USER GUIDE

Understanding Shift Mapping in Attendance Management System
Table of Contents

1 PURPOSE OF SHIFT MAPPING..................................................................................................................3
2 ENTITY RELATIONSHIP............................................................................................................................3
3 IMPORTANT POINTS TO REMEMBER ..............................................................................................................3
4 PERQUISITE......................................................................................................................................................3
5 STEP TO BE FOLLOWED FOR MAPPING THE SHIFT.......................................................................................3
  5.1 CREATE SHIFT ..............................................................................................................................................4
  5.2 CREATE TEAM ..........................................................................................................................................5
  5.3 MAP YOURSELF AS AN ADMINISTRATOR TO A TEAM ..............................................................................6
  5.4 MAP PROFILE TO A TEAM .......................................................................................................................9
  5.5 CREATE PATTERN ....................................................................................................................................11
6 CHANGE THE SHIFT ......................................................................................................................................16
7 REMOVE PROFILE FROM PATTERN / GROUP ...............................................................................................16
1 **Purpose of shift mapping**
   The purpose of Shift - Pattern mapping is to maintain resources planned working pattern

2 **Entity relationship**

3 **Important points to remember**
   - For Shift and Team Administration always map current date.
   - Always map patterns for future date.
   - On mapping of a new pattern to employees, any approved leave falling in the period of new pattern, need to be re-applied by employee in the system as per new pattern mapped.
   - In case if there is no fixed weekly off for a group then please set the profile from and to date based on your plan so that if the resource is applying for leave for future date for which you have not planned, the default shift having Saturday and Sunday off is taken into consideration and their leave are deducted accordingly. For the planned duration put the assign shift off using menu Administrator -->Mappings--> Shift - Profile.

4 **Perquisite**
   - Analyze the Shift to be created other than default mapping which is General Shift (09:15 AM to 18:00 PM) having weekly off as Saturday and Sunday.
   - Analyze the different working pattern and employees in this working pattern
     - Friday to Tuesday i.e. Wednesday, Thursday, is week off – Profile : P1, P2 etc
     - Saturday to Wednesday i.e. Thursday, Friday is week off – Profile: P3, P4 etc

5 **Step to be followed for mapping the Shift**
   Following are the steps that are required to be followed for
   - Create Shift
   - Create Team
5.1 Create shift

Following steps need to be followed for creating the shifts

- Go to Menu – Administrator → Masters → Shifts

- Click on “Add New” button

<table>
<thead>
<tr>
<th>Fields</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>From Time</td>
<td>Shift start time</td>
</tr>
<tr>
<td>To Time</td>
<td>Shift end time</td>
</tr>
<tr>
<td>Grace Time Early Signin</td>
<td>Time (hh:mm) prior to shift “From Time” user will be allowed to Sign-in in the shift</td>
</tr>
<tr>
<td>Grace Time Late Signin</td>
<td>Time (hh:mm) after shift “From Time” user will be allowed to Sign-in in the shift. This should be more than 4 hours so that in case the user has taken the half day leave he will be able to do a sign in.</td>
</tr>
<tr>
<td>Grace Time Late Signout</td>
<td>Time (hh:mm) after shift “To Time” user will be allowed to Sign-out in the shift</td>
</tr>
<tr>
<td>From Date</td>
<td>Date from which this shift will be available in the system</td>
</tr>
</tbody>
</table>
Enter all the details

Click on “Save” button to save the entered data.
Similarly create required shifts

5.2 **Create team**

Following steps need to be followed for creating the Team

- Go to Menu – Administrator → Masters → Team

Click on “Add New” button
Enter all the details

Click on “Save” button to save the entered data.
Similarly create the required team

5.3 **Map yourself as an administrator to a team**

Following steps need to be followed for Mapping Administrator to team, so that the profile can be mapped to the team

- Go to Menu – Administrator → Mappings → Team – Administrator
Click on “Add New” button

- Select the Team Cd by clicking on icon
- Click on Add Profiles icon.
- Search profile to be mapped as an Admin. In this case map yourself as admin
Select the Profile after searching and click on “Select Close” button

On click of “Select and Close” button the select profile will be displayed in parent page
Enter the From Date i.e. Date from which the profile would be an admin for the selected Team.

Click on “Save” button to save the entered data.
Similarly map admin for all the team created by you.

5.4 Map Profile to a team
Following steps need to be followed for mapping profile to team

- Go to Menu – Administrator → Mapping → Team – Profile
  
  Important Note: Profile who is mapped as “Team Administrator” can do the profile mapping to a team.

- Click on “Edit” button to map the profile to the team

- Click on Add Profiles icon and add the profile to be mapped

- Select the From Date i.e. Date from which selected profile we will a part of this team
Click on “Save” button to save the mapping
Similarly map resource to all the teams created by you

5.5 Create Pattern

Following steps need to be followed for Creating Pattern

- Go to Menu – Administrator → Masters → Pattern

- Click on “Add New” Button to map pattern

<table>
<thead>
<tr>
<th>Fields</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Org Level Code</td>
<td>Select Org Level Code</td>
</tr>
<tr>
<td>Pattern Code</td>
<td>Pattern Code</td>
</tr>
<tr>
<td>Pattern Description</td>
<td>Description of Pattern</td>
</tr>
<tr>
<td>From Date</td>
<td>Pattern is valid From</td>
</tr>
<tr>
<td>To Date</td>
<td>Pattern is valid till</td>
</tr>
<tr>
<td>Fixed Weekly Off</td>
<td>Weekly Off Day</td>
</tr>
<tr>
<td>Team Cd</td>
<td>Team to which this pattern is applicable</td>
</tr>
<tr>
<td>No Of Day in Pattern</td>
<td>Pattern consist of how many days i.e 7, 14</td>
</tr>
<tr>
<td>No Of Shifts in a day</td>
<td>No of shifts in each day</td>
</tr>
</tbody>
</table>

- Enter all the details
Click on “Set Pattern Detail” button to assign shift and profile to this pattern.

In case you don’t have fixed weekly off but there is a weekly off for a defined group then in that case you will select the Shift Off check box against that day for that group.

Click button near Group dropdown and create all required groups.
On click of button a popup will open

Select “New Group” from Group Cd drop down

Click on Profile Search icon to search and add the profile
- Select all the Profile
- Select From Date

- Click on “Set Profile From Date” to set the From Dt against the selected profile
Click on “Save” button to save the data

Then click on “Select Group 1 & Close”
Similarly create or assign already created group against each shift each day
Select Shift for each against each day and then click on Insert.
6 **Change the shift**

Any changes in the default assigned shifts can be done by using Shift-Profile Mapping.

In Shift-Profile mapping there are following options:

- **Assign Additional Shift**: Additional Shift can be assigned to a resource for particular day.

- **Assign Shift Off**: Shift off can be assigned to a resource for already assigned shift as per pattern defined for particular day.

- **Swap Shift**: Is to assign Shift off for Shift date and assign shift for swap date.

7 **Remove Profile from Pattern / Group**

In case if you want to remove the profile from the pattern then edit the pattern and then set the Profile To Date in Pattern against the Group in which you no longer want that profile to be mapped.