. You can configure other style parameters like Font, Borders, Padding etc.



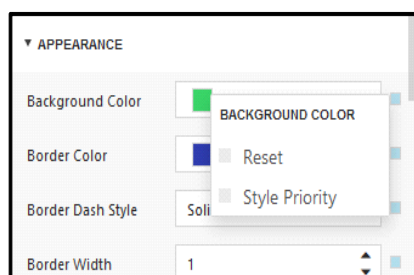


The configuration of style will be reflected in Appearance. If the new control is placed in the band configured with style; then the new label will also get the same style.



When both Styles and individual Appearance settings are assigned to an element, the Style's appearance property has a higher priority than an element's Appearance property.

To assign a higher priority to an element's Appearance property, click Advanced ☐ and then click **Style Priority**.



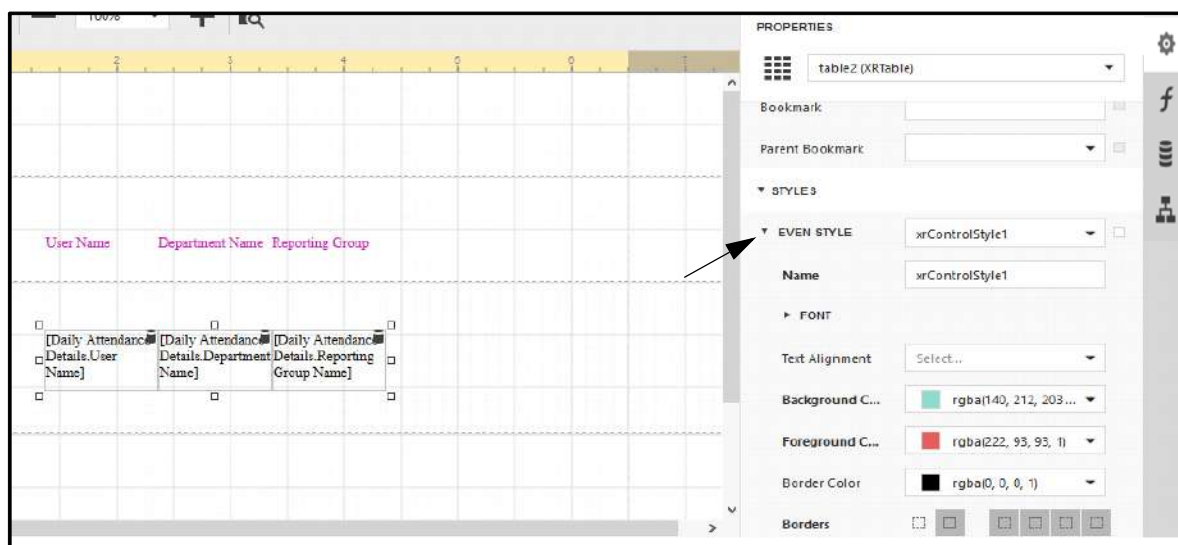


## Odd and Even Style

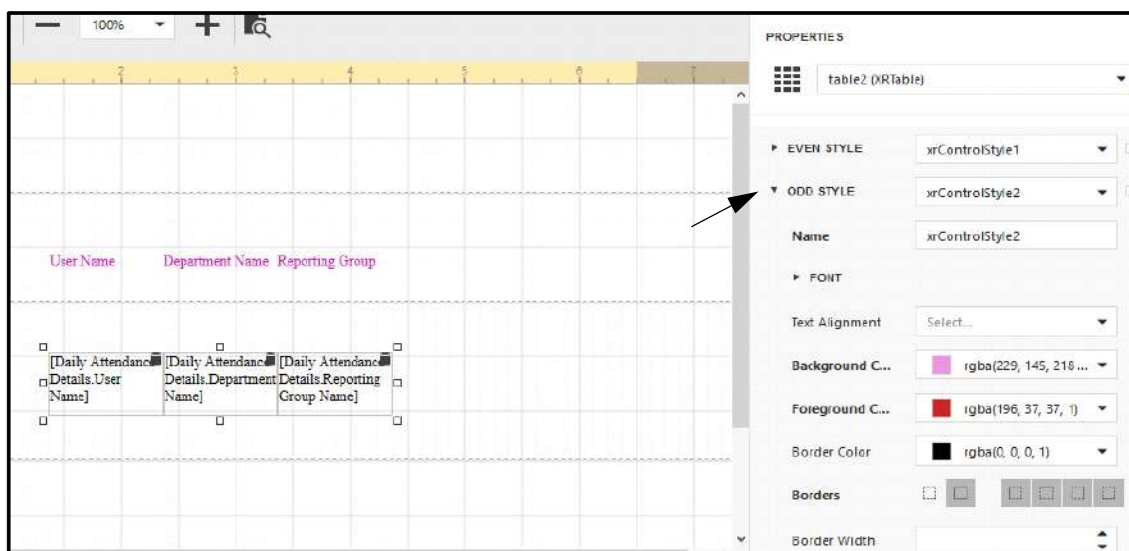
This is mostly used if you wish to assign alternate background color for the records.

Select the Detail table (table in Details band). Click **Styles** collapsible panel under **Properties**.

Click the drop-down of **Even Style**. Select **Create a New Style**. Now for created style; you can select the Background Color, Foreground Color, Border, Font etc. After creating a style; assign the same by selected it as the Even Style.



Similarly create another style and assign as the **Odd style**.

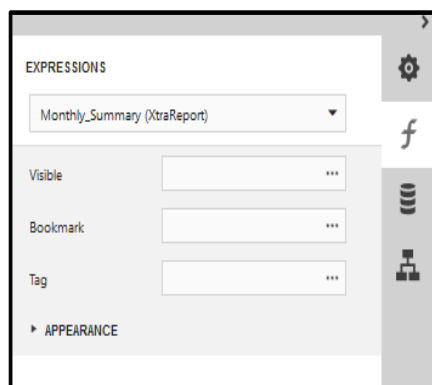


To view the preview of Report; click **Sample Preview**  b. The report preview will be displayed as below with odd and even background colors in different rows.

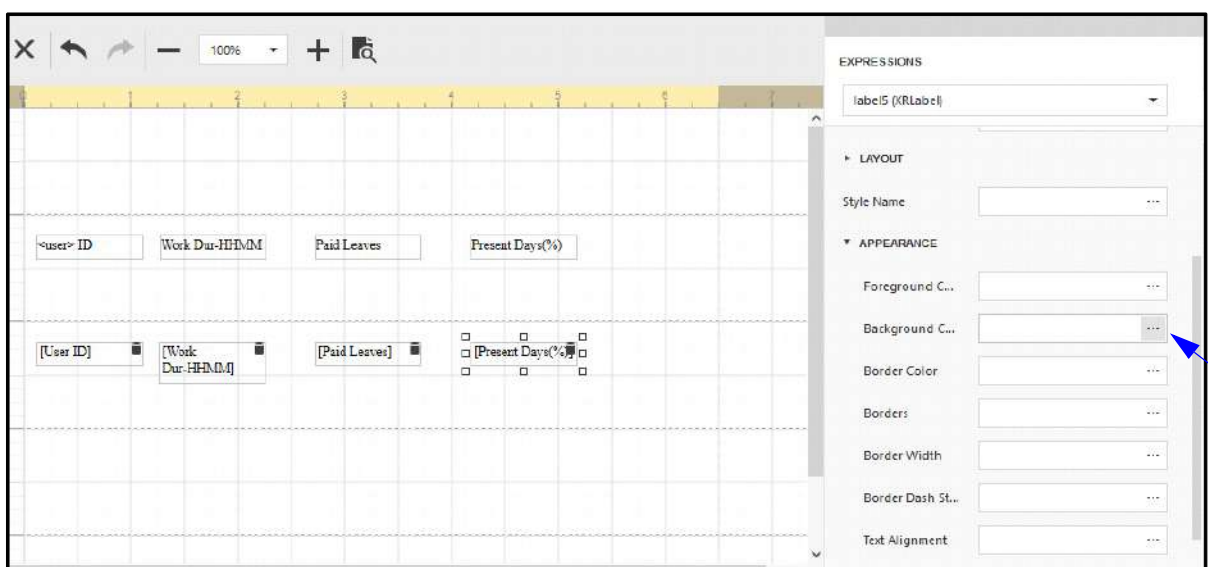
User Name	Department Name	Reporting Group
User 1	Department1	RG1
User 1	Department1	RG1
User 1	Department1	RG1
User 2	Department1	RG2

### Conditional Appearance (Conditional formatting)

Create a report and bind it to a data source. Select the **Expression** Panel, click the **Appearance** collapsible panel.

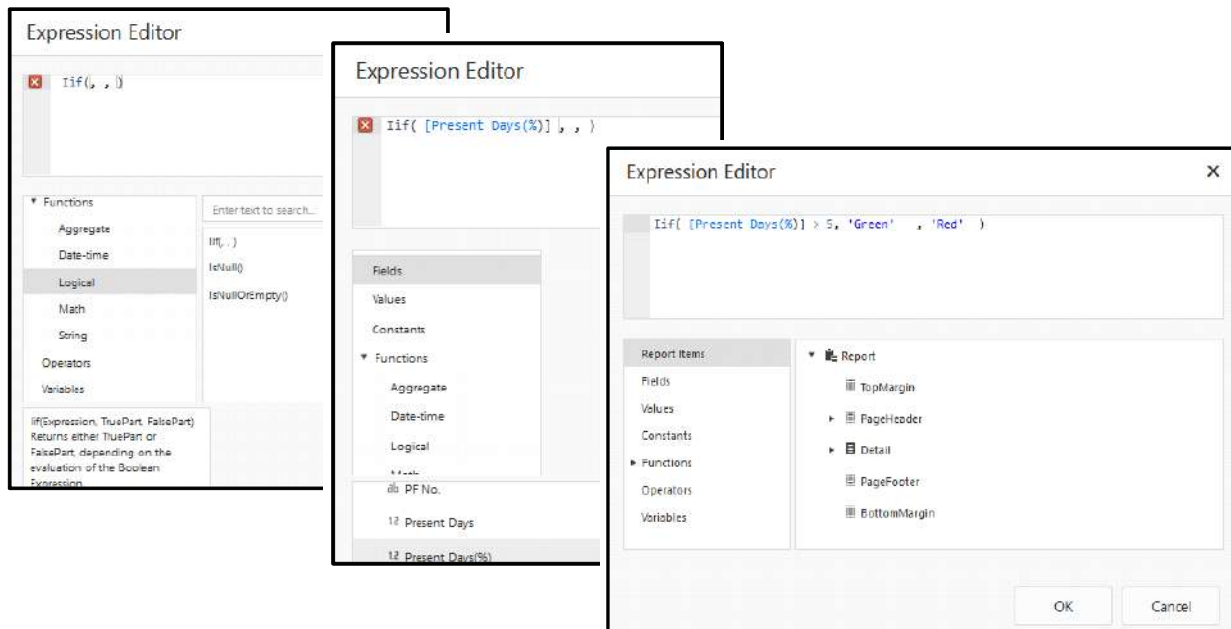


To configure conditional appearance for a control, select the required report control.

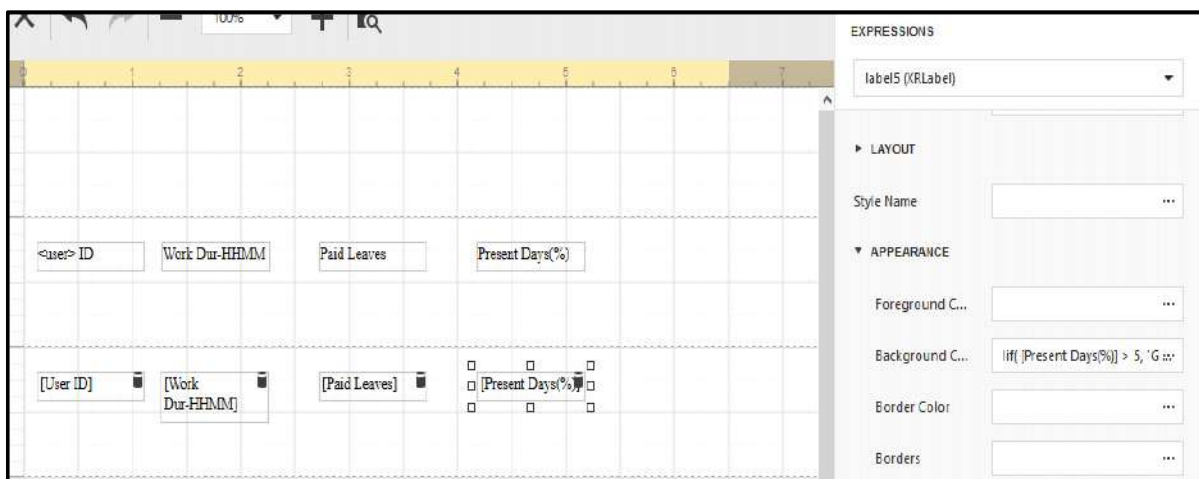


Click **...** to configure the appearance settings based on condition for **Foreground Color**, **Background Color**, **Text Alignment** and **Border related** options. When the conditions defined in the Expression are fulfilled then report control will appear as per the configured conditional appearance.

The Expression Editor will appear. You can create the required Boolean condition based on which appearance formatting will be applied to the report control. Here the Expression for Background Color is defined.



This means when Present Days percentage is greater than 5, then the associated control will display background as green or else will display red color.

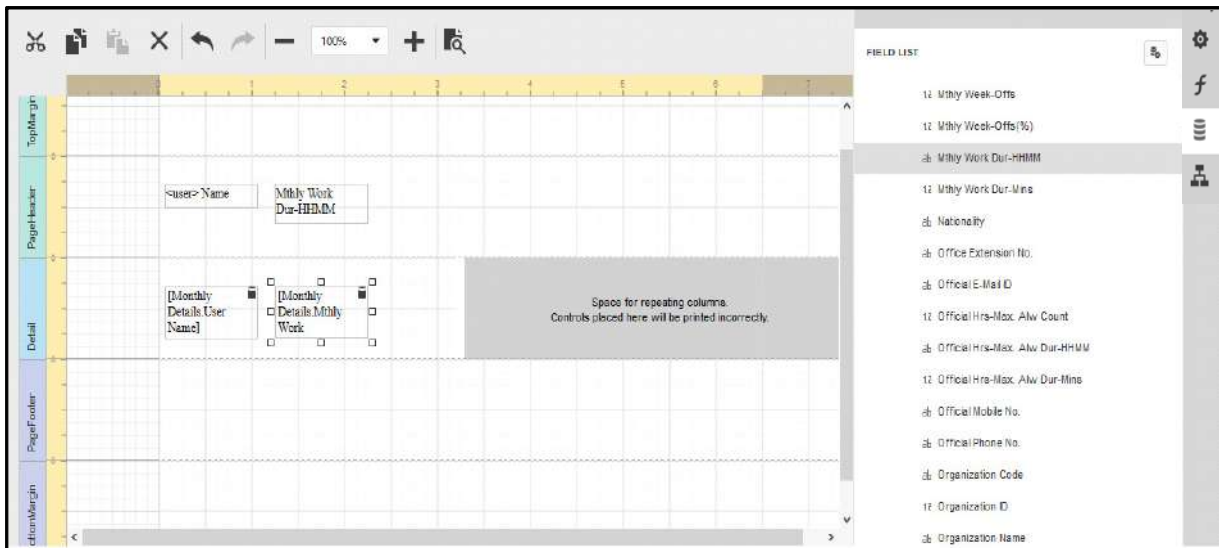


The report preview displays the background color as green for which Present Days percentage is greater than 5.

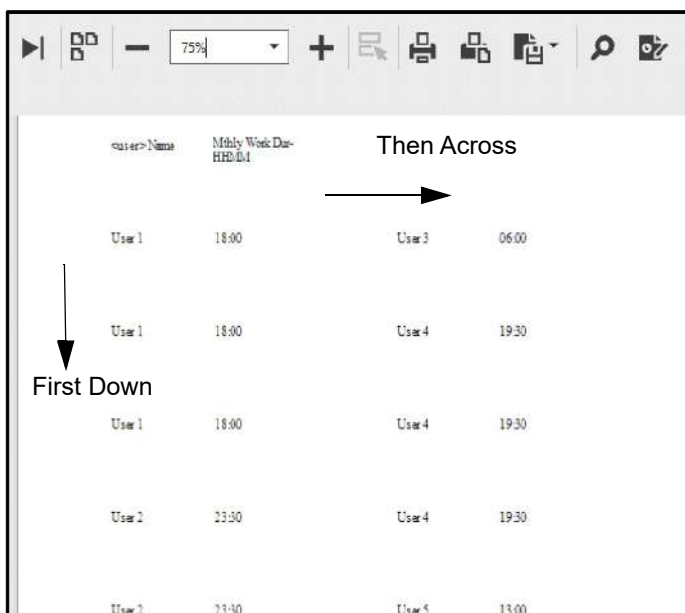


**Layout** determines the order in which records of the same group are processed. Select the desired option — First Down, then Across or First Across, then Down.

Now, on the Detail band's surface, a Grey Area appears, delimiting the available column's width.

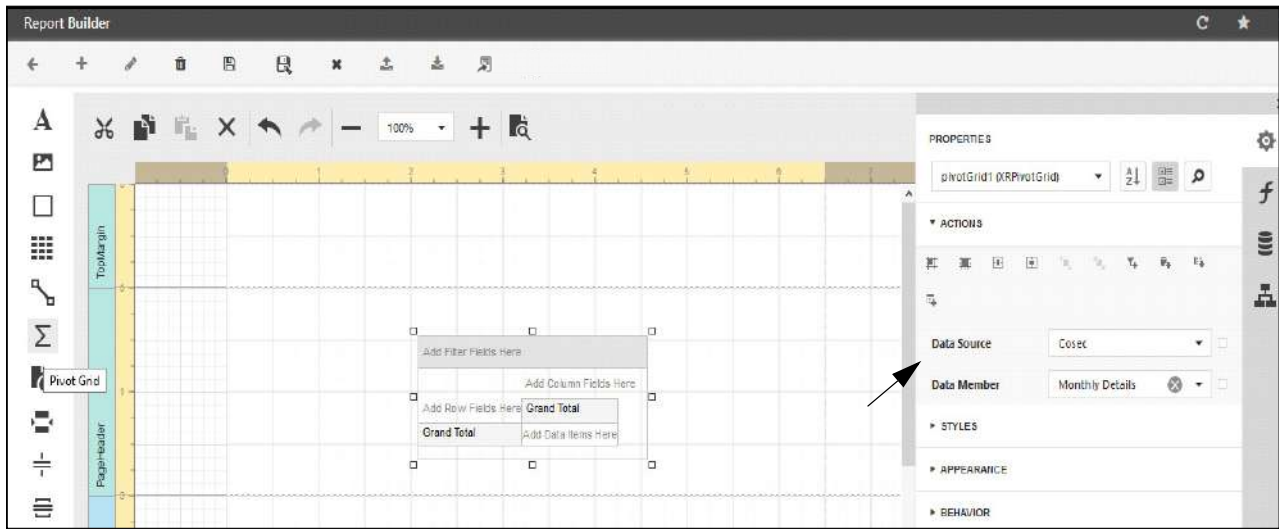



Place the field list elements and adjust the controls width, so that they fit within the effective borders. The preview of the report is displayed below.



## Cross-tab Report (Pivot Grid)





This is the cross-tab report using a **Pivot Grid** that calculates automatic summaries and grand totals across a large number of grouped rows and columns.



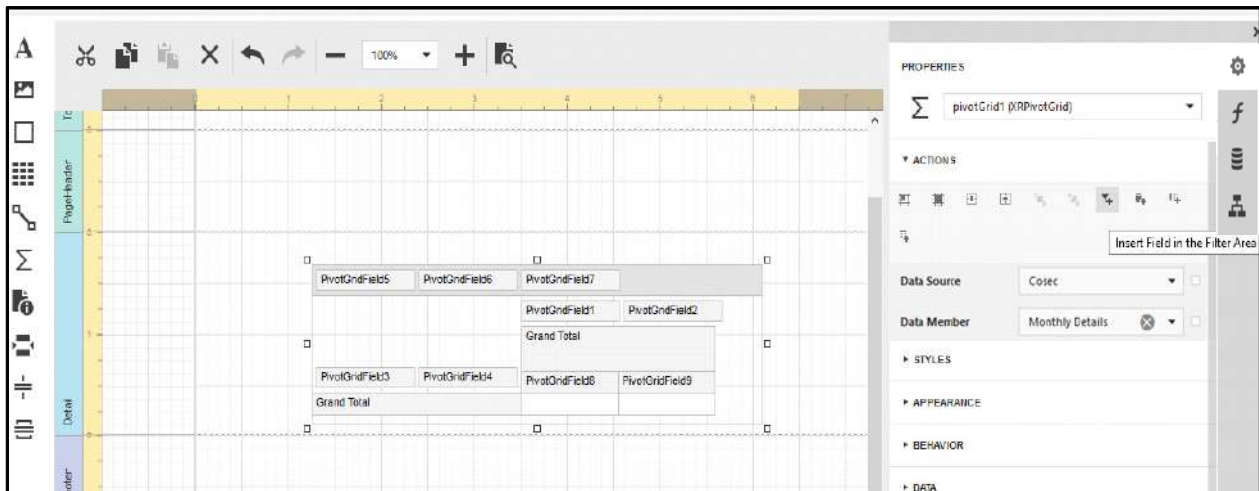
Place **Pivot Grid**  from the Control Toolbox on the report's Detail band as shown above.

The Pivot Grid will get bound to **Data Source** and **Data Member** as shown above. The Data Member property defines from which table or view of your dataset the grid obtains its data.

To add a field to the particular grid area, click the Actions collapsible panel and click one of the following buttons.

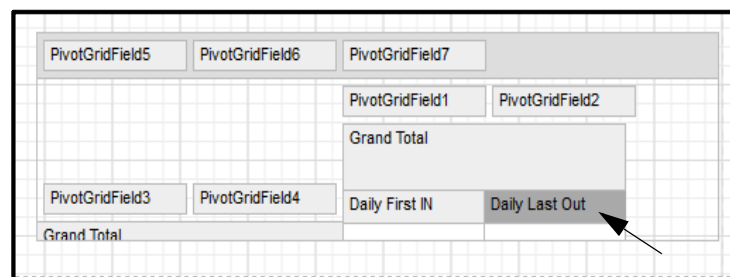
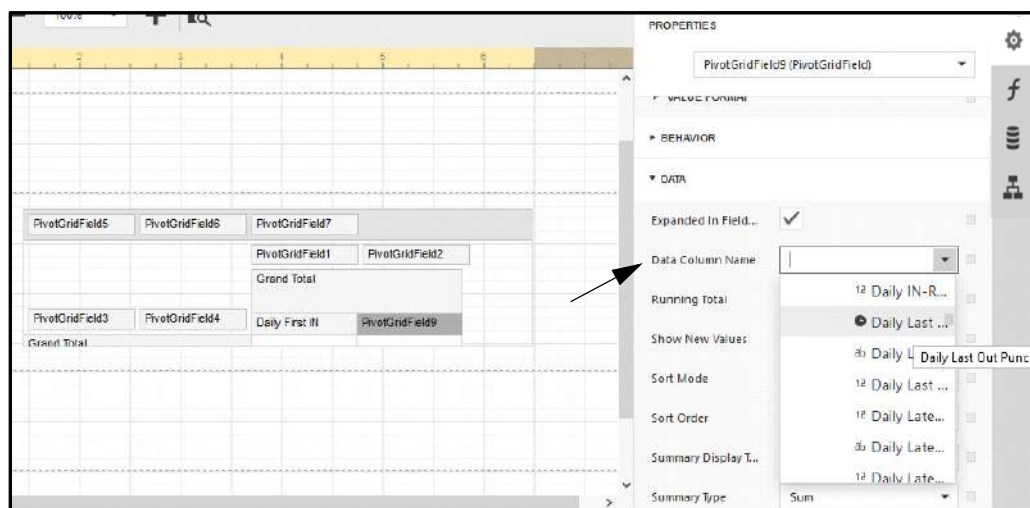
1. **Insert Field in the Filter Area**  : It adds a field to the Filter Header area. This field is available for further customizations.
2. **Insert Field in the Data Area**  : It adds a field to the Data Header area. The summaries will be calculated for all the cells, each cell is identified by a specific column and row.
3. **Insert Field in the Column Area**  : It adds a field to the Column Header area. This field's values will represent column headers.
4. **Insert Field in the Row Area**  : It adds a field to the Row Header area. This field's values will represent row headers.

Add two column fields, two row fields and two data fields, by clicking the above described buttons. You can also add several filter fields.



The Data binding of PivotGridField9 is displayed below. For this click the **Data** collapsible panel and the click the **Fields** collapsible panel. Select the **PivotGridField9**. Now click the drop-down arrow and select the desired field for **Data Column Name**.

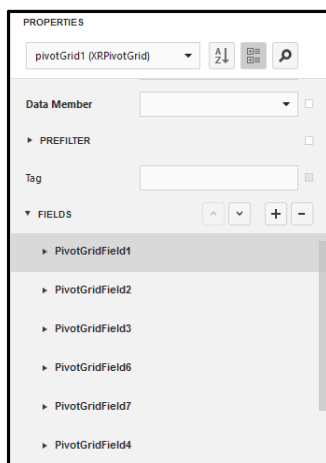
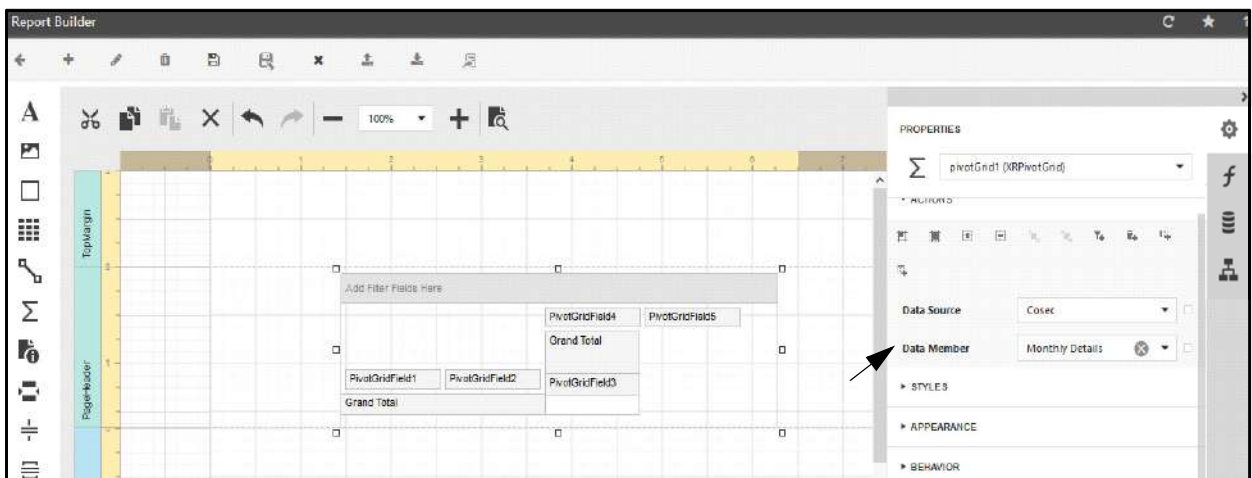
For example: **Daily Last Out Punch** is selected as shown below.



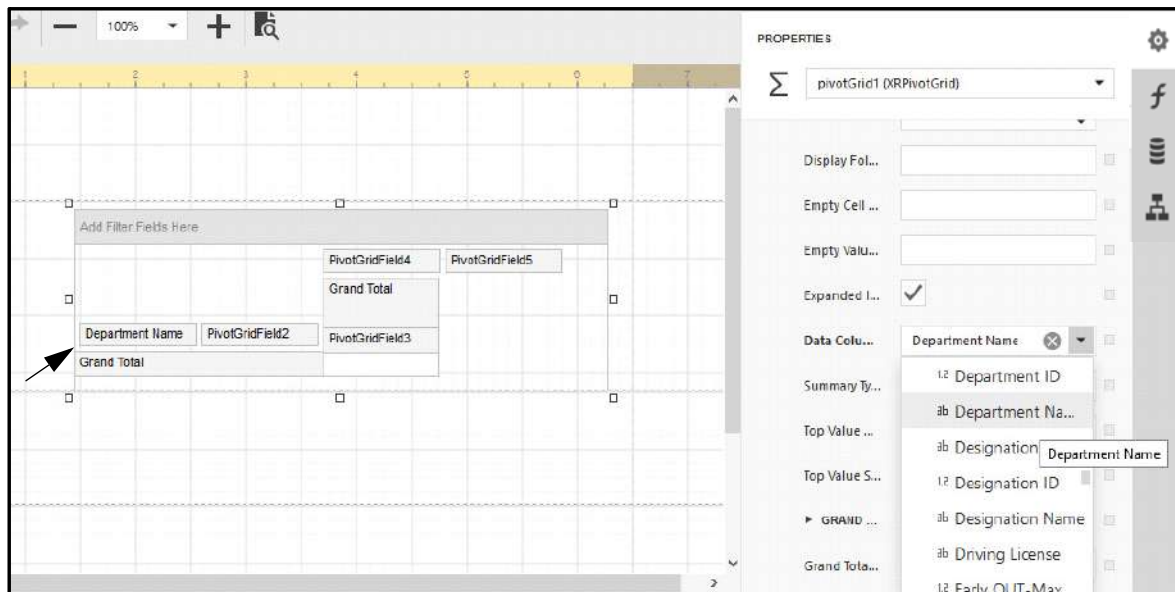
The other pivot grid fields can be updated in the similar manner.

Report Group ID	1st Half Status	2nd Half Status		
		Daily Attendanc...	Daily Schdule Sh...	
		Grand Total		
User ID	User Name	Daily First IN	Daily Last Out	
Grand Total				

### Example: Pivot Grid based Report







All the fields are mapped as displayed below.

Daily Site ID			
		Month	
Department Name	User ID	Work Duration	Late- IN Count
Grand Total			

The report preview is displayed below:

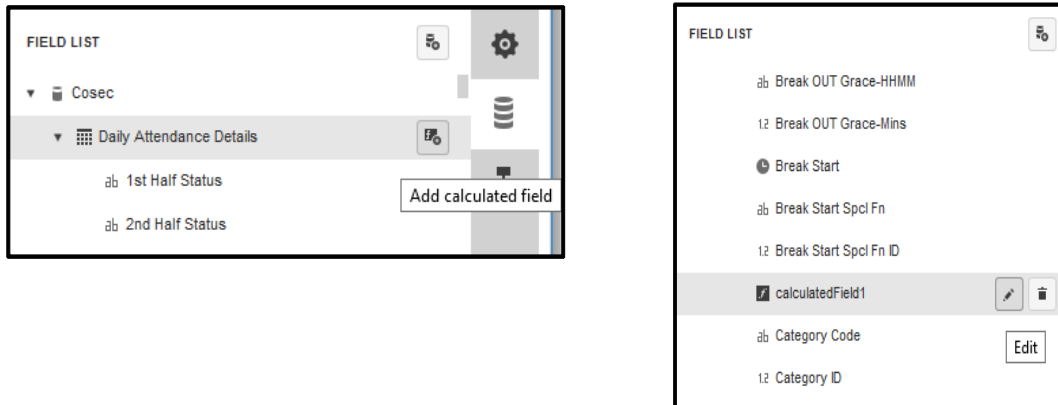
Daily Site ID			
Work Duration	Late- IN Count	Month	
11			
Department Name	User ID	Work Duration	Late- IN Count
Department1	1	0	£0.00
	2	0	£0.00
	3	0	£0.00
	4	0	£0.00
	5	0	£0.00
	6	0	£0.00
	7	0	£3.00
Department1 Total		0	£3.00
Department2	10	0	£0.00
	8	0	£0.00
	9	0	£0.00
Department2 Total		0	£0.00
Grand Total		0	£3.00

## Calculated field

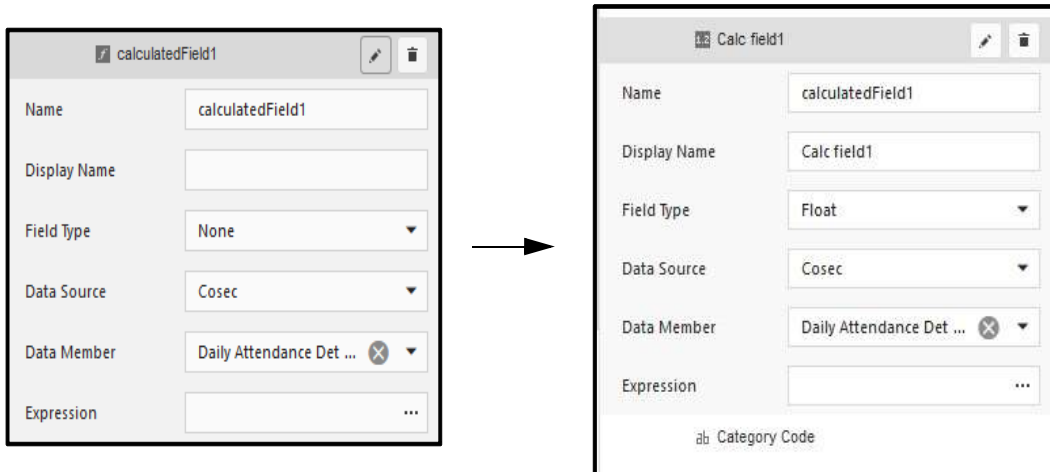
If there is a requirement, wherein you need to perform some pre-calculations over the data field to which a control is bound, this can be done by creating a calculated field, and binding the control to it.

The main purpose of calculated fields is to perform pre-calculations over data fields based on a specific expression.

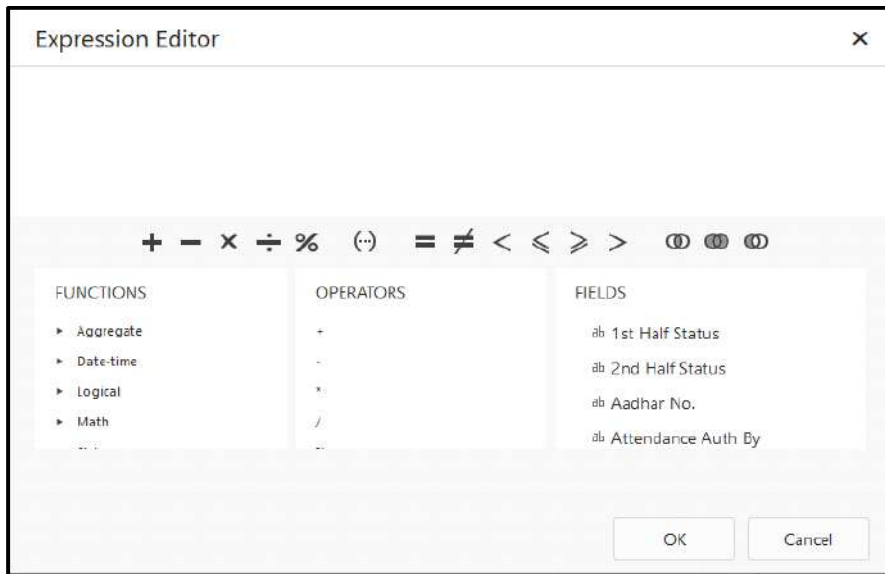
To create a calculated field, in the Field List, Click Data Source. The Add Calculated field icon appears as displayed below. Click **Add Calculated Field**. The field will be created in the field list as displayed below.



Click **Edit** to configure the calculated field and specify the values of different attributes such as **Display Name**, **Field Type**, **Data Source**, **Data Member** and **Expression**. You can change the **Field Type** property in which the result of calculated field is required.



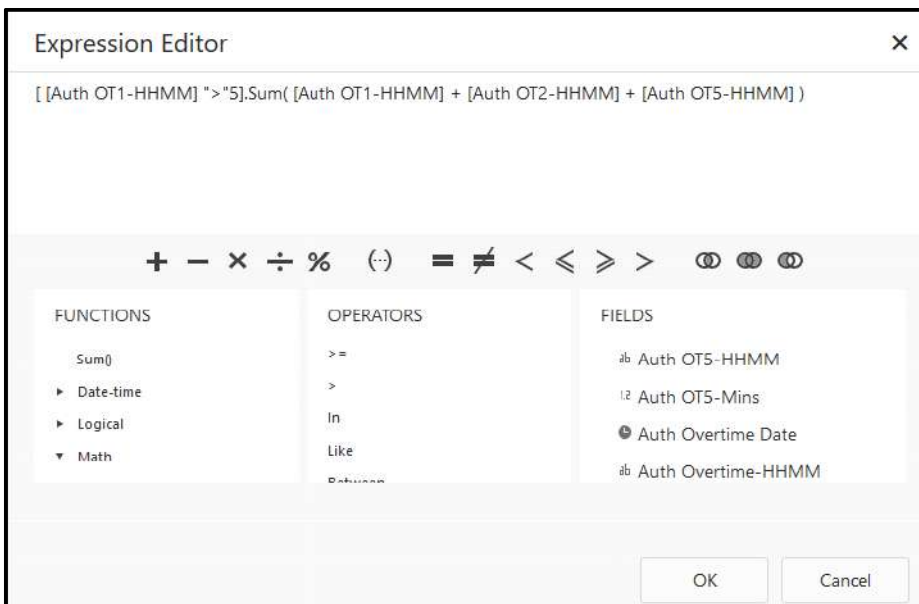
Now, create an Expression for the calculated field. Click **...** in the Expression section. The Expression Editor window appears as displayed below.



To perform different string, date-time, logical, and math operations over data, use standard functions from the **Functions** list. To add a data field or report parameter to this expression, double-click the required name in the **Fields** list. A data field is inserted into the expression's text using its name in [square brackets]. To add **Operators** between field names, use the toolbar or Operators list.

Select and double-click on the function. for example: Sum(). Then double-click on the fields to move them to the expression string. for example: Select Authorized OT1, OT2 and OT5 and click the operator( for example: +) between fields from the tool-bar as shown below.

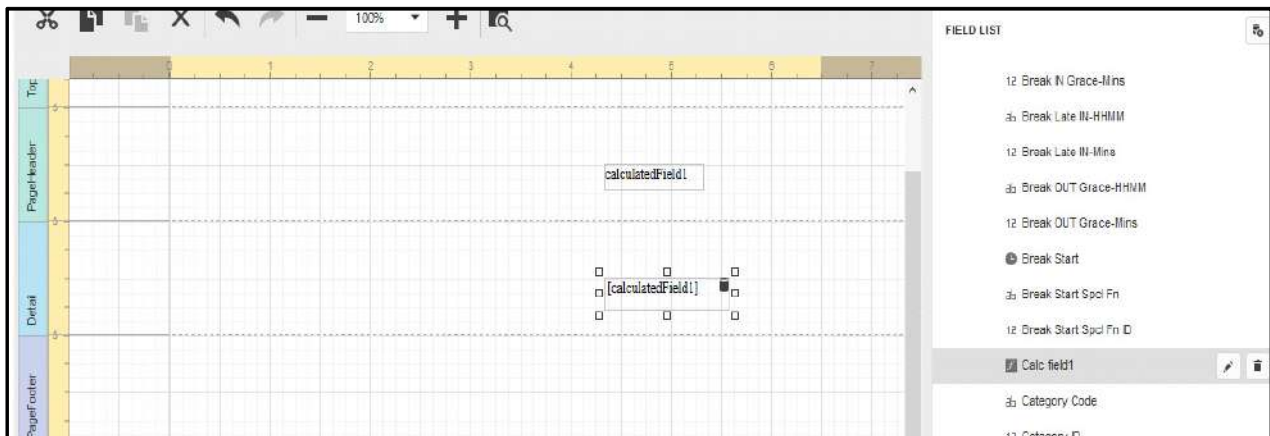
The function [sum() implies that if some condition is true then sum of defined fields will be done. For example: If Authorized OT1 is greater than 5 then sum of OT1, OT2 and OT5 will be done.



Then click **OK** to save the expression.

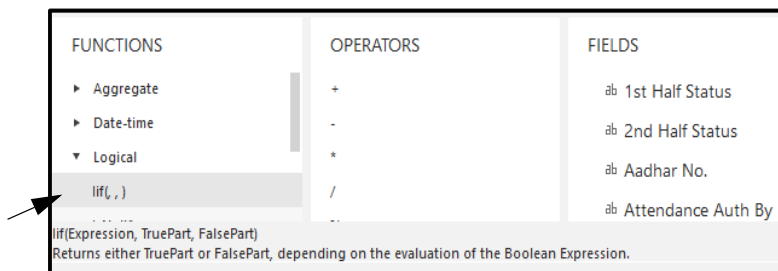
This expression will calculate the sum of all OT1,OT2 & OT5 of all records and will return the overall sum. For calculating sum of individual record, you have to simply specify OT1+OT2+OT5.

Finally, drag the calculated field from the Field List onto the required band, just like an ordinary data field.



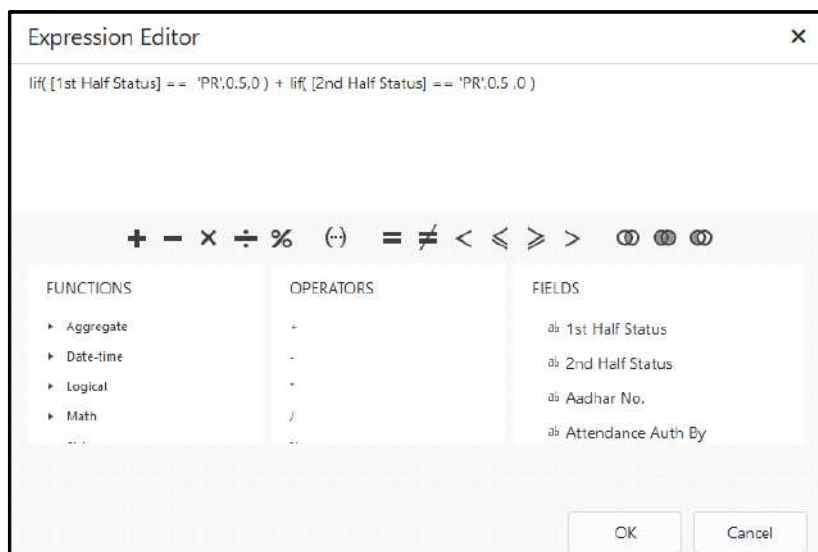
### Example1- Logical function

For conditional based sum; **lif(,,)** can be used. For this select the function **lif(,,)** from logical functions.

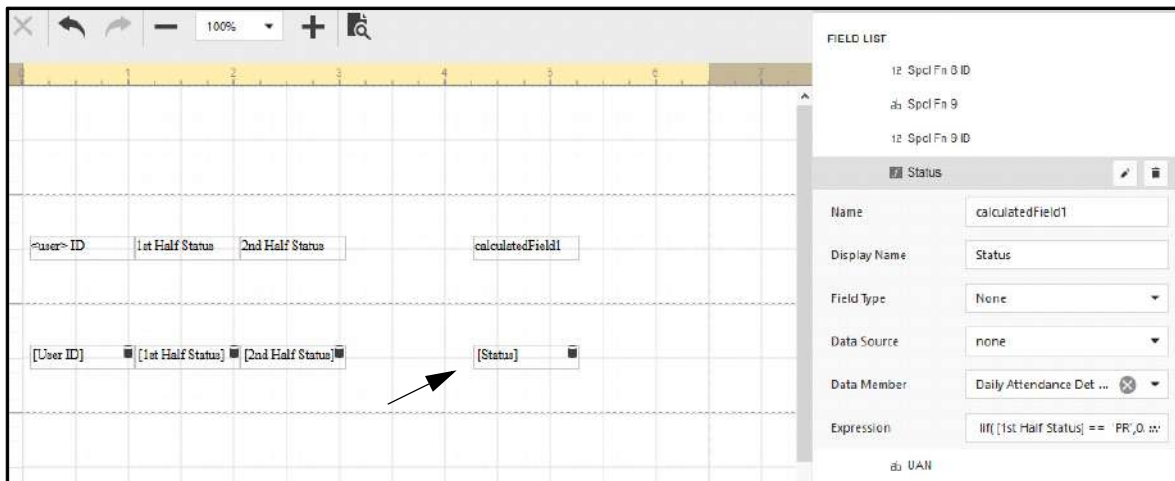


Then select the field to create the expression, that is, If 1st Half Status is equal to PR then display true value as 0.5 or else display 0. The **equal to** operator can be selected from the operators list.

Another expression can also be added to this expression by using **+** operator. Then create expression as If 2nd Half Status is equal to PR then display true value as 0.5 or else display 0. If both 1st half and 2nd half status is PR, PR then resultant will be displayed as 1.



Now this calculated field can be dropped onto the Report Detail band as displayed below.



The Report Preview page appears as displayed below:

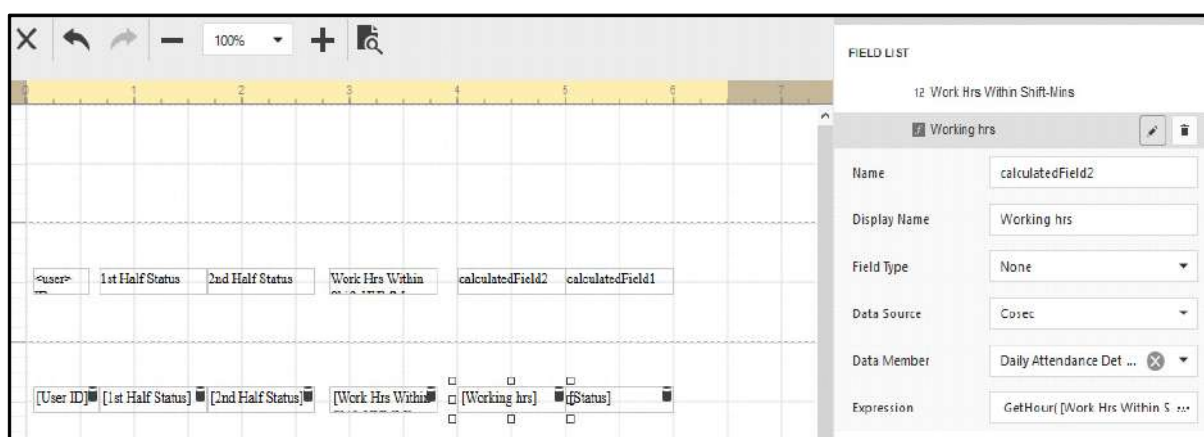
<user> ID	1st Half Status	2nd Half Status	calculatedField1
1	PR	PR	1
1	PR	PR	1
1	WO	WO	0
2	PR	PR	1
2	PR	PR	1

## Example2- Date-time function

Select the **GetHour()** function from the Date-time function.



Then select the field- Work Hrs within shift-HHMM.



This calculated field when placed in Report will get the value in hours from value in HHMM.

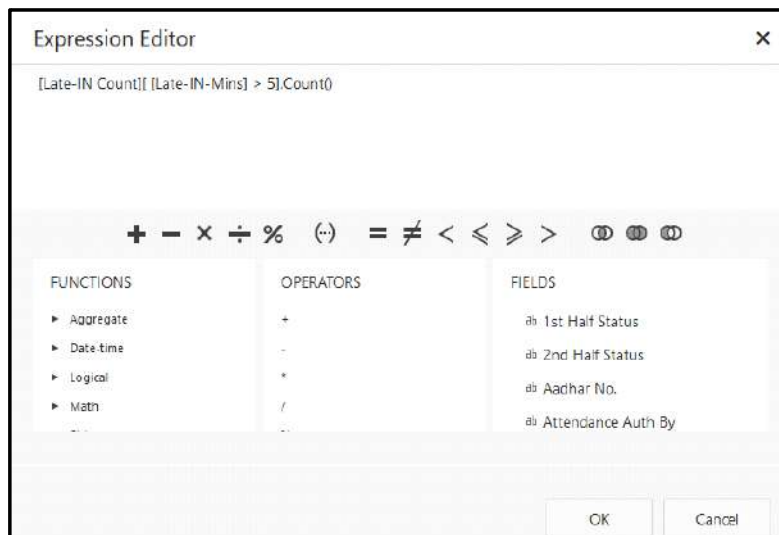
<user> ID	1st Half Status	2nd Half Status	Work Hrs Within Shift-HH:MM	calculatedField2	calculatedField1
1	PR	PR	08:00	8	1
1	PR	PR	09:00	9	1
1	WO	WO	00:00	0	0
2	PR	PR	09:00	9	1
2	PR	PR	09:00	9	1

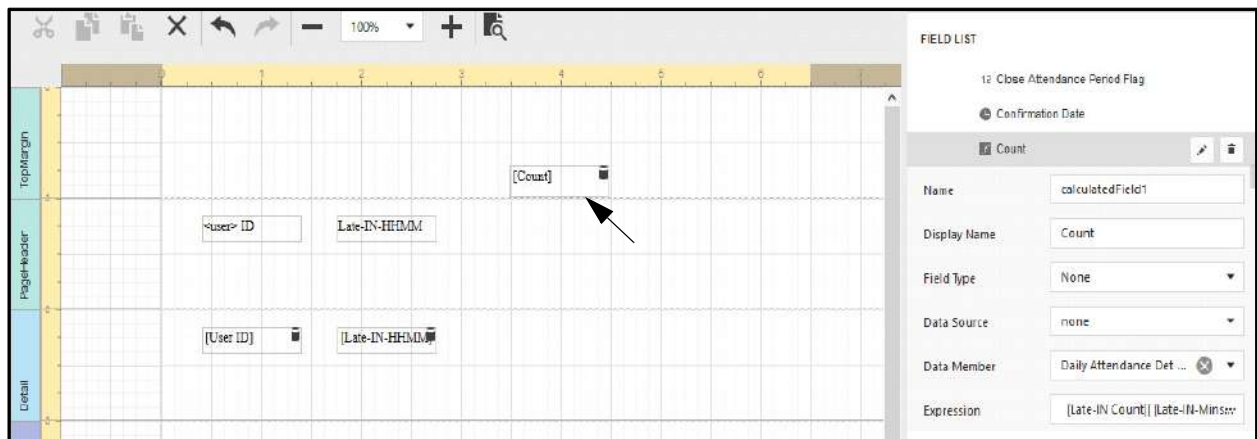
### Example3- Aggregate function- Count

The syntax for Aggregate function is **[Collection] [Condition].Function([Field])**. Count Aggregate function does not require field values to count records so leave round brackets empty.

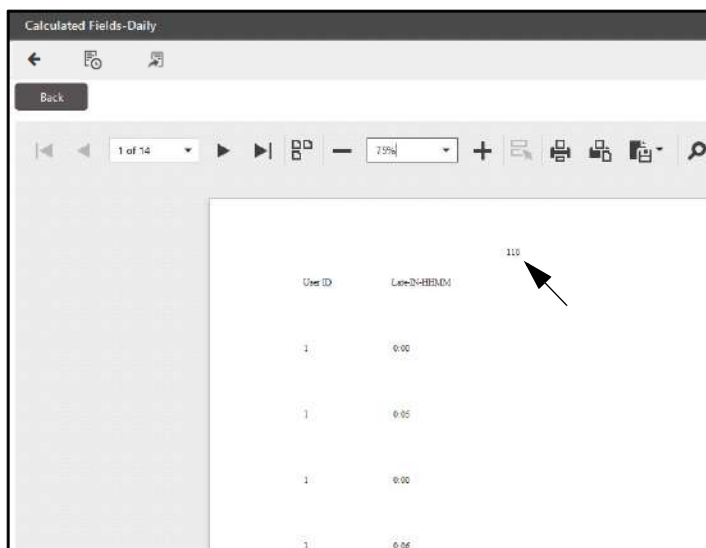
Select the Aggregate function **[Count()]**. Then specify Collection as **Late- IN Count**. And condition (optional) as **Late- IN Mins >5**. It returns number of entries in collection based on specified condition.

Here If Late-IN Mins is greater than 5 then Late-IN count will be displayed.






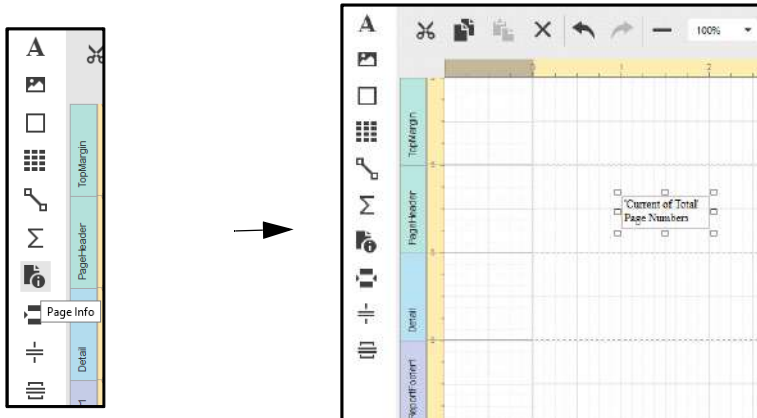
In actual report the calculated field will be displayed as below.





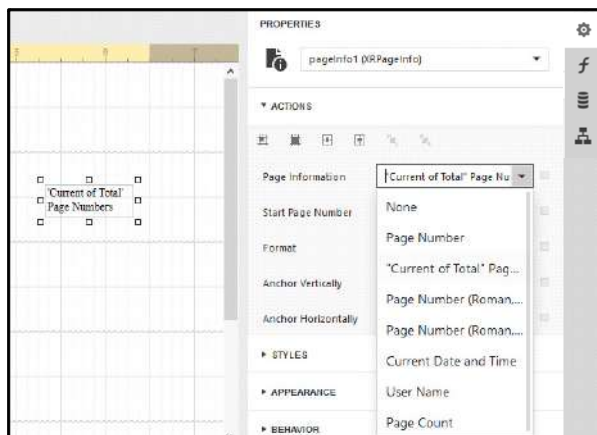
## Adding Page Numbers and System information to Report

To add page numbers or system information to a report, drag and drop **Page Info**  from the Control Toolbox to the Page Header band as displayed below.



### 1. For Page Number

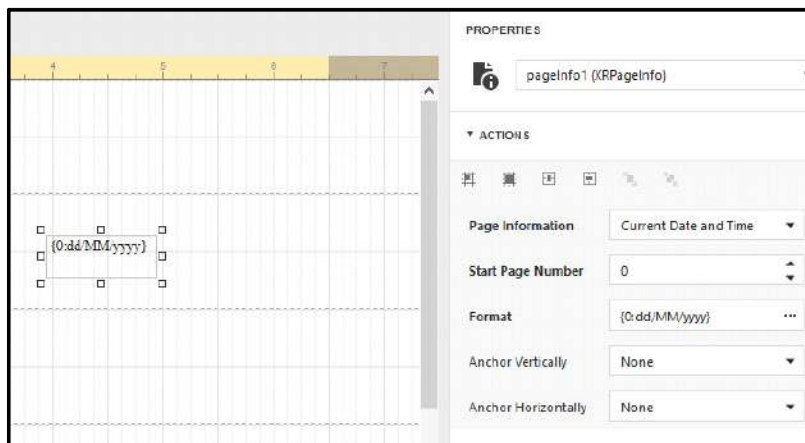
a. Under Properties, click the Action collapsible panel. Select whether to display only the page number (Latin or Roman - uppercase or lowercase), or the current page number with total pages.



b. To format the control's text, specify the required format (for example: Page {0} of {1}). You can also specify the starting page number, and the running band (for example: this option is available when there are groups in a report, and it is required to apply independent page numbering for them).

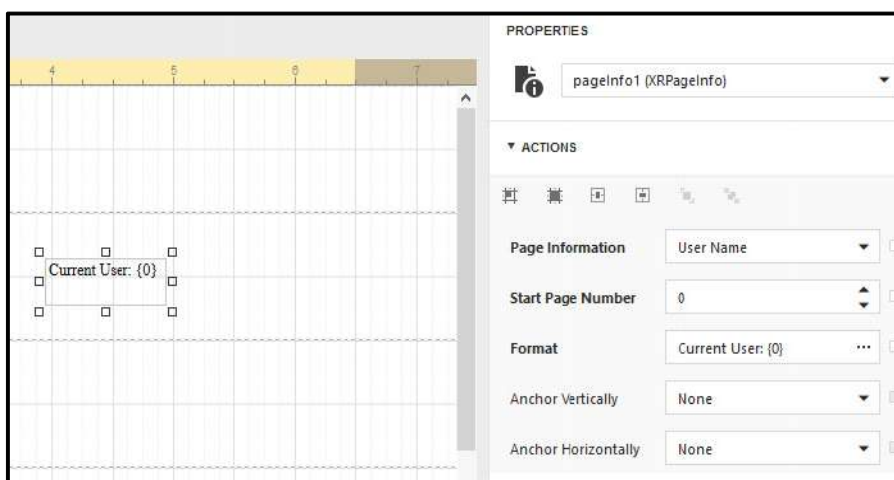
### 2. For Date and Time

a. Under Properties, click the Action collapsible panel. Select Page Information as **Current Date and Time** to display the date and time. Select the required format eg: dd/MM/yyyy Eg: date-time can be used to mention datetime of report generation.

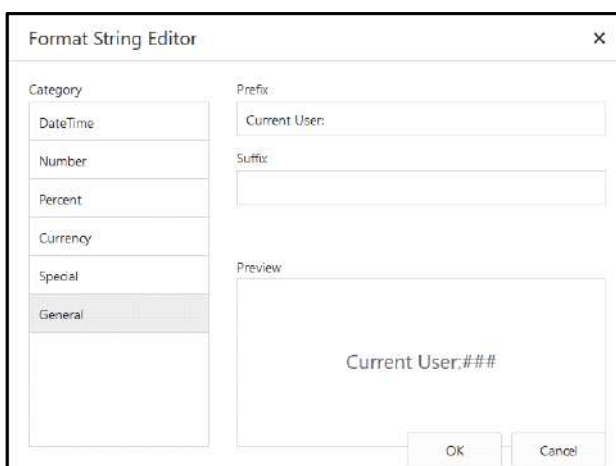


### 3. For User Name

a. Under Properties, click the Actions collapsible panel. Select Page Information as **User Name** to display the name of current user. for example: UserName can be used to mention logged in username. Specify the required format by selecting it from Format (for example: Current User: {0}).



The Format String Editor enables to set Prefix and Suffix as displayed below.

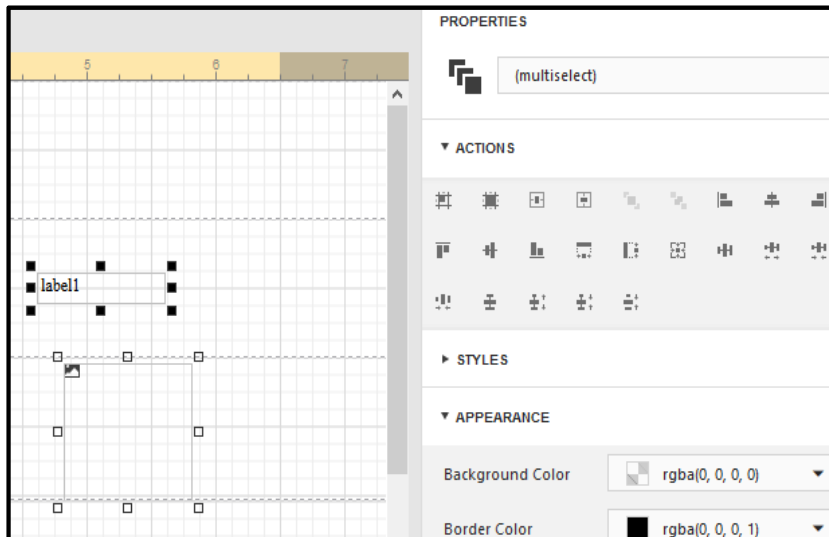


If nothing is specified; then only User Name will be displayed

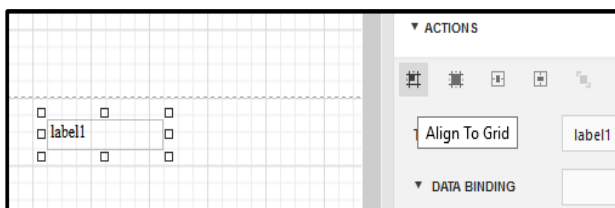
## Controls Positioning

When a control is selected then its related Actions will be activated.

When multiple controls are selected by pressing CTRL and selecting the controls, then Actions related to both the controls are activated as shown for Custom Field and Insert Image controls.



By pressing **Align to Grid**; the control will get aligned to the nearest grid cell. You can select **Center Horizontally** for moving the control in the horizontal center of the report or **Center Vertically** to move the control in the vertical center of the report.

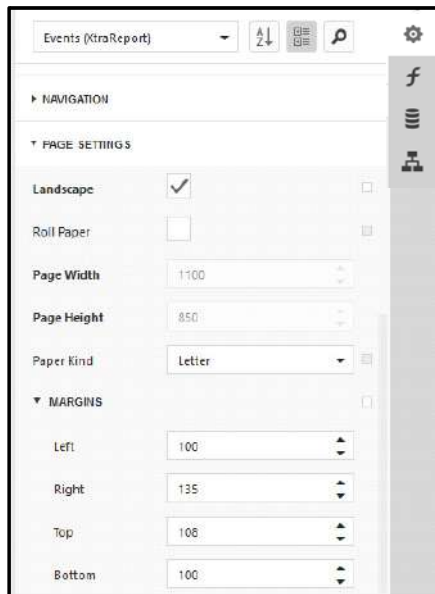


## Page Setting

In the report Designer, you can change page layout settings before you print a report.

To specify the report's page settings, under **Properties**, from the Report Controls drop-down list, select the report. Click the **Page Settings** collapsible panel and adjust the required page settings.

To create your own paper size, set the Paper Kind property to Custom, and then specify the Page Width and Page Height properties.



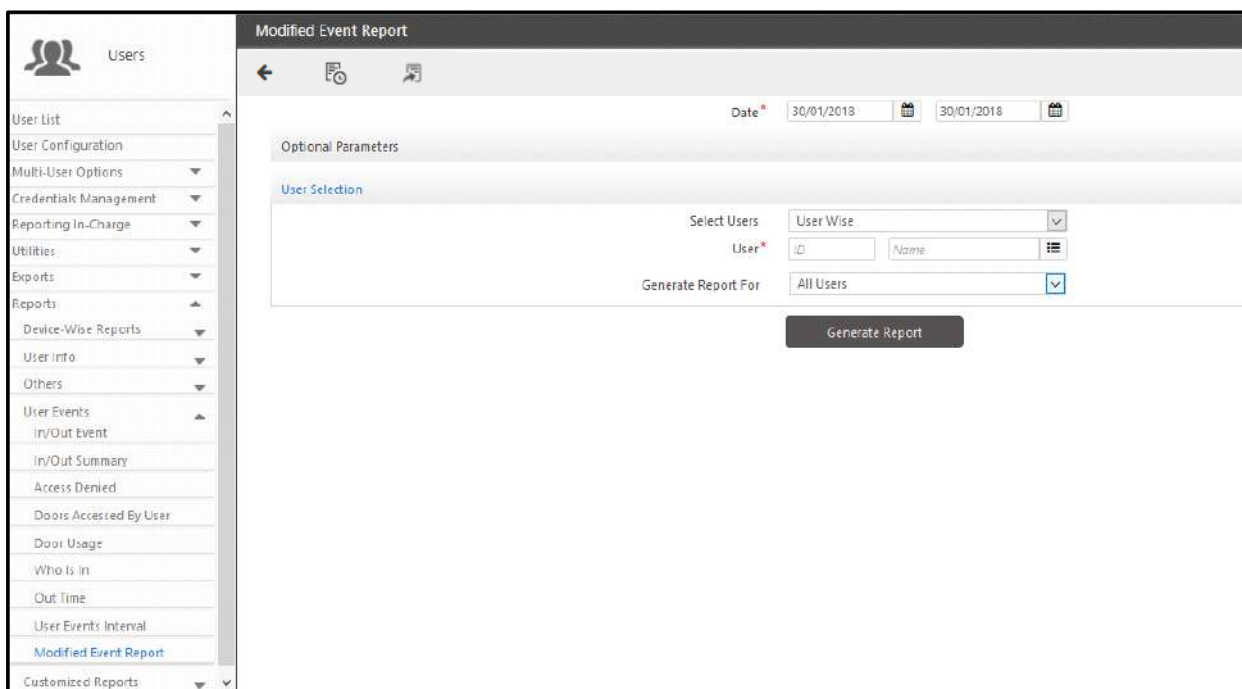
When you enable Landscape then page orientation will be landscape or else it will be portrait.

When you enable Roll Paper then document will be printed on a roll of paper, that is, as a single uninterrupted page.


# Customized Report Page

The Customized Report Page is the user created report as designed from Report builder module. In the report page user can specify the conditions in filter while generating reports.

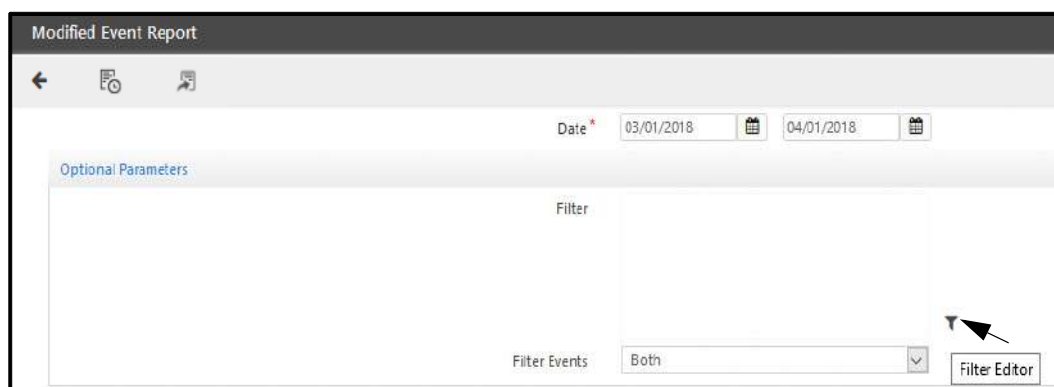
## Example: Events Report Template placed in User module



The screenshot shows the 'Modified Event Report' page within the 'Users' module. On the left is a sidebar menu with options like 'User List', 'User Configuration', 'Multi-User Options', 'Credentials Management', 'Reporting In-Charge', 'Utilities', 'Exports', 'Reports', 'Device-Wise Reports', 'User Info', 'Others', 'User Events', 'In/Out Event', 'In/Out Summary', 'Access Denied', 'Doors Accessed By User', 'Door Usage', 'Who Is In', 'Out Time', 'User Events Interval', 'Modified Event Report', and 'Customized Reports'. The main area is titled 'Modified Event Report' and contains a 'Date' range selector (30/01/2018 to 30/01/2018), an 'Optional Parameters' section with a 'User Selection' sub-section, and a 'Generate Report' button. The 'User Selection' section includes a 'Select Users' dropdown (set to 'User Wise'), a 'User' field with a search icon, a 'Name' field, and a 'Generate Report For' dropdown (set to 'All Users').

You can click on **Redirect To Designer Page**  button to switch back to report Designer for modifying the report design.

Click on **Optional Parameters** panel. In this you can design your own filter to be applied for generating the report.



The screenshot shows the 'Optional Parameters' panel in the 'Modified Event Report' page. It features a 'Date' range selector (03/01/2018 to 04/01/2018), a 'Filter' section, and a 'Filter Events' dropdown (set to 'Both'). A 'Filter Editor' button is located at the bottom right of the panel, with a mouse cursor pointing to it.

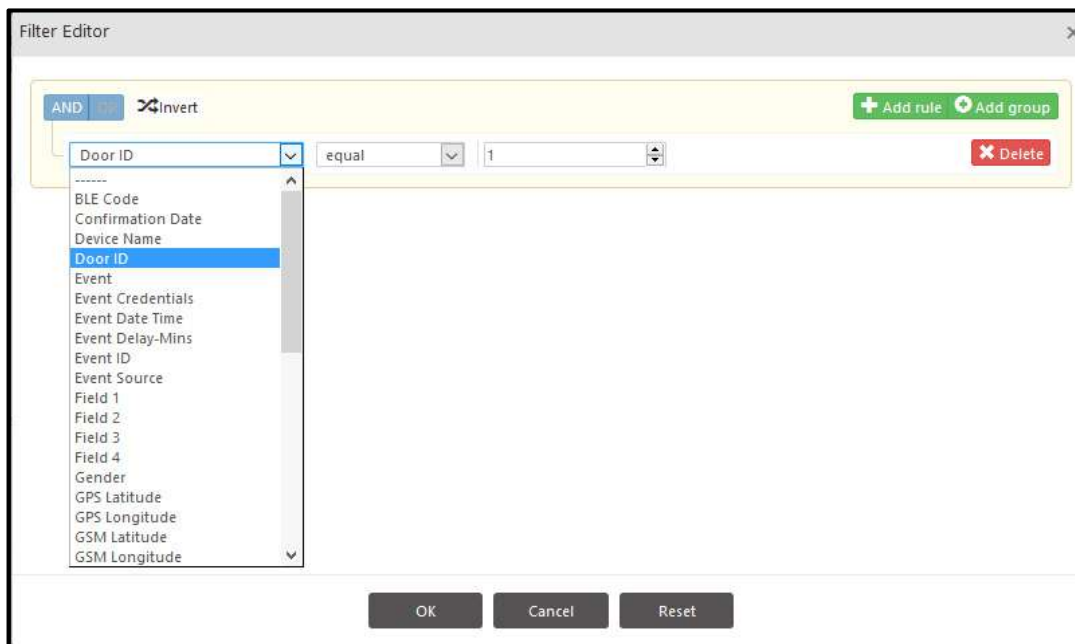
Click **Filter Editor**. The Filter Editor window appears.



The Invalid characters for filter editor controls are ~ # % ^ \* = { } | \ ; " ' < > ?

The **Invert** option changes the group from **AND** to **OR** and vice versa. It also changes values of function from **not equal** to **equal** and vice versa. Select the logical group.

Now click the drop-down list and select the field for defining the rule/condition. for example: Door ID is set equal to 1.



Then click **Add rule** to define another rule/condition.

The Filter Editor interface shows a list of rules. At the top, there are buttons for 'AND', 'OR', and 'Invert'. Below these, there are two rules defined:

- Rule 1: Door ID (dropdown) equal (dropdown) 1 (text input). A red 'Delete' button is next to it.
- Rule 2: Event Date Time (dropdown) less or equal (dropdown) 15/01/2018 18:30 (text input). A red 'Delete' button is next to it.

At the top right, there are buttons for '+ Add rule' and '+ Add group'.

Now when Rule1 AND Rule2 are true, that is, when both the conditions are satisfied then report will be generated based on the set filter.

Click **OK**. This filter rule will be reflected in the filter expression as displayed below.

Example: Here Event Report will be generated for Door ID=1 and for the events whose generation date-time is before 15/01/2018 18:30.

The Modified Event Report interface shows the following fields and options:

- Date:** 02/01/2018 to 31/01/2018.
- Optional Parameters:**
  - Filter:** [Door ID] = 1 AND [Event Date Time] <= '15/01/2018 18:30' (indicated by an arrow).
  - Filter Events:** Both (dropdown).
- User Selection:**
  - Select Users:** All (dropdown).
  - Generate Report For:** All Users (dropdown).
- Generate Report** button.



*For Event based report, you can filter events based on Attendance Events, Access Control events or Both.*

You can select the users and click on Generate Report.

The Event Report is displayed below.

Modified Event Report

Back

1 of 1

Whole Page

**MATRIX**

**Default Events Template**

User Name	Event Source	Event	EventDateTime	Device Name
Chirag	Device	Allowed	03/01/2018 09:00:54	PVR.Door- Device-1
Chirag	Device	Allowed	03/01/2018 16:28:55	PVR.Door- Device-1
Chirag	Device	Allowed	03/01/2018 19:00:53	PVR.Door- Device-1



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### Glossary of Terms

**2-Person Groups:** The 2-person rule feature can be used to require that two people enter valid access codes to access a secure area. This is typically used in high security areas or in areas where industrial safety is an issue.

**Absentee Rule:** This rule sets the maximum number of days for non-use of an ID. On expiration (no ID usage - for the maximum number of days set) the User will be automatically disabled or deleted.

**Access Groups:** Access Group can be defined as group of users having similar roles and need equal access privileges throughout the day. The access may be restricted to certain times by the use of a time profile.

**Access Zones:** ACCESS ZONE can be defined as an area with well defined boundaries and access to this area can be controlled using single or multiple doors.

**Additional Security:** In order to keep Additional level of security check other than Facility code and card number check, smart cards can be written with additional security code that takes security to the next higher level.

**Anti-Pass-Back (APB):** The Anti Pass Back or APB feature is used to require users to pass through an entry reader followed by passing through an exit reader before their ID will be accepted a second time at another designated entry reader. Hard APB restricts the entry/exit of a person in case of an APB violation while Soft APB does not restrict the person from re-entering/leaving on an APB Violation but reports the same and maintains a log.

**Anti-Tamper:** A means of detecting unauthorized removal of covers from security equipment.

**AWG:** American Wire Gauge, denotes the size of wire conductors used in a system.

**Badge:** To use an access card at a reader to gain access to secure areas.

**Blocked User:** Blocked Users are users whose credentials have been temporarily blocked due to inactivity, as defined in the Absentee Rule.

**Dead Man Timer:** This condition allows the system to track the safety and security of a user while a specific task is being performed, by requiring the user to badge his card within the pre-defined dead man time period.

**Debounce Time:** It defines the minimum time an input interface must be in a given state i.e. up or down, before being reported.

**Degraded Mode:** Degraded mode allows a valid user to access the facility even if the door controller is not communicating with the master.

**DND Zones:** DND feature allows the user to declare that a particular zone is not to be accessed by other users for a specific period of time thereby ensuring that the users inside the zone are not disturbed by others.

**Door Force Open:** A door forced open condition results from a state wherein the door is sensed to be in an open state without an associated valid credential transaction or an associated REX signal.

**Door Sense:** Contact switch activated whenever a door is opened. This switch monitors the door status (open or closed).

**Door Relay:** This relay is used to control the locking and unlocking functions of door hardware in an access control system.

**Duress detection:** Duress detection enables the card holder to trigger an alarm or output device in the event of threats or being forced to grant access to an unauthorized person. The Duress Digit is added at the end of a User's normal Code.

**Electric Door Strike:** An electric door locking device that unlocks the door when electrical power is applied to it and is thus a fail secure locking device.

**Electromagnetic Lock (EM Lock):** An electro-magnet must be powered at all times to keep the door locked. It is a fail safe locking device that will automatically unlock if power is removed.

**Enrollment:** It is defined as the process where in the controller is accepting and storing the user credential inputs against that particular user in any of the modes available viz. Fingerprint, Card, Fingerprint + Card, Smartcard.

**Facility Code:** Facility code is unique 8 or 16 bits of every HID Prox card number specific to a site and is encoded in to the card by the manufacturer.

**First-In Users:** First in users are users defined in the system whose card or fingerprint is used to unlock the Access to a particular zone.

**Form C Relay:** A type of relay which has contacts including a common, a normally open and a normally closed.

**Functional Groups:** Functional Group can be defined as cluster of individuals formed to organize them in hierarchical manner and their roles.

**Guard Tour:** A guard tour is defined as a series of checkpoints where the guard has to badge his credential within a given amount of time.

**Home Zone:** Home zone is a pre-defined valid access Zone assigned to the user during working and break hours. In other words it can be defined as the assigned work place of the user/employee. User is allowed to access Home zone during working and break hours without checking the access levels and the event is recorded.

**Inter Digit Wait Timer:** It is the time period between two digits for which the system waits before considering the user input to be complete.

**Mantrap:** Mantrap, also known as security interlock system provides safety, security and environmental control between two or more rooms by ensuring that opening any door causes all other doors to lock until the opened door returns to the closed position.

**Multi Access Wait Timer:** Specifies the period within which user needs to present the next credential when Zone access modes are defined for more than one credentials to be used to grant access.

**Occupancy Control:** Occupancy Control is a feature that monitors and controls the number of users permitted within a secured area or controlled zone. Occupancy controls require entry and exit readers on the controlled area.

**Pulse Time:** It is the time for which the relay will be energized for a valid credential or input.

**REX:** REX means Request-To-Exit. A REX device can be used to mask an alarmed Door for authorized exit and to unlock magnetic locks for exit. REX devices can be push-button or motion sensors. A REX Push-button can be installed at a receptionist's desk to manually grant access at an intercom controlled visitor's entry door.

**Software Override:** The override function allows user to change the current status of a system temporarily from the Software application.

**Supervised Inputs:** Passive, non-current supplying inputs capable of 4 state monitoring with end of line resistors are supervised inputs.

**Time Zones:** Time Zones are used to manage the use of IDs and the scheduling of automatic events. Time Zones are made up of a start time, an end time, and a set of valid days.

**Use Count Control:** Use count control sets a maximum number of times an authorized user can use their credential in order to enter/exit a controlled area after which the credential is blocked.

**Visit Zone:** Visit zone like the Home Zone is again another predefined valid access zone assigned to the user. Here again the user is allowed to access visit zone during working and break hours without checking the access levels and the event should be recorded.

**Visitor Escort Rule:** This rule requires all Visitors to be accompanied by an escort and the credential of the visitor has to be followed by the credential of the Escort within the stipulated time period.

**Wiegand:** A communication protocol widely accepted as an industry standard in the manufacturing of access control equipment. Wiegand data is typically the protocol used between the reader and the host controller.

**Zone Access Mode:** Zone Access Mode defines the type and number of credentials required to identify and validate a user. Once defined it is assigned to access zones.

# GDPR Reflections

General Data Protection Regulation basically ensures security for the users personal data. If you desire implicating with GDPR norms, select the **Personal Data Protection** checkbox in Admin > System Configuration > Global Policy > Basic. To know more refer [“General Data Protection Regulation”](#).

Enabling GDPR will result in data masking and encryption. Set of defined fields revealing users personal data from the respective modules will be considered for masking on the server end, at the same time this data will be encrypted in the database.

The general fields considered for masking and encryption irrespective of the modules are tabulated below:

Profile Photo	Passport Expiry	UAN No	Blood Group	Medical History
Date of Birth	PAN	Voter Id	Height	Marital Status
Driving License No.	Aadhar No	Visa	Weight	Father / Spouse Name
Driving License Expiry	ESI No.	Visa Expiry	Qualification	Official - Mobile, Phone, Email
Passport No.	PF No.	Gender	Experience	Personal - Mobile, Phone , Email
Local - Address, Street, City - Pincode, State, Country	Permanent - Address, Street, City - Pincode, State, Country	PIN	Document File	IMEI number
Mobile Identification Number	Custom Fields	Nationality	Cards (Access cards and Enrolled Cards)	CardCsv (Access cards and Enrolled Cards)
Address Proof	ID Proof 1 ID Proof 2	Signature	Service Tax No.	License No.

Further for detailed reflections, refer to the respective links of the modules as mentioned below:

- [“User Module”](#)
- [“Contract Worker Management”](#)
- [“Time and Attendance”](#)
- [“Visitor Management Module”](#)



*Masking will not be applicable for modules other than the above mentioned modules, only relevant data will be encrypted.*

Depending on the roles and rights provided to the respective users in Admin> System Accounts > Roles And Rights Configuration, the user data will be considered for masking.

- For all user defined System Account Users or system defined System Engineer/Operator having the roles and rights as **View**, the data will be displayed in masked form.

- For all user defined System Account Users or system defined System Engineer/Operator having the roles and rights as **View**, **Edit** and **Add**, the data will be displayed in unmasked form. These users can edit data for the desired module as existing.

For the Visitor Management Module, you need to make sure the rights for relevant pages are provided. Refer to "[Visitor Management Module](#)" for details.

To know more about Roles and Rights, refer "[Roles and Rights Configuration](#)"



- Make sure while assigning rights for the respective module, provide **View** as well as **Edit** / **Add** right to the parent entity or else you will not be able to edit any field of the child entity. Despite providing necessary rights, the data displayed will be in masked form.

For example: If you have provided all the rights for **Invite User** page (child entity) and assigned only **View** right to the **User Configuration** page (parent entity) then you will not be able to edit any field in the **Invite User** page and data will be displayed in masked form.

## User Module

The symbol indicate the following action:

✓	Masked
---	--------

TABS	SUB TABS	FIELD	REFLECTION
User Configuration > Profile	General	Profile Image	Dummy Image
User Configuration > Profile	General	Signature	Hidden
User Configuration > Profile	General	Date of Birth	✓
User Configuration > Profile	General	Driving License	✓
User Configuration > Profile	General	Driving License Expiry	✓
User Configuration > Profile	General	Passport No.	✓
User Configuration > Profile	General	Passport Expiry	✓
User Configuration > Profile	General	PAN	✓
User Configuration > Profile	General	Aadhaar No.	✓
User Configuration > Profile	General	PF No	✓
User Configuration > Profile	General	UAN	✓
User Configuration > Profile	General	ESI No.	✓
User Configuration > Profile	General	Voter ID	✓
User Configuration > Profile	General	Visa	✓

TABS	SUB TABS	FIELD	REFLECTION
User Configuration > Profile	General	Visa Expiry	✓
User Configuration > Profile	General	Custom Fields	✓
User Configuration > Profile	Personal	Gender	✓
User Configuration > Profile	Personal	Blood Group	✓
User Configuration > Profile	Personal	Height (cm)	✓
User Configuration > Profile	Personal	Weight (kgs)	✓
User Configuration > Profile	Personal	Medical History	✓
User Configuration > Profile	Personal	Marital Status	✓
User Configuration > Profile	Personal	Father/Spouse Name	✓
User Configuration > Profile	Personal	Phone	✓
User Configuration > Profile	Personal	Mobile	✓
User Configuration > Profile	Personal	Email	✓
User Configuration > Profile	Personal	Phone	✓
User Configuration > Profile	Personal	Extn	✓
User Configuration > Profile	Personal	Mobile	✓
User Configuration > Profile	Personal	Email	✓
User Configuration > Profile	Personal	Address	✓
User Configuration > Profile	Personal	Street	✓
User Configuration > Profile	Personal	City	✓
User Configuration > Profile	Personal	Pincode	✓
User Configuration > Profile	Personal	State	✓
User Configuration > Profile	Personal	Country	✓
User Configuration > Profile	Personal	Address	✓

TABS	SUB TABS	FIELD	REFLECTION
User Configuration > Profile	Personal	Street	✓
User Configuration > Profile	Personal	City	✓
User Configuration > Profile	Personal	Pincode	✓
User Configuration > Profile	Personal	State	✓
User Configuration > Profile	Personal	Country	✓
User Configuration > Profile	Aadhar QR Popup (Enter Data Manually)	Aadhar No.	✓
User Configuration > Profile	Aadhar QR Popup (Enter Data Manually)	Gender	✓
User Configuration > Profile	Aadhar QR Popup (Enter Data Manually)	Date of Birth	✓
User Configuration > Profile	Aadhar QR Popup (Enter Data Manually)	Address	✓
User Configuration > Profile	Aadhar QR Popup (Enter Data Manually)	Street	✓
User Configuration > Profile	Aadhar QR Popup (Enter Data Manually)	City	✓
User Configuration > Profile	Aadhar QR Popup (Enter Data Manually)	Pincode	✓
User Configuration > Profile	Aadhar QR Popup (Enter Data Manually)	State	✓
User Configuration > Profile	Aadhar QR Popup (Enter Data Manually)	Country	✓
User Configuration > Profile	Aadhar QR Popup (Enter Data Manually)	Father/ Spouse Name	✓
User Configuration > Credentials	-	PIN	✓
User Configuration > Credentials	-	Access Card 1	✓
User Configuration > Credentials	-	Access Card 2	✓
User Configuration > ESS	-	Mobile Identification Number	✓
User Configuration > Face Recognition	Face Enrollment collapsible panel	-	Hidden
User Configuration > Events	Attendance events collapsible panel	View Image	View Image icon disabled
User Configuration > Events	Access Control Events collapsible panel	View Image	View Image icon disabled

TABS	SUB TABS	FIELD	REFLECTION
Temporary User	-	Profile Image	Dummy Image
Credential Management > Enrollment	User Enrollment Status collapsible panel	Enrolled Card 1	✓
Credential Management > Enrollment	User Enrollment Status collapsible panel	Enrolled Card 2	✓
Credential Management > Enrollment	User Enrollment Status collapsible panel	Blood Group	✓
Credential Management > Enrollment	User Enrollment Status collapsible panel	Medical History	✓
Credential Management > Set And Sync Credentials	Single User	PIN Number	✓
Credential Management > Set And Sync Credentials	Single User	Card 1	✓
Credential Management > Set And Sync Credentials	Single User	Card 2	✓
Credential Management > Delete Credentials	Single User	PIN Number	✓
Credential Management > Delete Credentials	Single User	Card 1	✓
Credential Management > Delete Credentials	Single User	Card 2	✓
Utilities > Invite User	Icon (Grid)	Add User	Icon will not be displayed when User Configuration/ Worker Profile Rights= View only
Utilities > Invite User	Icon (Grid)	Add Worker	Icon will not be displayed when User Configuration/ Worker Profile Rights= View only
Utilities > Invite User	Grid > User Details > Basic	Profile Photo	Dummy Image
Utilities > Invite User	Grid > User Details > Basic	Enrolled Face Images	Dummy Image
Utilities > Invite User	Grid > User Details > General	Date Of Birth	✓
Utilities > Invite User	Grid > User Details > General	Driving License	✓



TABS	SUB TABS	FIELD	REFLECTION
Utilities > Invite User	Grid > User Details > General	Driving License Expiry	✓
Utilities > Invite User	Grid > User Details > General	Passport No.	✓
Utilities > Invite User	Grid > User Details > General	Passport Expiry	✓
Utilities > Invite User	Grid > User Details > General	PAN	✓
Utilities > Invite User	Grid > User Details > General	Aadhar No.	✓
Utilities > Invite User	Grid > User Details > General	PF No.	✓
Utilities > Invite User	Grid > User Details > General	UAN	✓
Utilities > Invite User	Grid > User Details > General	ESI No.	✓
Utilities > Invite User	Grid > User Details > General	Voter ID	✓
Utilities > Invite User	Grid > User Details > General	Visa	✓
Utilities > Invite User	Grid > User Details > General	Visa Expiry	✓
Utilities > Invite User	Grid > User Details > General	Field 1	✓
Utilities > Invite User	Grid > User Details > General	Field 2	✓
Utilities > Invite User	Grid > User Details > General	Field 3	✓
Utilities > Invite User	Grid > User Details > General	Field 4	✓
Utilities > Invite User	Grid > User Details > Personal	Nationality	✓
Utilities > Invite User	Grid > User Details > Personal	Qualification	✓
Utilities > Invite User	Grid > User Details > Personal	Experience	✓
Utilities > Invite User	Grid > User Details > Personal	Gender	✓
Utilities > Invite User	Grid > User Details > Personal	Blood Group	✓
Utilities > Invite User	Grid > User Details > Personal	Hieght	✓

TABS	SUB TABS	FIELD	REFLECTION
Utilities > Invite User	Grid > User Details > Personal	Weight	✓
Utilities > Invite User	Grid > User Details > Personal	Medical History	✓
Utilities > Invite User	Grid > User Details > Personal	Marital Status	✓
Utilities > Invite User	Grid > User Details > Personal	Father/Spouse Name	✓
Utilities > Invite User	Grid > User Details > Contact (Contact Info Collapsible Panel)	Personal - Phone	✓
Utilities > Invite User	Grid > User Details > Contact (Contact Info Collapsible Panel)	Personal- Mobile	✓
Utilities > Invite User	Grid > User Details > Contact (Contact Info Collapsible Panel)	Personal -Email	✓
Utilities > Invite User	Grid > User Details > Contact (Contact Info Collapsible Panel)	Official- Phone	✓
Utilities > Invite User	Grid > User Details > Contact (Contact Info Collapsible Panel)	Official- Mobile	✓
Utilities > Invite User	Grid > User Details > Contact (Contact Info Collapsible Panel)	Official- Email	✓
Utilities > Invite User	Grid > User Details > Contact (Address Collapsible Panel)	Local -Address	✓
Utilities > Invite User	Grid > User Details > Contact (Address Collapsible Panel)	Local -Street	✓
Utilities > Invite User	Grid > User Details > Contact (Address Collapsible Panel)	Local -City	✓
Utilities > Invite User	Grid > User Details > Contact (Address Collapsible Panel)	Local -Pincode	✓
Utilities > Invite User	Grid > User Details > Contact (Address Collapsible Panel)	Local -State	✓
Utilities > Invite User	Grid > User Details > Contact (Address Collapsible Panel)	Local -Country	✓

TABS	SUB TABS	FIELD	REFLECTION
Utilities > Invite User	Grid > User Details > Contact (Address Collapsible Panel)	Permanent -Address	✓
Utilities > Invite User	Grid > User Details > Contact (Address Collapsible Panel)	Permanent -Street	✓
Utilities > Invite User	Grid > User Details > Contact (Address Collapsible Panel)	Permanent -City	✓
Utilities > Invite User	Grid > User Details > Contact (Address Collapsible Panel)	Permanent -Pincode	✓
Utilities > Invite User	Grid > User Details > Contact (Address Collapsible Panel)	Permanent -State	✓
Utilities > Invite User	Grid > User Details > Contact (Address Collapsible Panel)	Permanent-Country	✓
Utilities >Unidentified Face Authorization	-	-	Page Hidden
Utilities > IMEI Authorization	Pending Collapsible Panel	IMEI Number	✓
Utilities > IMEI Authorization	Authorized Collapsible Panel	IMEI Number	✓
Utilities > IMEI Authorization	Rejected Collapsible Panel	IMEI Number	✓
Utilities >User Events	Attendance Events Collapsible Panel	View Image	Dummy Image (View Image-disabled)
Utilities >User Events	Access Control Events Collapsible Panel	View Image	Dummy Image (View Image-disabled)
Utilities >User Events	Visitor Events Collapsible Panel	View Image	Dummy Image (View Image-disabled)
Utilities >Blacklist Cards	-	Select Card	Blacklisted Cards Collapsible Panel hidden
Utilities >Blacklist Cards	Blacklisted Card Events Collapsible Panel	Card Number	✓
Report > User Info	Access Profile	Card	Hidden
Report > User Info	Profile Info	Birth Date	Hidden
Report > User Info	Profile Info	Blood Group	Hidden
Report > User Info	Profile Info	Qualification	Hidden

TABS	SUB TABS	FIELD	REFLECTION
Report > User Info	Profile Info	Nationality	Hidden
Report > User Info	Profile Info	Marital Status	Hidden
Report > User Info	Profile Info	Gender	Hidden
Report > User Info	Contact Info	Local Address	Hidden
Report > User Info	Contact Info	Permanent Address	Hidden
Report > User Info	Contact Info	Personal Contact Number	Hidden
Report > User Info	Contact Info	Official Contact Number	Hidden
Report > User Info	Contact Info	Personal Cell	Hidden
Report > User Info	Contact Info	Official Cell	Hidden
Report > User Info	Contact Info	Personal Email	Hidden
Report > User Info	Contact Info	Official Email	Hidden
Report > User Info	Official Info	Qualification	Hidden
Report > User Info	Official Info	Experience	Hidden
Report > User Info	Retirement Info	Date of Birth	Hidden
Report > User Info	Enrollment Info	Card 1	Hidden
Report > User Info	Enrollment Info	Card 2	Hidden
Report > User Info	Enrollment Info	PIN	Hidden

## Contract Worker Management

The symbol indicates the following action:

✓	Masked
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TABS	SUB TABS	FIELD	REFLECTION
Contractor > Contractor Profile	Address Collapsible Panel	Address	✓
Contractor > Contractor Profile	Address Collapsible Panel	Street	✓
Contractor > Contractor Profile	Address Collapsible Panel	City	✓
Contractor > Contractor Profile	Address Collapsible Panel	Pincode	✓
Contractor > Contractor Profile	Address Collapsible Panel	State	✓
Contractor > Contractor Profile	Address Collapsible Panel	country	✓
Contractor > Contractor Profile	Address Collapsible Panel	phone	✓

Contractor > Contractor Profile	Contact Information Collapsible Panel > Contact Person 1	mobile	✓
Contractor > Contractor Profile	Contact Information Collapsible Panel > Contact Person 1	Email	✓
Contractor > Contractor Profile	Contact Information Collapsible Panel > Contact Person 2	Mobile	✓
Contractor > Contractor Profile	Contact Information Collapsible Panel > Contact Person 2	email	✓
Contractor > Contractor Profile	Details Collapsible Panel	Service Tax no.	✓
Contractor > Contractor Profile	Details Collapsible Panel	PAN	✓
Contractor > Contractor Profile	Details Collapsible Panel	PF No.	✓
Contractor > Contractor Profile	Details Collapsible Panel	ESI No.	✓

Contractor > Contractor Profile	License info Collapsible Panel	License No.	✓
Dashboard > Worker Visa Expiry	Visa Expiry pop - up	Visa	Hidden
Dashboard > Worker Driving License Expiry	Driving License Expiry pop - up	Driving License	Hidden
Dashboard > Worker Passport Expiry	Passport Expiry pop - up	Passport	Hidden
Workers > Worker List	-	Profile Image	Dummy Image
Worker Profile> Profile	-	Profile Image	Dummy Image
Worker Profile> Profile	-	Signature	Hidden
Worker Profile> Profile	General	Date of Birth	✓
Worker Profile> Profile	General	Driving License	✓
Worker Profile> Profile	General	Driving License Expiry	✓
Worker Profile> Profile	General	Passport No.	✓
Worker Profile> Profile	General	Passport Expiry	✓
Worker Profile> Profile	General	PAN	✓
Worker Profile> Profile	General	Aadhar No.	✓

Worker Profile> Profile	General	PF No	✓
Worker Profile> Profile	General	UAN	✓
Worker Profile> Profile	General	ESI No.	✓
Worker Profile> Profile	General	Voter ID	✓
Worker Profile> Profile	General	Visa	✓
Worker Profile> Profile	General	Visa Expiry	✓
Worker Profile> Profile	General	Custom Fields	✓
Worker Profile> Profile	Personal	Gender	✓
Worker Profile> Profile	Personal	Blood Group	✓
Worker Profile> Profile	Personal	Height (cm)	✓
Worker Profile> Profile	Personal	Weight (kgs)	✓
Worker Profile> Profile	Personal	Medical History	✓
Worker Profile> Profile	Personal	Marital Status	✓
Worker Profile> Profile	Personal	Father/Spouse Name	✓
Worker Profile> Profile	Contact	Contact Info Collapsible Panel - Phone (Personal)	✓
Worker Profile> Profile	Contact	Contact Info Collapsible Panel - Mobile (Personal)	✓
Worker Profile> Profile	Contact	Contact Info Collapsible Panel - Email (Personal)	✓
Worker Profile> Profile	Contact	Contact Info Collapsible Panel - Phone (Official)	✓
Worker Profile> Profile	Contact	Contact Info Collapsible Panel - Extn. (Official)	✓
Worker Profile> Profile	Contact	Contact Info Collapsible Panel - Mobile (Official)	✓
Worker Profile> Profile	Contact	Contact Info Collapsible Panel - Email (Official)	✓
Worker Profile> Profile	Contact	Address Collapsible Panel - Address (Local)	✓
Worker Profile> Profile	Contact	Address Collapsible Panel - Street (Local)	✓
Worker Profile> Profile	Contact	Address Collapsible Panel - City (Local)	✓

Worker Profile> Profile	Contact	Address Collapsible Panel - Pincode (Local)	✓
Worker Profile> Profile	Contact	Address Collapsible Panel - State (Local)	✓
Worker Profile> Profile	Contact	Address Collapsible Panel - Country (Local)	✓
Worker Profile> Profile	Contact	Address Collapsible Panel - Address (Permanent)	✓
Worker Profile> Profile	Contact	Address Collapsible Panel - Street (Permanent)	✓
Worker Profile> Profile	Contact	Address Collapsible Panel - City (Permanent)	✓
Worker Profile> Profile	Contact	Address Collapsible Panel - Pincode (Permanent)	✓
Worker Profile> Profile	Contact	Address Collapsible Panel - State (Permanent)	✓
Worker Profile> Profile	Contact	Address Collapsible Panel - Country (Permanent)	✓
Worker Profile > Profile	Aadhar QR Popup (Enter Data Manually)	Aadhar No.	✓
Worker Profile > Profile	Aadhar QR Popup (Enter Data Manually)	Gender	✓
Worker Profile > Profile	Aadhar QR Popup (Enter Data Manually)	Date of Birth	✓
Worker Profile > Profile	Aadhar QR Popup (Enter Data Manually)	Address	✓
Worker Profile > Profile	Aadhar QR Popup (Enter Data Manually)	Street	✓
Worker Profile > Profile	Aadhar QR Popup (Enter Data Manually)	City	✓
Worker Profile > Profile	Aadhar QR Popup (Enter Data Manually)	Pincode	✓
Worker Profile > Profile	Aadhar QR Popup (Enter Data Manually)	State	✓
Worker Profile > Profile	Aadhar QR Popup (Enter Data Manually)	Country	✓

Worker Profile > Profile	Aadhar QR Popup (Enter Data Manually)	Father/ Spouse Name	✓
Worker Profile > Credential	Credentials	PIN	✓
Worker Profile > Credential	Credentials	Access Card 1	✓
Worker Profile > Credential	Credentials	Access Card 2	✓
Worker Profile > Credential	Other Details	ID Proof	✓
Worker Profile > Credential	Other Details	Address Proof	✓
Worker Profile > ESS	Settings	Mobile Identification Number	✓
Worker Profile > Face Recognition	Settings	Face Enrollment Collapsible Panel	Hidden
Worker Profile > Events	Events	View Image (Access Control Events Collapsible Panel)	Disabled
Worker Profile > Events	Events	View Image (Access Control Events Collapsible Panel)	Disabled
Temporary Worker	-	Profile Image	Dummy Image
Authorization/Approval > Induction Approval	General Collapsible Panel	Date Of Birth	✓
Authorization/Approval > Induction Approval	General Collapsible Panel	Driving license	✓
Authorization/Approval > Induction Approval	General Collapsible Panel	Driving License Expiry	✓
Authorization/Approval > Induction Approval	General Collapsible Panel	Passport No.	✓
Authorization/Approval > Induction Approval	General Collapsible Panel	Passport Expiry	✓
Authorization/Approval > Induction Approval	General Collapsible Panel	PAN	✓
Authorization/Approval > Induction Approval	General Collapsible Panel	AADHAR No.	✓
Authorization/Approval > Induction Approval	General Collapsible Panel	PF No.	✓
Authorization/Approval > Induction Approval	General Collapsible Panel	UAN	✓
Authorization/Approval > Induction Approval	General Collapsible Panel	ESI No.	✓



Authorization/Approval > Induction Approval	General Collapsible Panel	Voter ID	✓
Authorization/Approval > Induction Approval	General Collapsible Panel	Visa	✓
Authorization/Approval > Induction Approval	General Collapsible Panel	Visa Expiry	✓
Authorization/Approval > Induction Approval	General Collapsible Panel	Custom fields	✓
Authorization/Approval > Induction Approval	General Collapsible Panel	ID Proof	✓
Authorization/Approval > Induction Approval	General Collapsible Panel	Address Proof	✓
Authorization/Approval > Induction Approval	Personal Collapsible Panel	Nationality	✓
Authorization/Approval > Induction Approval	Personal Collapsible Panel	Qualification	✓
Authorization/Approval > Induction Approval	Personal Collapsible Panel	Experience	✓
Authorization/Approval > Induction Approval	Personal Collapsible Panel	Gender	✓
Authorization/Approval > Induction Approval	Personal Collapsible Panel	Blood group	✓
Authorization/Approval > Induction Approval	Personal Collapsible Panel	Height	✓
Authorization/Approval > Induction Approval	Personal Collapsible Panel	Weight	✓
Authorization/Approval > Induction Approval	Personal Collapsible Panel	Medical history	✓
Authorization/Approval > Induction Approval	Personal Collapsible Panel	Marital status	✓
Authorization/Approval > Induction Approval	Personal Collapsible Panel	Father/spouse Name	✓
Authorization/Approval > Induction Approval	Contact Collapsible Panel	Phone	✓
Authorization/Approval > Induction Approval	Contact Collapsible Panel	Mobile	✓
Authorization/Approval > Induction Approval	Contact Collapsible Panel	Email	✓
Authorization/Approval > Induction Approval	Contact Collapsible Panel	Address	✓
Authorization/Approval > Induction Approval	Contact Collapsible Panel	Street	✓

Authorization/Approval > Induction Approval	Contact Collapsible Panel	City-Pincode	✓
Authorization/Approval > Induction Approval	Contact Collapsible Panel	State	✓
Authorization/Approval > Induction Approval	Contact Collapsible Panel	Country	✓
Authorization/Approval > Induction Approval	Worker Details	View	Dummy Image
Reports > Worker Details	-	Gender	Hidden
Reports > Worker Details	-	Birth Date	Hidden
Reports > Worker Details	-	Blood group	Hidden
Reports > Worker Details	-	PF No.	Hidden
Reports > Worker Details	-	Mobile	Hidden
Reports > Worker Details	-	Qualification	Hidden
Reports > Worker Details	-	Nationality	Hidden
Reports > Worker Details	-	ESI No.	Hidden
Reports > Worker Details	-	Phone	Hidden
Reports > Contractor Details	-	Phone	Hidden
Reports > Contractor Details	-	Mobile	Hidden
Reports > Contractor Details	-	PAN	Hidden
Reports > Contractor Details	-	Email	Hidden
Reports > Contractor Details	-	Contact No.	Hidden

## Time and Attendance

The symbol indicates the following action:

✓	Masked
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TABS	SUB TABS	FIELD	REFLECTION
Utilities > Daily Attendance View	Template Configuration	Any GDPR defined field data shown in the grid view	✓
Utilities > Mark Group Attendance	-	-	Hidden

## Visitor Management Module

The symbol indicates the following action:

✓	Masked
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TABS	SUB TABS	FIELD	REFLECTION	PAGE RIGHTS
Visitor Profile List > Photo View		Profile Image	Dummy Image	Visitor Profile
Visitor Profile		View Image	Dummy Image	Visitor Profile
Visitor Profile > Change Photo		Image	Dummy Image	Visitor Profile
Visitor Profile > Credentials		PIN	✓	Visitor Profile
Visitor Profile > Credentials		Access Card 1	✓	Visitor Profile
Visitor Profile > Credentials		Access Card 2	✓	Visitor Profile
Invite Visitor		Mobile No.	✓	Invite Visitor
Invite Visitor		Email ID	✓	Invite Visitor
Visitor Pre-Registration		Mobile No.	✓	Pre-Registration
Visitor Pre-Registration		Email	✓	Pre-Registration
Visitor Pre-Registration		Date of Birth	✓	Pre-Registration
Visitor Pre-Registration		Address	✓	Pre-Registration
Visitor Pre-Registration		City	✓	Pre-Registration
Visitor Pre-Registration		State	✓	Pre-Registration
Visitor Pre-Registration		Country	✓	Pre-Registration
Visitor Pre-Registration		Pincode	✓	Pre-Registration
Visitor Pre-Registration		Gender	✓	Pre-Registration
Visitor Pre-Registration		Nationality	✓	Pre-Registration
Visitor Pre-Registration		ID Proof 1	✓	Pre-Registration
Visitor Pre-Registration		ID Proof 2	✓	Pre-Registration
Visitor Pre-Registration		Gender	✓	Pre-Registration
Visitor Pre-Registration		Mobile No.	✓	Pre-Registration
Visit Registration Approval		Mobile No.	✓	Visit Registration Approval
Visit Registration Approval		Email ID	✓	Visit Registration Approval

Security Approval		Mobile No.	✓	Security Approval
Security Approval		Email ID	✓	Security Approval
Security Approval		Designation Name	✓	Security Approval
Security Approval		Profile photo	Dummy Image	Security Approval
Visitor Login Authorization		Mobile No.	✓	Visitor Login Authorization
Visitor Login Authorization		Email ID	✓	Visitor Login Authorization
Visit Approval		ID Proof 1	✓	Visit Approval
Visit Approval		ID Proof 2	✓	Visit Approval
Utilities > Set and Sync Credentials > Single Visitor		PIN Number	✓	Set and Sync Credentials
Utilities > Set and Sync Credentials > Single Visitor		Card 1	✓	Set and Sync Credentials
Utilities > Set and Sync Credentials > Single Visitor		Card 2	✓	Set and Sync Credentials
Utilities > Delete Credentials > Single Visitor		PIN Number	✓	Delete Credentials
Utilities > Delete Credentials > Single Visitor		Card 1	✓	Delete Credentials
Utilities > Delete Credentials > Single Visitor		Card 2	✓	Delete Credentials
Utilities > Visitor Events		Searchbox > Mobile No.	Suggestions under Mobile No. will not be displayed	Frequent Visitor
Utilities > Visitor Events		Picklist > Mobile Number	Will function only if exact number is provided	Frequent Visitor
Visitor Events		Mobile Number	✓	Frequent Visitor
Visitor Events		View Image	Dummy Image	Frequent Visitor
Utilities > Frequent Visitor		View Image	Dummy Image	Frequent Visitor
Utilities > Frequent Visitor > Change Photo		Image	Dummy Image	Frequent Visitor
Utilities > Frequent Visitor		Mobile Number	✓	Frequent Visitor
Utilities > Frequent Visitor	Last Visit Details	Gender	✓	Frequent Visitor
Utilities > Frequent Visitor	Last Visit Details	Mobile No.	✓	Frequent Visitor
Utilities > Frequent Visitor	Additional Details	Address	✓	Frequent Visitor
Utilities > Frequent Visitor	Additional Details	City	✓	Frequent Visitor
Utilities > Frequent Visitor	Additional Details	State	✓	Frequent Visitor
Utilities > Frequent Visitor	Additional Details	Country	✓	Frequent Visitor

Utilities > Frequent Visitor	Additional Details	PIN/ZIP Code	✓	Frequent Vistor
Utilities > Frequent Visitor	Additional Details	Email ID	✓	Frequent Vistor
Utilities > Frequent Visitor	Additional Details	Gender	✓	Frequent Vistor
Utilities > Frequent Visitor	Additional Details	Date Of Birth	✓	Frequent Vistor
Utilities > Frequent Visitor	Additional Details	Nationality	✓	Frequent Vistor
Utilities > Frequent Visitor	Additional Details	ID Proof 1	✓	Frequent Vistor
Utilities > Frequent Visitor	Additional Details	ID Proof 2	✓	Frequent Vistor
Utilities > Frequent Visitor	Additional Details	Custom Field 1	✓	Frequent Vistor
Utilities > Frequent Visitor	Additional Details	Custom Field 2	✓	Frequent Vistor
Utilities > Frequent Visitor	Additional Details	Custom Field 3	✓	Frequent Vistor
Utilities > Frequent Visitor	Additional Details	Custom Field 4	✓	Frequent Vistor
Utilities > Frequent Visitor	Additional Details	Custom Field 5	✓	Frequent Vistor
Utilities > Frequent Visitor	Additional Details	Mobile Number	✓	Frequent Visitor
Utilities > Frequent Visitor	Additional Details	Gender	✓	Frequent Visitor
Utilities > Watchlist/Blacklist	Grid > Total	Mobile Number	✓	Watchlist/Blacklist
Utilities > Watchlist/Blacklist	Grid > Watchlist	Mobile Number	✓	Watchlist/Blacklist
Utilities > Watchlist/Blacklist >	Grid > Blacklist	Mobile Number	✓	Watchlist/Blacklist
Utilities > Watchlist/Blacklist		Mobile Number	✓	Watchlist/Blacklist
Utilities > Watchlist/Blacklist	Additional Details	Address	✓	Watchlist/Blacklist
Utilities > Watchlist/Blacklist	Additional Details	City	✓	Watchlist/Blacklist
Utilities > Watchlist/Blacklist	Additional Details	State	✓	Watchlist/Blacklist
Utilities > Watchlist/Blacklist	Additional Details	Country	✓	Watchlist/Blacklist
Utilities > Watchlist/Blacklist	Additional Details	PIN/ZIP Code	✓	Watchlist/Blacklist
Utilities > Watchlist/Blacklist	Additional Details	Email ID	✓	Watchlist/Blacklist

Utilities > Watchlist/Blacklist	Additional Details	Gender	✓	Watchlist/Blacklist
Utilities > Watchlist/Blacklist	Additional Details	Date Of Birth	✓	Watchlist/Blacklist
Utilities > Watchlist/Blacklist	Additional Details	Nationality	✓	Watchlist/Blacklist
Utilities > Watchlist/Blacklist	Additional Details	ID Proof 1	✓	Watchlist/Blacklist
Utilities > Watchlist/Blacklist	Additional Details	ID Proof 2	✓	Watchlist/Blacklist
Utilities > Watchlist/Blacklist	Additional Details	Custom Field 1	✓	Watchlist/Blacklist
Utilities > Watchlist/Blacklist	Additional Details	Custom Field 2	✓	Watchlist/Blacklist
Utilities > Watchlist/Blacklist	Additional Details	Custom Field 3	✓	Watchlist/Blacklist
Utilities > Watchlist/Blacklist	Additional Details	Custom Field 4	✓	Watchlist/Blacklist
Utilities > Watchlist/Blacklist	Additional Details	Custom Field 5	✓	Watchlist/Blacklist
Utilities > Visitor History		Image	Dummy Image	Frequent Vistor
Utilities > Visitor History		Mobile number	✓	Frequent Vistor
Utilities > Visitor History		ID Proof 1	✓	Frequent Vistor
Utilities > Visitor History		ID Proof 2	✓	Frequent Vistor
Utilities > Visitor History		Vehicle Number	✓	Frequent Vistor
Utilities > Visitor History	Additional Vsitor's Details	Gender	✓	Frequent Vistor
Utilities > Visitor History	Additional Vsitor's Details	Mobile No.	✓	Frequent Vistor
Utilities > Delete Frequent Visitors	Select Visitor	Mobile No.	✓	Delete Frequent Visitors
Reports > Visitor Access > Visitor Enrollment Status		Card 1	Hidden	Visitor Profile
Reports > Visitor Access > Visitor Enrollment Status		Card2	Hidden	Visitor Profile
Reports > Visitor Access > Visitor Enrollment Status		PIN	Hidden	Visitor Profile

Reports > Visitor Summary > Visitor Watchlist/ Visitor Blacklist			Hidden	Frequent Visitor
Reports > Visitor History			Hidden	Frequent Visitor
Visitor Evacuation > Missing Count Link			Hidden	Frequent Visitor

## Visitor Management Module - Authorized Host User Login

The symbol indicates the following action:

✓	Masked
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TABS	SUB TABS	FIELD	REFLECTION	PAGE RIGHTS
Visitor Magement > Invite Visitor		Mobile No.	✓	Logged in user is Authorized Host user
Visitor Magement > Invite Visitor		Email ID	✓	Logged in user is Authorized Host user
Visitor Magement > Visitor Pre Registration		Mobile No.	✓	Logged in user is Authorized Host user
Visitor Magement > Visitor Pre Registration > Additional Visitors Details		Gender	✓	Logged in user is Authorized Host user
Visitor Magement > Visitor Pre Registration > Additional Visitors Details		Mobile No.	✓	Logged in user is Authorized Host user
Visitor Magement > Visitor Pre Registration > Additional Visitors Details > Visitor Profile		Email	✓	Logged in user is Authorized Host user
Visitor Pre Registration > Additional Visitors Details > Visitor Profile		Date of Birth	✓	Logged in user is Authorized Host user
Visitor Pre Registration > Additional Visitors Details > Visitor Profile		Designation Name	✓	Logged in user is Authorized Host user
Visitor Pre Registration > Additional Visitors Details > Visitor Profile		Address	✓	Logged in user is Authorized Host user
Visitor Pre Registration > Additional Visitors Details > Visitor Profile		City	✓	Logged in user is Authorized Host user

Visitor Pre Registration > Additional Visitors Details > Visitor Profile		State	✓	Logged in user is Authorized Host user
Visitor Pre Registration > Additional Visitors Details > Visitor Profile		Country	✓	Logged in user is Authorized Host user
Visitor Pre Registration > Additional Visitors Details > Visitor Profile		Pincode	✓	Logged in user is Authorized Host user
Visitor Pre Registration > Additional Visitors Details > Visitor Profile		Gender	✓	Logged in user is Authorized Host user
Visitor Pre Registration > Additional Visitors Details > Visitor Profile		Nationality	✓	Logged in user is Authorized Host user
Visitor Pre Registration > Additional Visitors Details > Visitor Profile		ID Proof 1	✓	Logged in user is Authorized Host user
Visitor Pre Registration > Additional Visitors Details > Visitor Profile		ID Proof 2	✓	Logged in user is Authorized Host user
Visitor Magement > Visit Approval > Visit Application Details (when Visitor Approve Configuration icon is clicked)		Mobile No.	✓	Logged in user is Authorized Host user
Visitor Magement > Visit Approval > Visit Application Details (when Visitor Approve Configuration icon is clicked)		Email	✓	Logged in user is Authorized Host user
Visitor Magement > Visit Approval > Visit Application Details (when Visitor Approve Configuration icon is clicked)		Designation	✓	Logged in user is Authorized Host user
Visitor Magement > Visit Approval > Visit Application Details (when Visitor Approve Configuration icon is clicked)		ID Proof 1	✓	Logged in user is Authorized Host user
Visitor Magement > Visit Approval > Visit Application Details (when Visitor Approve Configuration icon is clicked)		ID Proof 2	✓	Logged in user is Authorized Host user



# Copy Parameter Details

Using the Copy Configuration From  all parameters will not be copied. Refer to the table below for details:

Device	Type	Profile	Enrollment	Advanced
<b>Panel 200</b>		All parameters will be copied except Device, IP Address, MAC Address and Basic > Optional > Finger Template Format	All parameters will be copied	All parameters will be copied except Settings -> Advertise Bluetooth all parameters
<b>Panel Door</b>	<b>Vega Controller</b>	All parameters will be copied except Device, IP Address, MAC Address, Optional > Door Group and Reader Settings	All parameters will be copied	All parameters will be copied except, Advanced -> Settings -> Enable Man Trap Door Interlocking
	<b>ARC IO 800</b>	All parameters will be copied except Device, Connection Type, IP Address, MAC Address	NA	NA
	<b>ARGO</b>	All parameters will be copied except Device, IP Address, MAC Address, Optional > Door Group and Reader Settings	All parameters will be copied	All parameters will be copied except, Advanced -> Settings -> Enable Man Trap Door Interlocking
	<b>Path V2</b>	All parameters will be copied except Device, Connection Type, IP Address, MAC Address, Optional > Door Group and Reader Settings	NA	All parameters will be copied except, Advanced -> Settings -> Enable Man Trap Door Interlocking
	<b>ARGO FACE</b>	All parameters will be copied except Device, IP Address, MAC Address, Optional > Door Group and Reader Settings	All parameters will be copied	All parameters will be copied except, Advanced -> Settings -> Enable Man Trap Door Interlocking
<b>Vega Controller</b>		All parameters will be copied except Device, IP Address, MAC Address, Reader Settings and Basic > Optional > Finger Template Format	All parameters will be copied	All parameters will be copied
<b>ARC Controllers</b>	<b>ARC DC 200</b>	All parameters will be copied except Device, IP Address, MAC Address, Reader Settings and Basic > Optional > Finger Template Format	All parameters will be copied	All parameters will be copied
<b>ARC IO 800</b>		All parameters will be copied except Device, IP Address, MAC Address	NA	NA
<b>Path Controller</b>	<b>Path V2</b>	All parameters will be copied except Device, IP Address, MAC Address, Reader Settings and Basic > Optional > Finger Template Format	All parameters will be copied	All parameters will be copied

<b>MODE</b>		All parameters will be copied except Device, IP Address, UUID, Basic > Optional > Access Control through Device, Consider For Attendance, Device, Alternative Address, Port No. (HTTPS)	All parameters will be copied	All parameters will be copied
<b>ARGO</b>		All parameters will be copied except Device, IP Address, MAC Address, Reader Settings and Basic > Optional > Finger Template Format	All parameters will be copied	All parameters will be copied
<b>ARGO FACE</b>		All parameters will be copied except Device, IP Address, MAC Address and Reader Settings	All parameters will be copied	All parameters will be copied

Device	Type	Video Surveillance	Features	Special Function	Input/Output	Job Costing
<b>Panel 200</b>		NA	All parameters will be copied	Exclude all parameters	Exclude all parameters	NA
<b>Panel Door</b>	<b>Vega Controller</b>	Exclude all parameters	NA	NA	Exclude all parameters	NA
	<b>ARC IO 800</b>	Exclude all parameters	NA	NA	Exclude all parameters	NA
	<b>ARGO</b>	Exclude all parameters	NA	NA	Exclude all parameters	NA
	<b>Path V2</b>	Exclude all parameters	NA	NA	Exclude all parameters	NA
	<b>ARGO FACE</b>	Exclude all parameters	NA	NA	Exclude all parameters	NA
<b>Vega Controller</b>		Exclude all parameters	All parameters will be copied	Exclude all parameters	Exclude all parameters	All parameters will be copied
<b>ARC Controllers</b>	<b>ARC DC 200</b>	Exclude all parameters	All parameters will be copied	Exclude all parameters	Exclude all parameters	All parameters will be copied
<b>ARC IO 800</b>		Exclude all parameters	NA	NA	Exclude all parameters	NA

Path Controller	Path V2	Exclude all parameters	All parameters will be copied	Exclude all parameters	Exclude all parameters	All parameters will be copied
MODE		NA	NA	Exclude all parameters	NA	NA
ARGO		Exclude all parameters	All parameters will be copied	Exclude all parameters	Exclude all parameters	All parameters will be copied
ARGO FACE		Exclude all parameters	All parameters will be copied	Exclude all parameters	Exclude all parameters	All parameters will be copied

Device	Type	Zones	Additional	Access Clusters	Door Group	Assign Users	Face Settings	Identification Server
Panel 200		Exclude all parameters	Exclude all parameters	Exclude all parameters	Exclude all parameters	NA	NA	NA
Panel Door	Vega Controller	NA	NA	NA	NA	Exclude	NA	NA
	ARC IO 800	NA	NA	NA	NA	NA	NA	NA
	ARGO	NA	NA	NA	NA	Exclude	NA	NA
	Path V2	NA	NA	NA	NA	Exclude	NA	NA
	ARGO FACE	NA	NA	NA	NA	Exclude	All parameters will be copied	NA
Vega Controller		NA	Exclude all parameters	NA	NA	Exclude	NA	Exclude all parameters
ARC Controllers	ARC DC 200	NA	Exclude all parameters	NA	NA	Exclude	NA	Exclude all parameters
ARC IO 800		NA	NA	NA	NA	NA	NA	NA

<b>Path Controller</b>	<b>Path V2</b>	NA	Exclude all parameters	NA	NA	Exclude	NA	Exclude all parameters
<b>MODE</b>		NA	Exclude all parameters	NA	NA	Exclude	NA	Exclude all parameters
<b>ARGO</b>		NA	Exclude all parameters	NA	NA	Exclude	NA	Exclude all parameters
<b>ARGO FACE</b>		NA	Exclude all parameters	NA	NA	Exclude	All parameters will be copied	NA

Device	Type	Cafeteria
<b>Panel 200</b>		NA
<b>Panel Door</b>	<b>Vega Controller</b>	NA
	<b>ARC IO 800</b>	NA
	<b>ARGO</b>	NA
	<b>Path V2</b>	NA
	<b>ARGO FACE</b>	NA
<b>Vega Controller</b>		All parameters under Settings tab will be copied All parameters under Menu tab will be excluded
<b>ARC Controllers</b>	<b>ARC DC 200</b>	NA
<b>ARC IO 800</b>		NA
<b>Path Controller</b>	<b>Path V2</b>	NA
<b>MODE</b>		NA
<b>ARGO</b>		All parameters under Settings tab will be copied All parameters under Menu tab will be excluded
<b>ARGO FACE</b>		All parameters under Settings tab will be copied All parameters under Menu tab will be excluded

# Features Not Supported in Panel SDK1

When Panel Doors are added to a Panel200 (Server Mode) with SDK1, the following will not be supported:

Sr. No	Feature	Whether supported in SDK1	Remarks
1	First IN User Rule (Configurable via Panel)	Yes	99 Users per First IN Group can be configured.
2	Elevator Floor Group (Configurable via Panel)	Yes	64 Floors per Elevator Floor Group can be configured.
3	Temporary Addition of Unknown User (Configurable via Panel and Panel Door)	No	
4	Face Mask Compulsion Alarm (Configurable via Panel and Panel Door)	No	
5	Bluetooth Range in Internal/External Readers (Configurable via Panel Door)	Yes	Custom option for Bluetooth Range is not supported.
6	Allowed/Denied Acknowledgment Display Duration (ms) (Configurable via Panel and Panel Door)	Yes	Display Duration range 500-3000 ms is supported.
7	Allowed/Denied Acknowledgment LED-Buzzer Duration (Configurable via Panel and Panel Door)	Yes	LED Buzzer Duration options — Long, Medium and Short are supported.
8	Pulse Time (sec) (Configurable via Panel Door)	Yes	Pulse Time (sec) range 1-65535 is supported.
9	Shift Configuration*	Yes	Maximum 999 Shifts can be configured.
10	OSDP Parameters	No	
11	Duplicate Access Time Interval (Sec)	No	



*You can add ARGO FACE as Panel Door with Panel SDK1, but the door will not be active. Hence all related features of ARGO FACE will not be functional.*

*\* Shift Schedule with Shift ID (as configured in Shift Configuration) more than 999 is created and then assigned to users, then these shifts will not be assigned to users as SDK1 supports only 999 shifts.*

# Supported OSDP Commands and Responses

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## Terminologies Used

Abbreviations	Description
PD	Peripheral Devices
CP	Control Panel
ACU	Access Control Unit
APDU	Application Protocol Data Unit
SCS	Secure Channel Session
SPE	Secure PIN Entry
AES	Advanced Encryption Standard
CBC	Cypher Block Chaining
cUID	Client's Unique Identifier
ICV	Initial Chaining Vector
MK	Master Key
PGM	Portable Grey Map
SCBK	Secure Channel Base Key
MAC	Message Authentication Code
S-ENC	Session Key for ensuring data confidentiality (message encryption)
S-MAC1	Session Key for Message Authentication, key 1
S-MAC2	Session Key for Message Authentication, key 2
C-MAC	Command MAC (for packets from ACU to PD)
R-MAC	Reply MAC (for packets from PD to ACU)

Given below is the list of supported [“Commands”](#) and [“Responses”](#).

## Commands

- [“Poll \(osdp\\_POLL\)”](#)
- [“ID Report Request \(osdp\\_ID\)”](#)
- [“Peripheral Device Capabilities Request \(osdp\\_CAP\)”](#)
- [“Local Status Report Request \(osdp\\_LSTAT\)”](#)
- [“Reader LED Control Command \(osdp\\_LED\)”](#)
- [“Reader Buzzer Control Command \(osdp\\_BUZ\)”](#)
- [“Communication Configuration Command \(osdp\\_COMSET\)”](#)
- [“Encryption Key Set Command \(osdp\\_KEYSET\)”](#)
- [“Challenge and Secure Session Initialization Request \(osdp\\_CHLNG\)”](#)
- [“Server's Random Number and Server Cryptogram \(osdp\\_SCRIPT\)”](#)

## Poll (osdp\_POLL)

This command serves as a general inquiry. The PD may return any reply that is marked as a possible "poll response". Normally, the PD will return any unreported input data or status change information as a poll response.

Packet Format Field	Code	Name
CMND	0x60	osdp_POLL
DATA	Omitted	

## ID Report Request (osdp\_ID)

This command requests the return of the PD ID Report. The id request code parameter may request the extended form of the PD ID block.

Packet Format Field	Code	Name
CMND	0x61	osdp_ID
DATA	0x00	Send Standard PD ID Block

For response refer to ["Device Identification Report \(osdp\\_PDID\)"](#).

## Peripheral Device Capabilities Request (osdp\_CAP)

This command requests the PD to return a list of its functional capabilities, such as the type and number of input points, outputs points, reader ports, etc.

Packet Format Field	Code	Name
CMND	0x62	osdp_CAP
DATA	0x00	Send Standard Reply

For response refer to ["Device Capabilities Report \(osdp\\_PDCAP\)"](#)

## Local Status Report Request (osdp\_LSTAT)

This command instructs the PD to reply with a local status report.

Packet Format Field	Code	Name
CMND	0x64	osdp_LSTAT
DATA	Omitted	

For response refer to ["Local Status Report \(osdp\\_LSTATR\)"](#).

## Reader LED Control Command (osdp\_LED)

This command controls the LEDs associated with one or more readers.

Once the temporary command's timer expires the LED will revert to the last permanent state set.

The permanent command is volatile (does not transcend power cycles).

The LED will flash, alternating between the color specified for ON and color specified for OFF at the rate specified by the corresponding timers. Setting both color codes to the same value will produce a steady (non-flashing) output.

The 16-bit timer applies to the temporary LED commands only.

The LED Control Command message packet may contain multiple 14-byte records. The PD should use the total message length to determine the number of records present. The number of records should not exceed the number of LEDs as reported in ["Function Code 4 – Reader LED Control"](#); however the upper limit should not exceed the receive buffer size of the PD as reported in ["Function Code 10 – Receive BufferSize"](#).

Records containing an invalid Reader/LED number will result in a 0x09 error reply.

If the ACU sets a Temporary Setting and tries to establish another Temporary Setting, then a new Temporary Command should override a currently active temporary command.

The ON Time OFF Time values cannot both be set to zero.

Packet Format Field	Code	Name	Meaning
CMND	0x69	osdp_LED	
DATA 14 bytes repeated 1 or more times.	0x00 = First Reader 0x01 = Second Reader etc.	Reader Number	
	0x00 = first LED 0x01 = second LED etc.	LED Number	
	<b>Temporary Settings</b>		
	Refer to <a href="#">"Temporary Control Code Values"</a>	Control Code	The mode to enter temporarily
	0x00 – 0xFF	ON time	An 8 bit ON duration of the flash, in units of 100 ms  A zero value means no duration
	0x00 – 0xFF	OFF time	An 8 bit OFF duration of the flash, in units of 100 ms  A zero value means no duration
	Refer to <a href="#">"Color Values"</a>	ON color	The color to set during the ON time



Packet Format Field	Code	Name	Meaning
DATA 14 bytes repeated 1 or more times.	Refer to “Color Values”	OFF color	The color to set during the OFF time
	Refer to details mentioned under “Reader LED Control Command (osdp_LED)”	Timer (LSB)	A 16 bit timer value, in units of 100 ms A zero value means “forever”
		Timer (MSB)	
	Permanent Settings		
	Refer to “Permanent Control Code Values”	Control Code	The mode to return to after the timer expires,
	0x00 – 0xFF	ON time	An 8 bit ON duration of the flash, in units of 100 ms  A zero value means no duration
	0x00 – 0xFF	OFF time	An 8 bit OFF duration of the flash, in units of 100 ms  A zero value means no duration
	Refer to “Color Values”	ON color	The color to set during the ON time.
	Refer to “Color Values”	OFF color	The color to set during the OFF time

### Temporary Control Code Values

Temporary Control Code Value	Meaning
0x00	NOP – do not alter this LED's temporary settings. The remaining values of the temporary settings record are ignored.
0x01	Cancel any temporary operation and display this LED's permanent state immediately
0x02	Set the temporary state as given and start timer immediately.

### Permanent Control Code Values

Permanent Control Code Value	Meaning
0x00	NOP – do not alter this LED's permanent settings. The remaining values of the temporary settings record are ignored.
0x01	Set the permanent state as given.

## Color Values

Color Value	Meaning
0	Black (off/unlit)
1	Red
2	Green
3	Amber
4	Blue
5	Magenta
6	Cyan
7	White
The reply can be any of the following: <ul style="list-style-type: none"><li>osdp_ACK as described in <a href="#">“Positive Acknowledgment (osdp_ACK)”</a></li><li>osdp_NAK as described in <a href="#">“Negative Acknowledgment (osdp_NAK)”</a></li></ul>	

Examples:

To cause the first LED on the first Reader to flash red (100 ms) / black (200 ms) for 3 seconds, then resume its current display mode:

0, 0, 2, 1, 2, 1, 0, 30, 0, 0, 0, 0, 0, 0

To set the reader's second LED to display a steady green output

0, 1, 1, 0, 0, 0, 0, 0, 0, 1, 1, 1, 2, 2

## Reader Buzzer Control Command (osdp\_BUZ)

This command defines commands to a single, monotone audible annunciator (beeper or buzzer) that may be associated with a reader.

The permanent command is volatile (does not transcend power cycles).

A record that contains an invalid Reader Number will result in a 0x09 error reply.

Packet Format Field	Code	Name	Meaning
CMND	0x6A	osdp_BUZ	

Packet Format Field	Code	Name	Meaning
DATA 5 bytes repeated 1 or more times.	0x00 = First Reader 0x01 = Second Reader etc.	Reader Number	
	0x00 = no tone (off) – use of this value is deprecated. 0x01 = off 0x02 = default tone 0x03-0xff = Reserved for future use	Tone Code	Requested Tone State
	0x00 – 0xFF	On Time	The ON duration of the sound, in units of 100 ms. Must be nonzero unless the tone code is 0x01 (off.)
	0x00 – 0xFF	OFF Time	The OFF duration of the sound, in units of 100 ms
	0x00 – 0xFF	Count	The number of times to repeat the ON/OFF cycle. 0 = tone continues until another tone command is received

## Communication Configuration Command (osdp\_COMSET)

This command sets the PD's communication parameters. The settings will take effect AFTER the PD has completed its response to this command. It is recommended that communication parameters set by this command (address, baud rate) are non-volatile.

If the PD is unable to comply, it will return the values that it will use after the completion of this reply.

Packet Format Field	Code	Name	Meaning
CMND	0x6E	osdp_COMSET	
DATA 5 bytes	0x00 – 0x7E	Address	Unit ID to which this PD will respond after the change takes effect.
	0x00 – 0xFF	Baud Rate LSB	The baud rate is expressed as a 32-bit integer holding the actual value of the baud rate to use, such as 9600, 38400, etc.
	0x00 – 0xFF	Baud Rate	
	0x00 – 0xFF	Baud Rate	
	0x00 – 0xFF	Baud Rate MSB	

For response, refer to [“Communication Configuration Report \(osdp\\_COM\)”](#).

## Encryption Key Set Command (osdp\_KEYSET)

This command transfers an encryption key from the ACU to a PD.

Byte	Name	Meaning	Value
0	Key_Type	Encryption method to use with this key	0x01 – Secure Channel Base Key

Byte	Name	Meaning	Value
10	Length	Number of bytes of key data	(Key Length in bits + 7) / 8
2- (2+Length)	Data	Key data	Any
Reply: osdp_ACK, osdp_NAK			

**Note:**

The following notes apply to Key\_Type = 0x01:

The Length indicates the number of bytes containing key data in the array Data[]. It is computed as the integer value of the quantity of Key Length in bits plus 7 divided by 8. For example, the Length shall be 16, and the Data[] array shall contain the 128-bit Secure Channel base key (SCBK).

This command shall be sent by the ACU and accepted by the PD only while the connection is “secure”. The “secure” connection in this context shall mean that either:

- a) the current connection is encrypted, and the session keys are based on the current SCBK (or SCBK-D), or
- b) that the connection is inherently secure via physical security, such as ACU/PD are connected via simple short cable. The “inherently secure” connection shall be asserted to the ACU and to the PD by setting the devices into a special installation setup mode. The devices should exit the setup mode automatically after a successful completion of this osdp\_KEYSET command.

## Challenge and Secure Session Initialization Request (osdp\_CHLNG)

This command is the first in the Secure Channel Session Connection Sequence (SCS-CS). It delivers a random challenge to the PD and it requests the PD to initialize for the secure session. It's SCS connection sequence value is SCS\_11.

Byte	Name	Meaning	Value
0 -7	Random Number	Random number generated by the ACU (RND.A)	Any
Command structure: none Reply: osdp_NAK, osdp_CCrypt			

## Server's Random Number and Server Cryptogram (osdp\_SCRIPT)

This command transfers a block of data used for encryption synchronization. It's SCS connection sequence value is SCS\_12.

Byte	Name	Meaning	Value
0 - 15	Cryptogram	16-byte Server Cryptogram array	Any. Refer to the Server Cryptogram paragraph below.
Reply: osdp_NAK, osdp_RMAC_I			

## Server Cryptogram

The Server Cryptogram is computed by encrypting the concatenated RND.B[8] and RND.A[8] using key S-ENC. RND.A[8] is generated by the ACU (server) and RND.B[8] is generated by the PD (client).

ServerCryptogram = ENC( RND.B[8] || RND.A[8], S-ENC )

## Responses

- “Positive Acknowledgment (osdp\_ACK)”
- “Negative Acknowledgment (osdp\_NAK)”
- “Device Identification Report (osdp\_PDID)”
- “Device Capabilities Report (osdp\_PDCAP)”
- “Local Status Report (osdp\_LSTATR)”
- “Card Data Report, Raw Bit Array (osdp\_RAW)”
- “Keypad Data Report (osdp\_KEYPAD)”
- “Communication Configuration Report (osdp\_COM)”
- “Client’s ID and Client’s Random Number (osdp\_CCRYPT)”

### Positive Acknowledgment (osdp\_ACK)

There is no reply structure associated with this reply. Sent in response to all valid commands that do not require a specific response or will not receive an immediate response.

Packet Format Field	Code	Name	Meaning
CMND	0x40	osdp_ACK	
DATA	Omitted		

### Negative Acknowledgment (osdp\_NAK)

The optional completion code array may be omitted if none of the command records were processed either because the command had only one record, or because none of the records were processed due to invalid record sizing.

Bytes 1-N are present only for error codes that define its use. The optional completion code array may be omitted if none of the command records were processed either because the command had only one record, or because none of the records were processed due to invalid record sizing.

Packet Format Field	Code	Name	Meaning
CMND	0x41	osdp_NAK	
DATA	Refer to “Error Codes”	Error Code	Refer to “Error Codes”
	0x00 – 0xFF	Data	Error Code dependent, 1 – N

### Error Codes

Error Code Value	Meaning
0x00	No error

Error Code Value	Meaning
0x01	Message check character(s) error (bad cksum/crc)
0x02	Command length error
0x03	Unknown Command Code – Command not implemented by PD
0x04	Unexpected sequence number detected in the header
0x05	This PD does not support the security block that was received
0x06	Encrypted communication is required to process this command
0x07	BIO_TYPE not supported
0x08	BIO_FORMAT not supported
0x09	<p>Unable to process command record</p> <p>0x09 indicates that one or more command records had invalid parameters and was not processed which can be followed by an optional array, where each byte represents the completion code of the corresponding command record. A zero value indicates no error, and the value 0xFF indicates a generic error.</p>

## Device Identification Report (osdp\_PDID)

Sent in response to an osdp\_ID command. Note also that the “cUID”, used in certain Secure Channel operations, is the first 8 bytes of the PDID response.

Reply Structure: 12-byte fixed record.

Packet Format Field	Code	Name	Meaning
CMND	0x45	osdp_PDID	

Packet Format Field	Code	Name	Meaning
DATA 12 Bytes	0x00 – 0xFF	Vendor Code 1st	IEEE assigned OUI The Vendor Code is a 24-bit identifier of the manufacturer. It is recommended that each manufacturer use its IEEE assigned Organizationally Unique Identifier, the same 24 bits it uses to form the MAC addresses of its Ethernet-based products.
	0x00 – 0xFF	Vendor Code 2nd	
	0x00 – 0xFF	Vendor Code 3rd	
	0x00 – 0xFF	Model Number	Manufacturer's model number The Model field is assigned by and managed by the Vendor.
	0x00 – 0xFF	Version	Manufacturer's version of this product The Version Number field is assigned by and managed by the Vendor.
	0x00 – 0xFF	Serial Number (LSB)	4-byte serial number The 32-bit Serial Number field is assigned and managed by the Vendor.
	0x00 – 0xFF	Serial Number	
	0x00 – 0xFF	Serial Number	
	0x00 – 0xFF	Serial Number (MSB)	
	0x00 – 0xFF	Firmware Major	Firmware revision code The Firmware Revision fields are assigned and managed by the Vendor.
	0x00 – 0xFF	Firmware Minor	
	0x00 – 0xFF	Firmware Build	

## Device Capabilities Report (osdp\_PDCAP)

Sent in response to an osdp\_CAP command. The Device Capabilities report message may contain multiple records of this form (3 bytes per record). Use the total message length to determine the number of records present.

The records may be in any order. If a function code is omitted from the list, The ACU may assume that the PD has no support for that function code. A list of Function Codes and their definition, and the corresponding compliance levels is incorporated as Annex B of this Document.

Reply Structure: 3-byte element, repeated one or more times.

Packet Format Field	Code	Name	Meaning
CMND	0x46	osdp_PDCAP	
DATA 3 Bytes	0x00 – 0xFF	Function Code	Repeated once per capability. Refer to <a href="#">“Function Codes”</a> .
	0x00 – 0xFF	Compliance	
	0x00 – 0xFF	Number of	

## Function Codes

Byte	Name	Meaning	Value
0	Function Code	Function/feature code	Refer to Function Codes mentioned below.
1	Compliance	Level of compliance with above function	Refer to the compliance levels mentioned in the respective Function Codes
2	Number of	Number of objects of this type	Refer to Number of Objects in the respective Function Code.

### Function Code 1 – Contact Status Monitoring

This function indicates the ability to monitor the status of a switch using a two-wire electrical connection between the PD and the switch. The on/off position of the switch indicates the state of an external device.

The PD may simply resolve all circuit states to an open/closed status, or it may implement supervision of the monitoring circuit. A supervised circuit is able to indicate circuit fault status in addition to open/closed status.

#### **Compliance Levels:**

01 – PD monitors and reports the state of the circuit without any supervision. The PD encodes the circuit status per its default interpretation of contact state to active/inactive status.

02 – Like 01, plus: The PD accepts configuration of the encoding of the open/closed circuit status to the reported active/inactive status. (User may configure each circuit as "normally closed" or "normally open".)

03 – Like 02, plus: PD supports supervised monitoring. The operating mode for each circuit is determined by configuration settings.

04 – Like 03, plus: the PD supports custom End-Of-Line settings within the Manufacturer's guidelines.

The End-Of-Line circuit parameters are defined by the manufacturer of the PD.

**Number Of:** The number of Inputs.

### Function Code 2 – Output Control

This function provides a switched output, typically in the form of a relay. The Output has two states: active or inactive. The ACU can directly set the Output's state, or, if the PD supports timed operations, the ACU can specify a time period for the activation of the Output.

#### **Compliance Levels:**

01 – The PD is able to activate and deactivate the Output per direct command from the ACU.

02 – Like 01, plus: The PD is able to accept configuration of the Output driver to set the inactive state of the Output. The typical state of an inactive Output is the state of the Output when no power is applied to the PD and the Output device (relay) is not energized. The inverted drive setting causes the PD to energize the Output during the inactive state and de-energize the Output during the active state.

This feature allows the support of "fail-safe/fail-secure" operating modes.

03 – Like 01, plus: The PD is able to accept timed commands to the Output. A timed command specifies the state of the Output for the specified duration.

04 – Like 02 and 03 – normal/inverted drive and timed operation.



**Number Of:** The number of Outputs.

### **Function Code 3 – Card Data Format**

This capability indicates the form of the card data is presented to the Control Panel.

#### ***Compliance Levels:***

01 – the PD sends card data to the ACU as array of bits, not exceeding 1024 bits.

02 – the PD sends card data to the ACU as array of BCD characters, not exceeding 256 characters.

03 – the PD can send card data to the ACU as array of bits, or as an array of BCD characters.

**Number Of:** N/A, set to 0.

### **Function Code 4 – Reader LED Control**

This capability indicates the presence of and type of LEDs.

#### ***Compliance Levels:***

01 – the PD support on/off control only

02 – the PD supports timed commands

03 – like 02, plus bi-color LEDs

04 – like 02, plus tri-color LEDs

**Number Of:** The number of LEDs per reader.

### **Function Code 5 – Reader Audible Output**

This capability indicates the presence of and type of an Audible Annunciator (buzzer or similar tone generator).

#### ***Compliance Levels:***

01 – the PD supports on/off control only

02 – the PD supports timed commands

**Number Of:** This field is ignored. Per 6.11 there is only one audible output per PD.

### **Function Code 6 – Reader Text Output**

This capability indicates that the PD supports a text display emulating character-based display terminals.

#### ***Compliance Levels:***

00 – The PD has no text display support

01 – The PD supports 1 row of 16 characters

02 – the PD supports 2 rows of 16 characters

03 – the PD supports 4 rows of 16 characters

04 – FF Reserved for future use

80 – FF Reserved for private use

**Number Of:** Number of textual displays per reader.

### **Function Code 7 – Time Keeping**

This capability indicates that the type of date and time awareness or time keeping ability of the PD. This function has been deprecated.

#### ***Compliance Levels:***

00 – The PD does not support time/date functionality  
0x01-0xff – reserved for future use

**Number Of:** N/A, set to 0.

### **Function Code 8 – Check Character Support**

All PDs shall be able to support the checksum mode. This capability indicates if the PD is capable of supporting CRC mode.

#### ***Compliance Levels:***

00 – The PD does not support CRC-16, only checksum mode.  
01 – The PD supports the 16-bit CRC-16 mode.

**Number Of:** N/A, set to 0.

### **Function Code 9 – Communication Security**

This capability indicates the extent to which the PD supports communication security as defined in Annex D.

#### ***Compliance Levels:***

This field is a bit map of the supported encryption algorithms:  
0x01 – (Bit-0) AES128 support  
(Bits 1-7) Must be zero

**Number of:** This field is encoded to represent the key exchange capabilities:  
0x01 – (Bit-0) default AES128 key  
(Bits 1-7) Must be zero

### **Function Code 10 – Receive BufferSize**

This capability indicates the maximum size single message the PD can receive.

#### ***Compliance Levels:***

This field is the LSB of the buffer size

**Number of:** This field is the MSB of the buffer size

### **Function Code 11 – Largest Combined Message Size**

This capability indicates the maximum size multi-part message which the PD can handle.

#### ***Compliance Levels:***

This field is the LSB of the combined buffer size

**Number of:** This field is the MSB of the combined buffer size

### **Function Code 12 – Smart Card Support**

This capability indicates what kind of smartcard support is available for communicating directly with a smart card.

#### ***Compliance Levels:***

Bit 0 (mask 0x01) – PD supports transparent reader mode

Bit 1 (mask 0x02) – PD supports extended packet mode.

Either one or both modes may be supported.

### **Function Code 13 – Readers**

This capability indicates the number of credential reader devices present. Compliance levels are bit fields to be assigned as needed.

#### ***Compliance Level:***

Must be zero

**Number of:** Indicates the number of attached downstream readers.

### **Function Code 14 – Biometrics**

This capability indicates the ability of the reader to handle biometric input

#### ***Compliance Levels:***

0 – No Biometric

1 – Fingerprint, Template 1

2 – Fingerprint, Template 2

3 – Iris, Template 1

### **Function Code 15 – Secure PIN Entry support**

This capability indicates if the reader is capable of supporting Secure PIN Entry (SPE) for smart cards. Secure PIN Entry is used with ISO 7816 (Smartcards). It is assumed the osdp\_KEYPAD message will be used if the keypad is to be read by the ACU.

#### ***Compliance Levels:***

0 = does not support SPE

1 = supports SPE

### **Function Code 16 – OSDP Version**

This capability indicates the version of OSDP this PD supports.

#### ***Compliance Levels:***

0 = unspecified (also used for pre-IEC 60839-11-5 implementations)

1 = IEC 60839-11-5

2 = SIA OSDP 2.2

3-0x7F = Reserved for future use

0x80-0xFF = reserved for private use

## Local Status Report (osdp\_LSTATR)

Sent in response to an osdp\_LSTAT command or as a "poll response"

The local status report applies to conditions directly monitored by the PD. Tamper status is detected by the PD by monitoring the enclosure tamper mechanism. Power monitor status can be derived from the status of the power supply. Normally this reply is sent in response to an osdp\_POLL command if either status has changed since the last POLL..

Reply Structure: 2 status bytes.

Packet Format Field	Code	Name	Meaning
CMND	0x48	osdp_LSTATR	
DATA 2 Bytes	0x00 – normal 0x01 – tamper	Tamper Status	Status of tamper circuit
	0x00 – normal 0x01 – power failure	Power Status	Status of power

## Card Data Report, Raw Bit Array (osdp\_RAW)

Sent as a "poll response"

This reply is sent in response to an osdp\_POLL command after a card was read but the raw data was not decoded into a character array. Unreported card data is deleted in case of, or during, a communication loss.

Reply structure: 4-byte header, variable-length data.

Packet Format Field	Code	Name	Meaning
CMND	0x50	osdp_RAW	
DATA	0x00 – 0xFF	Reader Number	0=First Reader 1=Second Reader
	0x00 = not specified, raw bit array 0x01 = P/data/P (wiegand)	Format Code	Format of included data
	0x00 – 0xFF	Bit Count (LSB)	2-byte size (in bits) of the data at the end of the record
	0x00 – 0xFF	Bit Count (MSB)	
	0x00 – 0xFF	Data	8 bits of card data per data byte MSB to LSB (left justified)

## Keypad Data Report (osdp\_KEYPAD)

Sent as a "poll response"

This reply is sent in response to an osdp\_POLL if there is any data in the keypad buffer. It is applied when the keypad is in default operating mode. Unreported keypad data is deleted in case of, or during, a communication loss.

Reply Structure: 2-byte header, variable-length data.

Packet Format Field	Code	Name	Meaning
CMND	0x53	osdp_KEYPAD	
DATA	0x00 – 0xFF	Reader Number	0=First Reader 1=Second Reader
	0x00 – 0xFF	Digit Count	Number of keypad digits to follow.
	0x00 – 0xFF	Data	Keypad data represented as ASCII characters.
<p>The key encoding uses the following data representation:</p> <ul style="list-style-type: none"> <li>• Digits 0 through 9 are reported as ASCII characters 0x30 through 0x39</li> <li>• The clear/delete/'*' key is reported as ASCII DELETE, 0x7F</li> <li>• The enter/'#' key is reported as ASCII return, 0x0D</li> </ul> <p>Special/function keys are reported as upper case ASCII:</p> <ul style="list-style-type: none"> <li>• A or F1 = 0x41, B or F2 = 0x42, C or F3 = 0x43, D or F4 = 0x44</li> <li>• F1 &amp; F2 = 0x45, F2 &amp; F3 = 0x46, F3 &amp; F4 = 0x47, F1 &amp; F4 = 0x48</li> </ul>			

## Communication Configuration Report (osdp\_COM)

Sent in response to an osdp\_COMSET command. This reply returns the communication parameters the PD will use after sending this reply.

Reply Structure: 5-byte record

Packet Format Field	Code	Name	Meaning
CMND	0x54	osdp_COM	
DATA 5 Bytes	0x00 – 0x7E	Address	Unit ID for this PD to respond to
	0x00 – 0xFF	Baud Rate (LSB)	4 Byte Baud rate value
	0x00 – 0xFF	Baud Rate	
	0x00 – 0xFF	Baud Rate	
	0x00 – 0xFF	Baud Rate (MSB)	

## Client's ID and Client's Random Number (osdp\_CCrypt)

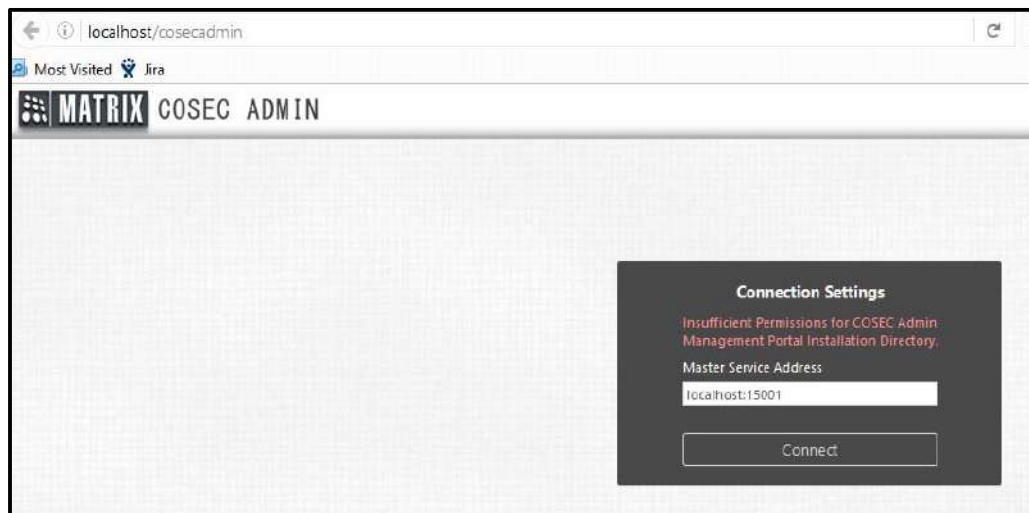
This reply sends a block of data used for encryption synchronization, sent in response to osdp\_CHLNG command. It's SCS connection sequence value is SCS\_13.

Byte	Name	Meaning	Value
0 - 7	Client ID	Client's Unique Identifier (cUID)	Any
8 -15	Random Number	PD's random number generated, (RND.B)	Any

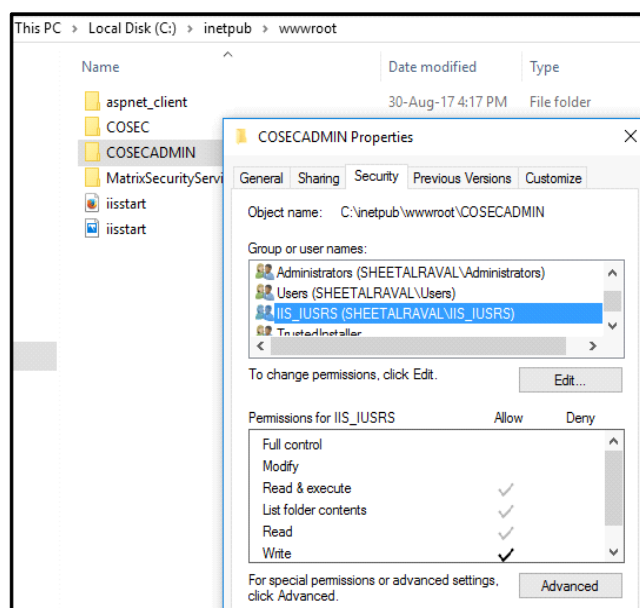
Byte	Name	Meaning	Value
16 - 31	Cryptogram	16-byte Client Cryptogram array	Any

# Troubleshooting

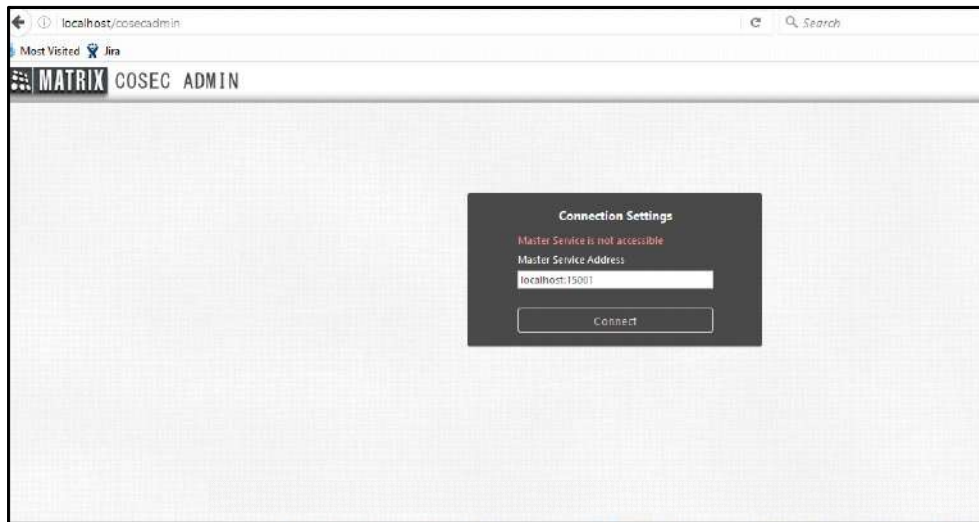
1. *When I login to Admin Portal, and permissions are insufficient to access the portal; then*



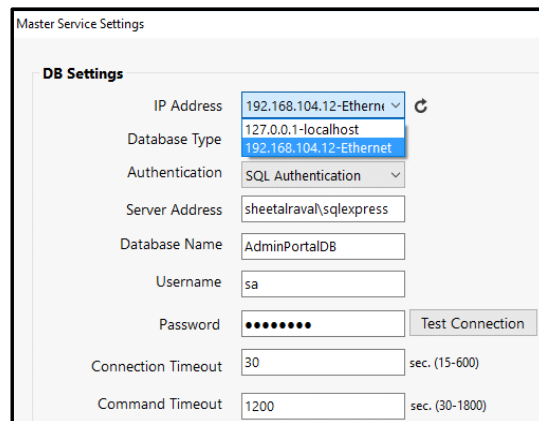
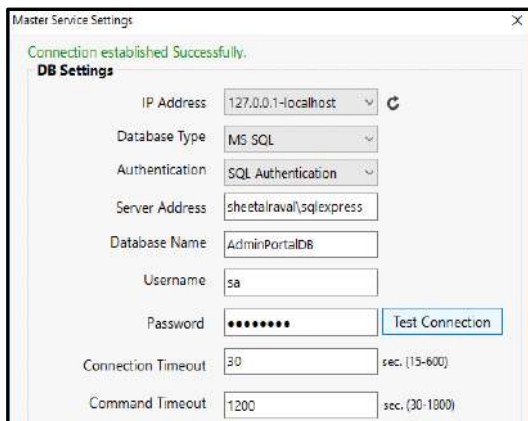
- Check the rights on COSECADMIN folder. For this go to path C:\inetpub\wwwroot. The IIS user must be given full control rights. So click Edit and enable Full control checkbox. Then apply the changes. Now you can login to Admin Portal.



## 2. *When I login to Admin Portal and Master Service is not accessible; then*



- Check the database settings. Ensure that connection of Admin Portal database is established with database server.
- Check that the IP address at which Master service is running is correctly selected. If the IP address has gone to 127.0.0.1 - Localhost; then you must manually select the IP address from the drop down list at which master service would be running.
- Then start the Master service from the service tray. Once the Admin portal database is upgraded then Master service will be started.



## 3. *When Admin Portal is running and error comes on Monitor configuration page; then*

- Ensure that Admin Portal's database and Tenant's database are different. If same database is kept, conflict in columns may occur.
- You must upgrade the existing database of tenant when new setup is installed. You can create new database of Tenant from Tenants > Database Configuration.

## 4. *When License voucher invalid/does not exist in COSEC VYOM; then*

- Check the Matrix Licensing Server URL in General Settings. Ensure that the license key and voucher is available on the specified licensing server.



- Ensure that the PC where Admin Portal is installed can access the Licensing server IP.



Enter the Matrix licensing Server URL in System Configuration > General Settings before creating a tenant.

License Voucher Activation

! License Voucher Invalid/does not exist

Tenant ^ 1 Sheetal

License Voucher ^ 7124915979208111

User Days ^ 10000

Product ^ VYOM PLATFORM

Add Cancel

License Voucher Product User Days

No Data

Activate

Current Balance:	As on Date: 08/11/2017
Platform: 0	VMM: 0
TAM: 0	CMM: 0
ACM: 0	JPC: 0
FVM: 0	ESS: 0
CWM: 0	

5. **When you login to COSEC Web and following error comes, then ensure that License voucher of COSEC is activated.**



6. **When Client Data is not available; then check that Client URL is available in the Web config file at path C:\inetpub\wwwroot\COSEC**

Client Data not available. Invalid URL. Please try again...

Login ID

Password

☐ Remember Me

Login

[Forgot Password ?](#)

## 7. *How to configure Device Based License Verification Mode.*

Connect the Dongle to the Device (for example Panel200)

Make the tenant/company as Device Based for license verification mode. Save the settings.

**MATRIX COSEC ADMIN**

Company Configuration

- Profile
- License and Services
- Monitor Configuration
- COSEC Services
- Manage Database

**Profile**

ID: 1

Name: sheetal

Active: ☒

Time Zone: (UTC+05:30) Chennai, Kolkata, Mumbai, New Delhi

License Verification Mode: Device Based

MAC Address: [Field] [Reset]

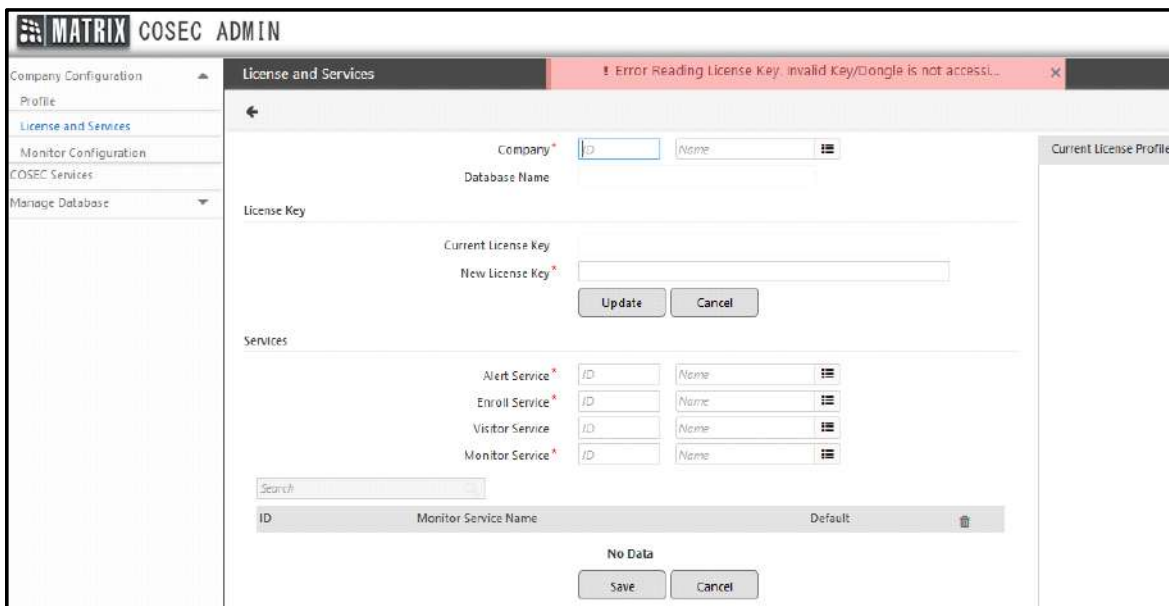
Contact Details

Address Details

Database Configuration

ID	Name	Status
1	sheetal	Active

Now check the License and Services page.

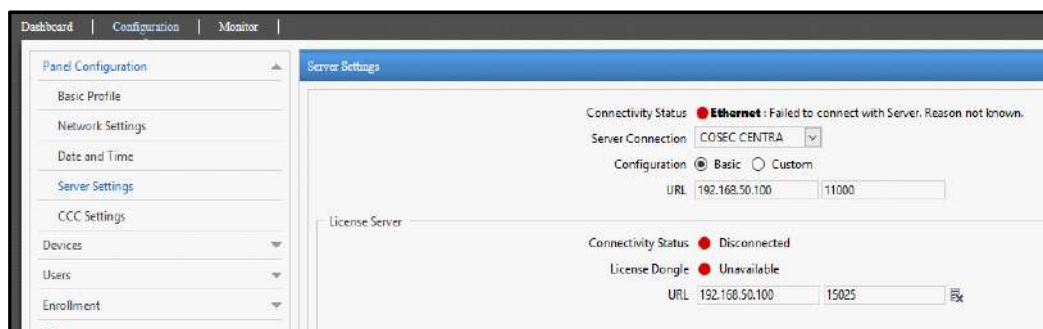


If there is Error in reading license key, then check the Device settings.

Now login to the webpage of Panel200. Ensure that Panel200 is in Server Mode. If it is in Standalone Mode, change the mode to Server Mode from Configuration > Panel Configuration> Basic Profile> Panel Mode.



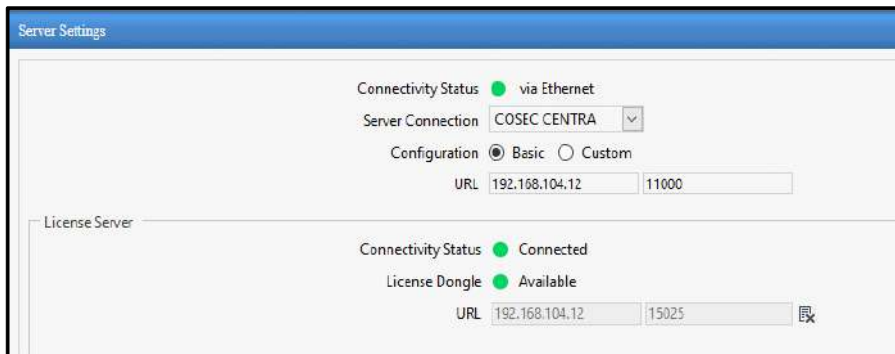
Now click Panel Configuration> Server Settings. The default settings are shown.



The URL for COSEC Centra Server is the IP Address of the computer where Monitor Service is running.

The License Server URL is the IP Address of the computer where Master Service is running.

If Monitor Service and Master Service are in the same computer then enter the same IP Address with the respective port as shown below.



**8. I have re-installed the setup; when I login to COSEC Web, license key is not found.**

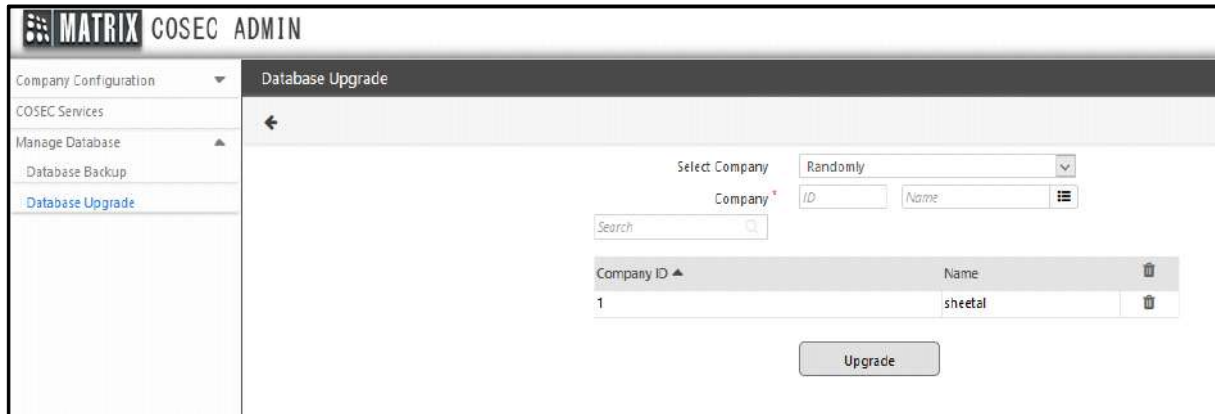


- Login to Admin Portal. Check the license verification mode in the Profile.
- If it is Server Based then make sure the dongle is connected to the USB Port of the CPU where Master Service is installed.
- If it is Device Based then make sure the dongle is connected to the USB port of Panel200/VEGA/ARGO/ARGO FACE with which it is configured or you can also Reset to use another device.

**9. When I login to COSEC Web and database is required to be upgraded.**



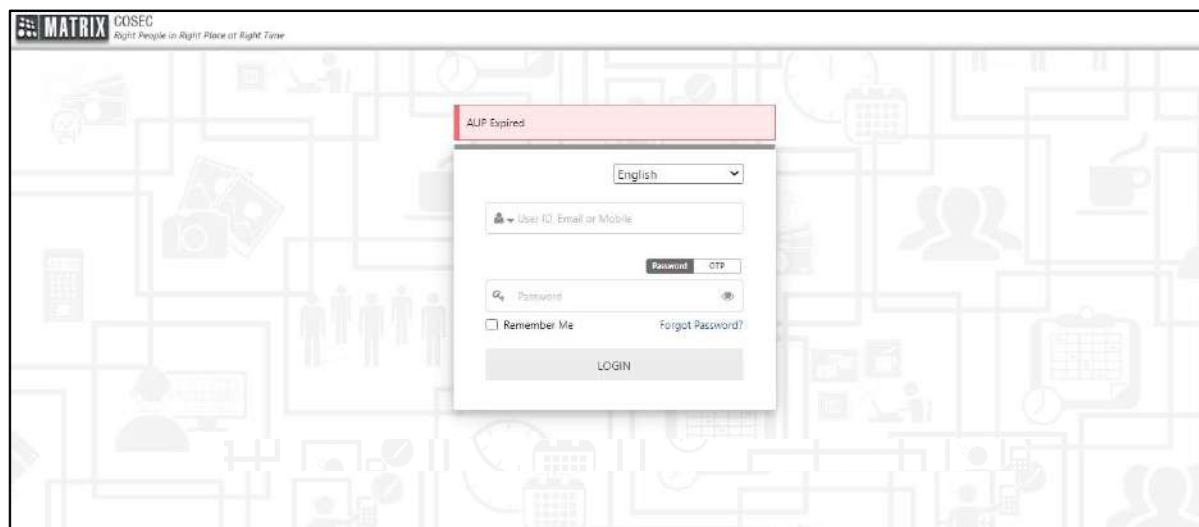
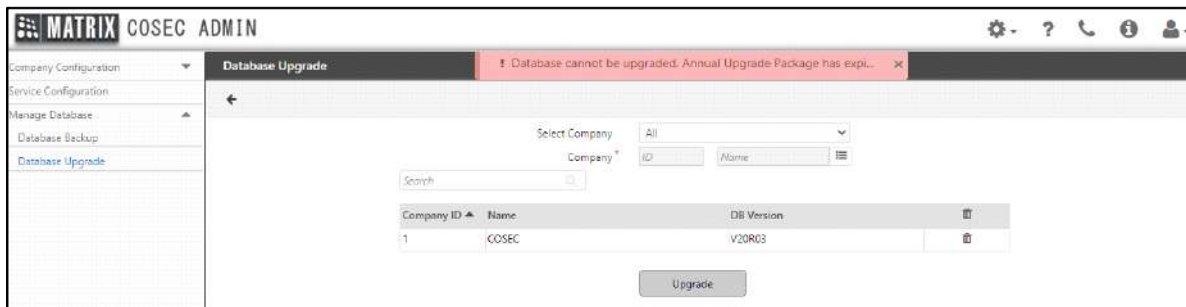
- Login to Admin Portal. Go to Manage Database> Database Upgrade.
- Select the company and click on Upgrade.
- Then click on Refresh. Once database is upgraded, status will be updated to Success. Now you can login to COSEC web.



**10. I have to change the database of COSEC Web. How can I do?**

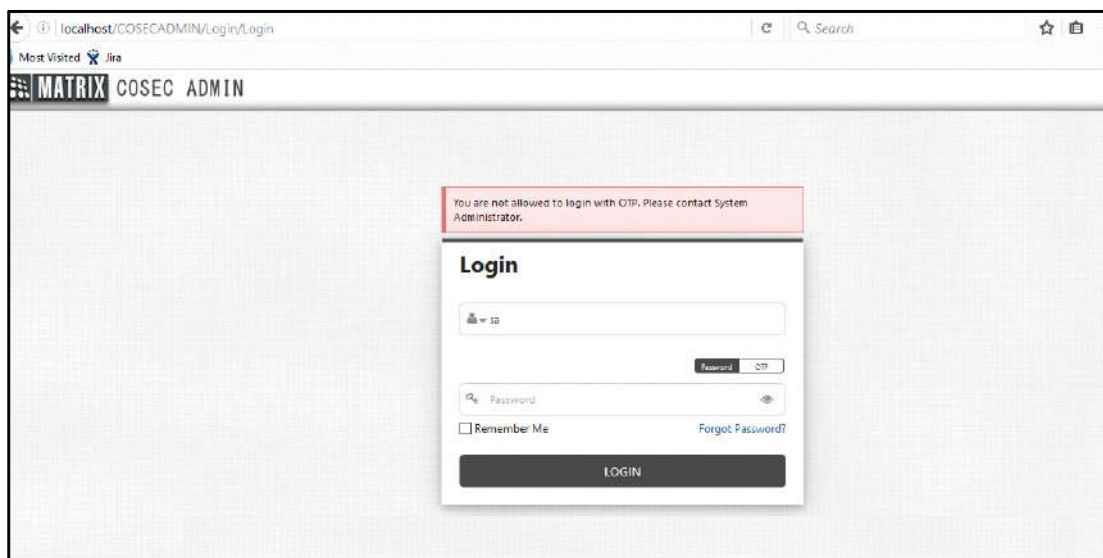
- Login to Admin Portal. Go to Profile> Database Configuration.
- You can change the type of database or different database of the current type. Then click Test Connection to test the connection with database and click Save to save the changed database.
- Now you can login to COSEC web with changed database.

**11. When I am trying to upgrade database; Annual Upgrade Package has expired and I am not able to login into COSEC. What to do?**



You have to upgrade the Annual package of License. For this contact Matrix channel partner.

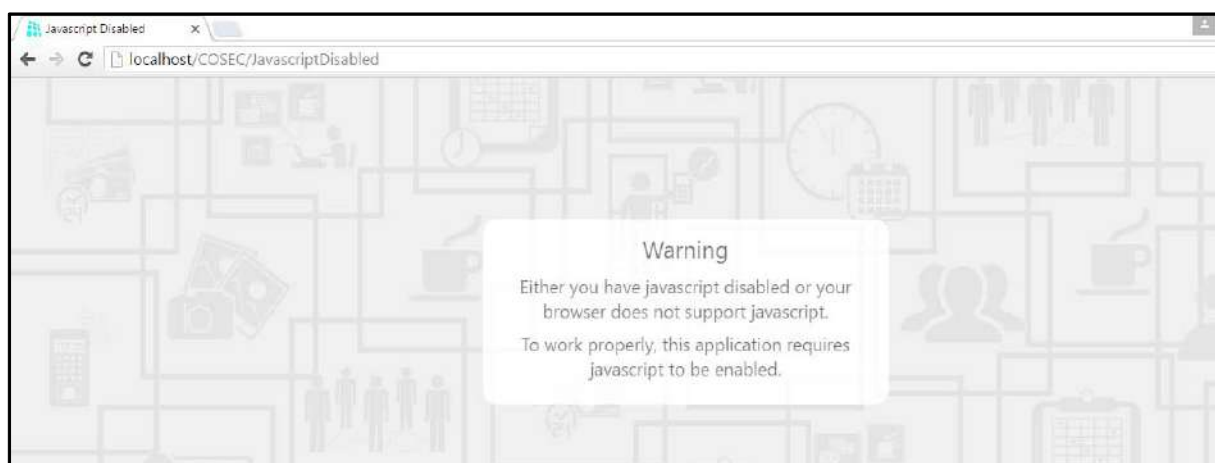
12. *I am not allowed to login into COSEC Admin Portal using OTP. What to do?*



- Login into Admin Portal with password. Then go to System Configuration> Login Policy and verify that the login policy is set as **Password OR OTP**.
- Ensure that SMS Configuration/Email Configuration are done.
- The Email ID and Contact number must be available on the System Accounts page so that OTP can be sent to the configured number and or Email ID.

Similarly you can select **Password Then OTP** option to enable 2 step authentication during login.

13. *I am not allowed to login into COSEC Web and COSEC Admin Portal due to disabled Javascript. What to do?*



You must enable Javascript on the browser.

- For this open the browser. Go to the Settings section.
- Go to the JavaScript section. Also you can search by keyword.
- Enable the option "Allow all Sites to run JavaScript".

# Technical Specifications

## Technical Specifications - Devices

### ARGO FACE

TECHNICAL SPECIFICATIONS	
<b>CREDENTIAL</b>	
Human Face	Yes
PIN	Yes
BLE - Mobile	Yes
<b>CAPACITY</b>	
User Profiles	50,000
Face Templates	2,00,000
Max. Templates Per User	30
Event Logs	5,00,000
<b>FACE RECOGNITION</b>	
Algorithm	Deep Learning-based Face Recognition
Fake Face Detection	Yes
Face Identification	1:200,000 in < 1 sec
	1:1 in < 0.5 sec
Face Enrolment	Enrolment Station
	Upload Images
Recognition Distance	30cm - 120cm (0.3m - 1.2m)
Recognition Height	140cm - 198cm (1.4m - 1.98m)
<b>GENERAL SPECIFICATIONS</b>	
Dimensions (HxWxD)	186mm x 74 mm x 50mm
	(7.3" x 3" x 2 ")
Weight	650gms (1.433 lbs)
Display	3.5" IPS LCD (Touch Screen)
Display Resolution	480 x 320 Pixel
Gorilla Glass	Yes (Gorilla Glass 3)
CPU	Quad-Core ARM Cortex-A7 @ 1.5 GHz
GPU	Built-in 2 TOPS Neural Network Computing Performance
RAM	2 GB DDR4
Flash Memory	16 GB eMMC
SD Card	No
Tamper Detection	Yes
Buzzer	Yes
IR LEDs	Yes
Ingress Protection	IP65
Vandal Proof	IK06
Certificate	CE, FCC, BIS, UL, RoHS
Operating Temperature	0°C to 50°C
Storage Temperature	-20°C to 60°C
Humidity	5% to 95 % RH Non-Condensing
<b>CAMERA</b>	
RGB Camera	2MP Surveillance Grade, IR Blocked
Infrared Camera	2MP Surveillance Grade, IR Band Pass
Camera Sensors	SONY IMX 307, EXMOR Technology, STARVIS Series
<b>COMMUNICATION</b>	
Ethernet	Yes (10/100 Mbps - 1 port)
PoE	Yes (IEEE 802.3 af)
WiFi	Yes (802.11 b/g/n)
3G/4G/LTE	Yes (Additional USB Modem)
BLE	Yes (8m Range)
USB	Yes (USB 2.0)
	Micro USB-Type B

INTERFACE	
Exit Switch Interface	Yes
External Reader Support	Yes (MATRIX and 3rd Party)
External Reader	Interface
	RS232
	Wiegand
	Power
	12VDC @ 0.5A
Wiegand	LED and Buzzer Control
	Allowed - GREEN LED
	Yes (Selectable IN/OUT)
	IN: 26 Bit format OUT: Configurable
Door Lock Relay	Yes (30VDC @ 2A, Dry Contacts NO/NC/COM)
Door Lock Power	Internal PoE Power: 12VDC @ 0.250 A
	Internal Adapter Power 12VDC @ 0.5 A
	External Power 12VDC @ 2A
INSTALLATION	
Wall Mount	Yes - Plastic Back Cover with Screws
Flush Mount	Yes - Metal Bracket with Screws
Power Adapter	12VDC @ 2A (CE, FCC, UL, BIS)
Card	
Smart Cards	MIFARE Classic® and NFC Tag and HID iCLASS
Proximity Cards	EM Prox and HID Prox
	(Separate variant for each card type. HID PROX requires HID iCLASS type)
<b>Note:</b> MIFARE and MIFARE Classic are trademarks of NXP B.V.	

## COSEC ARGO FOE/COSEC ARGO FOM/COSEC ARGO FOI

TECHNICAL SPECIFICATIONS	
GENERAL	
Credential Support	Bluetooth® (BLE), Fingerprint, RFID Card, PIN, Face (with Compatible Hardware)
IP Rating	IP65 (With wall mounting installation condition and flush mounting with recommended installation surface)
RF Option	Smart Cards - MIFARE Classic® and NFC Tag and HID iCLASS
	Proximity Cards - EM Prox and HID Prox
	(Separate variant for each card type. HID PROX requires HID iCLASS type)
CAPACITY	
Maximum Users	50,000
Maximum Templates	25,000 in 1: N Mode and 100,000 in 1:1 Mode (Optical sensing technology)
Event Buffer	5,00,000



Templates per User	Up to 10 (Single template per finger mode)
	Up to 5 (Dual template per finger mode)
Cards per User	Up to 2
<b>COMMUNICATION</b>	
Wi-Fi	Yes (802.11 b/g/n)
Bluetooth®	Built-in Bluetooth® (8m Range - For Mobile Applications)
Ethernet	Yes (10/100 Mbps)
PoE	Yes (IEEE 802.3 af)
RS-232	Yes
Mobile Broadband	Yes
Wiegand	Wiegand IN/OUT Available
USB	1 Micro-USB Port (Data transfer and 2G-3G dongle)
<b>INTERFACE</b>	
Exit Switch Port	Yes
Door Status Sense	Programmable NO, NC, Supervised
Door Lock Relay	30V DC @ 2 A, Form C, DPDT Relay
Door Lock Power	12V DC @ 0.5A (Power to external Lock from Device)
	30V DC @2 A (Power to lock from External power source)
Aux-In	No
Aux-Out	No
Reader Interface Types	RS-232 and Wiegand IN/OUT
Micro SD Card	Yes (Inbuilt 8GB)
<b>HARDWARE</b>	
CPU	800 MHz ARM Cortex A8 based Processor
Memory	512 MB Flash + 512 MB DDR3 RAM
Display	3.5" IPS Display with Capacitive Touch Panel with Gorilla Glass
Display Resolution	320 x 480 Pixel
Buzzer	Yes
Operating Temperature	0°C to +50°C
Humidity	5% to 95% RH Non-Condensing
Tamper Detection	Yes

Power	12V DC @ 2A
Power to Door Lock	12V DC @ 0.5A (Power to external Lock from Device)
Dimensions (W x H x D)	74mm x 186mm x 50mm
Weight	0.549Kgs (1.21Lbs)
<b>COMPATIBILITY</b>	
System Integration	API for Software Integration
Operational Modes	Direct Door with COSEC CENTRA Server
	Panel Door with COSEC PANEL200P
MIFARE and MIFARE Classic are trademarks of NXP B.V.	

## COSEC ARGO CAM/COSEC ARGO CAE/COSEC ARGO CAI

TECHNICAL SPECIFICATIONS	
<b>Credential Support</b>	
PIN	Yes
Card	<b>ARGO CAE:</b> EM Prox.
	<b>ARGO CAM:</b> MIFARE Classic, DESFire EV1 and EV2(Read/Write)
	<b>ARGO CAI:</b> HID iClass Card Support (Read/Write) HID Prox,
	EM Prox, Desfire EV1 & EV2 (CSN Read) and Mifare Classic (CSN Read)
BLE - Mobile	Yes
<b>Capacity</b>	
User Profiles	50,000
Event Logs	5,00,000
<b>General Specification</b>	
Weight	550gms (1.12 lbs)
Display	3.5" IPS LCD (Touch Screen)
Display Resolution	480 x 320 Pixel
Gorilla Glass	Yes (Gorilla Glass 3)
CPU	800 MHz ARM cortex A8 based processor
RAM	512 MB DDR3
Flash Memory	512 MB
SD Card	Yes (16 GB)
Tamper Detection	Yes
Speaker	No
Buzzer	Yes
Ingress Protection	IP65
Vandal Proof	IK06
Certificate	CE, FCC, BIS, RoHS
Operating Temperature	0°C to 50°C
Storage Temperature	-20°C to 60°C
Humidity	5% to 95 % RH Non-Condensing
<b>Communication</b>	
Ethernet	Yes (10/100 Mbps - 1 port)
PoE	Yes (IEEE 802.3 af)
WiFi	Yes (802.11 b/g/n)
3G/4G/LTE	Yes (Additional USB Modem)

BLE	Yes (8m Range)
USB	Yes (USB 2.0) Micro USB-Type B
<b>Interface</b>	
Exit Switch Interface	Yes
External Reader Support	Yes (MATRIX and 3rd Party)
External Reader	<b>Interface</b>
	RS232
	Wiegand
	<b>Power</b>
	12VDC @ 0.5A
	<b>LED and Buzzer Control</b>
	Allowed - GREEN LED
	Buzzer
Wiegand	Yes (Selectable IN/OUT)
	<b>IN:</b> 26 Bit format
Door Lock Relay	<b>OUT:</b> Configurable
	Yes (30VDC @ 2A, Dry Contacts NO/NC/COM)
	Internal PoE Power: 12VDC @ 0.250 A
Door Lock Power	Internal Adapter Power 12VDC @ 0.5 A
	External Power 12VDC @ 2A
AUX IN / AUX OUT	NO
<b>Installation</b>	
Wall Mount	Yes
Flush Mount	Yes
<b>Accessories</b>	
Power Adapter	12VDC @ 2A (CE, FCC, BIS)
Mounting Options	<b>Flush Mount:</b> Metal Bracket with Screws
	<b>Surface Mount:</b> Plastic Back Cover with Screws
Battery Backup	No
MIFARE and MIFARE Classic are trademarks of NXP B.V.	

## VEGA FAX/VEGA FAXQ

TECHNICAL SPECIFICATIONS		
Variants	COSEC VEGA FAX	COSEC VEGA FAXQ
<b>Credential Support</b>	Bluetooth® (BLE), Fingerprint, RFID Card, PIN, Face (with Compatible Hardware)	Fingerprint, RFID Card and PIN
<b>Fingerprint Sensor</b>	Optical	Optical
<b>Templates Capacity</b>	9600 (1: N mode), and 1,00,000 (1:1 mode)	9600 (1: N mode), and 1,00,000 (1:1 mode)
<b>Templates Per User</b>	Up to Ten	Up to Ten
<b>Cards Per User</b>	Up to Two	Up to Two
<b>Type of Card</b>	EM Prox, MIFARE Classic®, and HID iCLASS (Card Module is required)	EM Prox, MIFARE Classic®, and HID iCLASS (Card Module is required)
<b>User Capacity</b>	50,000	50,000
<b>Display</b>	3.5" TFT Display with Capacitive Touch Panel	3.5" TFT Display with Capacitive Touch Panel
<b>Communication Port</b>	Ethernet, Wi-Fi, Mobile Broadband (3G/4G Using USB Dongle), Built-in Bluetooth® (8m Range - For Mobile Applications)	Ethernet, Wi-Fi, Mobile Broadband (3G/4G Using USB Dongle)
<b>Built-in PoE</b>	Yes	Yes

<b>Built-in Wi-Fi</b>	Yes	Yes
<b>USB</b>	One USB Port (for Data Transfer and Mobile Broadband)	One USB Port (for Data Transfer and Mobile Broadband)
<b>Micro SD Card</b>	Yes (16GB)	Yes (16GB)
<b>Event Buffer</b>	5,00,000	5,00,000
<b>Exit Switch Port</b>	Yes	Yes
<b>Exit Reader</b>	Yes	Yes
<b>Reader Interface Types</b>	RS-232 and Wiegand	RS-232 and Wiegand
<b>Reader Power Output</b>	Internal 12VDC @ 0.5A or External	Internal 12VDC @ 0.5A or External
<b>Door Status Sense</b>	Programmable NO, NC, Supervised	Programmable NO, NC, Supervised
<b>Door Lock Relay</b>	Relay SPDT, Form C, 1A @ 30VDC	Relay SPDT, Form C, 1A @ 30VDC
<b>Door Lock Power</b>	Internal 12VDC @ 0.5A or External	Internal 12VDC @ 0.5A or External
<b>Aux-In</b>	Programmable NO, NC, Supervised	Programmable NO, NC, Supervised
<b>Aux-Out</b>	Relay SPDT, Form C, 1A @ 30VDC	Relay SPDT, Form C, 1A @ 30VDC
<b>Tamper Detection</b>	Yes	Yes
<b>Input Power</b>	12VDC @ 2A	12VDC @ 2A
<b>Operating Temperature</b>	0° C to +50°C (32°F to 122°F),	0° C to +50°C (32°F to 122°F),
<b>Humidity</b>	5% to 95% RH Non-condensing	5% to 95% RH Non-condensing
<b>IP65</b>	Verified	Verified
<b>STQC Certified</b>	No	Verified
<b>Certification</b>	CE,FCC PART15B(VOC),BIS,ROHS	CE,FCC PART15B(VOC),BIS,ROHS
<b>Dimensions (mm)</b>	91X186X38	91X186X38
<b>Weight (kgs)</b>	0.54	0.54
MIFARE and MIFARE Classic are trademarks of NXP B.V.		

## VEGA CAX

TECHNICAL SPECIFICATIONS	
<b>Variants</b>	<b>COSEC VEGA CAX</b>
<b>Credential Support</b>	Bluetooth® (BLE), RFID Card, PIN, Face (with Compatible Hardware)
<b>Cards Per User</b>	Up to Two
<b>Type of Card</b>	EM Prox, MIFARE Classic®, and HID iCLASS (Card Module is required)
<b>User Capacity</b>	50,000
<b>Display</b>	3.5" TFT Display with Capacitive Touch Panel
<b>Communication Port</b>	Ethernet, Wi-Fi, Mobile Broadband (3G/4G Using USB Dongle), Built-in Bluetooth® (8m Range - For Mobile Applications)
<b>Built-in PoE</b>	Yes
<b>Built-in Wi-Fi</b>	Yes
<b>USB</b>	One USB Port (for Data Transfer and Mobile Broadband)
<b>Micro SD Card</b>	Yes (16GB)
<b>Event Buffer</b>	5,00,000
<b>Exit Switch Port</b>	Yes
<b>Exit Reader</b>	Yes

<b>Reader Interface Types</b>	RS-232 and Wiegand
<b>Reader Power Output</b>	Internal 12VDC @ 0.5A or External
<b>Door Status Sense</b>	Programmable NO, NC, Supervised
<b>Door Lock Relay</b>	Relay SPDT, Form C, 1A @ 30VDC
<b>Door Lock Power</b>	Internal 12VDC @ 0.5A or External
<b>Aux-In</b>	Programmable NO, NC, Supervised
<b>Aux-Out</b>	Relay SPDT, Form C, 1A @ 30VDC
<b>Tamper Detection</b>	Yes
<b>Input Power</b>	12VDC @ 2A
<b>Operating Temperature</b>	0° C to +50°C (32°F to 122°F),
<b>Humidity</b>	5% to 95% RH Non-condensing
<b>IP65</b>	Verified
<b>STQC Certified</b>	No
<b>Certification</b>	CE,FCC PART15B(VOC),BIS,ROHS
<b>Dimensions (mm)</b>	91X186X38
<b>Weight (kgs)</b>	0.54
MIFARE and MIFARE Classic are trademarks of NXP B.V.	

## Door FMX

TECHNICAL SPECIFICATIONS	
<b>Credential Support</b>	Fingerprint, RFID Card, PIN and Face (with Compatible Hardware)
<b>Display</b>	4.3" Capacitive Touch Screen
<b>User Capacity</b>	1000 (1:N) and 50,000 (1:1)*
<b>Template Capacity</b>	1000 (1:N) and 100,000 (1:1)
<b>Cards Per User</b>	Up to 2
<b>Types of Cards Support</b>	EM Prox, HID Prox, HID iClass and MIFARE Classic® (COSEC CPM Module Required)
<b>Event Buffer</b>	5,00,000
<b>Communication</b>	Ethernet, PoE, Wi-Fi and Mobile Broadband (3G/4G)
<b>Exit Switch</b>	Yes
<b>Door Status Sense</b>	Programmable NO, NC and Supervised
<b>Door Lock Relay</b>	Form C and SPDT Relay (Max 2A@30 VDC)
<b>Door Lock Power</b>	12VDC @ 1A (for Adaptor Supply Mode) 12VDC @ 0.5A (For PoE Supply Mode)
<b>Aux-IN</b>	Programmable NO, NC and Supervised
<b>Aux-OUT</b>	Form C and SPDT Relay (Max 2A@30 VDC)
<b>Reader Interface types</b>	RS 232 and Wiegand In Only
<b>USB</b>	2 (1 for Data Transfer and 1 for Broadband Dongle)
<b>CPU</b>	800 MHz ARM Cortex A8 based Processor
<b>Flash Memory</b>	256MB Flash
<b>RAM Memory</b>	512 MB DDR3 RAM
<b>Micro SD Card</b>	Yes (Inbuilt 4 GB)
<b>Input Power</b>	12VDC @ 2A
<b>Battery Backup</b>	No Internal Battery Backup and External through Power Supply Battery Backup (PSBB)
<b>Dimensions (WxHxD)</b>	100mm x 220mm x 56mm (3.9" x 8.7" x 2.2")
<b>Weight</b>	0.6kg (1.32 lbs)
<b>Humidity</b>	5% to 85% RH Non-condensing
<b>Operating Temperature</b>	0°C to + 50°C (32°F to 122°F)
<b>System Integration</b>	API for Software Integration
<b>Operational Mode</b>	Direct Door with COSEC CENTRA Server
<b>Tamper Detection</b>	Yes
<b>Sensor Technology</b>	Multispectral Lumidigm Sensor with LFD
<b>Sensing Area</b>	27mm x 30mm x 41mm

MIFARE and MIFARE Classic are trademarks of NXP B.V.

## Door FOP

TECHNICAL SPECIFICATIONS	
Credential Support	Fingerprint, RFID Card, PIN and Face (with Compatible Hardware)
Display	4.3" Capacitive Touch Screen
User Capacity	1000 (1:N) and 50,000 (1:1)*
Template Capacity	1000 (1:N) and 100,000 (1:1)
Cards Per User	Up to 2
Types of Cards Support	EM Prox, HID Prox, HID iClass and MIFARE Classic® (COSEC CPM Module Required)
Event Buffer	5,00,000
Communication	Ethernet, PoE, Wi-Fi and Mobile Broadband (3G/4G)
Exit Switch	Yes
Door Status Sense	Programmable NO, NC and Supervised
Door Lock Relay	Form C and SPDT Relay (Max 2A@30 VDC)
Door Lock Power	12VDC @ 1A (for Adaptor Supply Mode) 12VDC @ 0.5A (For PoE Supply Mode)
Aux-IN	Programmable NO, NC and Supervised
Aux-OUT	Form C and SPDT Relay (Max 2A@30 VDC)
Reader Interface types	RS 232 and Wiegand In Only
USB	2 (1 for Data Transfer and 1 for Broadband Dongle)
CPU	800 MHz ARM Cortex A8 based Processor
Flash Memory	256MB Flash
RAM Memory	512 MB DDR3 RAM
Micro SD Card	Yes (Inbuilt 4 GB)
Input Power	12VDC @ 2A
Battery Backup	No Internal Battery Backup and External through Power Supply Battery Backup (PSBB)
Dimensions (WxHxD)	100mm x 220mm x 56mm (3.9" x 8.7" x 2.2")
Weight	0.6kg (1.32 lbs)
Humidity	5% to 85% RH Non-condensing
Operating Temperature	0°C to + 50°C (32°F to 122°F)
System Integration	API for Software Integration
Operational Mode	Direct Door with COSEC CENTRA Server
Tamper Detection	Yes
Sensor Technology	Multispectral Lumidigm Sensor with LFD
Sensing Area	27mm x 30mm x 41mm
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## Door FOT

TECHNICAL SPECIFICATIONS	
Variants	COSEC DOOR FOT
Credential Support	Fingerprint, RFID Card and PIN
Display	128 x 64 Dot Matrix Display
Keypad	16 Touch Sense Keys
User Capacity	50,000 (Max. 9600 in 1:N Mode)
Template Per User	Up to Ten (Single Template per Finger Mode) or Up to Five (Dual Template per Finger Mode)
Template Storage Capacity	9600 in 1:N Mode and 1 lac in 1:1 Mode

<b>Cards Per User</b>	Up to Two
<b>Event Buffer</b>	5,00,000
<b>Types of Cards Support</b>	Proximity Card (EM Prox and HID Prox)
<b>Mobile Broadband</b>	Yes (3G/4G Support)
<b>RS-485</b>	Yes (115.2Kbps)
<b>Ethernet</b>	Yes (10 Mbps / 100Mbps on Ethernet)
<b>USB</b>	2 USB Ports (1 for Data Transfer and 1 for 3G/4G Dongle)
<b>Buzzer</b>	Yes
<b>LED</b>	4 LEDs (Status, Alarm, Allowed, Denied)
<b>CPU</b>	400MHz ARM 9 based Processor
<b>Flash Memory</b>	256MB
<b>RAM Memory</b>	128MB DDR2
<b>Input Power</b>	12VDC @ 2A
<b>Battery Backup</b>	No
<b>Humidity</b>	5% to 85% RH Noncondensing
<b>Operating Temperature</b>	0°C to + 50°C (32°F to 122°F)
<b>Tamper detection</b>	Yes
<b>Certification</b>	CE and RoHS
<b>STQC Certified</b>	No
<b>Dimensions (mm)</b>	100 x 220 x 56
<b>Weight (kgs)</b>	0.65

## COSEC PATH DCFE/COSEC PATH DCFI/COSEC PATH DCFM

TECHNICAL SPECIFICATIONS	
<b>Credential Support</b>	BLE, Fingerprint and RFID Card
<b>Template Per User</b>	Up to Ten (Single Template per Finger Mode) or
	Up to Five (Dual Template per Finger Mode)
<b>Card Type</b>	EM Prox (COSEC PATH DCFE)
	MIFARE Classic® Smart (COSEC PATH DCFM)
	HID iCLASS, HID Prox (COSEC PATH DCFI)
<b>Template Storage Capacity</b>	SFM 6030: 25,000 (1:N) And 100,000 ( 1:1)
<b>Cards Per User</b>	Two
<b>Events Buffer</b>	5,00,000
<b>Max. Users</b>	50,000
<b>RS-485</b>	Yes (115.2Kbps)
<b>Battery Backup</b>	No
<b>Ethernet</b>	Yes (10/100Mbps)
<b>PoE</b>	Yes (IEEE 802.3 af)
<b>Exit Switch</b>	Yes
<b>Door Status Sense</b>	Yes (2 State)
<b>Door Lock Relay</b>	Dry Contacts NO/NC/COM (Max 1A@30 VDC)

<b>Door Lock Power</b>	Internal 12V DC @ 0.5 A
<b>Reader Interface types</b>	RS-232 and Wiegand IN/OUT
<b>Buzzer</b>	Yes
<b>LED</b>	Single LED (TriColor )
<b>CPU</b>	Cortex A8 800 MHz
<b>Flash Memory</b>	512 MB
<b>RAM Memory</b>	512 MB
<b>Input Power</b>	12V DC @ 2A
<b>Humidity</b>	5% to 95% RH Non – Condensing
<b>Operating Temperature</b>	0°C to +50°C (32°F to 122°F) For Variants supporting EM Proximity Card and MiFare Classic® Card
	0°C to +45°C (32°F to 113°F) For Variant Support HiD iClass Card
<b>Tamper Detection</b>	Yes
<b>IP65</b>	Verified
<b>Certification</b>	CE and BIS
<b>Dimension (mm)</b>	50x159x42
<b>Weight (kgs)</b>	0.27
<b>Wi-Fi</b>	Yes (802.11 b/g/n)
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## COSEC PATH DCCE/COSEC PATH DCCI/COSEC PATH DCCM

TECHNICAL SPECIFICATIONS	
<b>Credential Support</b>	BLE and RFID Card
<b>Card Type</b>	EM Prox (COSEC PATH DCCE)
	MIFARE Classic® Smart (COSEC PATH DCCM)
	HID iCLASS, HID Prox (COSEC PATH DCCI)
<b>User Capacity</b>	10,000
<b>Cards Per User</b>	Two
<b>Events Buffer</b>	5,00,000
<b>Max. Users</b>	50,000
<b>Battery Backup</b>	No
<b>Ethernet</b>	Yes (10/100Mbps)
<b>PoE</b>	Yes (IEEE 802.3 af)
<b>Exit Switch</b>	Yes
<b>Door Status Sense</b>	Yes (2 State)
<b>Door Lock Relay</b>	Form C and SPDT Relay (Max 1A@30 VDC)
<b>Door Lock Power</b>	Internal 12V DC @ 0.5 Amp
<b>Reader Interface types</b>	RS-232 & Wiegand IN/OUT



<b>Buzzer</b>	Yes
<b>LED</b>	Single LED (TriColor)
<b>CPU</b>	Cortex A8 800 MHz
<b>Flash Memory</b>	512 MB
<b>RAM Memory</b>	512 MB
<b>Input Power</b>	12V DC @ 2A
<b>Humidity</b>	5% to 95% RH Non – Condensing
<b>Operating Temperature</b>	0°C to +50°C (32°F to 122°F) For Variants supporting EM Proximity Card and MiFare Classic® Card
	0°C to +45°C (32°F to 113°F) For Variant Support HiD iClass Card
<b>Tamper Detection</b>	Yes
<b>IP65</b>	Verified
<b>Certification</b>	CE and BIS
<b>Dimension (mm)</b>	50.5X137X34
<b>Weight (kgs)</b>	0.18
<b>Wi-Fi</b>	Yes (802.11 b/g/n)
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## ARC DC200

TECHNICAL SPECIFICATIONS	
<b>Credential Support</b>	BLE and RFID Card
<b>Card Type</b>	EM Prox (COSEC PATH DCCE)
	MIFARE Classic® Smart (COSEC PATH DCCM)
	HID iCLASS, HID Prox (COSEC PATH DCCI)
<b>User Capacity</b>	10,000
<b>Cards Per User</b>	Two
<b>Events Buffer</b>	5,00,000
<b>Max. Users</b>	50,000
<b>Battery Backup</b>	No
<b>Ethernet</b>	Yes (10/100Mbps)
<b>PoE</b>	Yes (IEEE 802.3 af)
<b>Exit Switch</b>	Yes
<b>Door Status Sense</b>	Yes (2 State)
<b>Door Lock Relay</b>	Form C and SPDT Relay (Max 1A@30 VDC)
<b>Door Lock Power</b>	Internal 12V DC @ 0.5 Amp
<b>Reader Interface types</b>	RS-232 & Wiegand IN/OUT
<b>Buzzer</b>	Yes
<b>LED</b>	Single LED (TriColor)

<b>CPU</b>	Cortex A8 800 MHz
<b>Flash Memory</b>	512 MB
<b>RAM Memory</b>	512 MB
<b>Input Power</b>	12V DC @ 2A
<b>Humidity</b>	5% to 95% RH Non – Condensing
<b>Operating Temperature</b>	0°C to +50°C (32°F to 122°F) For Variants supporting EM Proximity Card and MiFare Classic® Card
	0°C to +45°C (32°F to 113°F) For Variant Support HiD iClass Card
<b>Tamper Detection</b>	Yes
<b>IP65</b>	Verified
<b>Certification</b>	CE and BIS
<b>Dimension (mm)</b>	50.5X137X34
<b>Weight (kgs)</b>	0.18
<b>Wi-Fi</b>	Yes (802.11 b/g/n)
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## ARC IO800

TECHNICAL SPECIFICATIONS	
<b>GENERAL</b>	
Input Power	PoE (IEEE 802.3 af) OR 12V DC @ 2A Power Adaptor
Communication Mode	Ethernet and RS-485
Ethernet	10/100 Mbps
LED	One
<b>IN/OUT</b>	
IN Ports	Eight Input Ports
OUT Ports	Eight Output Ports
INPUT Type	Four Stare Supervised
OUTPUT Type	28V DC @ 2A, Relay SPDT, Form C
<b>PHYSICAL</b>	
Standalone Mode	With Built-in Software in COSEC PANEL200P
CENTRA Mode	With COSEC CENTRA (with or without COSEC PANEL200P)
<b>PHYSICAL</b>	
Dimensions (W x H x D) (mm3)	107 x 125.5 x 55
Weight	260 g (Approx.)
<b>ENVIRONMENTAL</b>	
Humidity	5% to 95% RH Non-Condensing
Operating Temperature	0°C to + 50°C (32°F to 122°F)

## ATOM RD300SF

Specifications	ATOM RD300SF
<b>GENERAL</b>	
PIN	Yes
Card	Yes
Fingerprint	Yes
BLE - Mobile	Yes
User capacity	Depends on the master device
Template Capacity	25,000(1:N Mode)
Event Logs	Depends on the master device
Sensor Name	SFM6030-OC6
Sensor Surface	Scratch Free
Resolution	500 DPI
Sensing Area	16.0mm X 18.0mm
Dimensions (H X W X D)	Wall Mount:153mm X 56 mm X 37mm
	Flush Mount: 183mm X 71 mm X 37mm
Weight	330grms (0.72 lbs)
Display	2" Touch screen Display
Display Resolution	320 x 240 Pixel
Gorilla Glass	Yes (Gorilla Glass 3)
Keypad	Yes (In-Display Keypad)
CPU	AM3352
RAM	256 MB
Flash	256 MB
USB	No
SD Card	No
Tamper Detection	Yes
Speaker	No
Buzzer	Yes (12V Magnetic buzzer)
LEDs	No
Ingress Protection (IP65)	Yes
Vandal Proof (IK06)	Yes

Certificate	CE, FCC, ROHS, BIS
Operating Temperature	-20°C to + 55 °C
Humidity	5% to 95 % RH Non-Condensing
Ethernet	No
PoE	No
WiFi	Yes (802.11 b/g/n)
BLE	Yes
Wiegand	Yes
RS232	Yes
RS485	Yes
OSDP	Yes*
Wall Mount	Yes
Flush Mount	Yes
<b>Variants</b>	
With Proximity	EM Proximity Card
	<b>Variant Name:</b> ATOM RD300SFE
With Mifare	Mifare Classic/Desfire EV1 &
	EV2 /combo cards/ NFC Tag
	<b>Variant Name:</b> ATOM RD300SFM
With HID i-Class	HID iClass/Mifare/Desfire/combo cards
	<b>Variant Name:</b> ATOM RD300SFI

## ATOM RD200SF

<b>Specifications</b>	<b>ATOM RD200SF</b>
<b>Credential Supported</b>	
Card	Yes
Fingerprint	Yes
BLE - Mobile	Yes

User capacity	Depends on the master device
<b>Capacity</b>	
Template Capacity	25,000(1:N Mode)
Event Logs	Depends on the master device
<b>Fingerprint Sensor</b>	
Sensor Name	SFM6030-OC6
Resolution	500 DPI
Sensing Area	16.0mm X 18.0mm
Dimensions (H X W X D)	Wall Mount:153mm X 56 mm X 37mm
	Flush Mount: 183mm X 71 mm X 37mm
Weight	330grms (0.72 lbs)
Gorilla Glass	Yes (Gorilla Glass 3)
Keypad	Yes (In-Display Keypad)
CPU	AM3352
RAM	256 MB
Flash	256 MB
USB	No
SD Card	No
Tamper Detection	Yes
Speaker	No
Buzzer	Yes (12V Magnetic buzzer)

LEDs	No
Ingress Protection (IP65)	Yes
Vandal Proof (IK06)	Yes
Certificate	CE, FCC, ROHS, BIS
Operating Temperature	-20°C to + 55 °C
Humidity	5% to 95 % RH Non-Condensing
Ethernet	No
PoE	No
WiFi	Yes (802.11 b/g/n)
BLE	Yes (8m Range - For Mobile Applications)
Wiegand	Yes
RS232	Yes
RS485	Yes
Wall Mount	Yes
Flush Mount	Yes
<b>Variants</b>	
With Proximity	EM Proximity Card
	<b>Variant Name:</b> ATOM RD200SFE

With Mifare	Mifare Classic/Desfire EV1 &
	EV2 /combo cards/ NFC Tag
	<b>Variant Name:</b> ATOM RD200SFM
With HID i-Class	HID i-class/mifare/desfire/combo cards
	<b>Variant Name:</b> ATOM RD200SFI

## ATOM RD100

Specifications	ATOM RD100K	ATOM RD100
<b>GENERAL</b>		
Credential Support	BLE, PIN and Card	BLE and Card
RF Option	<b>ATOM RD100KE:</b> EM Proximity Card	<b>ATOM RD100E:</b> EM Proximity Card
	<b>ATOM RD100KM:</b> MIFARE Classic, DESFire EV1 and EV2(Read/Write)/ NFC Tag	<b>ATOM RD100M:</b> MIFARE Classic, DESFire EV1 and EV2(Read/Write)/ NFC Tag
	<b>ATOM RD100KI:</b> HID i-Class/ Mifare/ Desfire/ Combo Cards	<b>ATOM RD100I:</b> HID i-Class/ Mifare/ Desfire/ Combo Cards
<b>COMMUNICATION</b>		
Inbuilt Bluetooth®	Yes	Yes
<b>INTERFACE</b>		
RS-232	Yes (Compatible with COSEC ARGO, COSEC VEGA, COSEC PATH V2)	Yes (Compatible with COSEC ARGO, COSEC VEGA, COSEC PATH V2)
Weigand	Yes	Yes
RS – 485	Yes (Compatible with ARC DC200P)	Yes (Compatible with ARC DC200P)
<b>HARDWARE</b>		
Dimensions (H X W X D)	101mm X 60 mm X 19mm	101mm X 60 mm X 19mm
Weight	140grms (0.30 Lbs)	140grms (0.30 Lbs)
Gorilla Glass	Yes (Gorilla Glass 3)	Yes (Gorilla Glass 3)
CPU	Nordic 32 Bit	Nordic 32 Bit
Tamper Detection	Yes	Yes
Buzzer	Yes (12V Magnetic Buzzer)	Yes (12V Magnetic Buzzer)
LEDs	Yes (Tri Color)	Yes (Tri Color)
Ingress Protection (IP)	Yes (IP65)	Yes (IP65)
Vandal Proof (Ik)	Yes (IK07)	Yes (IK07)
Keypad	Yes	-
<b>ENVIRONMENTAL</b>		
Operating Temperature	0°C to +55°C	0°C to +55°C

Humidity	5% to 95 % RH Non-Condensing	5% to 95 % RH Non-Condensing
<b>CERTIFICATES</b>		
Certificates	CE, FCC, ROHS, BIS	CE, FCC, ROHS, BIS

## PATH Readers

TECHNICAL SPECIFICATIONS			
Variants	COSEC PATH RDFE	COSEC PATH RDFM	COSEC PATH RDFI
<b>Credential Support</b>	Fingerprint and RFID Card	Fingerprint and RFID Card	Fingerprint and RFID Card
<b>Sensor</b>	Optical	Optical	Optical
<b>Template storage capacity</b>	9,600	9,600	9,600
<b>Type of Card</b>	EM Prox	MIFARE Classic® Smart	HID iCLASS, HID Prox
<b>Communication</b>	RS-485 and RS-232	RS-485 and RS- 232	RS-485 and RS- 232
<b>Buzzer</b>	Yes	Yes	Yes
<b>LED</b>	Single LED (Tri Color)	Single LED (Tri Color)	Single LED (Tri Color)
<b>Input Power</b>	12 VDC @ 0.1A	12 VDC @ 0.1A	12 VDC @ 0.1A
<b>Humidity</b>	5% to 85% RH Non-condensing	5% to 85% RH Non-condensing	5% to 85% RH Non-condensing
<b>Operating Temperature</b>	0°C to + 50°C (32°F to 122°F)	0°C to + 50°C (32°F to 122°F)	0°C to + 50°C (32°F to 122°F)
<b>Tamper Detection</b>	Yes	Yes	Yes
<b>IP65</b>	Verified	Verified	Verified
<b>Dimension (mm)</b>	50.5X160X44	50.5X160X44	50.5X160X44
<b>Weight (kgs)</b>	0.18	0.18	0.18
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TECHNICAL SPECIFICATIONS			
Variants	COSEC PATH RDCE	COSEC PATH RDCM	COSEC PATH RDCI
<b>Credential Support</b>	RFID Card	RFID Card	RFID Card
<b>Types of Card</b>	EM Prox	MIFARE Classic® Smart	HID iCLASS, HID Prox



<b>Communication</b>	RS-485 and RS- 232	RS-485 and RS- 232	RS-485 and RS- 232
<b>Buzzer</b>	Yes	Yes	Yes
<b>LED</b>	Single LED (Tri Color)	Single LED (Tri Color)	Single LED (Tri Color)
<b>Input Power</b>	12 VDC @ 0.1A	12 VDC @ 0.1A	12 VDC @ 0.1A
<b>Humidity</b>	5% to 85% RH Non-condensing	5% to 85% RH Non-condensing	5% to 85% RH Non-condensing
<b>Operating Temperature</b>	0°C to + 50°C (32°F to 122°F)	0°C to + 50°C (32°F to 122°F)	0°C to + 50°C (32°F to 122°F)
<b>Tamper Detection</b>	Yes	Yes	Yes
<b>IP65</b>	Verified	Verified	Verified
<b>Dimension (mm)</b>	50.5X137X34	50.5X137X34	50.5X137X34
<b>Weight (kgs)</b>	0.27	0.27	0.27
MIFARE and MIFARE Classic are trademarks of NXP B.V.			

## Panel200

TECHNICAL SPECIFICATIONS	
<b>SPECIFICATIONS</b>	<b>COSEC PANEL200P</b>
<b>CAPACITY</b>	
<b>Door Controllers on Ethernet</b>	255
<b>Door Controllers on RS-485</b>	32
<b>Max Users Capacity</b>	25,000
<b>Events Buffer</b>	5,00,000
<b>COMMUNICATION</b>	
<b>Wi-Fi</b>	Inbuilt Wi-Fi Module
	(IEEE 802.11 b/g/n)
<b>Inbuilt Bluetooth®</b>	Yes
<b>Ethernet</b>	Yes 10/100 Mbps
<b>Rs 485</b>	Yes
<b>USB</b>	One USB Port (for Data Transfer and for 2G-3G-4G /Wi-Fi Dongle)
<b>SD Card</b>	Yes (8GB)
<b>INTERFACE</b>	
<b>Aux-In</b>	Yes
	(4 states-short, open, activated & non-activated)
<b>Aux-Out</b>	Form C and SPDT Relay
<b>HARDWARE</b>	
<b>CPU</b>	Cortex A8 800 MHz
<b>Flash Memory</b>	256 MB

RAM Memory	256 MB
	(DDR3 SDRAM @ 800Mhz)
Operating system	Linux based OS
Communication Port	Ethernet & RS-485
Tamper Detection	Yes
RTC	Yes
AUDIO VISUAL	
LED	Tricolor LED
	(Power, Status and Alarm)
Buzzer	Yes(12V)
ENVIRONMENTAL	
Operating Temperature	-10°C to 55°C
	(14°F to 131°F)
Humidity	5% to 95% RH Non-condensing
POWER	
Input Power	External Power Adapter 12VDC @ 2A
MECHANICAL	
Dimensions (L x H x D)	125.25mm X 81.5mm X 30.5mm
	(4.93" x 3.20" x 1.20")
Weight	140gm (0.308 Lbs)
Encloser materia	ABS V0 grade
CERTIFICATES	
Certificates	FCC, CE, and RoHS
COMPATIBILITY	
System Integration	API For Software Integration
Architecture	1. Network Architecture - With COSEC CENTRA/VYOM
	2. Standalone Architecture
OTHER DETAIL	
Mounting	Wall Mounting or Table Top
Packaging Content	1. Main unit
	2. Adaptor (12VDC, 2A)
	3. SD Card (8GB)

## PSBB Specifications

Mains Supply Rating	100-265 VAC, 47-63Hz, 60W max.
Mains supply fuse	1A fast blow, glass fuse 5 x 20mm
Output ratings: "Output Voltage "Output Current	13.8 VDC 2A
Max. Ripple Voltage	< 100mV
Battery Type	12V sealed lead acid (3.2Ah)
Output ratings - Charger Battery Charge Voltage Battery Charge current	13.8V 1A

<b>Battery Dimensions (H x W x D) in mm and inches</b>	67mm x 134mm x 67 mm (2.64" x 5.28" x 2.64") - Vision model <b>cp 1232</b> or equivalent
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## Cable Specifications

Cable Type	Length	Specification
Ethernet	328 feet (100 m)	Cat5, Cat5E, and Cat6
RS-485 *	1000 m to host	Use Belden 3105A, 22AWG twisted pair, shielded 100Ω cable, or equivalent.
External Readers (Serial)	15 feet (4.57 m) for RS232 reader to COSEC Door Controller	ALPHA 1299C 22AWG, 13 conductor, stranded, overall shield (Fewer conductors needed if all control lines are not used)
External Readers (Wiegand)	500 feet (150 m) to reader	ALPHA 1299C 22AWG, 13 conductor, stranded, overall shield (Fewer conductors needed if all control lines are not used)
Input Circuits *	500 feet (150 m)	2-conductor, shielded, using ALPHA 1292C (22AWG), or equivalent.
Output Circuits *	500 feet (150 m)	2-conductor, using ALPHA 1172C (22AWG) or equivalent.

\* Minimum wire gauge depends on cable length and current requirements.

## Card Compatibility Matrix

Reader	Type	Function	Support
EM Prox Card Reader	125 Khz	Read Only	All EM Prox Cards
HID Prox Reader	125 Khz	Read Only	HID Prox Cards: 26 Bit format with FC (Base P/N H10301) 37 Bit format without FC (Base P/N H10302) 37 Bit format with FC (Base P/N H10304)
Mifare Card Reader	13.56 Mhz	Read & Write	Mifare Smart Cards: Mifare 1k Card Mifare 4k Card Mifare Ultralight (only CSN read)
HID iClass Reader	13.56 Mhz	Read & write	HID iClass Smart Cards (26 and 37 bit format) 2K/2 Card (base P/N 2000 series) 16K/2 Card (base P/N 2001 series) 16K/16 Card (base P/N 2002 series) All types of Mifare Cards (only CSN read)
Fingerprint Reader	Optical	Enroll & scan	9600 FP templates
Fingerprint Reader	Capacitive	Enroll & scan	9600 FP templates
Palm Vein Reader	Infrared	Enroll & scan	20,000 palm templates

# Disposal of Products/Components after End-Of-Life

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Main components of Matrix products are given below:

- **Soldered Boards:** At the end-of-life of the product, the soldered boards must be disposed through e-waste recyclers. If there is any legal obligation for disposal, you must check with the local authorities to locate approved e-waste recyclers in your area. It is recommended not to dispose-off soldered boards along with other waste or municipal solid waste.
- **Batteries:** At the end-of-life of the product, batteries must be disposed through battery recyclers. If there is any legal obligation for disposal, you may check with local authorities to locate approved batteries recyclers in your area. It is recommended not to dispose off batteries along with other waste or municipal solid waste.
- **Metal Components:** At the end-of-life of the product, Metal Components like Aluminum or MS enclosures and copper cables may be retained for some other suitable use or it may be given away as scrap to metal industries.
- **Plastic Components:** At the end-of-life of the product, plastic components must be disposed through plastic recyclers. If there is any legal obligation for disposal, you may check with local authorities to locate approved plastic recyclers in your area.

After end-of-life of the Matrix products, if you are unable to dispose-off the products or unable to locate e-waste recyclers, you may return the products to Matrix Return Material Authorization (RMA) designation.

Make sure these are returned with:

- proper documentation and RMA number
- proper packing
- pre-payment of the freight and logistic costs.

Such products will be disposed-off by Matrix.

**"SAVE ENVIRONMENT SAVE EARTH"**

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- The source of the open source software used in this product is available on CD, upon written request from:

R&D Team  
MATRIX COMSEC PVT. LTD.  
394, Makarpura GIDC,  
Vadodara - 390 010  
Gujarat  
India.

Customer shall bear the shipping and handling charges.

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