SPEKTRUM WORKFORCE MANAGEMENT SOFTWARE

USER MANUAL

A MEMBER OF **ais** GROUP

EQUALITY CERTIFIED NCPE

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SPEKTRUM WORKFORCE MANAGEMENT SOFTWARE

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1.0   What is Spektrum

AIS Spektrum is a web-based workforce management solution developed to manage your employees in an easy and comprehensive manner. Spektrum is made up of the local hardware (local computer and Readers) which is installed within your organisation, and the web-based platform, which lets you manage your employees' attendance from any device via a standard web browser. Across all its modules, AIS Spektrum features an intuitive user interface, advanced user management and sophisticated reporting tools which allow you to maintain an effective and productive workforce.

For Spektrum to work, it must make use of a local instance (i.e. the local computer), a local network (network between the Readers), and the Spektrum cloud. Firstly, the employee records are imported to the Spektrum cloud, either by importing them manually using the Spektrum Portal or by importing a CSV file. Once the employee records are imported, they are synced with the local computer and then the Spektrum Service connects with the Readers every five minutes to collect the employees' raw punches and save them to a flat file. These punches are then linked to the respective employees in the local computer and the Spektrum Service syncs these local punches to the Spektrum cloud. By syncing the raw punches and the respective employees to the Spektrum cloud, you are given access to your employees' punches and attendances easily through a simple URL, https://spektrum.aissoftware.com.mt.

Figure 1: How Spektrum Works
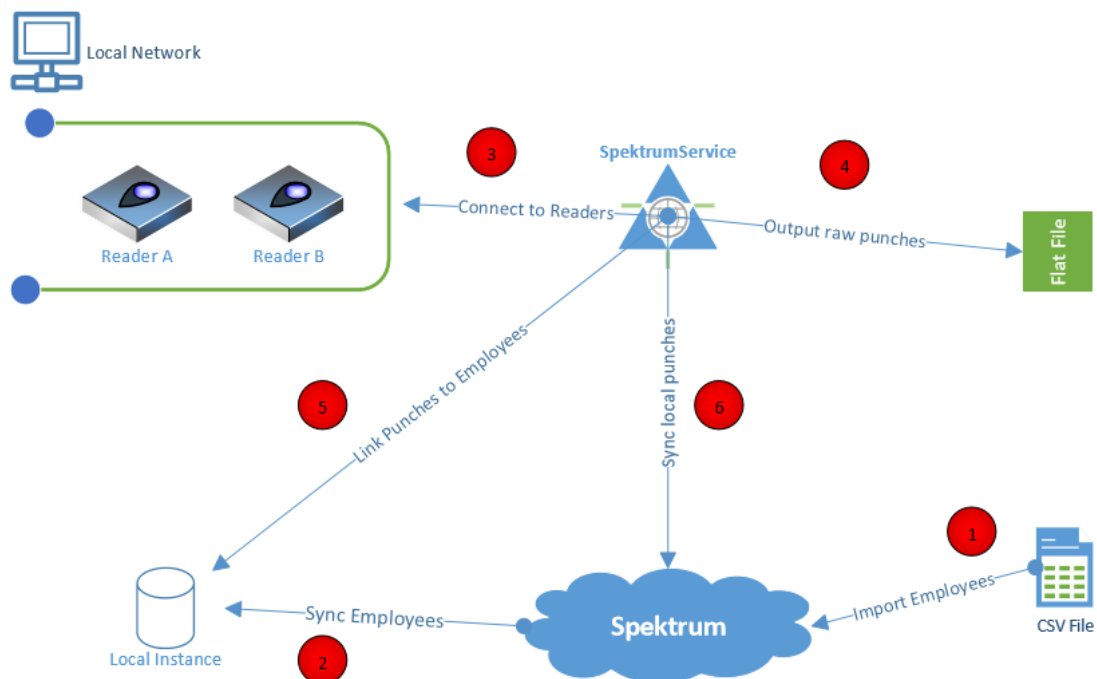
Figure 1: How Spektrum Works

AIS Spektrum is designed for businesses of all sizes operating in any industry. The solution is web-based, providing you with access to your information from practically anywhere. AIS Spektrum allows organisations to focus on their business objectives by reducing the burden on internal staff members and resources. With enhanced security controls, multi-user access rights and comprehensive audit trails included, AIS Spektrum is the right workforce management platform for your business.

Benefits of Spektrum include:

- Reduced downtime and maintenance costs
- Benefit from the latest software upgrades automatically
- Highly secure web platform with in-built audit trails and logging
- 24x7 access from any networked device to view real-time information
- Automatic back-up and disaster recovery in place

1.1 Time & Attendance Module

The AIS Spektrum Time & Attendance module is the next generation attendance tool suitable for businesses in a various range of industries. The Time & Attendance module collects user punches from a variety of T&A devices, such as biometric hand, fingerprint and face recognition technologies. Data is collected and converted into Attendance records in a simple and easy manner, to ensure that your payroll process is as easy as possible.

The Time & Attendance module caters for a mix of readers installed across multiple sites, allowing you to choose which technology mix to deploy across your organisation. Organisations can choose to extend the visibility of user punches with an employee self-service portal made available to managers and employees alike. The web-based platform means that you can manage your teams from any device via a standard web browser.

Features:

- Supports an extensive range of biometric readers
- Automated or scheduled reader polling and data downloads
- Allows for multiple reader deployments across various sites
- Integration with any third-party applications

Attendance management

- Role-based security model across specific departments
- Full administrator control to manage employee punches
- Support for multiple punches per user per day
- Support for work codes

Data Filtering & Reporting

- Standard Time & Attendance in-built reports for quick access
- On-screen data filtering coupled with an advanced reporting tool
- Exporting to various formats such as CSV, TXT, PDF, XLSX and more

2.0   Getting Started

Spektrum is a web-based application and therefore accessible from any internet-enabled device. These devices include:

- Desktop computers
- Laptops
- Tablets and Smartphones

Following a Role-based security model, access to Spektrum is controlled by the user access credentials.

2.1   Logging in – Main Console

To log into the management console, follow these steps:

1. https://spektrum.aissoftware.com.mt
2. Type Company Name (provided by AIS)
3. Enter Username
4. Enter Password
5. Press Log In
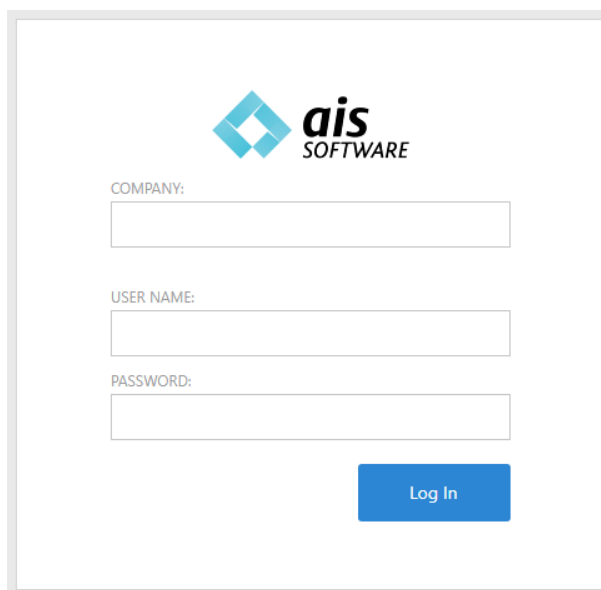
Figure 2: The Login Screen

Your access level into Spektrum depends on the Role and security levels assigned (by the Administrator) to your user. It is possible to grant your various Managers access to their specific sections and employees assigned to them. Access to this portal is identical to the process discussed in section 2.1 above.

It is very important to note that, the portal user access count is limited by the Spektrum subscription chosen by your organisation. Should you wish to increase this access count, get in touch with our Spektrum support team on **support@ais.com.mt**

3.0   Navigation (Menu)

Spektrum is a menu driven application designed to allow for simple navigation, to take you directly to the function you require from a single window. The Spektrum navigation menu is found on the left-hand side of your screen, as shown in Figure 3 below.

Figure 3: Navigation Menu

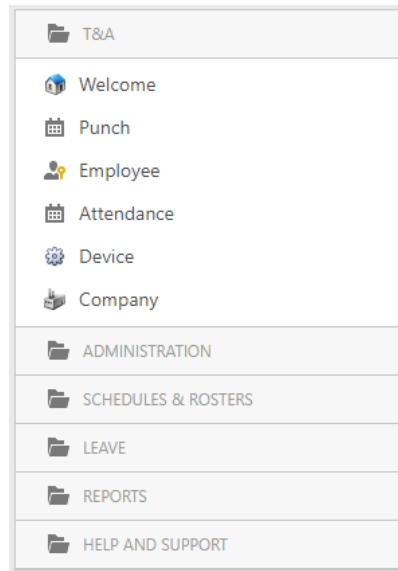Each menu option is clearly labelled and each link redirects you to the related page and function. Each individual page is headed by a menu bar which in turn is populated by a list of function buttons or icons. A comprehensive guide to these icons and buttons can be found in section 3.1 below.

A handy feature of the menu bar is the Show / Hide (menu) ☰ button which is found in the topmost left corner adjacent to the Spektrum logo. Hide the menu to expand the operation window to the full width of the screen, as shown in Figure 4 below.

This feature is particularly useful when Spektrum is accessed from mobile devices such as tablets or smartphones.

Figure 4: Menu bar (Visible vs Hidden)

3.1 Common Icons

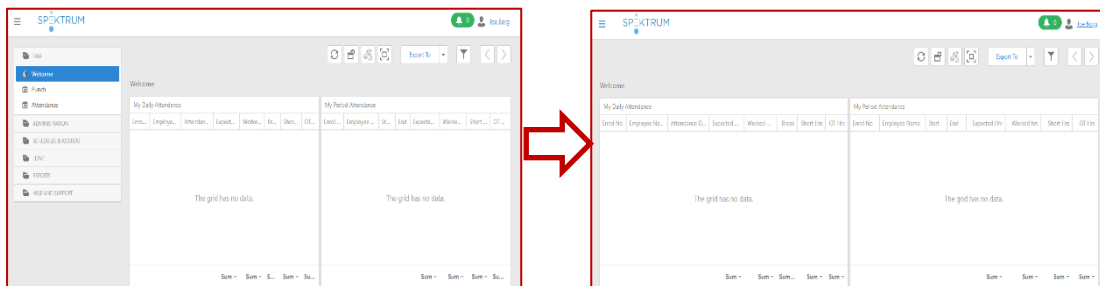Each page is headed by its own set of icons and shortcuts relative to the functions. The majority of these icons are common throughout Spektrum such as; Edit, Refresh, and Clear, whilst other icons are specific to the page such as; Change my password or Generate New Password under User.

Here are the Spektrum icons explained in further detail:
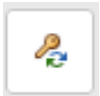
Icon		Icon	
	Edit You must select the object you wish to edit beforehand.		**Submenu** Open the page submenu for additional functionality.
	Refresh Reload the page. This function is not to be mistaken with the browser refresh option.		**Clear Search**
	Search Opens a 2nd window for customised search criteria and parameters.		**Previous Item**
	Next Item		**Delete** You must select the object you wish to delete beforehand.
	Validate Checks all entries for errors.		**Change my password** Administrative function to change a users' portal password.
	Generate a password Administrative function to reset a users' portal password.		**Menu show/hide icon**

Figure 5: Common Icons

Additionally, certain pages include additional functionality either built-in to the menu bar options indicated with a drop down ⌄ or under the submenu icon: ⋯

3.2   Function-specific Icons

Spektrum also includes a number of page or function specific icons which provide added functionality. Most of these icons also call an additional submenu with more features. These function-specific icons are explained as follows:
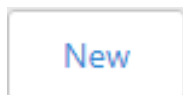
New	Create a NEW object, depending on the page.
Save ▼	Save the new object. Drop down options are: Save, Save and Close or Save and New.
Export to ▼	Depending on the page you can export the data to the most common file formats including CSV, TXT, PDF, XLSX and more.
Backup Users	Backup users to a file (on your local device).
⚙ **Sync Data**	Sync data between Spektrum and the local instance.
⬇	Pull user biometric templates from the reader.
⬆	Send user enrolment data to the reader(s) in the Device Group the Employee is assigned to.
Punch ▼	Toggle menu options between User Punches and Export mode.
Export Security	Export security roles to file.
Link	Allows you to link single / multiple entries with this object; example Link under Role will add the selected Employee(s) to that role.
Unlink	The reverse of the Link function. Select the required object(s) to remove their association.
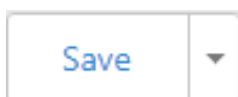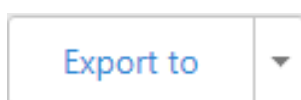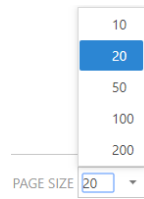
The Page Size option controls the number of information lines that are viewed on screen. Options are 10 / 20 / 50 / 100 or 200 lines.
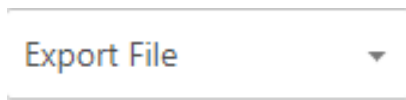
The Export File option under the punch menu is used to create a data export file (CSV format) for integration with 3rd party applications.

Figure 6: Function Specific Icons

3.3   Submenus

More functionality is accessed via the submenu icon [...] in certain menu bars. These submenus are expanded in the following table:

The Employee submenu
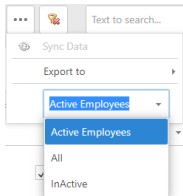
This submenu reveals functions specific to this group.

The Device submenu
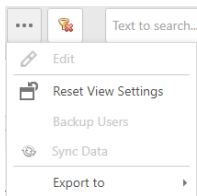
The Punch submenu
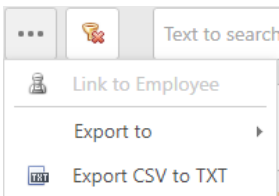
Figure 7: Submenus

3.4   Navigation and Customisation

There are the following methods available on every screen in Spektrum:

Global Search

In the top-right of every screen menu, one will find the Search Box:

Figure 8: Global Search

Put in any text into this box and click on the Search Icon. The system will try to find all entries that **contain** the text entered and will filter out the information accordingly. This will return all the records that **contain** the text entered i.e. if you enter "Grech", all the records that **contain** the word "Grech" will be returned.

Field Search

One must switch on the 'Filter Row' by right-clicking on any field header and selecting 'Filter Row'.
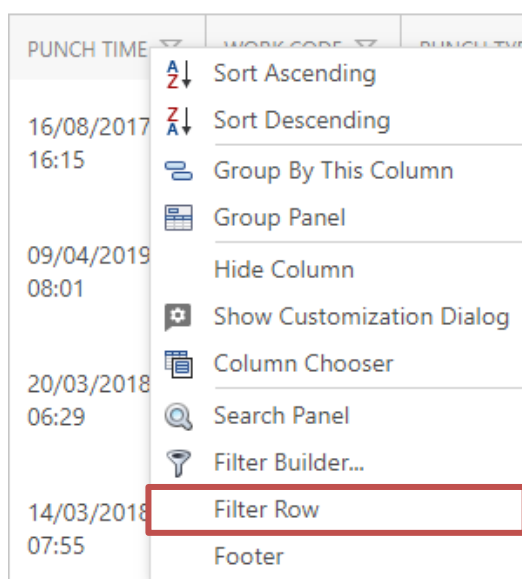
Figure 9: Filter Row Menu

This will open a blank row directly underneath the field headers:

Figure 10: Filter Row

Now you are able to search by entering the text directly under the field (column) that you require. As soon as you stop typing, Spektrum will go through all the entries available within that column and will match all entries that **contain** the text that you entered.

This will return only the records that **contain** the text entered**,** if you enter the text "Grech", the record that contains for example, "John Grech", will be returned since it contains the name "Grech".

If, for example, there is the need for you to search for all entries that **do not contain** the text entered, you will have to change the logical operator (Search type). This is possible by right-clicking on any field header and this time selecting 'Filter Row Menu'. Upon selection one will see another series of funnels appearing within the filter row:

Figure 11: Filter Row Menu

Once you left-click on the funnel within the filter row, you will be able to change how the search is performed:

Figure 12: Search Operators

In addition to searching, one can perform the following:

- Field Positioning
- Sorting
- Filtering
- Grouping
- Removing / Adding of fields

Field Positioning

The field position will control the layout in which data is exported by replicating what is shown on-screen.

The Field position can be adjusted by a simple click/hold and drag/drop action. To move a Field simply click and hold the Field, and then drag it to the required position. In the below example, the EMPLOYEE DESIGNATION field is dropped to its new position in front of the DEFAULT_DEPARTMENT tab.

Figure 13: Moving fields

Sorting

Data in the fields can be sorted in Ascending or Descending order. This is indicated by the arrow.

Figure 14: Ascending order (Left) and Descending order (Right)

It is also possible to execute multiple sorts on different fields by holding the Shift key and selecting the 2nd field, 3rd field and so on, to sort by, in that order.

Filtering

Data can be filtered or limited to the desired parameters. The filter menu is available by clicking the funnel icon. In the example below, the PUNCH DATE field is filtered with specific From/To dates.
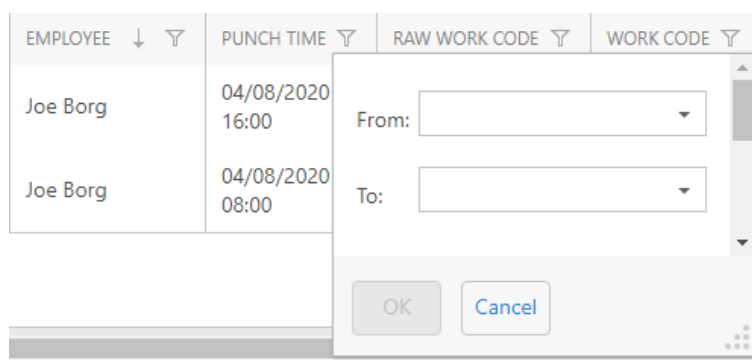

Figure 15: Setting a filter

Additionally, further customisation is available on the field headers. A Right Button Click will reveal the submenu, as shown in Figure 16 below.
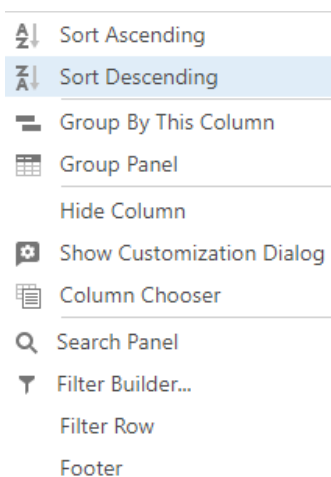

Figure 16: The Right Button Menu

Grouping

One may use the grouping function to organise data in a particular manner. For example, list the employees first by Default_Department, then by Employee Designation and finally by Employee Group.

To enable Grouping, right-click on any field header and select 'Group Panel'. This will have the effect of opening a panel right on top of the field headers:
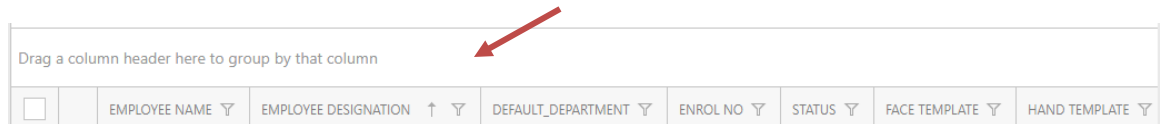

Figure 17: Group Panel

The concept here is to drag and drop the fields you wish to group by in this panel. Once done, you can right-click on one of the fields and select 'Expand All' to see all the grouped entries:
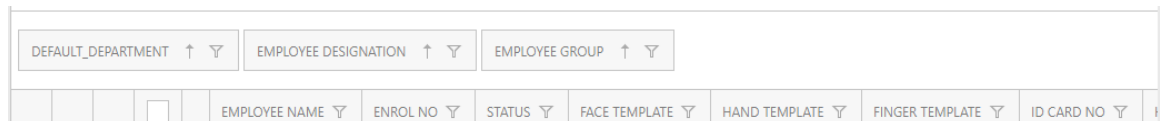

Figure 18: Group fields

Spektrum includes a special inbuilt feature that makes all of this sorting, filtering, grouping and field choosing very easy to manage. Right-click on any field header and select 'Show Customisation Dialog'. This will pull up the following control:
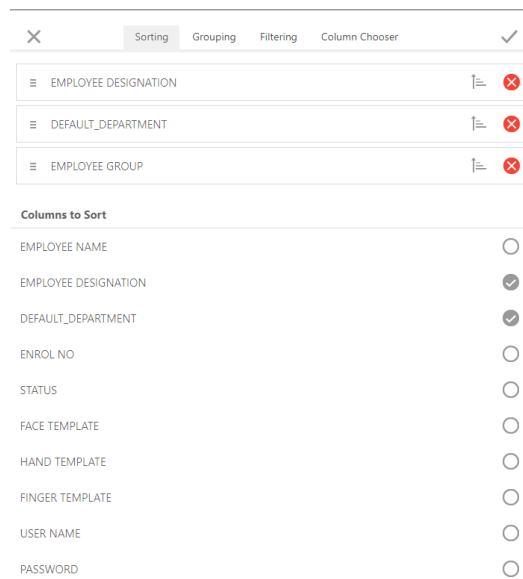

Figure 19: Customisation Dialog

One can quickly set up multiple sorting, grouping and filtering by clicking on the tabs available and simply selecting the desired fields. In addition, adding or removing fields to and from a specific screen is accomplished by clicking on the 'Column Chooser' tab and selecting which fields are needed and which fields are not. The eye icon on the right-hand side of the field names represents whether the Field is visible in the layout or hidden.
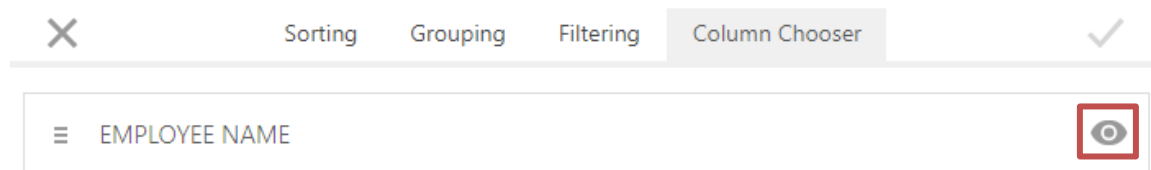
	Sorting	Grouping	Filtering	Column Chooser	
✕					✓

≡ EMPLOYEE NAME 👁

Figure 20: Field is Visible

	Sorting	Grouping	Filtering	Column Chooser	
✕					✓

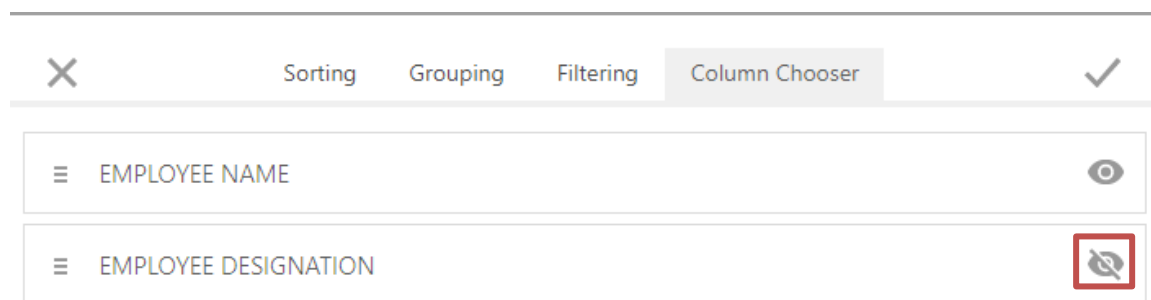≡ EMPLOYEE NAME 👁

≡ EMPLOYEE DESIGNATION 🚫

Figure 21: Field is Hidden

Removing / Adding of Fields

An alternate way to access the Column Chooser is to right-click on a field and select the Column Chooser option.
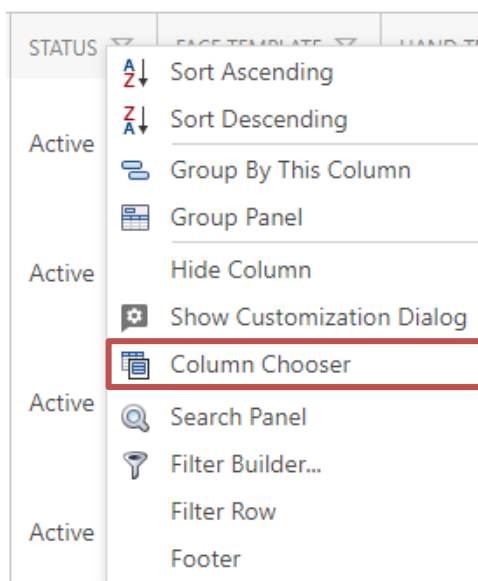

Figure 22: Column Chooser Option

Upon selecting the Column Chooser option, the following screen will appear in the bottom-right of the screen:
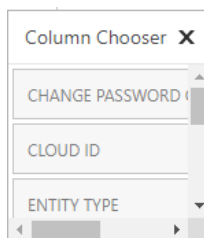
Figure 23: Column Chooser

One can add a Field to the layout simply by dragging the Field needed from the Column Chooser to the layout. To remove a Field from the layout, simply drag the Field from the layout to the Column Chooser.

All the changes in the screens are saved to one's profile and will be remembered after logging out and in again.

Using the Footer

To add the Footer to your table, right-click on a field and select the 'Footer' option. This will add a footer right under the table.
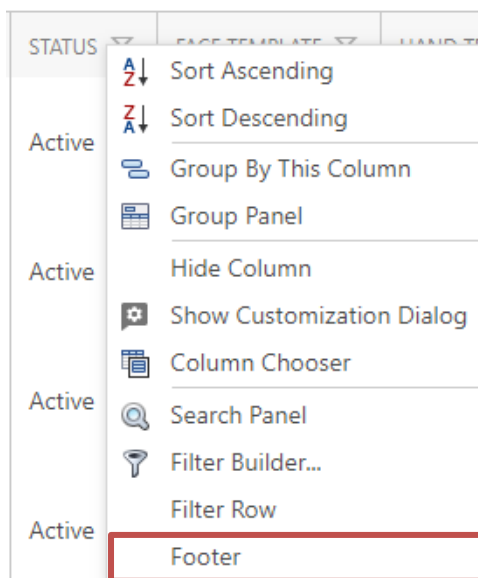

Figure 24: The Footer Option

The Footer offers a 'Count' function, which is particularly useful in the Employee page, as it gives you the number of employees you currently have registered on Spektrum. To enable the Count function, right-click on the footer and click the count option.
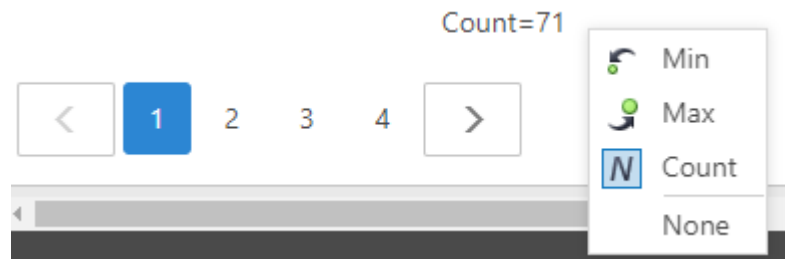

Figure 25: The Count Function

4.0   User Guide

The scope of this document is to provide you with first-hand assistance for this application. From this point onwards, each function and feature will be described in more detail. Immediately after logging into Spektrum, the below landing screen will be displayed.

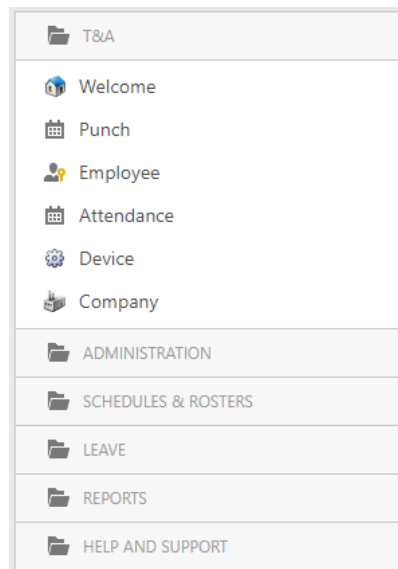The navigation menu is displayed on the left side of your screen.
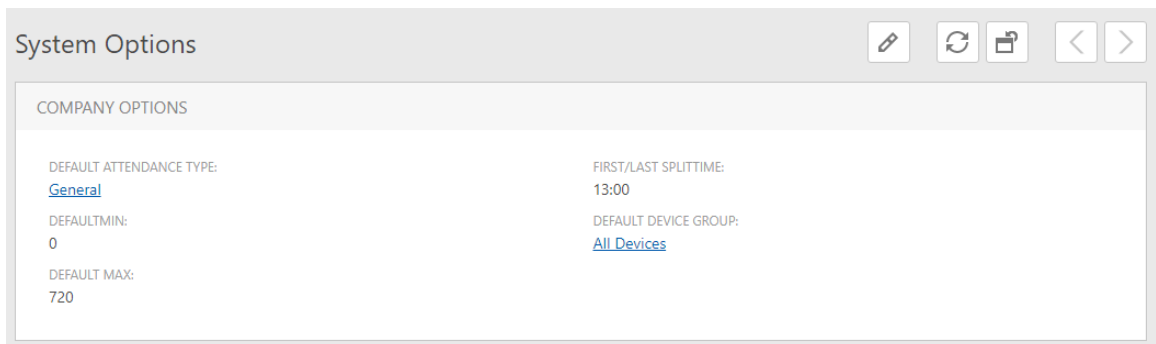

Figure 26: Spektrum Main Menu

4.1 Company

This section allows you to create new Companies and also amend existing Companies.

To create a new Company, simply click on the New button and fill in the required details.

To amend/edit an existing Company click on the **Edit** button (which is represented by a pencil icon) on the left hand-side of the company name.

4.2 System Options

This section allows you to customise the individual settings for your organisation. You can define features such as default attendance type, default minimum, default maximum, split time and device group.

Figure 27: System Options
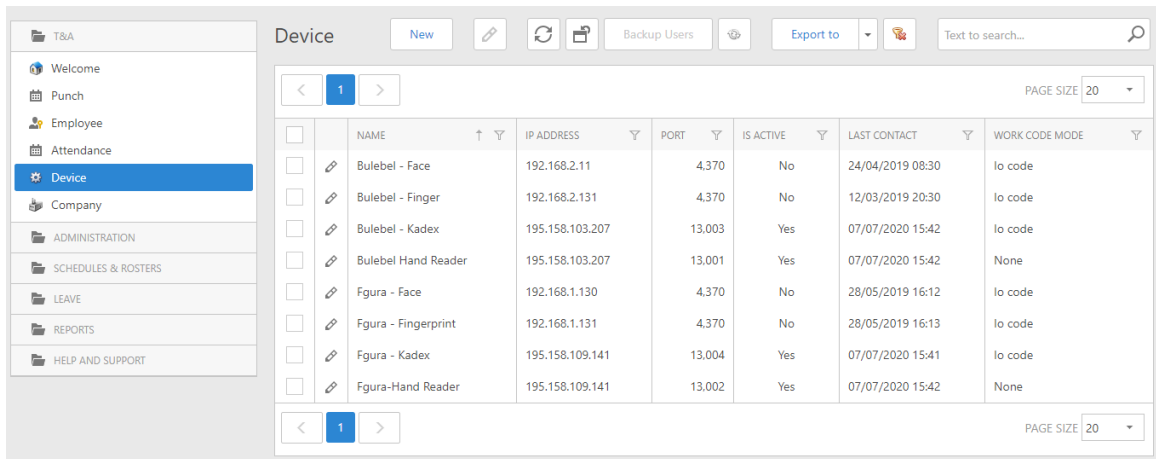
The parameters are explained below:

- **Default MIN:** This mandatory feature corrects any double punch, from the same user within the specified time bracket. There is no minimum or maximum values and the time bracket interval is in your control and can be amended as required.
- **Default MAX:** This mandatory feature defines the maximum number of minutes to the considered as a working day
- **SPLIT TIME:** An optional feature defines if a punch is to be defined as an IN or OUT and is used if Work Codes are not enforced on the reader(s). By default, punches detected before the split time will be marked as Start of day or IN and punches recorded after the split will be marked as End of day or OUT. You are in control of the Split time value.

4.3 Devices

Spektrum is capable of interfacing with different technology readers provided by AIS Technology. These technologies include:

- Palm / Hand
- Fingerprint
- Face recognition
- RFID card / Tag
- Pin / Code

Any mix of these technologies can be deployed anywhere in your organisation without limit whilst all readers will be centrally managed by Spektrum.

Figure 28: Devices

One of the fields in the Devices table is the 'Last Contact' field. This field indicates the last time Spektrum has had contact with the devices. Spektrum should establish contact with the devices every 5 to 15 minutes. If the last contact is far off, say an hour, a day or even more, this means that Spektrum is not communicating with the device, therefore punches will no longer be uploaded to Spektrum. In such a case, there are a number of steps you should follow:

- Restart any devices which are not connecting to Spektrum and check that the network cable is inserted properly.
- Contact your IT Department or providers in order to check for any network connectivity issues.

If after performing these steps you are still facing device connectivity issues, you may contact either of our support teams, depending on the issue.

Spektrum Technical Support - support@ais.com.mt

Spektrum Software Support - support@aisrelations.freshdesk.com

Alternatively, you may report any Spektrum related issue using the 'Help' widget, located in the bottom-right hand corner in Spektrum.

4.4   Device Group

Spektrum has the ability to support an unlimited number of readers as well as an unlimited number of sites or locations. As explained in Section 4.3 above, these can be different technology readers. Additionally, you can mix technologies within the same site.

By setting up the Device Groups, you can limit your employees to a particular reader or a group of readers. This means that you can force your employees to punch IN and OUT on only one reader, a group of readers or give them access to all the devices and let them roam freely.

Device Groups are used to facilitate the process of linking the employees to the Readers. With the help of Device Groups, to link an employee to more than one Reader, the employee only needs to be linked to one Reader of each type available (Fingerprint Scanner, Hand Scanner, Face Scanner) in the Device Group. The biometrics of the employee are then pulled from the Readers that they were linked to and then they can be pushed to the Device Group needed. If you want to link the employee to all the Readers, the biometrics of the employee must be pushed to the Device Group called 'All Devices'.
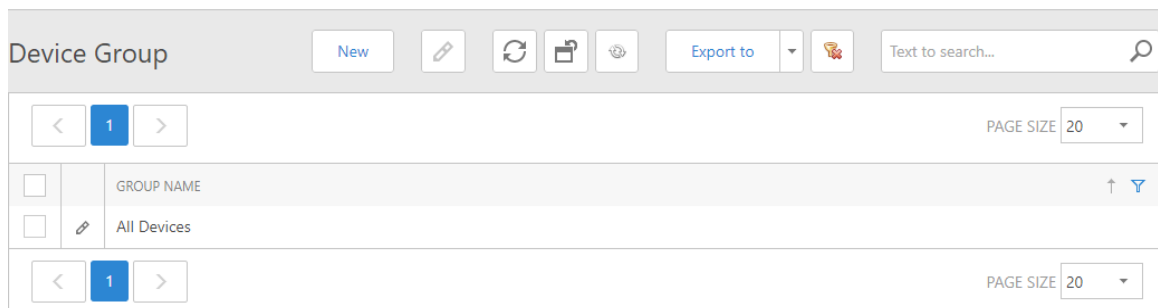

Figure 29: Device Group

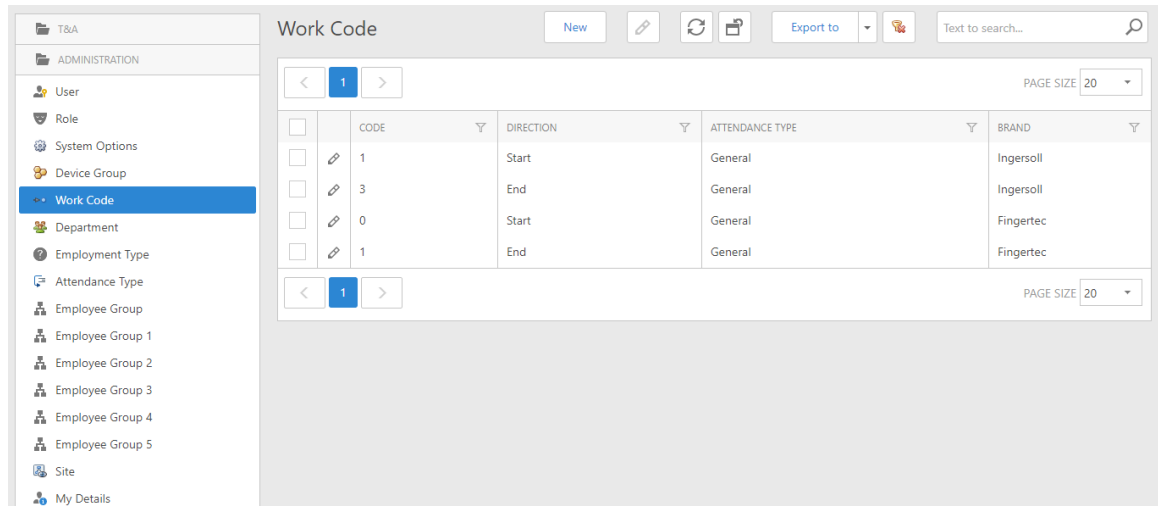### 4.4.1   Manage your groups

To create a Device Group, proceed as follows:

- Choose Device Group
- Choose New
- Type a unique Group Name
- Choose Link
- Select from the devices available
  - Choose single, multiple or all devices
- Press OK
- Save and close

4.5   Work Code

Work Codes are predefined by AIS according to the Reader being used. If Work Codes are enabled within your organisation, every time an employee enters their Enrol Number in a Reader and is successfully authenticated, the employee is asked to choose an option (IN, OUT, Lunch In, Lunch Out, etc.) depending on the reason why they are punching.
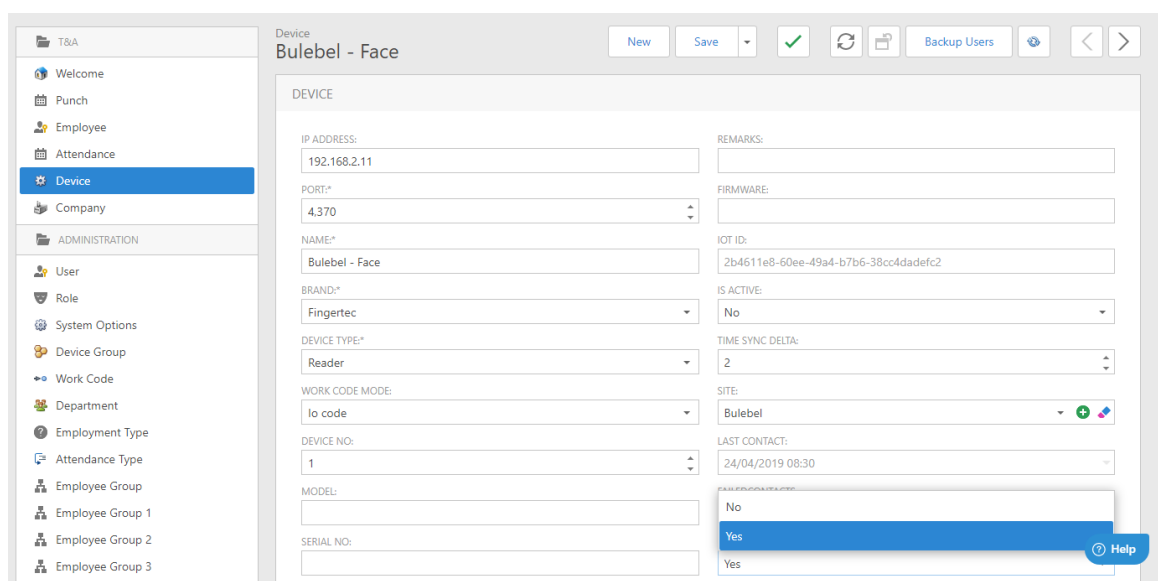
Work Codes are also tied within Spektrum to the Attendance Type which identifies the users' movement. When generating Attendance records for Employees, the Work Codes will define the Attendance Type for each set of punches.

Figure 30: Work Code

It is important to note that in order to use the Work Codes within your organisation, click the Edit button of the device you wish to activate Work Codes for, and select YES from the **Use Work Code** drop-down menu, as shown in Figure 29 below.

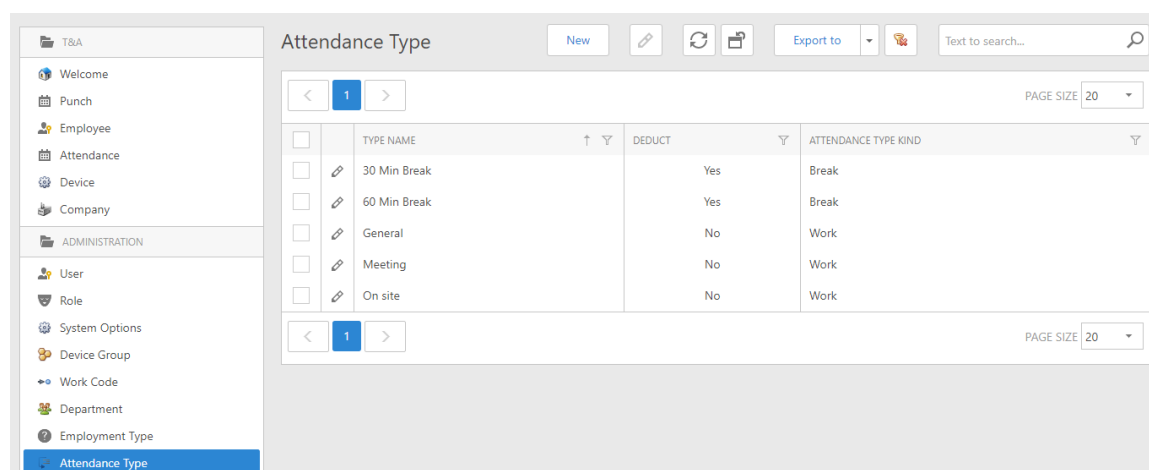
Figure 31: Enabling Work Codes

4.6   Attendance Type

Attendance Type works in conjunction with the Work Codes. By defining the Attendance Type entries in Spektrum, you are controlling the punch options available for your users on your Reader(s). These Attendance Types are selectable via key press on your reader. Each Work Code is attributed to a unique key value inputted on the reader.

The most common Attendance Types in Spektrum are:

- IN
- Out
- Break IN
- Break OUT

With Attendance Types in Spektrum, you have the ability to create a function that automatically deducts a set number of minutes from the Employee's daily punching, such as Deduct set to YES in the 30- & 60-min Break Attendance Type, as shown in Figure 30 below.

Figure 32: Attendance Type

4.6.1   Define Attendance types

To customise your Attendance Types, proceed as follows:

- New
- Type a name
- Choose if this option will deduct time or not
- Choose Save and close

4.6.2   Link Attendance Type to Work Code

After having determined that Work Codes are related to specific key values on your Reader(s), the next step is to link an Attendance Type to the Work Code. As shown in Figure 31 below, the drop-down list includes all the Attendance Types you created in Spektrum. Choosing an Attendance Type will link it to the Work Code being edited.
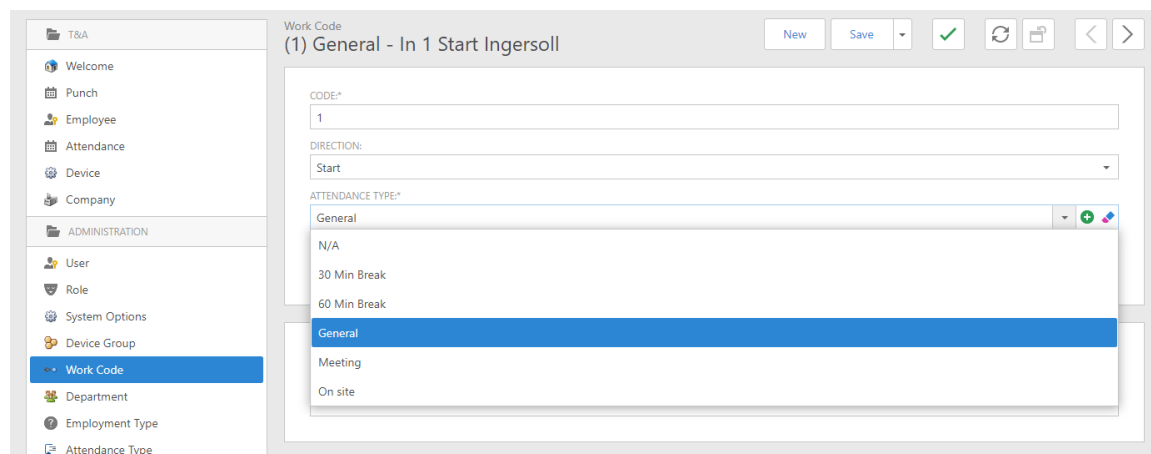

Figure 33: Linking Work Codes to Attendance Type

To link an Attendance Type with a Work Code, proceed as follows:

- Choose Work Code from the Navigation Menu
- Edit the required Work Code
- Choose the Attendance Type from the attendance type drop-down menu
- Choose Save and close

4.7   Site

The Site submenu allows you to define the physical locations where the readers are installed. This will allow you to manage readers by location and subsequently identify where your Employees have punched.
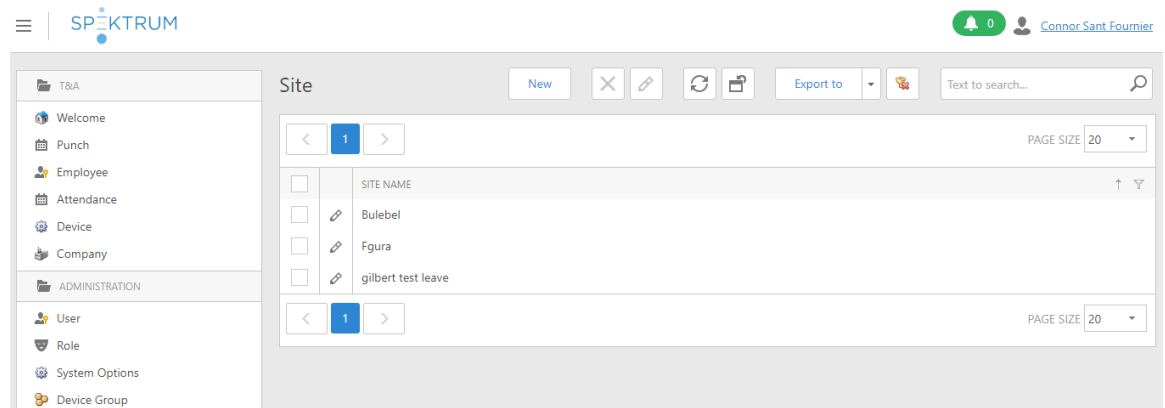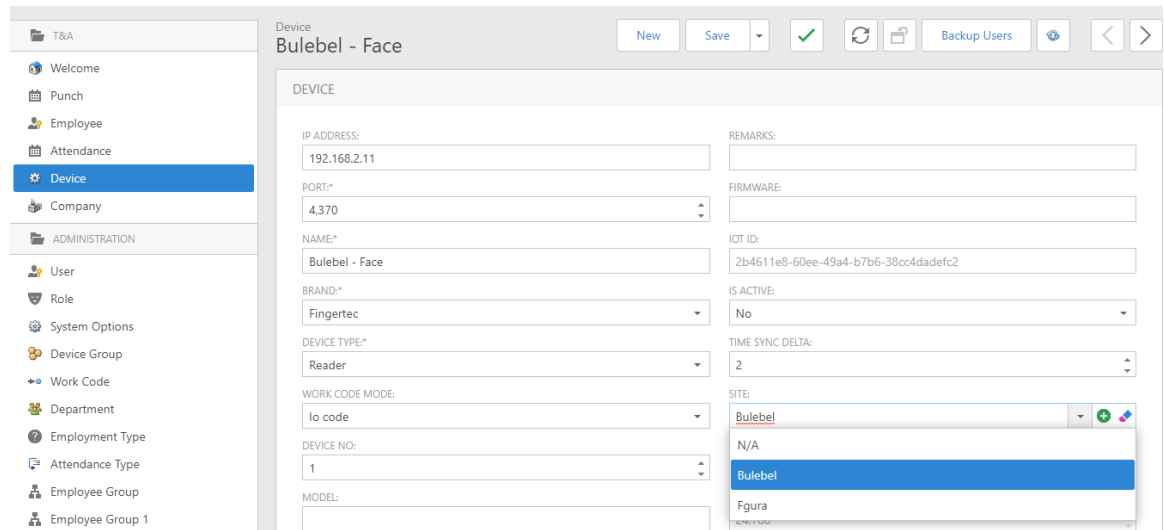

Figure 34: Site

4.7.1   Define Multiple Sites

To define your Sites, proceed as follows:

- Choose Site
- Choose New
- Type a Site Name
- Save and close

4.7.2   Linking Devices to Sites

As shown in Figure 33 below, the list of Sites is available from the drop-down menu under the Device tab. Select a site to link your reader to that location.

Figure 35: Linking your Devices to your Sites

To link a Device to a Site, proceed as follows:

- Choose Device from the Navigation Menu
- Edit the required Device
- Choose the Site from the site type drop-down menu
- Choose Save and close

4.8 Department

Spektrum has the ability to replicate your organisational structure and thus, includes three built-in organisational levels. The first level is the Company level. This field can be used to determine the various companies in your organisation. The second level is the Department level. This level is used to determine the various departments which exist in your companies, and it also ties to the Manager Role (discussed in section 4.10 below). In Spektrum, you can create as many companies and departments as required.

Additionally, with Spektrum, your various managers and head of departments can be given visibility to their domain. Each department or section manager can login using his/her own credentials and access the data for the employees that fall under their command. An Employee can be assigned to one department only.

Figure 36: Organisational Chart - Department

Figure 37: The Departments

4.8.1 Define Departments

To define your Departments, proceed as follows:

1. Select **Company** from the Navigation Menu on the left-hand side
2. Click on the **Edit** button of the Company you wish to add a department to
3. Scroll down to the **Departments** tab and click on **New**
4. Give the new department a name
5. At this point you have the option to link employees
6. Type the name of the employee(s) that you want to link to this department and tick the boxes of the employee(s) that you wish to link
7. Click on **Save and close**
8. Alternatively, you can link employees to the department under the Employee or Department sections.

4.8.1 Define Departments

4.9   Employee Group

Employee Groups can be considered as a 2nd level below the Departments, as shown in Figure 35 above. These fields add another layer of customisation to the employee profile. Employee groups can be used to facilitate searches, reports and data grouping.
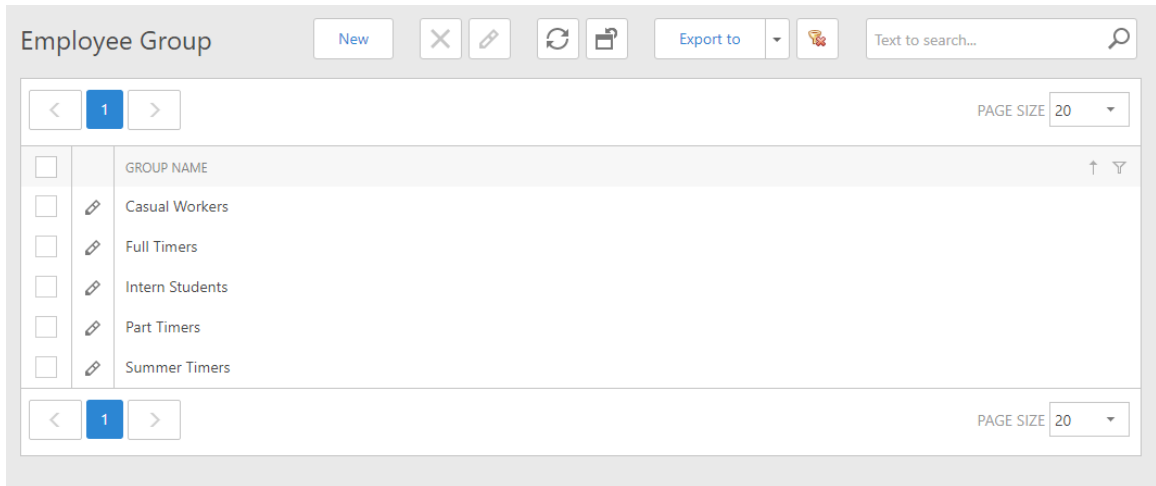

Figure 38: Employee Group

4.9.1   Define Employee Group

To define your Employee Groups, proceed as follows:

- New
- Type a Group Name
- Save and close

4.10 Roles

The scope of Roles is to grant portal users access to components within Spektrum with specific rights (read-only, can edit). Roles are pre-defined by AIS.

These Roles are:

- Administrators: full access to all components
- Default: This is the Employee Role or profile
- Enroller: gives the member the ability to create employees in Spektrum
- Manager: allowed to view punches and attendances of employees that are linked to their department

Figure 39: Roles

SPEKTRUM WORKFORCE MANAGEMENT SOFTWARE

4.10.1 Administrator

The Administrator role is the highest level and grants access to all areas within Spektrum with full rights.
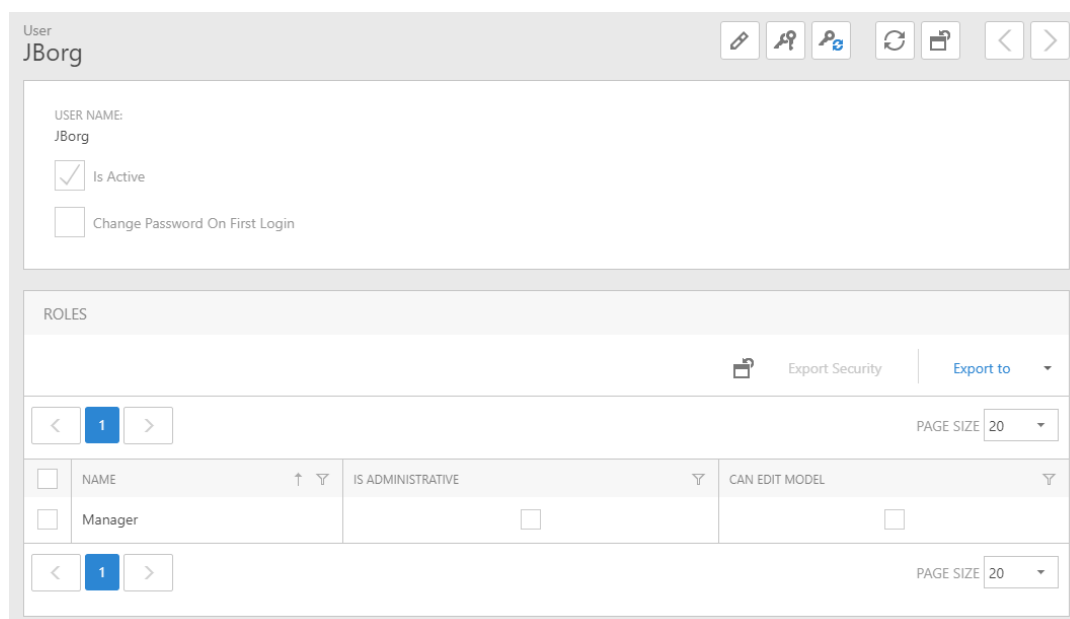

Figure 40: The Administrator Role

The Users tab allows you to view which employees are assigned to this Role. You can also create a new Employee, link to an existing employee (add the Employee to this Role) and unlink or remove an Employee from this Role.

4.10.2 Manager

Spektrum gives managers the ability to view the employee punches and attendance of their subordinates. When a user is defined as a Manager, the user will have access to all employee records that are linked to his/her Department.

In order to achieve this, you must set the identical Department for the members of each department, set the employees with Default Role and the leader with Manager Role. As shown below, the Manager *(Joe Borg)* is able to view the data pertaining to members of Department (*Sales - AIS Technology Ltd)* only.
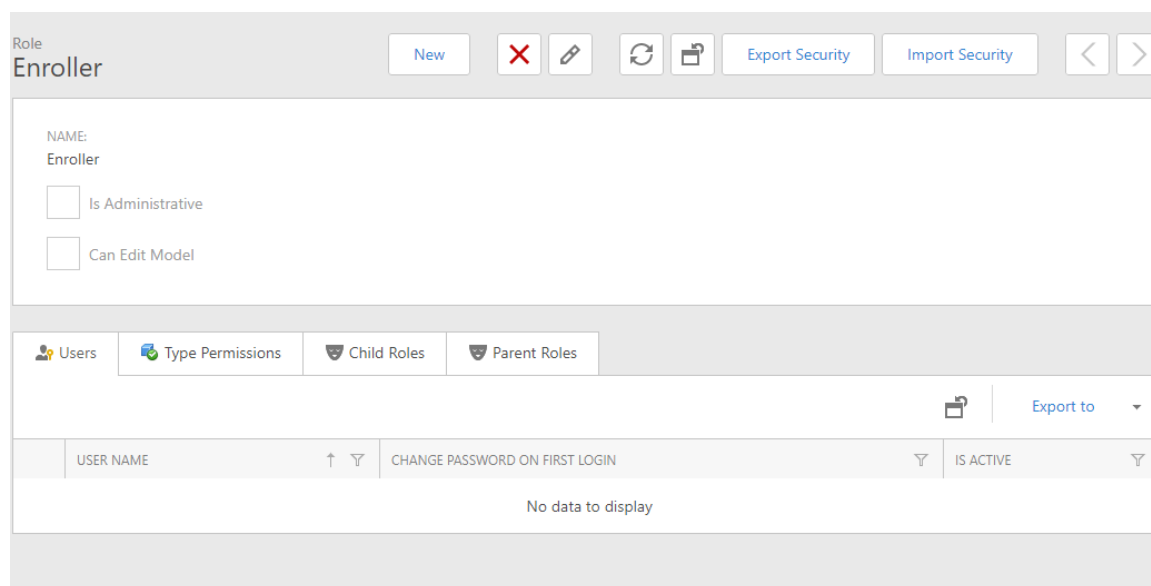
Figure 41: The Manager Role link

Figure 42: The Manager's Portal

4.10.3 Enroller
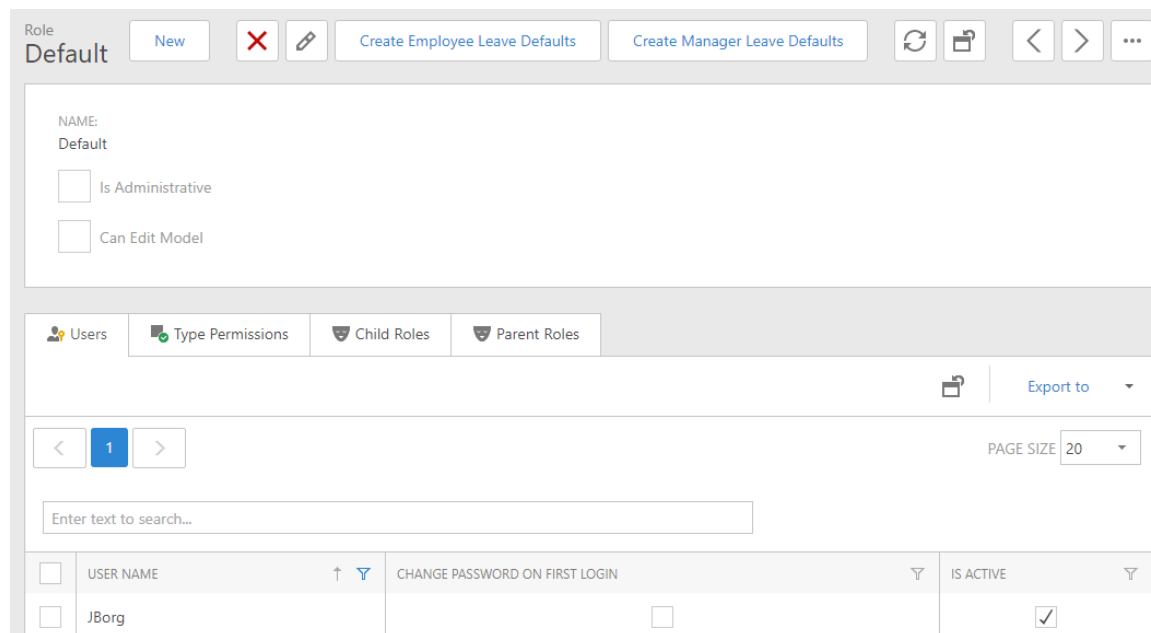
Figure 43: The Enroller

Users set as Enroller have the ability to create and amend Employees in Spektrum. An Enroller can enrol biometric patterns or RFID's on the reader(s). Once a User is linked to this Role, the user access control rights can be pushed on all linked devices to update the record.

4.10.4 Default / Employee

Figure 44: The Default or Employee

The Default Role can also be called the Employee Role. Standard employees who are only required to punch can be linked to this role.

4.11 Employee

The Employee function is used to create new Employees as well as to amend Employee data.

Figure 45: The Employees view

Figure 46: Employee options

Fields marked by an * are compulsory. These are Enrol No., Employee Name, Company, Device Group, Email Address and User Name.

Optional Spektrum related fields are Default Department, Status, Attendance Policy, Employee Designation, Overtime, Hourly Rate, ID Card No., Employee Group, Employee Group 1, Employee Group 2, Employee Group 3, Employee Group 4, Employee Group 5, Privilege, Card No., Password and Reject Threshold.

To remove employees from Spektrum, one may either change an employee's status to terminated or delete them from Spektrum altogether. To terminate an employee, update the 'Status' dropdown to 'Terminated' from the employee edit menu, and click 'Save'. Changing employee status to terminated means that no further punches for this employee will be uploaded into Spektrum. Since the employee is terminated, Spektrum will give you back that one licence spot which you can use to create another employee.

Alternatively, you may delete an employee. To do so, hover over the table row which contains the employee you want to delete, and tick the 'Checkbox'. Hover over the 'Three Dots' icon from the top navigation menu and select 'Delete Employee' from the dropdown. When you delete an employee, Spektrum will look up the employee on all the configured Readers and will wipe out the record including biometrics. This means the employee can no longer punch on any device. Spektrum will also look up all the punches that were registered on the 'Enrol number' and will replace the employee name with a '<Blank>'. This will preserve the punch records for your convenience whilst being GDPR compliant. The record card in Spektrum will be erased. This means that technically the 'Enrol number' used can be recycled. Naturally this licence spot is available for another employee.

Another option would be to Revoke Reader Access. This removes a user record completely from all devices, without deleting them from Spektrum.

This is done by selecting the employee and clicking the Revoke Reader Access button.

Figure 47: The Revoke Reader Access option

4.11.1 Employee status

To help manage your employees, Spektrum offers you four Status fields, as shown in Figure 45 below. An Employee can be assigned to ONLY one of these options. An Employee that has been set to Terminated, Suspended or Resigned can be reset to Active in the future should the employment be resumed. In Spektrum, a re-activated employee will continue to build on the previous history and data.
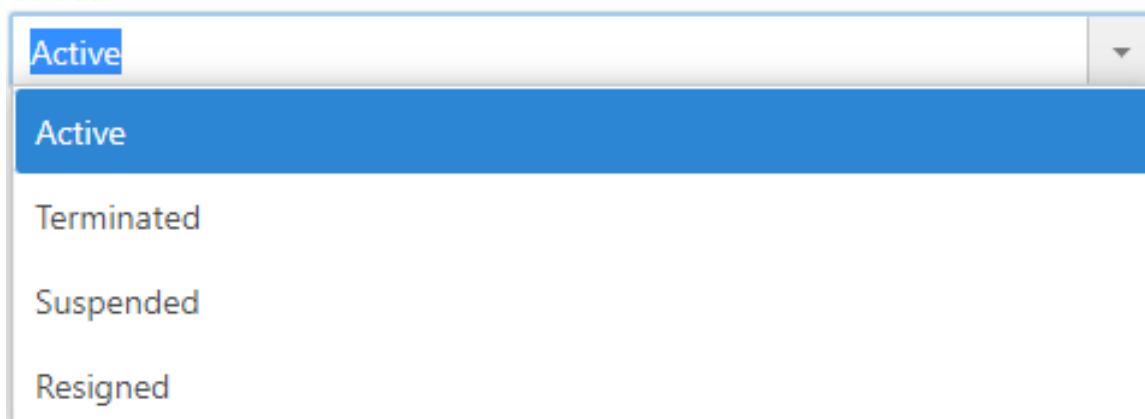
Figure 48: The Employee status

4.11.2 Link Employee to a Department

The first step is to choose a company from the drop-down menu of the Company field and, as shown in Figure 46 below, your list of Departments will be available by clicking on the 'Link' button available under the title 'Departments'. Choosing a Department will link your Employee to that specific section of your business. Click on 'Ok' and 'Save'.
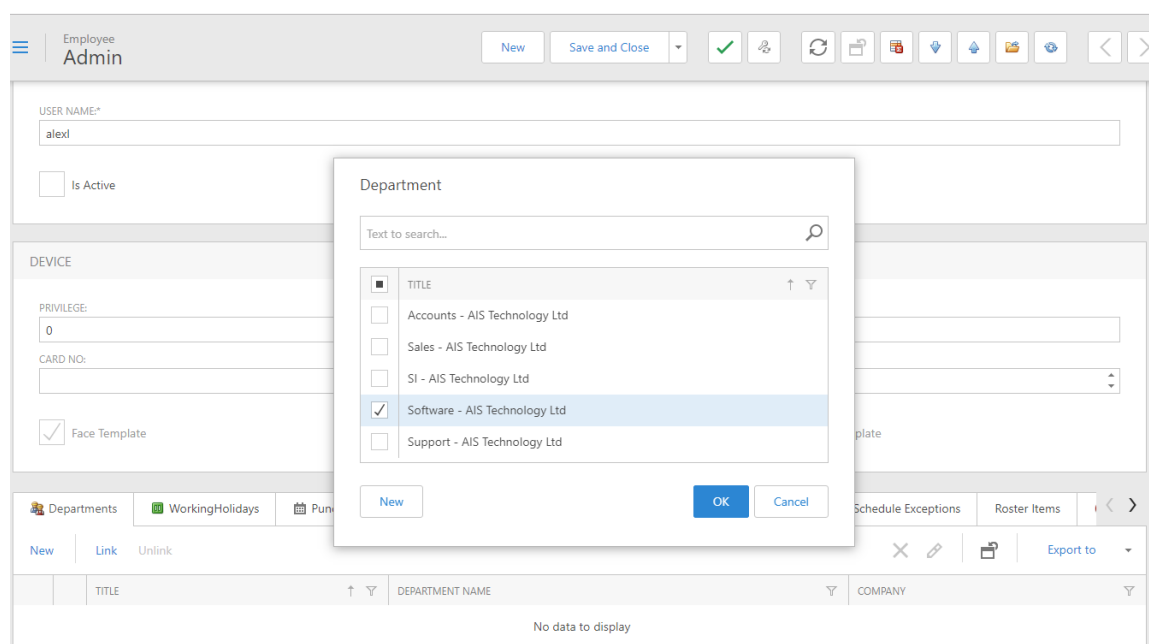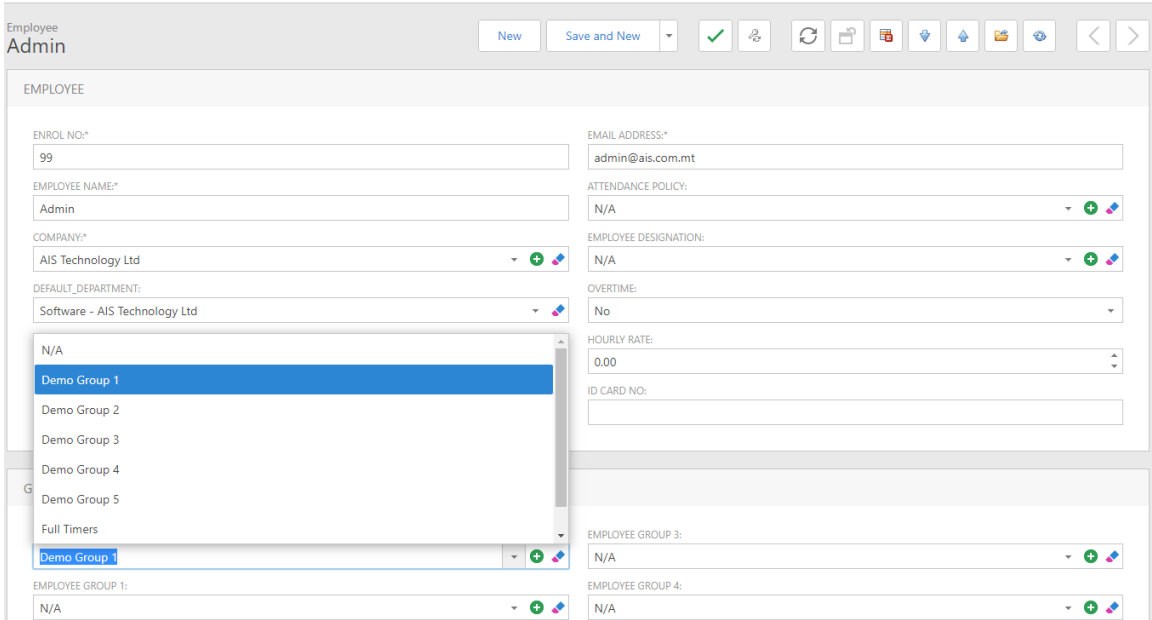
Figure 49: Link your Employee to a Department

4.11.3 Link Employee to an Employee Group

As shown in Figure 47 below, your list of Employee Groups is available from the drop-down menu under the Employee Group Tab available under the title 'Grouping'. Choosing an Employee Group will link your Employee to that specific operations group.
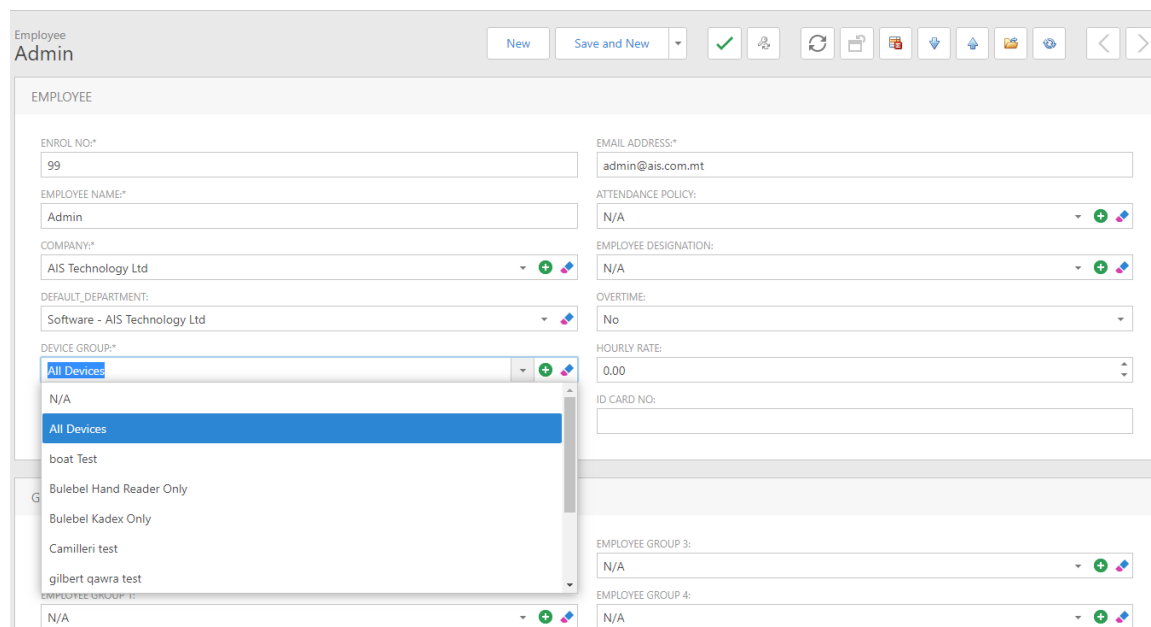
Figure 50: Linking your Employee to an Employee Group

4.11.4 Link Employee to a Device Group
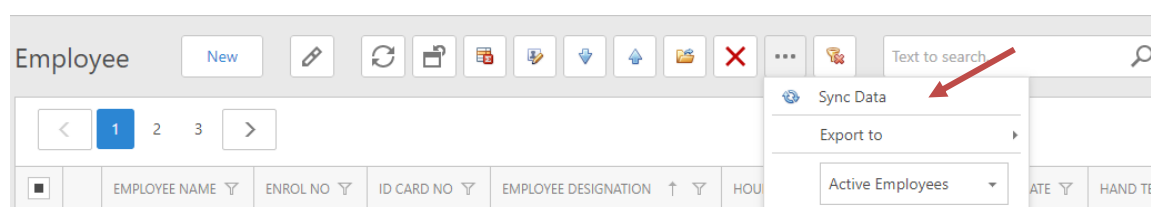
As shown in Figure 48 below, your list of Devices is available from the drop-down menu under the Device Group Tab available under the title 'Device'. Choosing a Device Group will link your Employee to that specific group of readers and the Employee's details can be manually updated on the reader(s) with a Pull and Push instruction to all the Devices linked to that group.

Figure 51: Linking your Employee to a Device Group

When creating a new employee in Spektrum it is advisable to sync the information with the local instance. Click on the three dots in the title bar and select Sync Data.

Figure 52: Sync Data

4.11.5 Employee Submenu
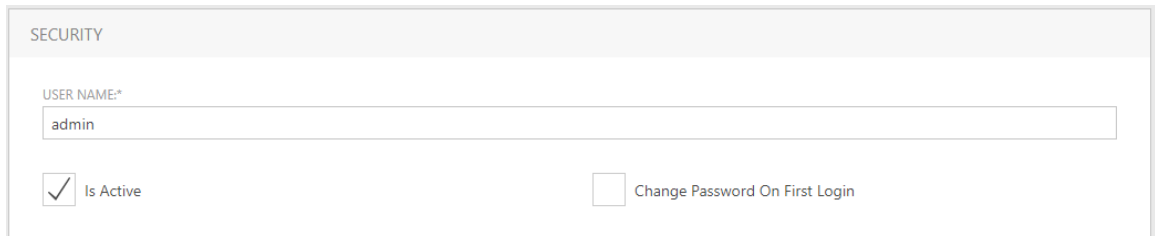
The Employee submenu allows you to:

- Push (User Data) to Device(s)
- Calculate attendances
- Batch Edit users
- Batch Import users via CSV (format) file
- Sync data between Spektrum and the local instance

To enable this additional functionality, you have to first select an employee, group of employees or all.

Individual employees are selected by the checking the box adjacent to them ✓ whilst the top left checkbox will select all the employees on the list.

As explained in Roles above, you can grant access to your department managers. This access is controlled by the Role and Department they are assigned to as well as the login credentials created by the administrator. Part of the Employee Tab is dedicated to this function, i.e. login credentials.
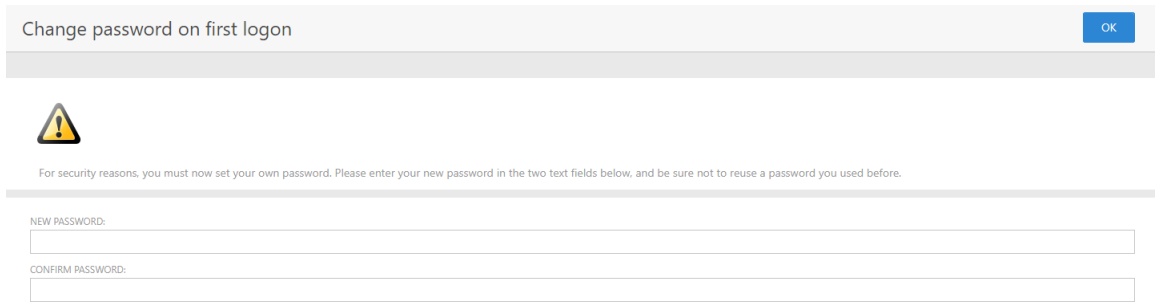
SECURITY

USER NAME:*

admin

✓ Is Active   ☐ Change Password On First Login

Figure 53: Portal login credentials

Login for the first time

Choose a username, ensure that the 'IS ACTIVE' box is checked and check 'Change Password on First Logon' box. Provide your manager with the Company, username and URL and let him/her login. The first time they login they must leave the password blank. As soon as they are given entry, Spektrum will ask them to provide a password which they will need to enter twice for validation reasons.

Change password on first logon   OK

⚠

For security reasons, you must now set your own password. Please enter your new password in the two text fields below, and be sure not to reuse a password you used before.

NEW PASSWORD:

CONFIRM PASSWORD:

Figure 54: Password on the first login

It is important to note that if the password is entered wrongly three times, you will need to close all instances of your browser (as indicated below) and start over.

Figure 55: Wrong login credentials

Reset Password

To reset a forgotten password, the administrator needs to select the employee by clicking on the record (in non-edit mode) and then selecting the 'Password reset' icon that is visible in the title bar at the top. This will generate a temporary password which will need to be passed on to the user (ideally by email). Once entered by the user, Spektrum will prompt him/her to set a new password.

Password Conditions

Alpha Numeric, contains a capital letter, lower case letter and must contain of minimum 8 characters.

Also, the password must be unique and never used before.

4.11.6 Employee Status Filtering

In order to filter the status of an employee, first one has to make sure that from the menu or the submenu icon (Depending on your screen size) 'All' is selected, so that when clicking on the funnel icon for the 'Status' tab every status will be available, as shown in Figures 53 and 54 below.
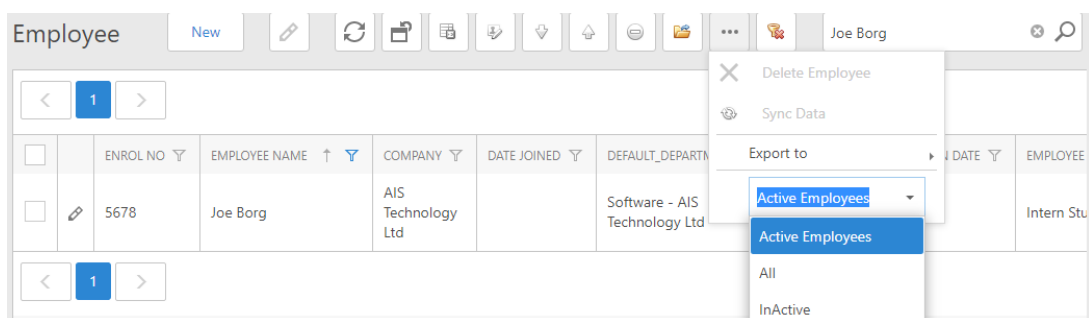
Figure 56: Filtering All, Active or InActive Employees
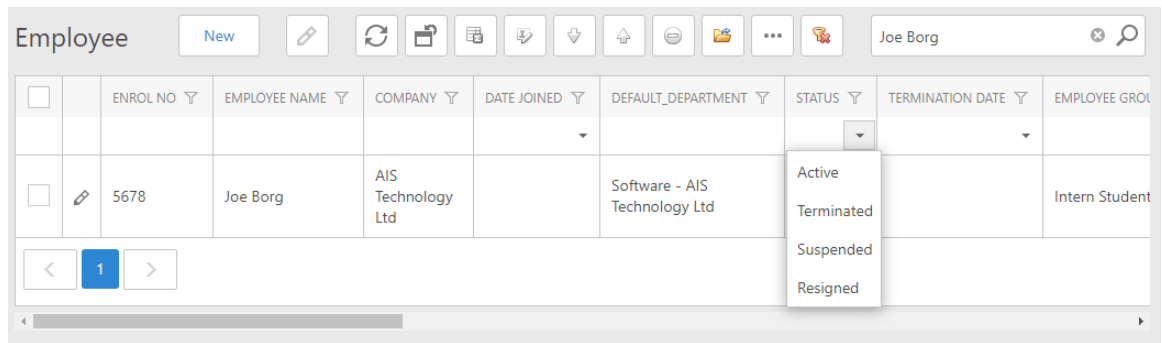
Figure 57: Status Filtering

4.11.7 Pull and Push Biometrics

The concept in Spektrum is to keep a copy of the employees Biometrics in the Cloud. The two main reasons are the following. Should one need to replace the physical Reader, rather than re-enrol the employees, all that needs to be done is to copy (Push) the Bio from Spektrum to the Reader. Also, if the company has multiple Readers, rather than enrolling the employees on all the devices, one would simply capture the Bio on one Reader and then copy (through Pull and Push) to all the other Readers on the network.

4.11.7.1 Pull Biometrics

You first need to identify where the physical Bio is located i.e. on which Reader. Then select your employee(s) and click on 'Pull Biometrics'. This will pull up the following wizard:
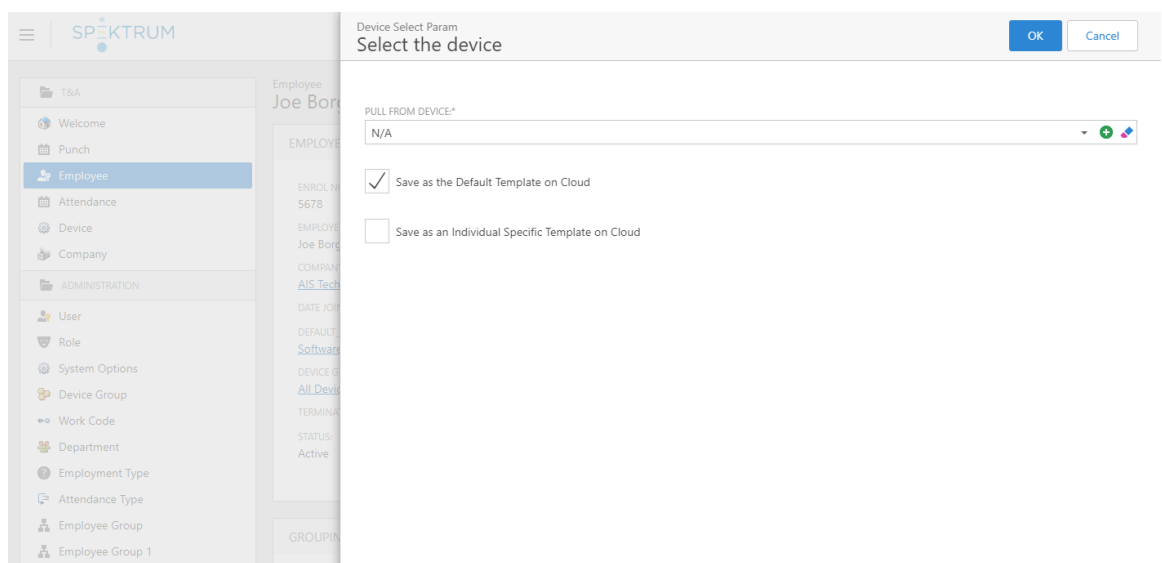
Figure 58: Pull Bio's

Device

You will first need to select the Reader that contains the Bio(s).

If you select (tick) 'Save as the Default Template on Cloud' this means that any stored Bio in the cloud will be replaced by this copy.

If you select (tick) 'Save as an Individual Specific Template on Cloud', this means that you wish to make an individual copy of the Bio that is stored on the specific Reader. This comes in handy when your employee(s) have Bio's across multiple Readers and you need to keep separate copies of each Bio that is kept on each Reader.

When you have made your choice and click on 'Ok' the Pull command will be scheduled to run in the background. This means that the effect is not instant. It will be activated and carried through according to the line of commands that the Service is dealing with at the current time.

If there is no Bio stored on the physical Reader that you are copying from, nothing will be pulled.

N.B. If you are dealing with a large number of Employees it is advisable to do this in batches rather than all in one go.

Push Biometrics

Before you 'Push' you need to ensure that the Employee(s) is linked to the appropriate 'Device Group'. This could be linked to one, multiple or all Readers on the network.

Also, you should confirm that the employee does have the Bio stored in the Cloud since this will be the source that you are copying from. To do this look at the employee record card and check that the appropriate Bio is indeed stored.

Look for the tick boxes that illustrate whether the employee has Finger, Face on Hand Template stored.

Figure 59: Bio's saved in Spektrum

In the 'Employee' section, select one, multiple or all Employees. Next click on 'Push to Device(s)' which is located on the title bar. The following popup will appear:
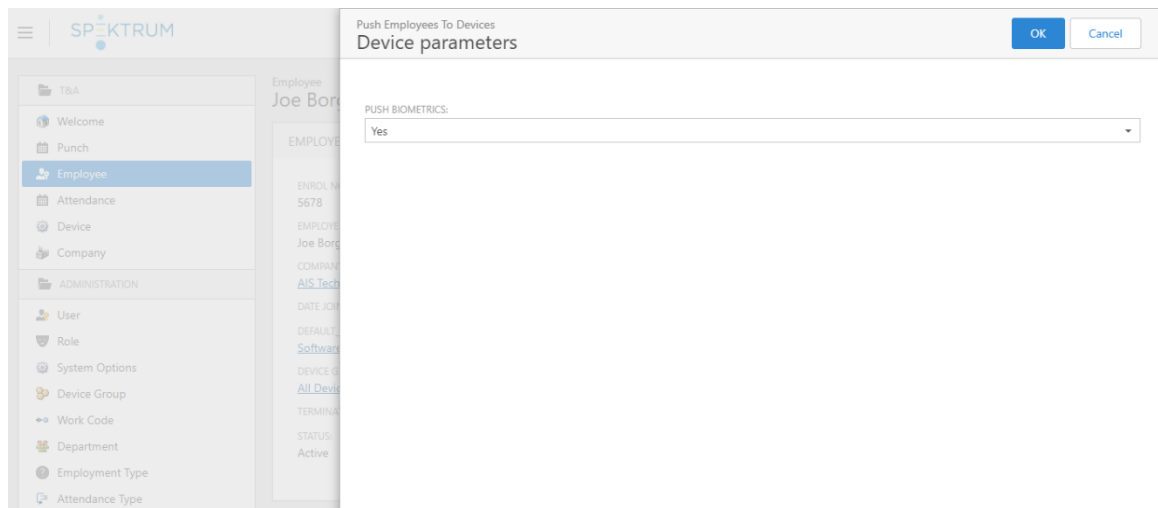
Figure 60: Push Bio's

Select 'Yes' in the 'Push Biometric' selection box and click on 'Ok'

This action will be scheduled within the service and will take place according to the line of commands that are being executed. If you push an employee's Bio that is not yet stored on the Cloud, nothing will be pushed.

If a certain number of Readers have an employee(s) Bio(s) pulled and a Device Template is created for each Bio, once these Bio(s) are pushed, they will replace the respective Bio(s). If three hand Bio(s) are pulled (H1, H2, H3), once these Bio(s) are pushed, H1 will replace H1, H2 will replace H2, and H3 will replace H3. If you want to replace the Bio(s) of all Readers with H1, make sure that H1's Bio is the only one with a copy on the Cloud. To do this, identify on which Reader H1 is, and when pulling the Bio, select **Save as the Default Template on Cloud** when asked. Refer to the previous section, *Pulling the Biometrics,* for further details.

4.11.8 Calculating Attendance

The scope of Attendance Calculation is to restructure the raw punches that have been downloaded from the reader(s) into formatted information that is comprehensible. This function will not only calculate the time elapsed between the punches of an Employee but will also:

- Highlight missed punches
    - o   Both Start and End
- Highlight days with no punches
    - o   Example weekend, public holidays
- Absence

It is also very important to note that the duration is calculated in decimal (or Base 100) to enable for further formulas and calculations to data that is exported into Excel.

To calculate the Employee attendance, follow these steps:

- Choose Employee(s), you can run this procedure for one, multiple or all employees
- Depending on your screen size access the Employee submenu (three dots)
- Point to Calc.Attendances
- Choose OK

The following wizard will appear:
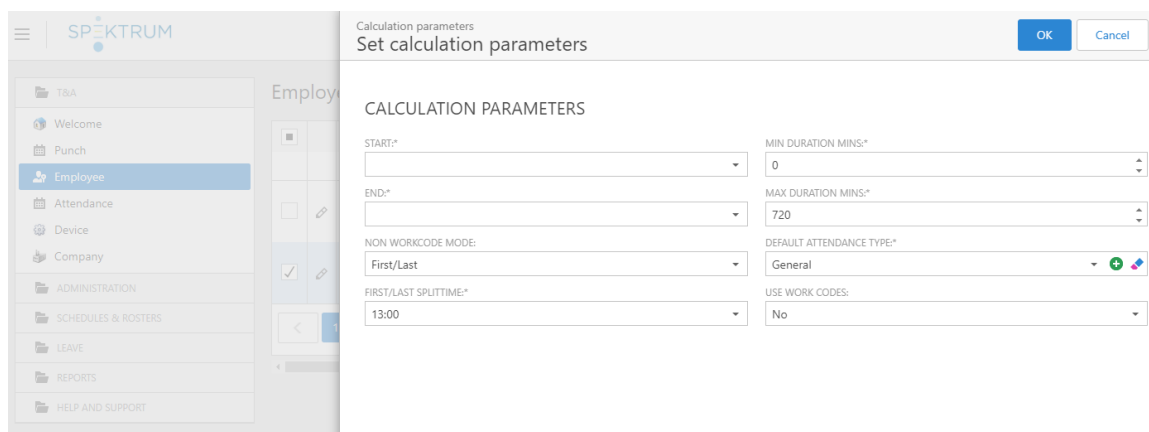
Figure 61: Calculate Attendance - Without Work Codes

4.11.8.1   Generate Attendance without using Work Codes

If your company does not use work codes, you need to follow the following steps to calculate the attendance:

- Specify the date bracket by choosing:
    - o   Start date
    - o   End Date

- Non WorkCode Mode
  Make sure that 'First/Last' option is selected. You can then define the mid-point of your working day. By default, this is set to 13:00.

This setting comes into play if whilst generating the attendance, Spektrum comes across a single punch rather than a pair. If the time of the recorded punch is earlier than the split time, the solitary punch will be marked as an 'In' punch. If the time of the recorded punch is later than the split time, the solitary punch will be marked as an 'Out' punch.

- **Min Duration Mins**
  This field specifies the number of minutes that must elapse in case of recorded multiple punches from an Employee on the same day. If, for example, this is set to 10, it means that should Spektrum encounter multiple punches from the same employee on the same date and spanning 10 minutes, then it will retain the first punch and ignore the rest. Spektrum will mark the extra punches as 'Error' in the punch type field.

- **Max Duration Mins**
  This field specifies the number of minutes that are considered as a full Work Day. Should Spektrum encounter a punch that is > Max Duration Mins, it will mark the punch as an 'Error'.

- **Default Attendance Type**
  This field specifies the wording to be used to describe the attendance. By default, it should be set to 'General'.

- **Use Work Codes**
  This should be set to 'No'.

Click on 'Ok' and the process will start. Upon completion you will see the following banner at the top of your screen:
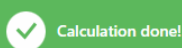
At this point, you can navigate to 'Attendance' and filter out the dates that you had previously selected when generating. You will see the listing of the attendance for the employees that were part of your selection together with the duration.

The next step is to return to the Attendance Tab to verify that the calculation process has been finalised and has been successful.

4.11.8.2   Generate Attendance using Work Codes

If your company uses work codes, you need to follow the following steps to calculate the attendance:
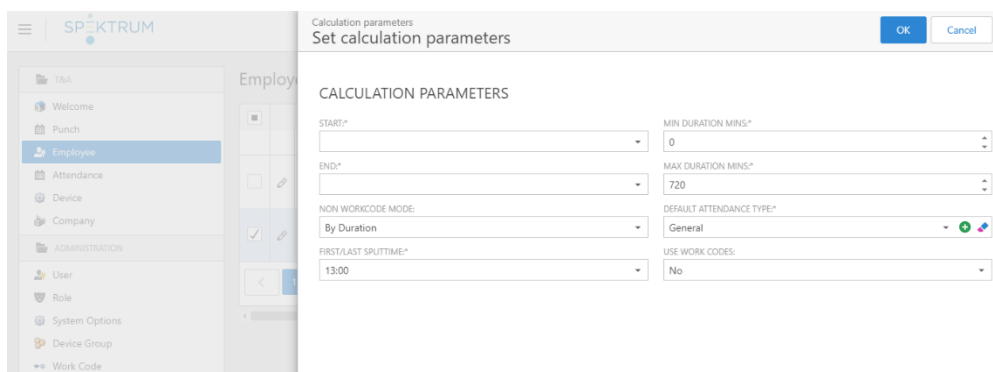
Figure 62: Calculate Attendance using Work Codes

- Specify the date bracket by choosing:
    o Start date
    o End Date

- Non WorkCode Mode
  Make sure that 'By Duration' option is selected.

- Min Duration Mins

  This field does not factor in this case.

- Max Duration Mins

  This field specifies the number of minutes that are considered as a full Work Day. Should Spektrum encounter a punch that is larger than the Max Duration Mins, it will mark the punch as though it belongs to the next day.

- Default Attendance Type

  This field specifies the wording to be used to describe the attendance. By default, it should be set to 'General'.

- Use Work Codes

  This should be set to 'Yes'.

Click on 'Ok' and the process will start. Upon completion you will see the following banner at the top of your screen:

Calculation done!
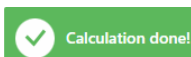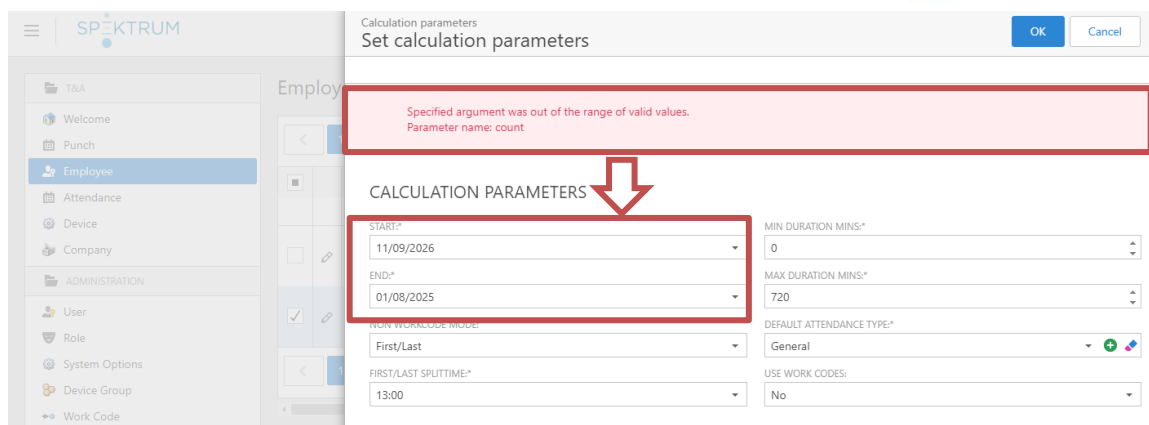
At this point, you can navigate to 'Attendance' and filter out the dates that you had previously selected when generating. You will see the listing of the attendance for the employees that were part of your selection together with the duration.

After a successful attendance generation, one will see the effect on the registered punches. You will need to click on 'Punch' in the navigation pane, filter out the dates and you will notice that the 'Punch Type' field is now marked as 'In', 'Out' or 'Error' instead of 'NA'.

Every time you generate the attendance, the results will overwrite the effect on the punches for the dates selected.

If any parameter is set wrongly; example: End date is set in the past to the start date as shown below, or any parameter has been omitted, Spektrum will return an error. Check your options and try again.
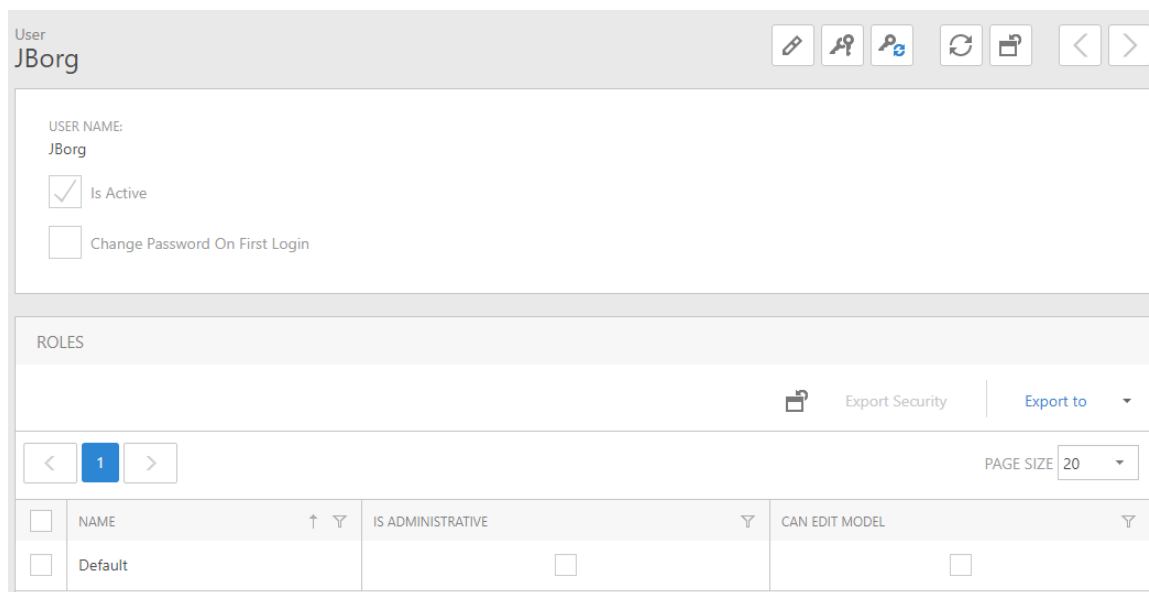
Figure 63: Error in Attendance Calculation

The parameters calculated in this option are available under the Attendance option on the Navigation menu.

4.12 My Details
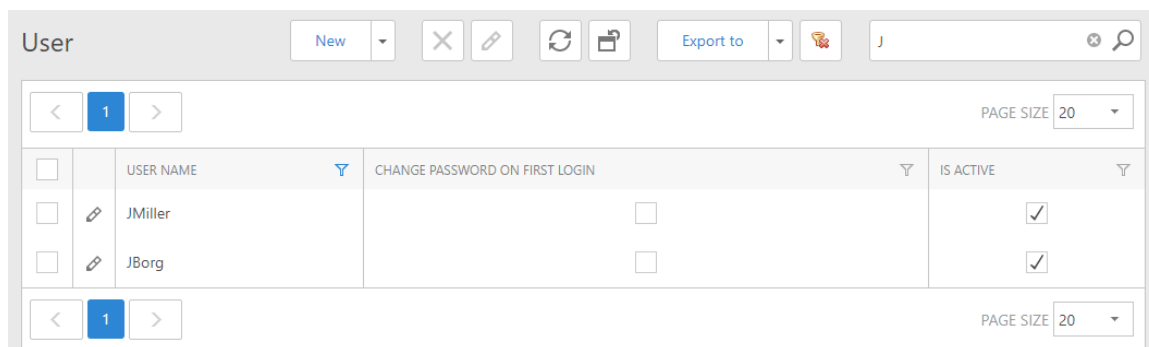
Figure 64: My Details

The My Details section in Spektrum lists the current (logged in) user details.

4.13 User

Figure 65: User

Users are the people who have access to the portal. Only users who are set AS ACTIVE will be able to log in using the credentials set in the User Logon section above. As shown in Figure 62 above, only 2 users are granted access to the Spektrum portal for this client.

4.13.1 Define User Access

To grant portal access to your Employees, proceed as follows:

- Edit a User
- Ensure that a username is supplied
- Tick the checkbox next to 'Is Active'
- Tap save and close

To revoke this right, repeat the above procedure and UNCHECK the 'IS ACTIVE' option before saving.

4.14 Punch

Figure 66: The Punch section

The punch option is a repository of the raw punches that have been downloaded from the reader(s) during the automated poll process. The information available here is unformatted, un-nominated and uncalculated, thus raw. The default cycle is set for every five minutes. This is an internal parameter that can be modified.

This section details all the transactions reported by the reader(s) both for successful and unsuccessful punch attempts. Successful punches will include the date and time stamp, site and reader ID together with the Enrol ID and Employee name details.

Unsuccessful attempts will be marked in RED and the reason behind this is one of the following:

- Reader was unable to identify the Employee
- Employee has been registered on the reader but not Spektrum

In both cases, the unsuccessful punch will also include the date and time stamp, site and reader ID and Enrol ID but no Employee name. If the reader was repeatedly unable to identify the Employee, simply re-enrol the person's biometrics. In the case that a new Employee was enrolled on the reader but not in Spektrum, simply create the Employee in Spektrum using the same Enrol number as entered in the reader.

Figure 67: The unknown Punches

Link Punches

The next step is to manually link the punches to the newly created user in Spektrum.
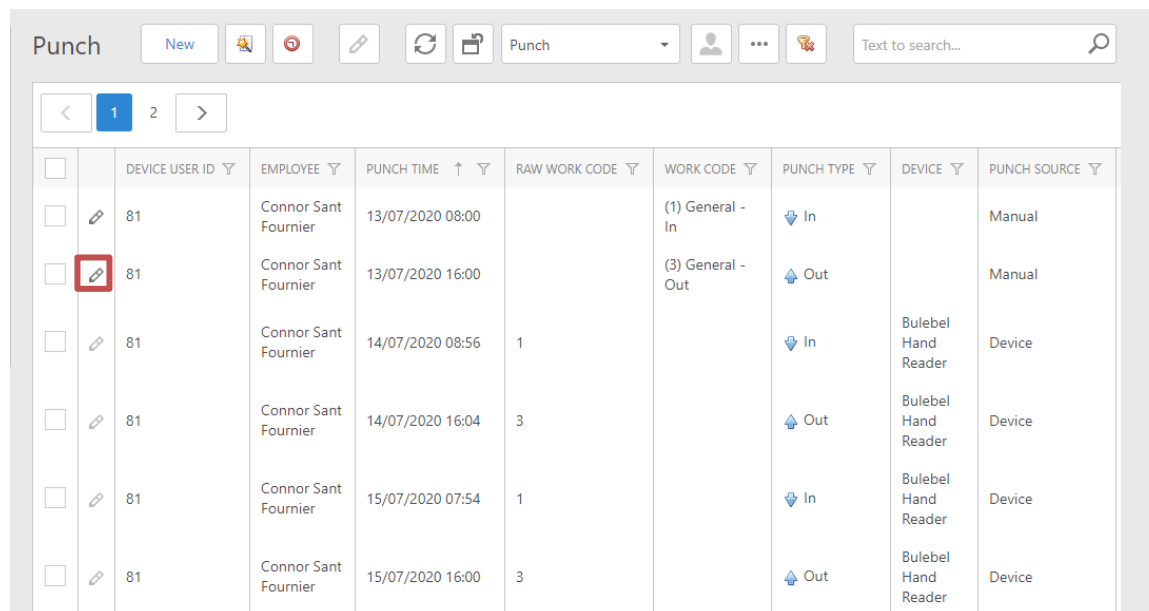
Identify and list the punches and select them with the available tick-box. On the title bar select the three dots and then select 'Set Employee'. You will then be prompted to search for the employee in question, once located click on 'OK' and all the marked punches will be linked to this employee.

Apart from identifying punches and data export, the Punch option offers more functions mainly

- Amend a Punch
- Create a Punch

4.14.1 Amending a Punch

The punch in question must first be located before it is amended. This search can be done via fields filtering or via field sorting. Once found enter Edit mode by choosing the Edit function adjacent to the punch, as shown in Figure 65 below.

Figure 68: Amending a Punch

In Edit mode the fields available for editing are: Employee | Punch Time | Work Code | Remarks | Site

In the case of manually entered punches, it is important to note that they will be marked as 'Manual' under the Punch Source, as shown in Figure 66 below and posted to the audit log.
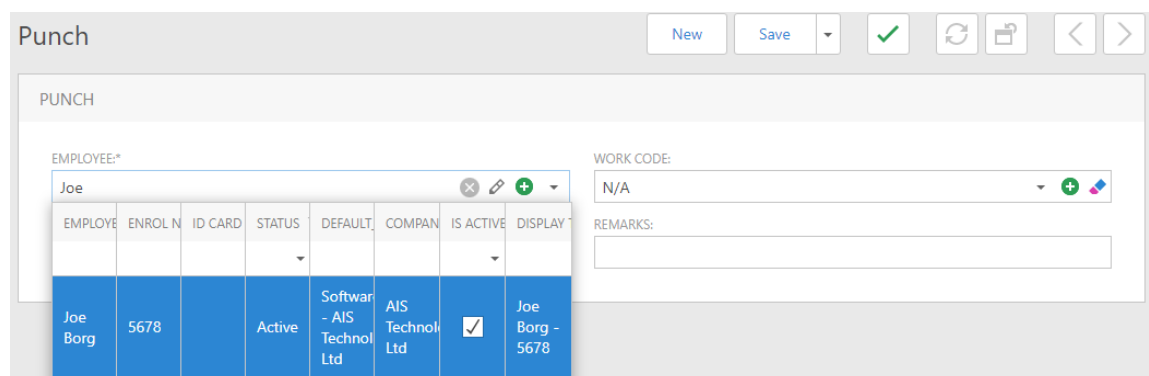
Figure 69: Amend a Punch Menu

4.14.2 Creating a Punch

To create a manual punch, select 'Punch' from the Navigation Menu on the left-hand side and click on the 'New' button. In the 'Employee' field, type in and select the employee's name:

Figure 70: Employee Search

Specify the date and time of the punch in the 'Punch Time' field. After specifying the date and time, if you company uses Work Codes, fill in the 'Work Codes' field depending on the type of punch i.e. IN, OUT, Lunch In, Lunch Out. Specify the Site at which the punch is going to be created and click on 'Save'.

Alternatively, you may insert punches or even import punches by using the 'Punch Quick Entry' option. To import punches, click the 'Quick Entry' button, which is situated next to the 'New' button. You may click the 'Get Template' button in order to download a spreadsheet template that stores punches. Compile the document by entering the data under each compulsory field. From the quick entry menu, click 'Browse', navigate to the location where the template is saved, and click 'Import'. Click 'OK' to import the punches.

Figure 71: The Punch Quick Entry Menu

4.14.3 Punch Period Filtering

In order for one to filter the period of a punch, one has to make sure that from the menu or the submenu icon (Depending on your screen size) 'All' is selected, as shown in Figure 68 below.

Figure 72: Filtering All, Today, Yesterday, This week, Last week or This month Punches

4.15 Attendance

	EMPLOYEE NAME	START	END	DURATION MINS	MISSED IN	MISSED OUT	DURATION	ATTENDANCE TYPE
☐	Joe Borg	24/07/2020 00:00	24/07/2020 00:00	0.00	☐	☐	0.00	General
☐	Joe Borg	18/10/2020 00:00	18/10/2020 00:00	0.00	☐	☐	0.00	General
☐	Joe Borg	08/10/2020 00:00	08/10/2020 00:00	0.00	☐	☐	0.00	General
☐	Joe Borg	24/09/2020 00:00	24/09/2020 00:00	0.00	☐	☐	0.00	General
☐	Joe Borg	03/08/2020 00:00	03/08/2020 00:00	0.00	☐	☐	0.00	General
☐	Joe Borg	11/07/2020 00:00	11/07/2020 00:00	0.00	☐	☐	0.00	General
☐	Joe Borg	12/08/2020 00:00	12/08/2020 00:00	0.00	☐	☐	0.00	General
☐	Joe Borg	05/10/2020 00:00	05/10/2020 00:00	0.00	☐	☐	0.00	General
☐	Joe Borg	23/10/2020 00:00	23/10/2020 00:00	0.00	☐	☐	0.00	General

Figure 73: Attendance

The Attendance section is the most important feature of Spektrum. It is a summary of all the information processed from all sections of Spektrum and the data contained within.

As shown in Figure 69 above, the employee attendance is calculated day by day together with the duration or the time elapsed between the START and END punches. Each entry is date and time stamped. Of particular importance are the MISSED IN and MISSED OUT fields which indicate a missing punch. In this case, no attendance can be calculated as indicated above. To correct this information, an Admin can create a manual entry for the employee under the punch section. This information can also be exported to Excel or other common formats like PDF.

4.16 Export Punches

One may want to simply export the Punches to Excel or as commonly required, as a CSV file which will be imported into a third-party application like Payroll.

Once the administrator has generated the attendance records for the employees and has checked that all the transactions are correct (adjustments for missed punches), then the Punches will be labelled correctly (In, Out, Break Out, Break In) and are ready for export.

To start the process, one must click on 'Punch' in the Navigation Pane and change the view from 'Punch' to 'Export' in the title bar:
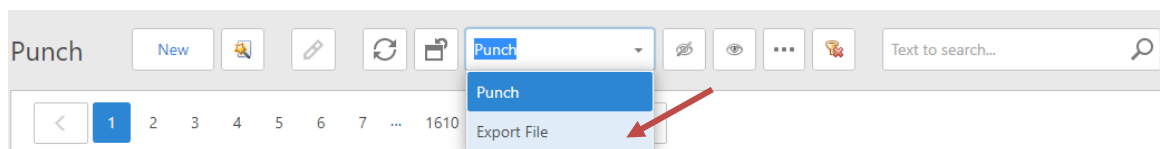
Figure 74: Export File

Once selected, the view will change and by default, the following fields will be displayed:
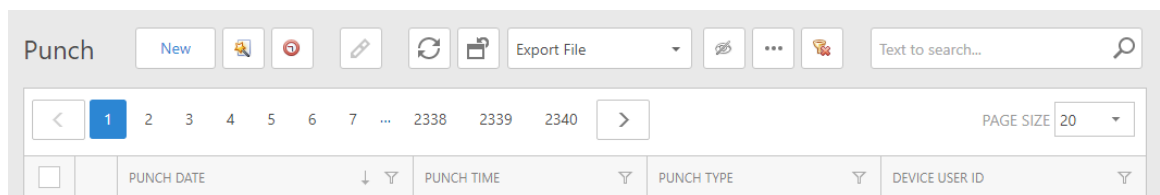
Figure 75: Export Punch Fields

Essentially, the fields and order that they are placed in (Punch Date – Punch Time – Punch Type – Device User ID) will be the way the file will be exported. This means that one needs to pay attention to what exactly and in which order the fields will be exported.

To help with the selection (of attendance records) one may need to filter the data by other fields. To obtain the available additional fields, right-click on any field name and select 'Column Chooser'. This will open up a box containing the optional fields. These are currently the following:

DEVICE | EMPLOYEE | HOUR | MINUTE | OID | PUNCH SOURCE | RAW WORK CODE | REMARKS | SITE | WORK CODE

To add one of these items, one would need to drag the field out (left-click mouse, keep pressed) and place on the field bar in the required place (Order).

Once the records required have been filtered (through the additional fields), one should remove them prior to exporting. To do this, one must evoke the 'Column Chooser' box again and this time drag the extra fields from the field bar to the box. Failing to do this will result in the additional fields being part of the export routine and this might lead to an import failure since these fields would not be expected.

Next step is to enter the date range that was used to generate the latest attendance:

Figure 76: Export Date Range

Once entered, the list of entries that match the date range will be shown. Simply click on the three dots and then on 'Export to':
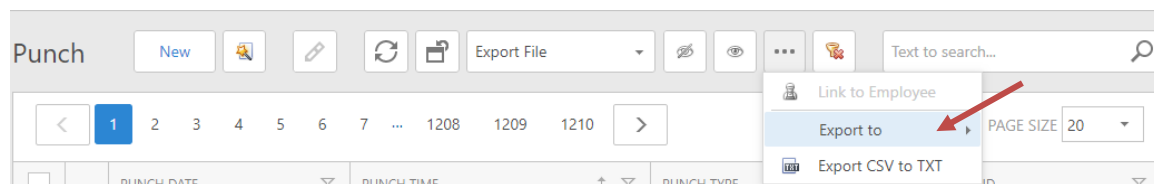
By default, the filename used for this import is Punch.csv and the administrator will have the opportunity to rename it accordingly and to save it in a specific location.

5.0   Schedules & Rosters

If you have access to Schedules and Rosters, then in the navigation pane you will see the following features enabled (not greyed out) and available:
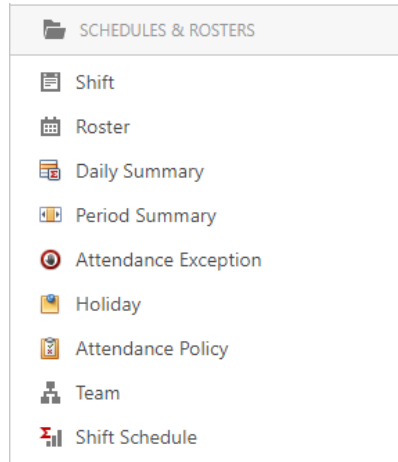
Figure 77: Schedules & Rosters

If the features above are greyed out, then it means that you are not subscribed to this module.

Contact AIS for information on enabling this module.

5.0   Schedules & Rosters

5.1 Teams

Ideally one of the first items to deal with when setting up your Scheduling & Rostering module is the feature called 'Team'.

One must first think of organizing their workforce in a way that is structured and that follows the same patterns. In a nutshell the primary parameters that one needs to address are the Shift times and conditions, together with Allowed Breaks.

With these in mind, one can link employees that follow the exact same parameters together and this is done by means of Teams. Think of Teams as a container that houses the employees that normally work the same shift times, have the same break allowances and conditions.

To create a Team simply click on 'Team' in the navigation pane and on the 'New' button.

The administrator will first need to provide a Team Name. Supplying a name that make sense is beneficial since later on one will link said Teams to Rosters.

The last step is to select the employee(s) to make up the group.
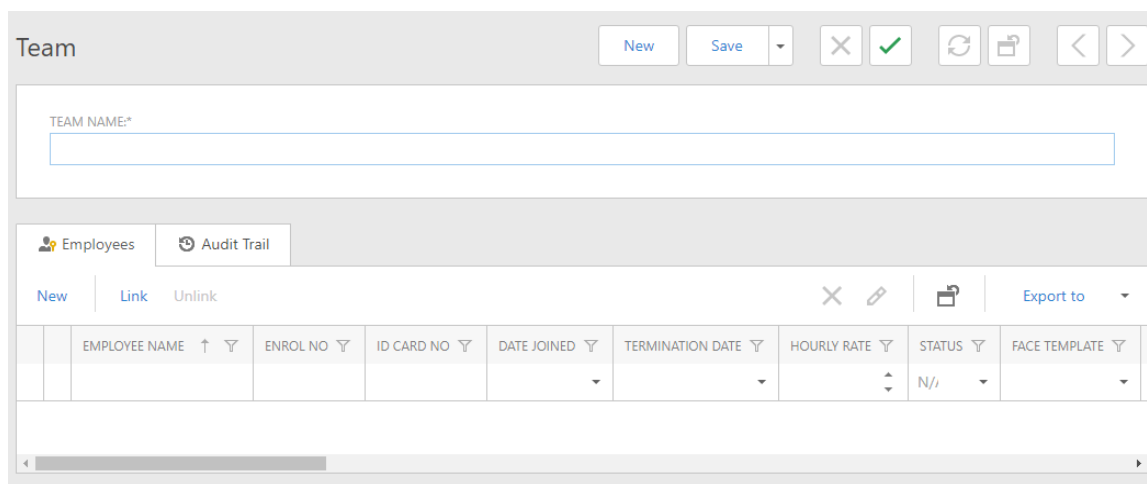
Figure 78: Create Team
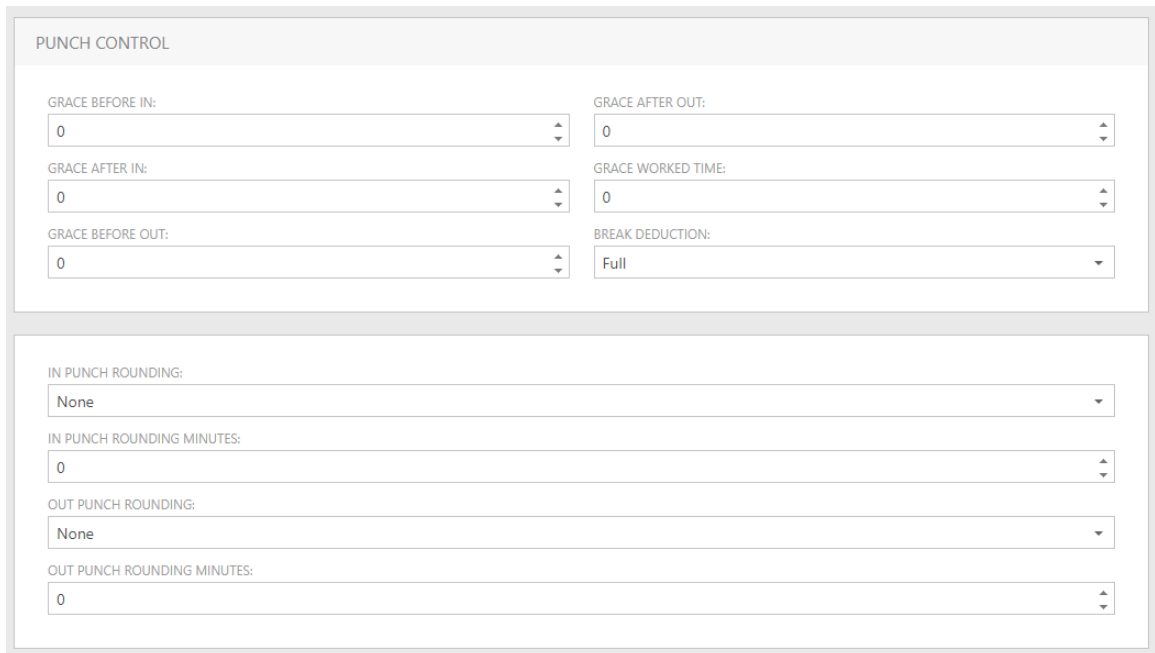
When completed, one must click on 'Save & Close'.

5.2 Parameters

There are essentially two sets of parameters that require attention to setup accordingly.

The first set of parameters are at company level. This means that one could have different scenarios according to the business model of the company.

Click on 'Company' in the Navigation Pane and edit the record (select the edit button which is located next to the company name). The following Punch Control settings will be available:

Figure 79: Company Parameters

Grace Before In	Allowed number of minutes for employee to punch in earlier than the shift start time and which will not trigger an exception.
Grace After In	Allowed number of minutes for employee to punch in later than the shift start time and which will not trigger an exception.
Grace Before Out	Allowed number of minutes for employee to punch out earlier than the shift end time and which will not trigger an exception.
Grace After Out	Allowed number of minutes for employee to punch out later than the shift end time and which will not trigger an exception.
Grace Worked Time	Total allowed number of minutes that employee is allowed to work without triggering an exception.
Break Deduction	Full – Break control is defined at shift level.
	Stepped – If employee work time is > half the Shift Expected Work and => 'Break Deduction Min Work' (parameter defined in Shift), then full Break Deduction will be carried out.
	If employee work time is < half the Shift Expected Work and < 'Break Deduction Min Work', then half the Break Deduction will be carried out.
In Punch Rounding	None – No rounding is performed on an In Punch record.
	Up – Round up to the nearest defined minutes.
	Down – Round down to the nearest defined minutes.
In Punch Rounding Minutes	Defined In Punch minutes to round up or down.
	E.g. if In Punch Time is 7:55 and In Punch Rounding Minutes is set to 5, then the Attendance Start Punch will be rounded up to 8:00.

Out Punch Rounding	None – No rounding is performed on an Out Punch record.
	Up – Round up to the nearest defined minutes.
	Down – Round down to the nearest defined minutes.
Out Punch Rounding Minutes	Defined Out Punch minutes to round up or down.
	E.g. if In Punch Time is 8:05 and Out Punch Rounding Minutes is set to 5, then the Attendance Start Punch will be rounded up to 8:00.

There are additional 'Punch Control' settings that are available at Shift Level. This means that each defined shift can have varying settings which affect Breaks and Overtime.

These supplementary controls are explained in the next section labelled 'Shifts'.

The second set of parameters will normally affect all the employees irrespective of Company or shift employed. In the navigation pane, under 'Schedule & Rosters', one will find set default settings in the option called 'Attendance Policy' as follows:

Policy Name	Default Policy.
Early In Bring Forward	Y/N. If employee 'In Punch Time' is earlier than the 'Start Shift time', then set the 'Start Attendance In Time' equal to the 'Start Shift Time'.
Late Out Move Back	Y/N. If employee 'Out Punch Time' is later than the 'End Shift Time', then set the 'End Attendance Out Time' equal to the 'End Shift Time'.
Check for Absence	If ticked, then when comparing attendance records to rostered records, trigger an exception if expected work > 0 and worked hours = 0.
Check for Extra Attendance	If ticked, then when comparing attendance records to rostered records, trigger an exception if expected work = 0 and worked hours > 0.
Check for Late In	If ticked, then when comparing attendance records to rostered records, trigger an exception if 'In Punch Time' is > 'Shift Start Time'.
Check for Early In	If ticked, then when comparing attendance records to rostered records, trigger an exception if 'In Punch Time' is < 'Shift Start Time'.
Check for Early Out	If ticked, then when comparing attendance records to rostered records, trigger an exception if 'Out Punch Time' is < 'Shift End Time'.
Check for Late Out	If ticked, then when comparing attendance records to rostered records, trigger an exception if 'Out Punch Time' is > 'Shift End Time'.
Check for Less Work	If ticked, then when comparing attendance records to rostered records, trigger an exception if worked hours < expected hours.

If changes are made to any of these settings, they will affect all the employees.

If you require that certain conditions are different for specific employees, then one can define a separate Attendance Policy (saved with a different name) and applied at employee level.

If multiple employees require a second Attendance Policy that would differ from the first, one could use the 'Batch Edit' feature available in the Employee section to swiftly link the second Attendance Policy to a group of employees.
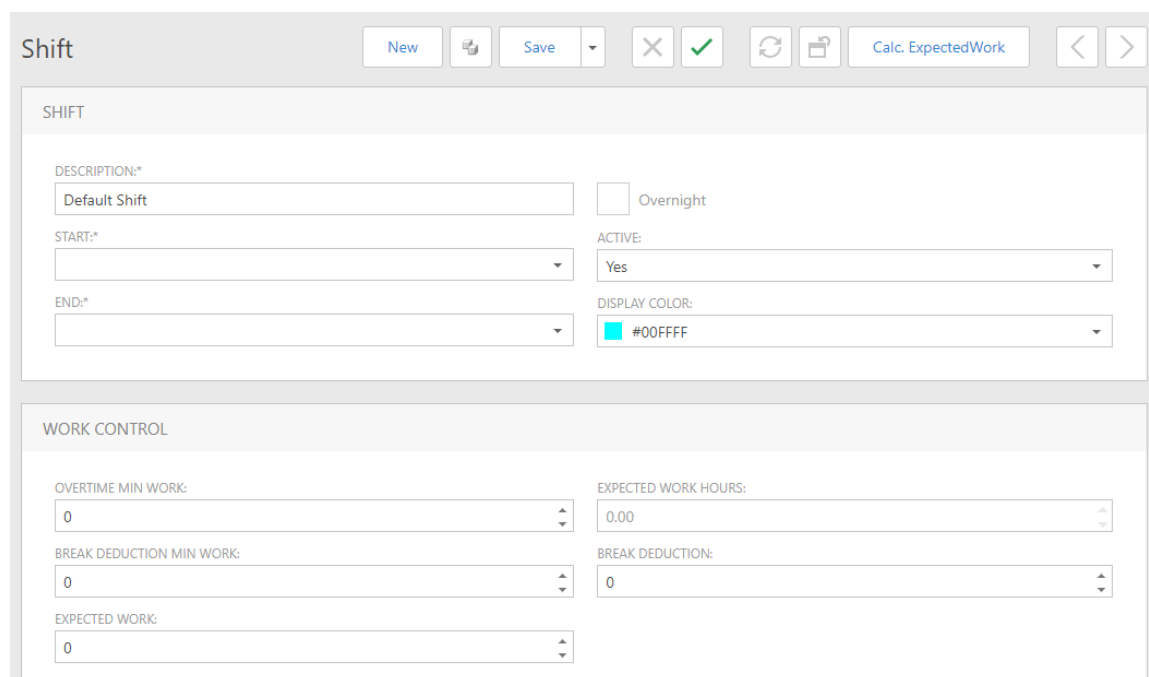
5.3 Shifts

Once the Teams have been completed it is time to define all the different shifts that are employed in the company or companies that fall under the Spektrum subscription. You can define a shift that can be utilized across the listed companies.

For example, 8:00 to 16:30 Monday to Friday, including 30 mins break and Overtime which will only kick in if the employee has worked for more than 30 minutes after normal working time.

Another example is a split shift that sees employees working on Mon to Fri, from 11:00 to 15:00 then again from 18:00 to 23:30. Then Sat and Sun from 11:00 to 16:00

Simply put together all the different shifts that the company operates with and begin creating them one by one. To create a shift, click on 'Shift' in the navigation button and click on the 'New' button:

Figure 80: Create Shift

The following are the fields and parameters that are available for the creation of a shift:

Shift Fields:

Description	E.g. 40hr, 8-16:30, with OT
Start	The start time of the shift e.g. 08:00
End	The end time of the shift e.g. 16:30
Overnight	Read only tick box that is automatically populated once you have defined the Start and End Timed for this shift. If the time period spans after midnight then it will be automatically labelled as an overnight shift.
Active	Define shift as an active or inactive one
Display Color	The color which identifies the shift

N.B. If any of the set Work Control Fields are surpassed then an exception could be flagged and will be posted in the Attendance Exception report. More on this later.

Work Control Fields:

Overtime Min Work	Minimum required minutes after the defined end work time that will enable overtime to start clocking. The initial x minutes will also be calculated as overtime if surpassed. N.B. The administrator must enable each employee that has OT benefits by editing their record card and selecting 'Yes' for overtime.
Break Deduction Min Work	Break time for this shift, in minutes is only allowed for a minimum working time.
Expected Work	This will be automatically calculated. Timing is in minutes.
Expected Work Hours	This will be automatically calculated. Timing is in hours.
Break Deduction	The allowed break time for this shift, in minutes
Break Deduction Min Work	Minimum required minutes that the employee must work in their shift before the Break Deduction figure is automatically deducted.

N.B. If the break deduction is set to, for example, 30 minutes and the reader in the company is also set to accept work codes defined for Break-Out and Break-In, then Spektrum will deduct the larger value for the break.

Examples (Break Deduction in Shift is set to 30mins)

> Employee punches in at 08:00, Break-Out at 13:00, Break-In at 13:25, Out at 16:30
> →   Spektrum will deduct 30 mins and not 25 mins.
> Employee punches in at 08:00, Break-Out at 13:00, Break-In at 13:45, Out at 16:30
> →   Spektrum will deduct 45 mins and not 30 mins.

If work codes are not being used for the breaks then the 'Break Deduction' in the Shift will dominate.

When completed, press 'Save & Close' to save the new shift for the company.

5.4   Rosters

5.4.1   Creating a Roster

The third item to deal with when setting up your Scheduling module is the item called 'Roster'.

To create a Roster simply click on 'Roster' in the navigation pane and the 'New Roster' ⊕ button.

Figure 81: Create Roster

Fields marked by an * are compulsory. These are Description, Start and End.

When completed, one must click on 'Ok' and you will be navigated to the Roster Designer, as shown in Figure 78 below.
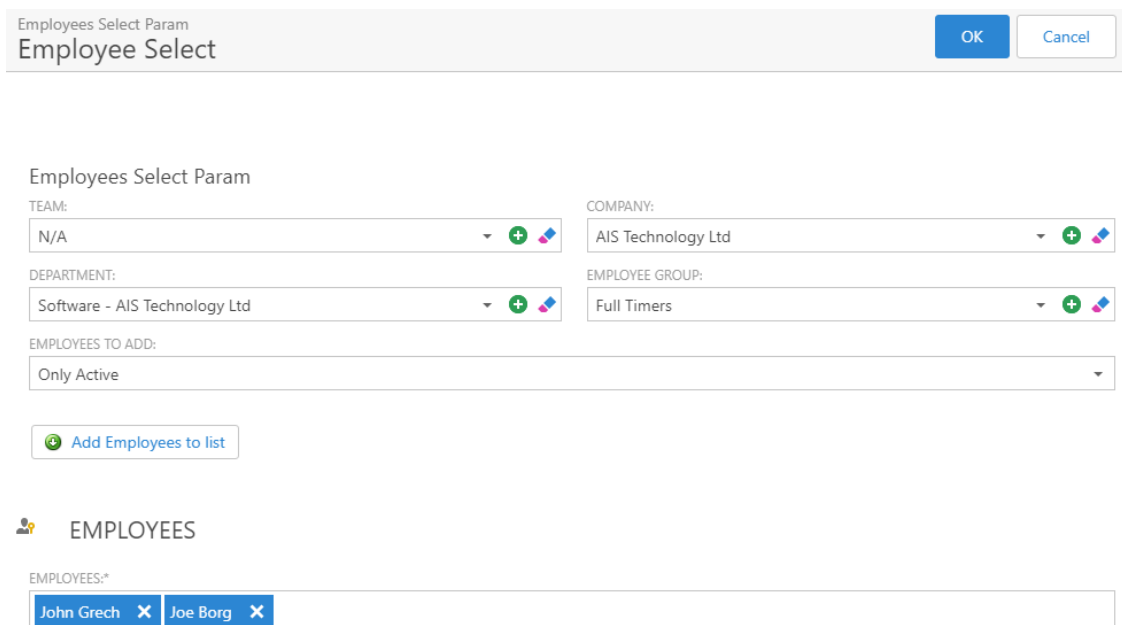
Figure 82: Roster Designer

5.4.2   Selecting Employees

Once the necessary Rosters have been set up it is time to select the employees, so that later on you will be able to assign shifts.

To select employees, click on 'Add Employees' ⊕ button, and you will be navigated to the Employee Selection window, as shown in Figure 79 below.

Figure 83: Employee Selection

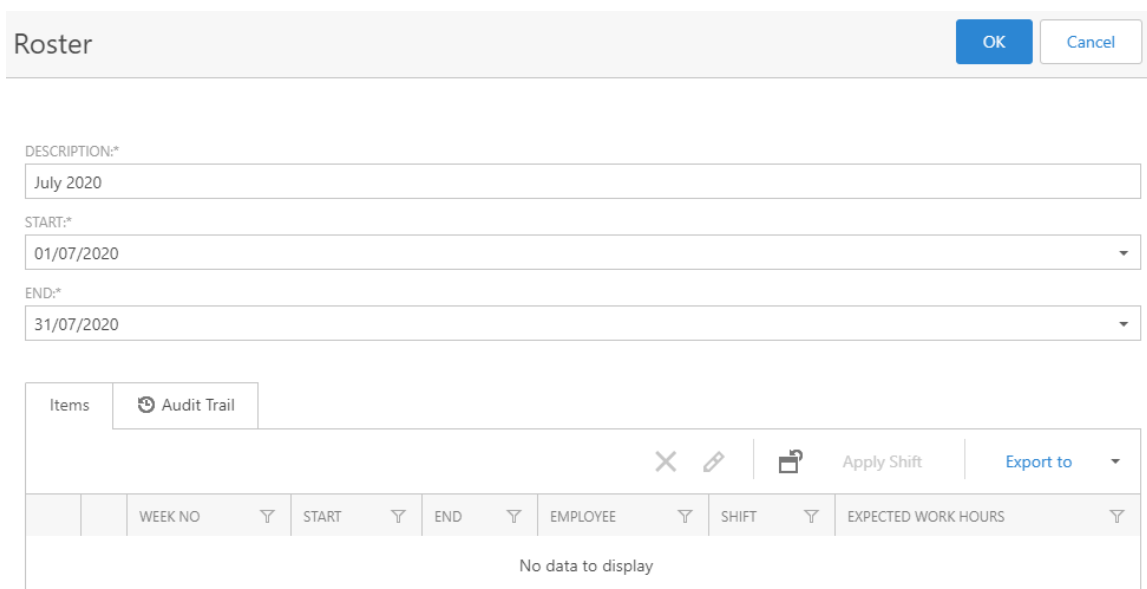The following are the fields and parameters that are available for the selection of employees: 'Team', 'Department', 'Company', 'Employee Group' and 'Employees To Add'.

One can have a combination of all the options available to select the employees.

When completed, press 'Add Employees to List' and 'OK' to add employees in the Roster Designer view, as shown in Figure 80 below.

Figure 84: Roster Designer populated with Employees

One will notice that there is no 'Save' button here. This is because within the Roster everything is automatically saved.

Note that when you click 'Close', the roster will be saved **only if you have allocated at least one shift to one employee**. When you select 'Close' you will be navigated back to the Roster page, as shown in Figure 81 below.

Rosters can be filtered by clicking the submenu ⋯ button. The filters available are 'All Rosters', 'Current Rosters', 'Future Rosters' and 'Past Rosters'. These will be viewed according to the date set for the roster, as shown in Figure 81 below.
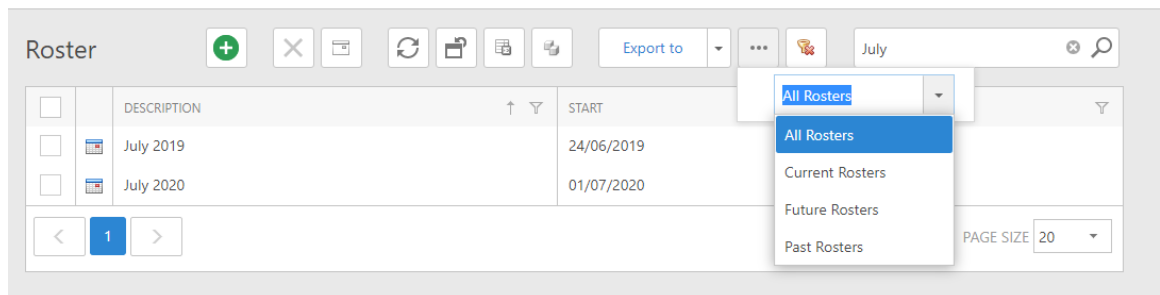
Figure 85: Filtering Rosters

5.4.3   Allocating Shift

In order to edit a roster, click on the calendar icon from the Roster page, as shown in Figure 82 below.
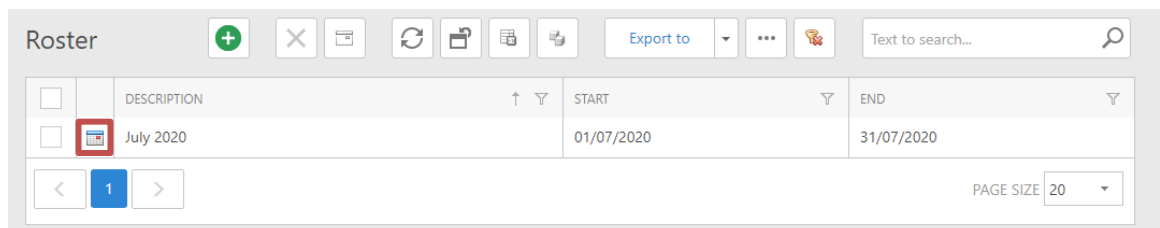
Figure 86: Edit Roster

As long as employees exist in the Roster Designer view, you will be able to start planning the roster. In order to do this, you have to click on the submenu ⋯ button, which allows you to use different functions to plan the roster.

As shown in Figure 83 below, navigate to 'Add Shift' which enables you to select what shift you are going to assign to the employee.

Figure 87: Add Shift

5.4.4   Repeating Shift

As shown in Figure 84 below, click on the shift you want the employee to work during the next days, navigate to 'Repeat' and select how much days to repeat. This will save time, as you do not have to assign the same shift per day.

Figure 88: Repeat Shift

5.4.5   Duplication Pattern

When a number of employees are going to work the same shifts for a number of days, one could use the cloning feature which is called 'Duplicating Pattern'. This will save time, as you do not have to assign or repeat every shift for each employee and/or per day.

As shown in Figure 85 below, the first thing you have to do is assign shifts to an employee (this is going to be the source employee).

Figure 89: Source Employee

The next step is to select the employees that are going to work with the same pattern of shifts, as shown in Figure 84 above, by checking the box adjacent to them ☑ . If the top left checkbox is selected, then all the employees on the page are selected. After you have selected the employees, click on the 'Duplicate Pattern' ⬚ button, and the Duplicate Roster Pattern window will appear, as shown in Figure 86 below.

Figure 90: Duplicate Roster Pattern

The following are the fields and parameters that are available for the duplication pattern:

Source Employee	Source employee which will contain the shift and pattern for a defined period (Roster).

Duplicate Roster Param:

Apply Holidays	If a holiday exists within the 'Target Range Start' and the 'Target Range End', do you want to apply shifts on that particular holiday? (Yes or No)
Source Range Start	The Source's start date within the Roster that one will be cloning from.
Source Range End	The Source's end date within the Roster that one will be cloning to.
Target Range Start	The Target's start date within the Roster that one will be cloning from.
Target Range End	The Target's end date within the Roster that one will be cloning to.
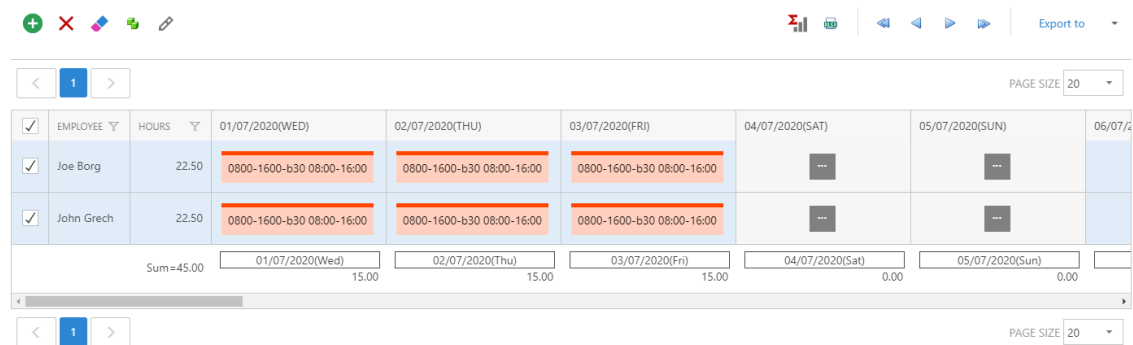
When completed, press 'Ok' to duplicate the pattern for all the selected employees.

Figure 91: Final result Roster Pattern

5.4.6   Roster: Export to Excel

Once the Roster is defined with all employees, shifts and patterns, the administrator has the choice of either exporting the information of all employees into one Excel file or otherwise exporting to an Excel file containing separate tabs for all employees.

To export all employees into one Excel file, the administrator needs to select the employees in the Roster (tick-box) and then click on the 'Export to' button and selecting XLSX file at the bottom of the list as illustrated below:
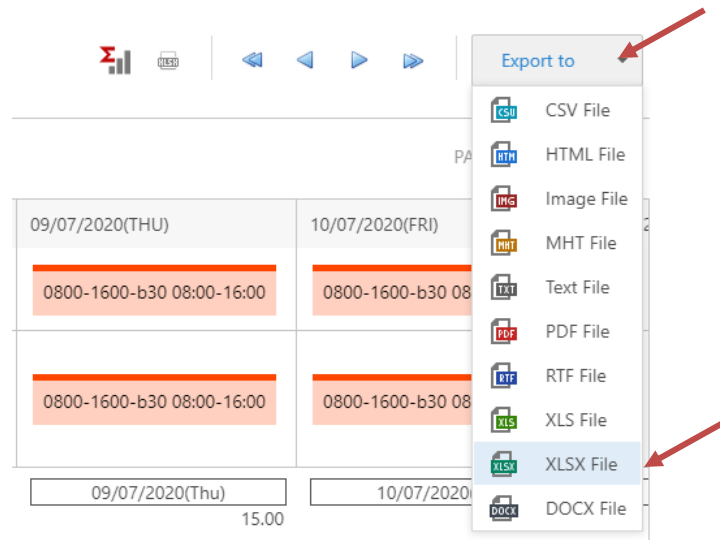
Figure 92: Export Roster

To export to an Excel file containing separate tabs for all employees, the administrator needs to select the employees in the Roster (tick-box) and then click on the [XLSX icon] button found in the title bar.

5.4.7   Roster: Chart by Employee Designation

If the field called 'Employee Designation', if the Employee Record card is populated with valid information, then one can issue a chart on a daily basis that illustrates the types of employees that are present on an hourly basis.

This is a very useful feature and as an example can be used to check that the Roster has placed the required number of specific employees to cover a shift.

Once defined, simply click on the ![button] button found on the title bar and select the day you wish to view. Refer to the sample below which clearly highlight the number of Technicians and Chief Engineers that are rostered for a specific day:
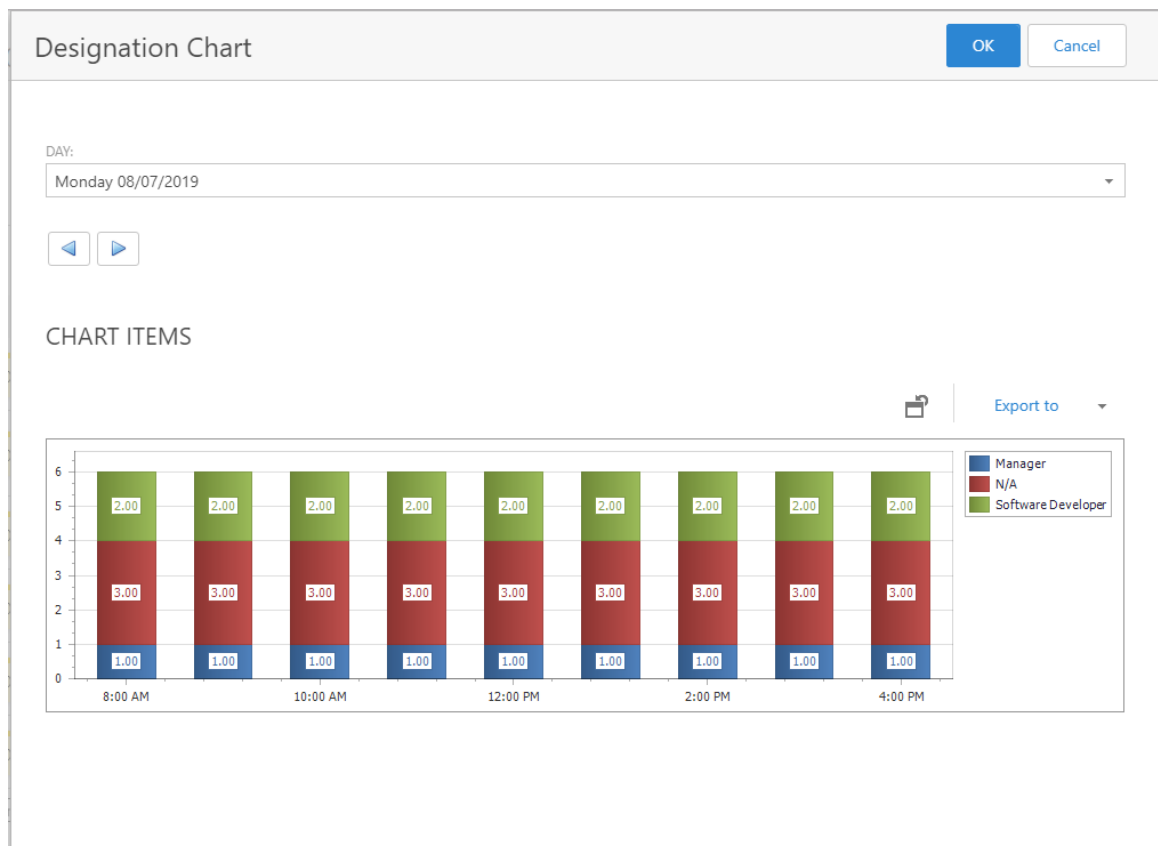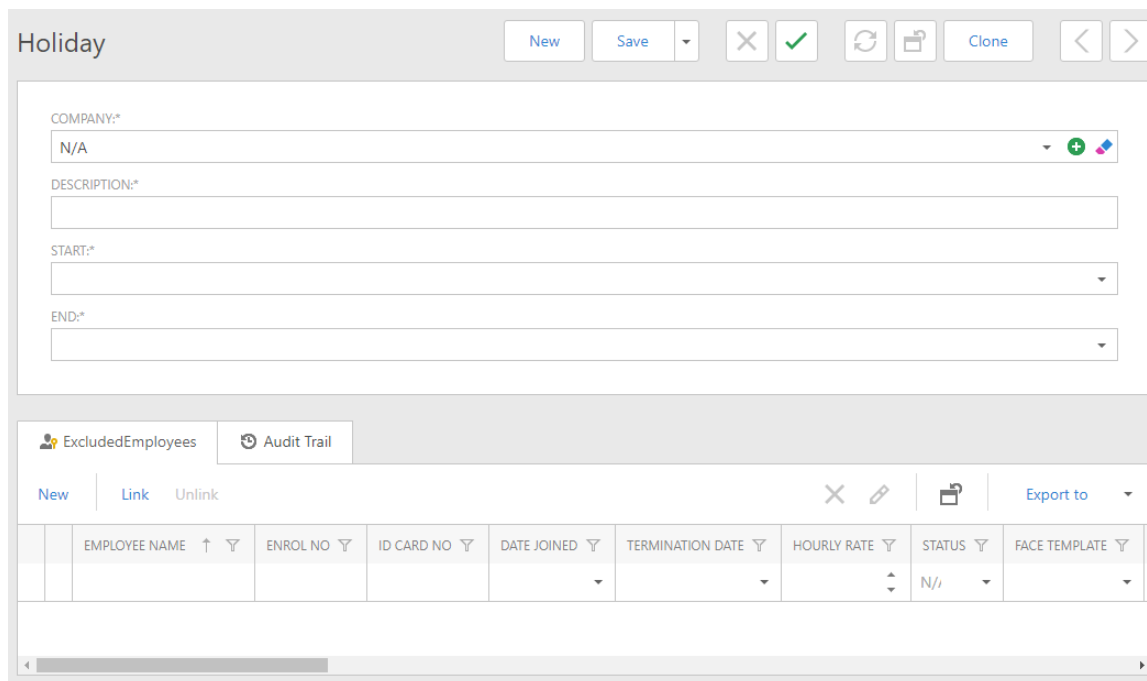
Figure 93: Employee Designation Chart

5.4.8   Holidays

To define public holidays and shut down periods per company, the administrator needs to click on 'Holiday' in the 'Schedules & Rosters' section.

Click on the 'New' button and the wizard in the below figure 90 will be displayed:

Figure 94: New Holiday

The following fields need to be inputted:

Company	Select the Company from the drop-down list
Description	Enter the description of the Holiday
Start	The Start Date of the Holiday
End	The End Date of the Holiday

It may also be noted that there exists the option to exclude particular employees from a given Holiday. This means that the excluded employees will continue to work as normal and will not be affected by the specified holiday.

Click on 'Save & Close'.

Once the administrator has defined all the holidays/shutdown periods for one company, he/she can use the cloning tool to copy the records over to other companies under the same subscription if they apply.

To clone, the administrator must select all the holidays (select tick-box next to Holiday) and then click on the 'Clone' button. Next, link to the company or companies which need to have the same defined holidays. Click on 'Ok' and all the holidays will be replicated for the linked companies.

5.4.9 Apply for Leave through the Roster.

It is possible to submit a new Leave request through the 'Roster' page. Begin by clicking 'Roster' in the Navigation Pane and selecting 'Edit Roster' for the roster you wish to review.
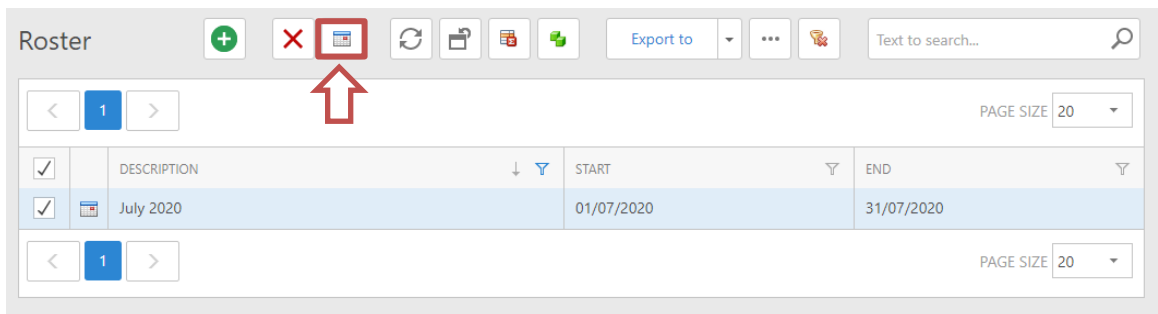
Figure 95: Roster list

Once you have entered the Roster view, click on the icon within a given date and click 'Add Absence Entry'.
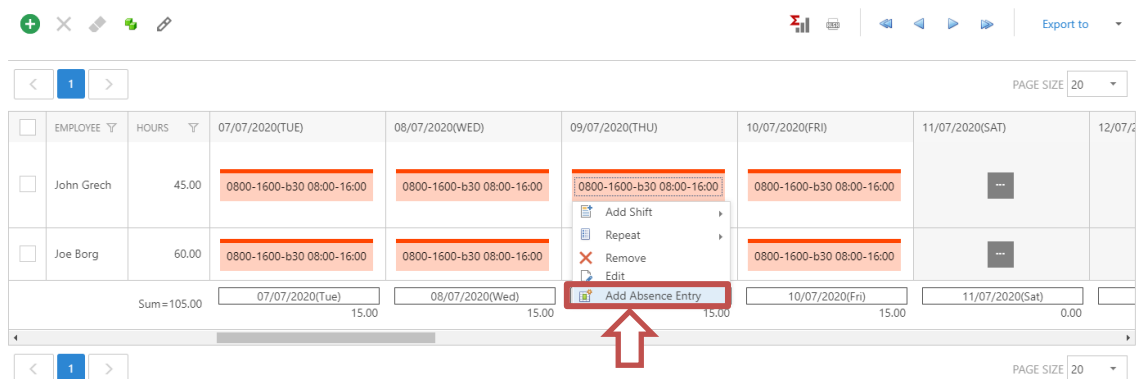
Figure 96: New Absence Entry

Upon selecting 'Add Absence Entry', you are provided with the form for creating a new Leave request. This form is just like the other Leave request forms discussed in the 'Leave' section, allowing you to carry out the Leave request submission directly from the Roster.

5.4.10 Calc. Summaries

Once all the rosters have been defined and the employee punches (actual) are being recorded in Spektrum, one will need to run a comparison between the actual punches and the forecast (Rosters).

This means that Spektrum will essentially convert all the raw punches to attendance records whilst paying special attention to the parameters defined in the Company and Shift Punch Control records.

Apart from these attendance records, 'Calc. Summaries' will also generate the Daily Summary, Period Summary and Exception Report for the period defined within the Roster.

To run this functionality, one would have to select a Roster or multiple Rosters, ideally within the same date range by selecting the tick-box next to said Roster.

Then click on the 'Calc Summaries' button, as shown in Figure 94 below.

Figure 97: Calc. Summaries

This will bring up the following wizard:

Figure 98: Calculation Parameters

Start	The start date of the Roster period.
End	The end date of the Roster period.
Min Duration Mins	The accepted minimum time in minutes between one punch and another. Used to curb for example multiple 'In' punches for an employee. Spektrum will accept the first punch as valid and will mark the remaining punches as errors.
Max Duration Mins	The maximum number of minutes that an employee works in a single day. Spektrum will be expecting a series of punches, per employee, within this time frame.
Use Work Codes	'Yes' if employees are selecting 'In' and/or 'Out' on the physical Reader. This is a must especially if employees work on night shifts.
	'No' if the employees are simply authenticating themselves without choosing a code to denote their action.
Default Attendance Type	Normally set to 'General'. If one has different defined work codes on the reader to depict say 'Break-Start', 'Break-End', 'Meeting-Start', 'Meeting-End', then one could define different Attendance types to map these codes.
OT Period Calculation	The number of days that Overtime and Short Hours should be calculated on. For example, daily (1), weekly (7), fortnightly (14).
Non Workcode Mode	If the Readers are not set with Word codes, then one will need to use these options to calculate the attendance records:
	By Duration – Find and report all the punches per employee and mark as 'In' and 'Out' according to the time stamps. Naturally an even number of punches is expected.
	First/Last – Simply calculate and report the first recorded employee punch as 'In' and the last recorded employee punch as 'Out' Ignore all other punches found in between, if available.
First/Last Split Time	Used in conjunction with Non Workcode Mode. If only one employee punch is found on a specific date, then mark as an 'In' punch if < mid-point defined or mark as an 'Out' punch if > defined mid-point.

By default, all the employees linked to the Roster will be selected for the 'Calc Summaries' routine.

The operator then needs to click on 'Ok' button situated on the top-right and the process will run. Once completed Spektrum will inform the user.
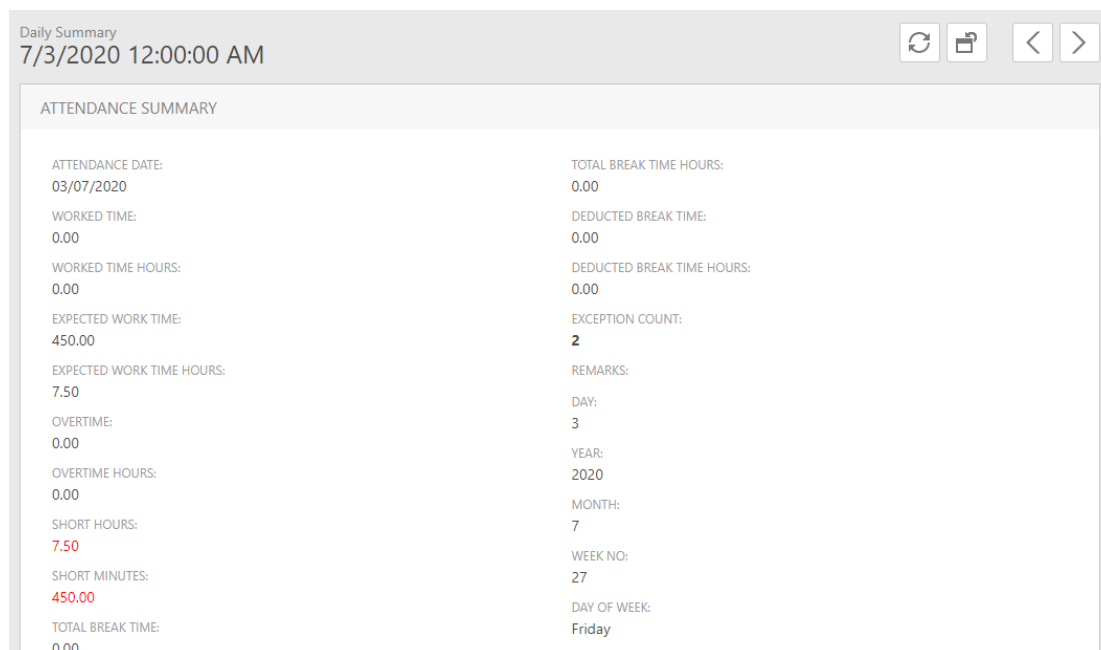
5.4.11 Daily Summary

Once the 'Calc Summaries' has been run, then one has access to the Daily and Period Summaries for the Date range that has been calculated.

The Daily Summary presents the operator with a list view containing the following fields:

Attendance Date	Date of Attendance
Enrol No	Employee Punch Clock number
Employee	Employee Name and Surname
Expected Work Time Hours	Expected Shift Hours to work on the day
Worked Time Hours	Actual hours worked on the day
Deducted Break Time Hours	Decimal format of Break Reduction on the day
Short Hours	Number of hours worked less than expected hours
Overtime Hours	Number of hours worked above the total shift hours
Exception Count	Number of attendance exceptions flagged on the day
Remarks	General Remarks

Furthermore, the administrator can click on any record in the list to obtain detailed attendance information:

Figure 99: Daily Summary

Additionally, there are two tabs at the bottom labelled 'Attendances' and 'Attendance Exceptions'.

'Attendances' lists all the recorded 'Attendance Start' and 'Attendance End' entries for the employee for the specific day.

'Attendance Exceptions' will list any shortcomings (worked less, absence) or benefits (Overtime) for the employee and specific day.

5.4.12   Period Summary

The Period Summary is similar to the Daily Summary with the following additional features:

The date ranges illustrated in the list view are grouped according to the 'OT Period Computation' figure that was used when calculating the Summaries for the Rosters.

For example, if the number 7 was used, then the Period Summary Report will be grouped on a weekly basis for the entire defined Roster period.

Secondly, in-built in this Report is the ability to approve and/or reject overtime hours for the employees.

5.4.13 Period Summary – Overtime Approval

The fields available within the Period Summary to handle the Overtime Approval Feature are the following:

OT Minutes	Total overtime minutes for the employee
OT Hours	Total overtime hours for the employee
Approved OT	Approved overtime in minutes
Unapproved OT	Balance pending of overtime in minutes
OT Approved By	Username of Person approving the overtime (Signed-in User)
OT Approval Status	Pending, Approved, Rejected

Within Period Summary, the administrator can partly approve a number of minutes, leaving a balance, can approve the whole number of minutes declared as overtime or simply reject the overtime balance for an employee.

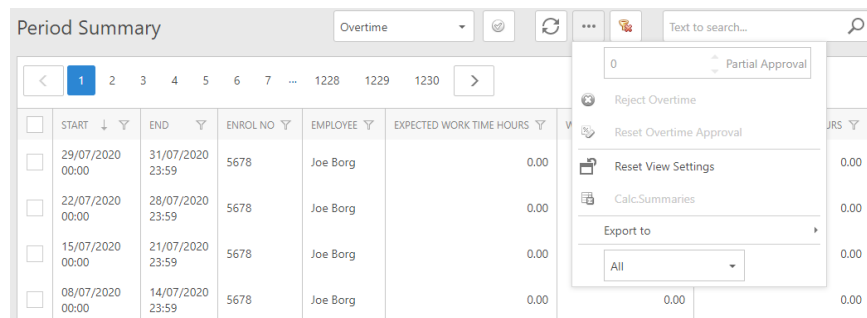For approval and rejection, the administrator will use the controls at the top of the screen:

Figure 100: Period Summary

To approve the whole balance, the administrator needs to select one or more records (using the tick-boxes) and simply click on the [button] button.

If this was performed by mistake, the administrator can undo the approval by re-selecting the record or records and then click on the [button] button. This will reset the overtime back to its original state i.e. pending approval.

To approve for example 1 hour out of 2 hours declare overtime, the administrator would key in 60 (minutes) in the space next to 'Partial Approval' and click on the Partial Approval button. The remaining balance of 60 minutes will then appear in the field called 'Unapproved OT'.

6.0 Reports

6.1 Attendance Report

This report is provided as a standard template and is used to generate the attendance records, primarily sorted by Enrol number and then by date. The report will show the "In" and "Out" punch times, as well as the duration, per employee.

Click on 'Reports' in the Navigation Pane and the report 'Attendance by Employee' will be displayed on the main screen. Now click on the file and a wizard will appear, prompting one to enter the desired date range:
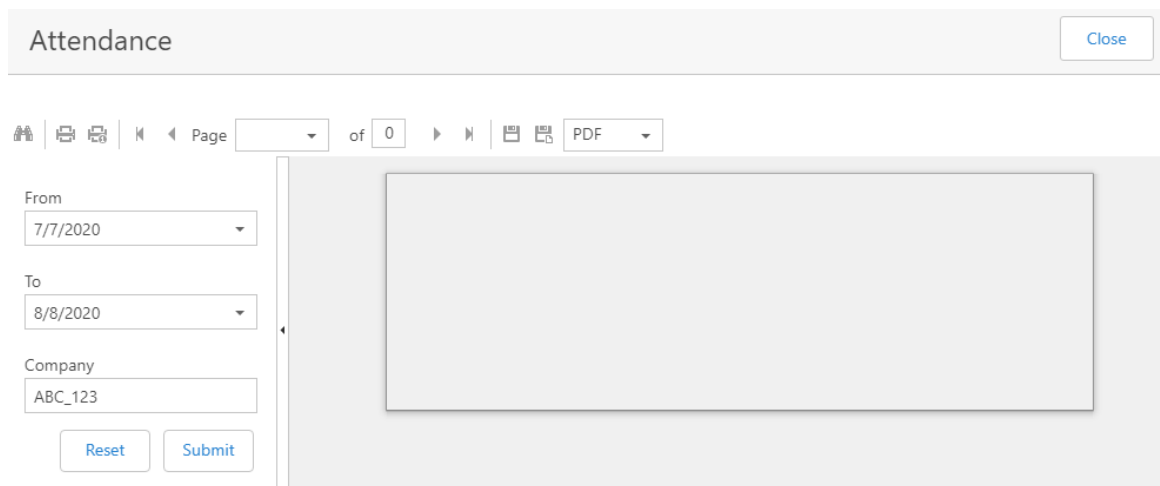

Figure 101: Attendance Report Date Range

Click on the 'Submit' button to confirm details entered and generate a report. Reports may be exported by selecting the format from the dropdown (PDF by default) and clicking the first floppy disk save icon.

6.2 Who's In Report

This report allows you to check for employees that have punched in from 00:00 of the current day and have not yet punched out, or rather employees who are currently at work.

Click on 'Who's In Report' under the 'Reports' tab in the left hand side navigation menu.

You then have the functionality to export the report by using the 'Export To' button at the top.
In order for this report to function properly, you have to be using work codes and employees have to adhere to punch in and out policies.

7.0   Leave

If you have access to Leave, then in the Navigation Pane you will see the following features enabled (not greyed out) and available:
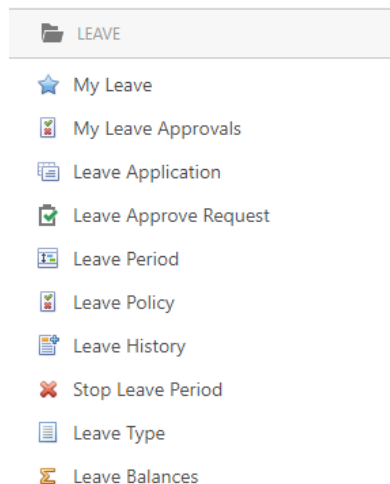

Figure 102: Leave

If the features above are greyed out, then it means that you are not subscribed to this module. Contact AIS for information on enabling this module.

7.1   Set up Leave

7.1.1   Leave types.

It proves ideal to begin with the setting up of 'Leave Types', being one of the first items involved in the management of Leave.

One must first consider the types of Leave that may be taken by employees of the company. By means of creating Leave types that appropriately coordinate with company structure, the optimal set of Leave types may be added for Leave management. The number of possible Leave types is not limited, therefore as many Leave types as is necessary may be added.

To create a Leave Type simply click on 'Leave Type' in the Navigation Pane and click on 'New'.

The administrator will need to provide a reason for Leave. Supplying a reason that makes sense proves beneficial as a means of allowing employees to properly express their need for Leave through each request.
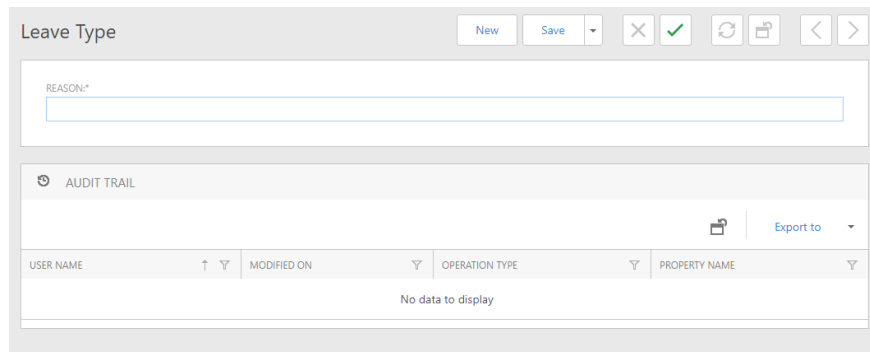
Figure 103: Create Leave Type

When completed, one must click on 'Save and Close'.

7.1.2   Define Leave Admins.

It is essential to define Leave admins before moving on to setting up the remaining parts for Leave Management.

Leave Admins may be defined at three levels:

- Company Level
- Department Level
- Employee Level

To begin with Company level, this means that a Leave admin will be able to manage Leave requests across an entire company.

Start by clicking on 'Company' in the Navigation Pane and editing the company you would like to assign with a Leave Admin. Scroll to the bottom and you will see 'Leave Admins' as a section of the table found at the bottom of the page. Click 'Link' to add an existing employee as a Leave Admin or 'New' to create a new employee who will serve as a Leave Admin at company level.

Next is Department level, implying that a Leave admin will be permitted to manage Leave requests throughout a given department.

To set a department Leave admin, click 'Department' in the Navigation Pane and edit the department you would like to assign to a Leave Admin. Scroll to the bottom and you will once again find a 'Leave Admins' section within the bottom most table on the page. Click 'Link' to add an existing employee as a Leave Admin or 'New' to create a new employee who will serve as a Leave Admin at department level.

Lastly, it is possible to directly assign an employee to a Leave Admin. Linking an employee directly to a Leave Admin will give a particular Leave Admin permission to manage the Leave requests of a linked employee.

This is done by clicking on 'Employee' in the Navigation Pane and editing the employee to be linked. Once again, scroll to the bottom and you will find the 'Leave Admins' section in the bottom most table. From this section you may link the employee to another employee who is to serve as a Leave admin.
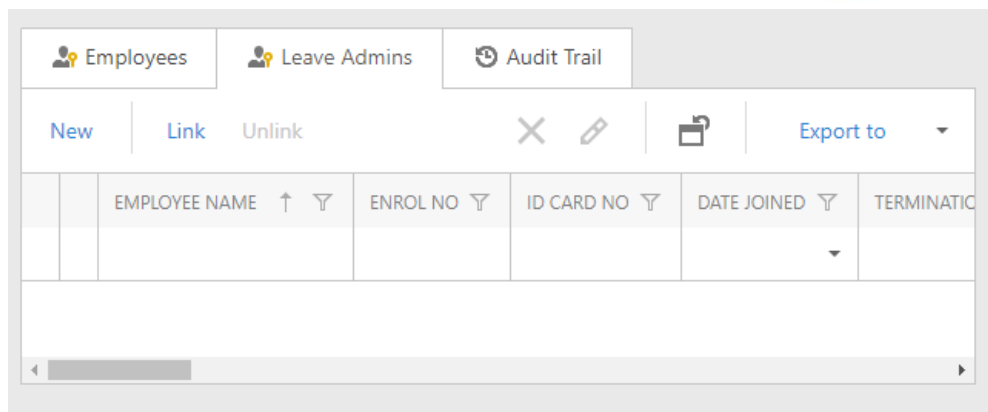
Figure 104: Leave Admins

7.1.3 Create a Leave Policy.

To create a Leave Policy, click on 'Leave Policy' in the Navigation Pane and click 'New'.

Firstly, enter a policy name, specify the Leave type to be added to for time in lieu and the Leave type hours to be deducted if less hours are worked.
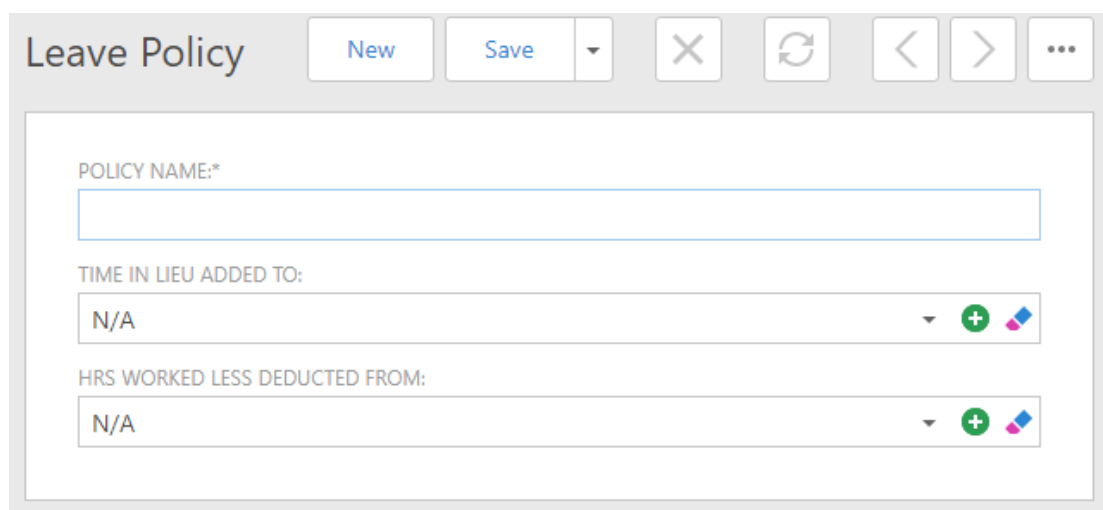

Figure 105: Leave Policy

Secondly, click 'New' under Leave Type Policies to open the Leave Type Policy form.

Figure 106: New Leave Type Policies

Figure 107: Add Leave Type Policy

Fields marked by an * are compulsory. The only compulsory field being Leave Type.

Approver	The application can be approved by any defined Leave Admins or all defined Leave Admins.
Max Leave Entitlement	The maximum number of hours that can be applied for.
Min Leave Entitlement	The minimum number of hours that can be applied for. Cannot be less than 1.
Min Days in Advance	The minimum number of days in advance that an employee can apply for leave.
Min Days in Advance Amount	The minimum block amount of leave (in hours) that an employee can apply for.
Max Days in Advance	The maximum number of days in advance that an employee can book leave for.

Cancellation Allowed	Certify if an employee is allowed to cancel a leave application.
Cancellation Days Before	If cancellation is allowed, up to how many days before the leave is due to commence, can the employee cancel?
Carry Over	Certify if unutilized leave can be carried forward to next year's balance.
Carry Over Max Amount	If allowed, the maximum number (in hrs.) that can be transferred over to next year's entitlement.
Carry Over Expiry Days	If permitted, the maximum number of days allowed for this carried-over balance to be utilized.

If you set 'Carry Over' to 'Yes' and add a value in 'Carry Over Expiry Days', the carried over balance will be recorded as a separate entitlement, and be consumed first, before moving on to the main entitlement for a Leave Period. It is important that you add an amount other than 0 for the 'Carry Over Expiry Days' if you want carried forward and new entitlement to be displayed separately, otherwise these will be combined into one total balance.

When completed, press 'OK' to add the new Leave Type policy. This process is to be done for each of the necessary Leave types, meaning that there should be at least one Leave type policy for a given Leave type.

Once you are done, click 'Save and Close' to exit.

7.1.4   Configure a Leave Period.

In order to view Leave Balances, it is necessary for a Leave Period to be defined. Begin by clicking 'Leave Period' in the Navigation Pane and 'New'.
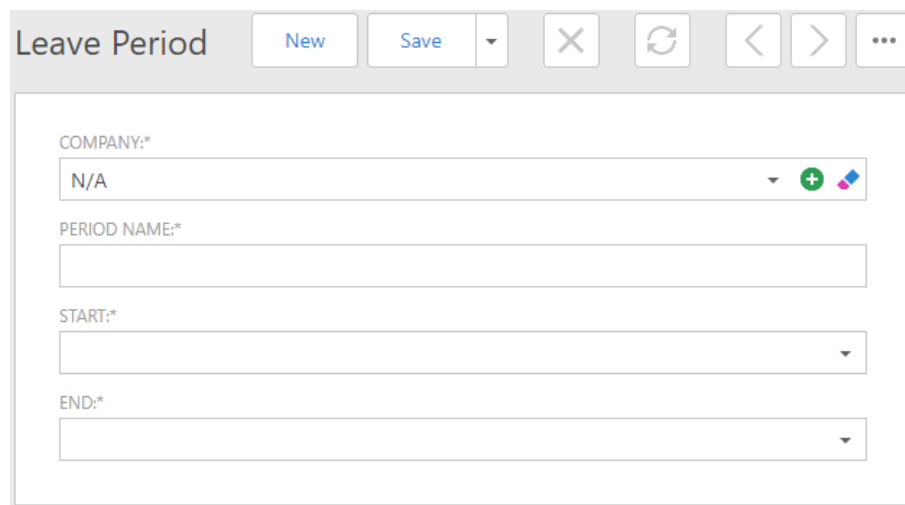
Figure 108: Leave Period

Fields marked by an * are compulsory. These are Company, Period Name, Start and End.

Next click 'New' under Employment Type Options to add Employment Type Leave Period Options.
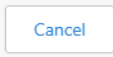
Figure 109: New Employment Type Leave Period Options

*Figure 110: Employment Type Leave Period Options*

All four fields in the form are compulsory being, Absence type, Employment type, Leave Hours, and Schedule type.

If you set the 'Schedule Type' to 'Each Month', you must also add a Leave Period Accrual Schedule Item. This is done to apply the Leave hours set as the starting total at the beginning of each period.

Important to note, if you are going to set each employee's Leave balance based on the hours brought forward from a previous period, the field Leave Hours for the Employment Type Option

and Accrual Schedule item are to be left as zero. Importing of previous Leave Balances is explained in a later sub-section under the Leave History section.

Figure 111: Leave Period Accrual Schedule Item

It is important that for each Leave type and Employment type, an Employment Type Leave Period Option is created. Therefore, if there exists an Employment type named "Full Time" and five Leave types, then you must include five Employment Type Leave Period Options with each Leave type linked to the Employment type "Full Time".

Once you are done, select the schedules and click 'Calculate Schedules' to add the new entitlements to the leave periods.

Figure 112: Calculate Schedules

Click 'Save and Close' to exit.

You also have the functionality to clone a leave period from one year to the next. In order to do this, select the leave period you want to clone, and click the 'Clone' button from the top nav.
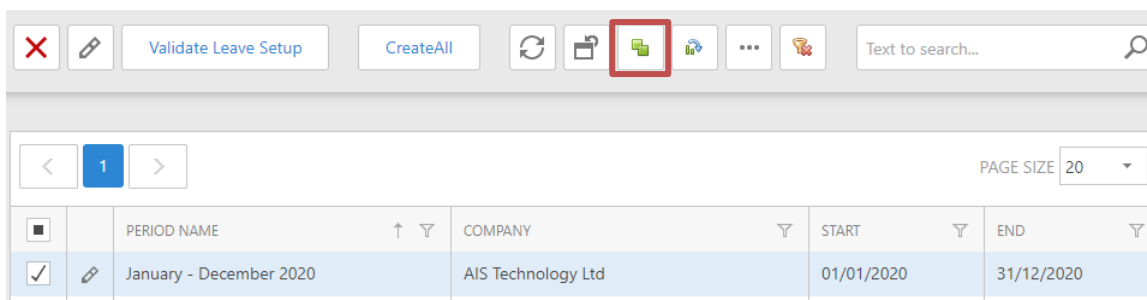

Figure 113: Clone Leave Period

You can also carry over Leave Balances to new periods. To do so, select the leave period you want to carry over from and click on the 'Balance Carry Over' button from the top nav.
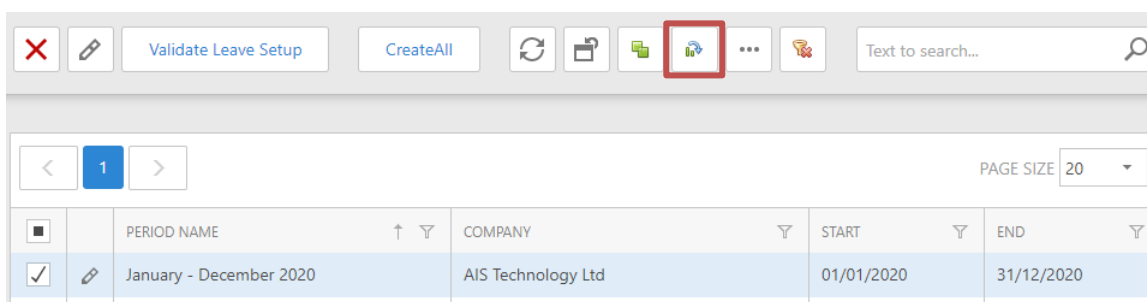

Figure 114: Balance Carry Over

Doing so will open the Leave Carry Over screen. Here you can select employees you would like to carry over leave for using the add and remove employee functions. Click 'Ok' to create the carry forward to the next leave period, starting on the next day following the end date of the previous period. If balance carry over is not working, make sure carry over is allowed for the desired leave type in your Leave Policy.

Figure 115: Leave Carry Over Menu

7.1.5   Adding a Stop Leave Period.

Once the Leave period, policy and admins have been set up, you may additionally add one or multiple Stop Leave Periods. A 'Stop Leave Period' consists of date/s where Leave is not allowed. Therefore, any employees applying for Leave in this period will be prevented from doing so.

To add a Stop Leave Period, click on 'Stop Leave Period' in the Navigation Pane and click 'New'.
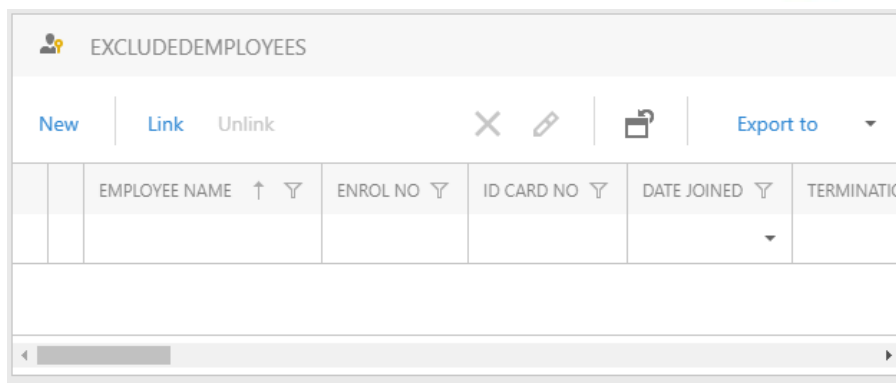
All field are compulsory being, Company, Period Name, Start, and End.

Figure 116: Stop Leave Period

Additionally, there is the option to exclude employees from this Stop Leave Period, allowing them to apply for Leave during this period.

Figure 117: Excluded Employees

The above figure shows the table from which employees may be excluded from the Stop Leave Period. This may be done by clicking the 'Link' button and selecting the employee/s to be excluded.

Once the form is completed, click 'Save and Close' to exit.

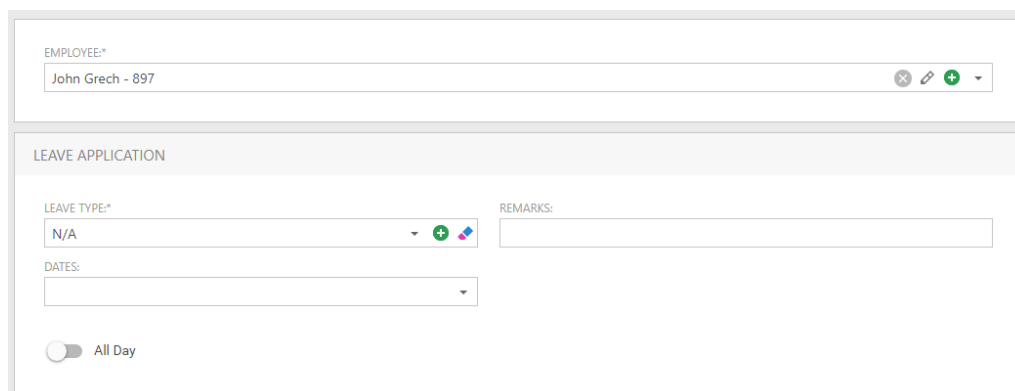## 7.2   Leave Request.

7.2.1   Add Leave Request

Click 'Leave Application' in the Navigation Pane and click 'New'.

An admin user may select any employee from the leave dropdown and request leave on their behalf.

Select a Leave Type you wish to request. This may be done by selecting an existing Leave type from the drop-down menu.

Provide the date/s you wish to request for Leave. Requested Leave may range from hours taken on a single day to multiple days of Leave.

Optionally, add any remarks that may serve as reasoning for your Leave request.

Figure 118: Leave Application

Figure 119: Booking a single leave day

Figure 120: Booking multiple leave days

Figure 121: Book leave by Start and End Time

Once you have completed the form, click 'Save and Close' to exit. Two emails will then be sent, one to the leave requester, and another the leave admin, who has the ability to approve or deny the request.

7.2.2   Cancel a Leave Request.

To cancel a Leave request, simply click 'Leave Application' in the Navigation Pane and click the ⬅ icon found on the row of the Leave request you would like to cancel and click 'OK' to confirm cancellation.
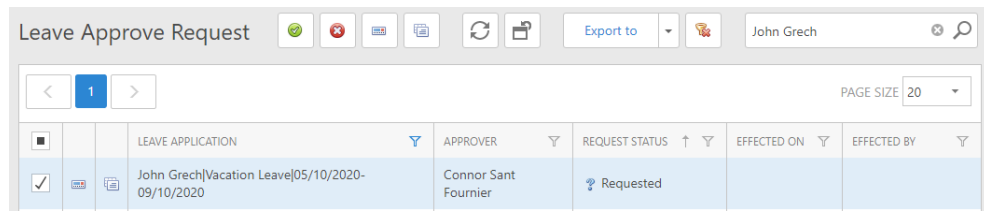
					EMPLOYEE ▽	COMPANY ▽	DEFAULT_DEPARTMENT ▽	REQUEST STATUS ↑ ▽	LEAVE TYPE ▽	START TIME ▽
☐	✎	⌨	🗐	⬅	🗎	John Grech	AIS Technology Ltd	Software - AIS Technology Ltd	❓ Requested	Vacation Leave	01/07/2020 00:00

Figure 122: Cancel Leave Request

7.2.3   Approve or Deny a Leave request.
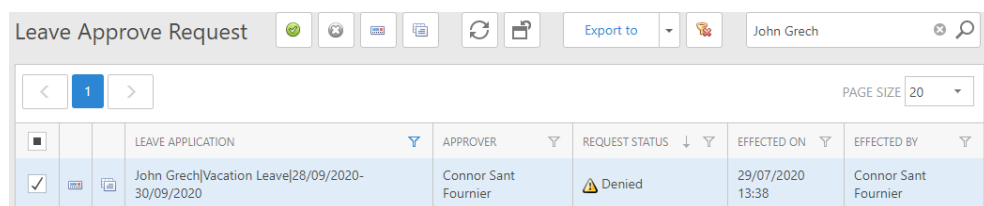
In order for a Leave admin to manage employee Leave requests, click 'Leave Approve Request' in the Navigation Pane. Select the request you wish to manage and the Approve or Deny icons will become available.

Figure 123: Leave Approve Requests

After selecting whether to approve or deny the request, your selection may be changed by repeating the same process. The selected option is now greyed out whilst the alternative is available. By selecting the alternative choice, the new selection overwrites the old, changing the request status of the Leave application.

Figure 124: Changing Leave Request status

7.2.4   Export Leave Requests

Click on 'My Leave' in the Navigation Pane and scroll to the Leave requests table. Now select a file type from the drop-down menu Export to.

Figure 125: Export Leave Requests

Once clicked, the selected file type will commence download, with the result being a table with the same data as what is shown on the web application table.

7.3   Leave Approvals.

7.3.1   View Leave Approvals

If a Leave admin wishes to view the Leave requests they have affected, they may do so by means of accessing 'My Leave Approvals'.

Start by clicking 'My Leave Approvals' in the Navigation Pane. Next, enter the Start Date, End Date, and specify the Request Status from a drop-down menu.
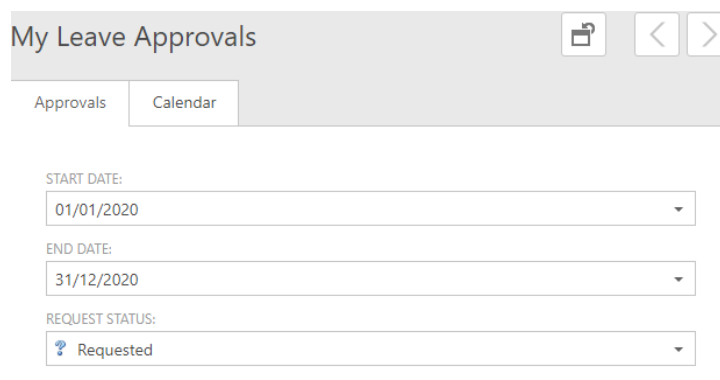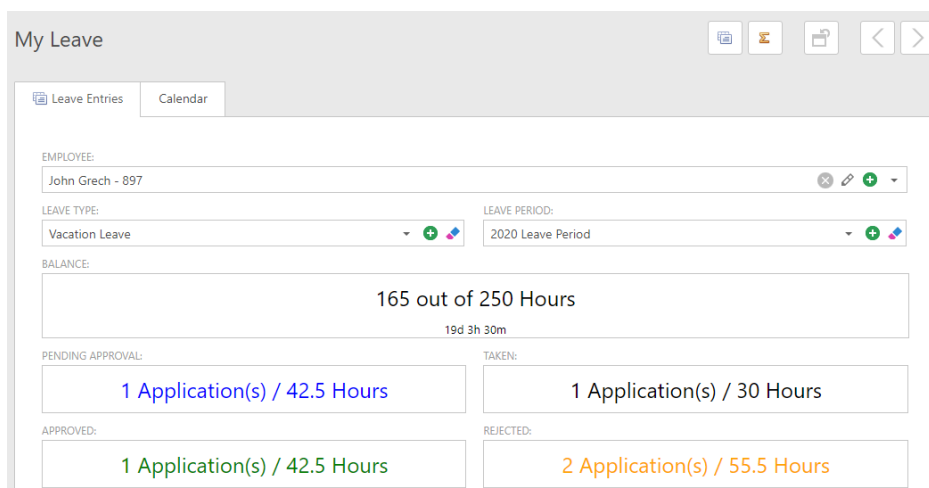
Figure 126: My Leave Approvals

Once completed, a table will be generated containing all the Leave requests of the specified request status that the Leave admin has affected.

7.4 My Leave

There exists a page from which an employee may view their Leave balance for Vacation Leave, along with having Leave requests categorized by Pending, Taken, Approved, and Rejected. As an admin, you will have access to the balances for all employees and their leave types, whereas a default role employee will be only able to see their own vacation leave balance.
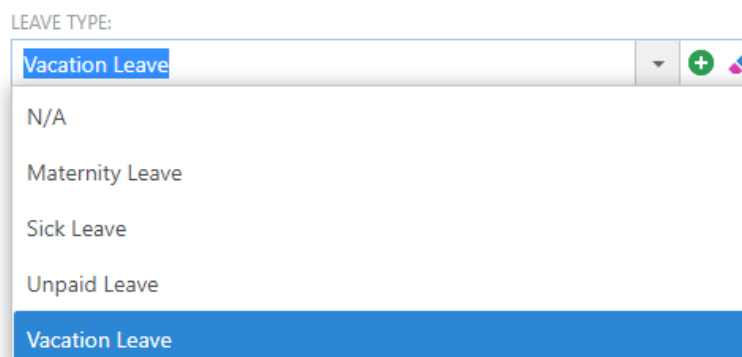
Figure 127: My Leave

From 'My Leave', you may select a Leave Type from the drop-down menu.
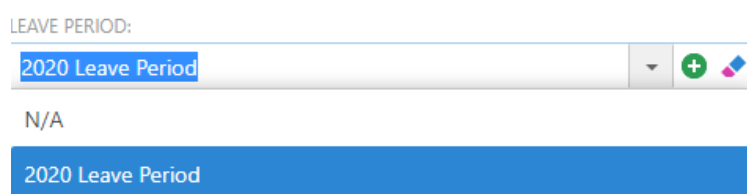
Figure 128: My Leave Type

A Leave Period is to be selected from a drop-down menu. The requests associated with the selected Leave type are then displayed for the chosen Leave period.

Figure 129: My Leave Period

Pending approvals are requests made that have yet to be handled by a Leave Admin.

Figure 130: Pending Approvals

Taken consists of any Leave that has been successfully carried out in the past.

Figure 131: Taken

Approved includes Leave requests that have been approved and confirmed by Leave admins.

Figure 132: Approved

If Leave has been denied by Leave admins, it is therefore invalid and falls under the Rejected category.

Figure 133: Rejected

Apart from the balances display, there are also two icons that you may select on the top right of the page.
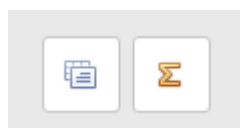
Figure 134: My Leave Icons, New Leave Application (Left) and Balance Details (Right)

The first, left-most icon allows you to move directly to a new Leave application. This means that you may create a Leave request straight from 'My Leave'.

Secondly, the right-most icon opens 'Balance Details'. This feature will be discussed in detail within a dedicated section.

Moreover, you may view a list of all your Leave requests from a table that is generated at the bottom of the page.

Figure 135: List of Leave Requests

7.5   Leave History.

7.5.1   View Leave History

'Leave History' serves as a log for Leave balance transactions. This means that any Leave activities that take place with regards to Leave balances are automatically recorded and available for review from the 'Leave History' page.

Figure 136: Leave History

If a transaction is to be manually created, click 'New' and a form will be provided. From this form you are to provide the Employee name, Transaction Date, Leave Type, Amount of Leave hours, and any additional notes you may wish to add.

Figure 137: New Leave History

There also exists the option to edit each Leave transaction.
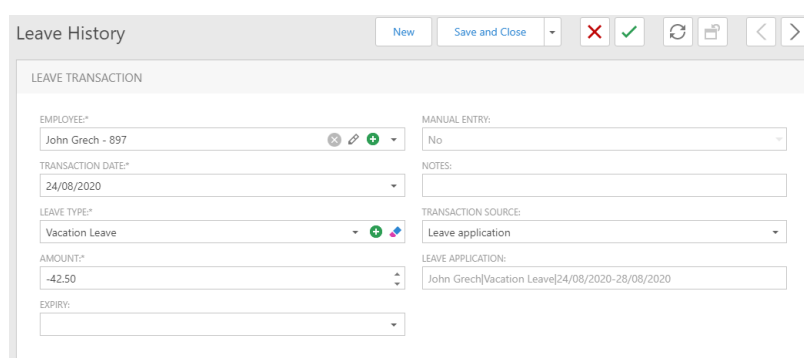
Figure 138: Edit Leave Transaction

The following fields are compulsory: Employee, Transaction Date, Leave Type and Amount.

Once complete, the changes made will overwrite the current Leave transaction with the new data provided.

7.5.2   Import Leave Balances.

In order to utilise Leave Balances that may have been in use prior to obtaining the Leave management module, you are to make use of the Import function in 'Leave History'.

Figure 139: Leave History Import

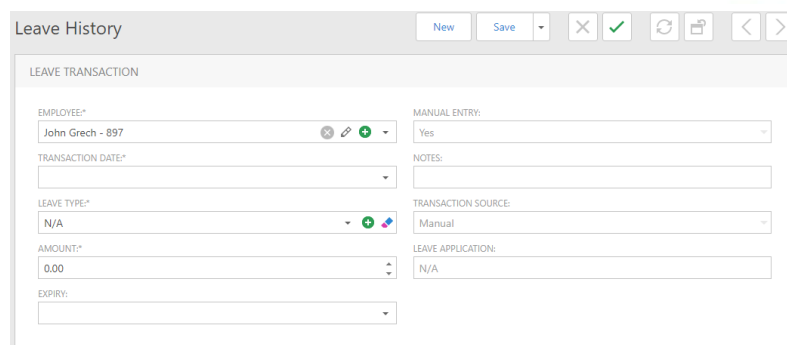Click 'Import' and you will be taken to a form. From this form select an input file that must be of CSV format. Also, the CSV file must have columns with headers in the following order:

- **Enrol No:** The unique punch clock number assigned to each employee through Spektrum.
- **TransactionDate**: The cut-off date for your Leave balances (Vacation, Sick).

- **LeaveType:** The type of Leave that is used in the transaction. E.g. Vacation Leave, Sick Leave. This has to match the descriptor defined within Spektrum.
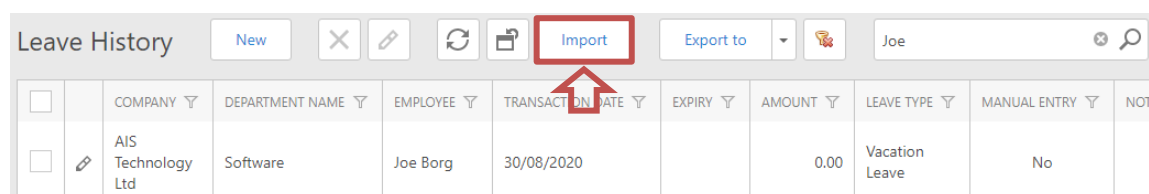- **Notes:** Any notes you would like to add as a reference to the transaction. E.g. Initial Balance.
- **Amount:** This is the remaining amount of Leave hours (in decimal) left from the cut-off date to the end of the period.

	1	2	3	4	5
1	Enroll No	TransactionDate	LeaveType	Notes	Amount
2	123	17/07/2020	Vacation Leave	Initial Balance	12

Figure 140: Template for Leave History Import

After selecting a CSV file, click 'OK' in order to confirm the import and save. Important to note is that the Amount field must be a quantity measured in hours. For example, a Leave balance of 1 day 4 hours with 8-hour shifts should be translated to 12 hours in the Amount field.

Your imported transactions are now uploaded and have been recorded as Leave transactions. The imported balances may be checked by performing a search in the 'Leave Balances' page. Instructions on how to perform such a search may be found in a dedicated section.

7.6 Leave Balances.

7.6.1 Check Employee Leave Balances

Click 'Leave Balances' in the Navigation Pane, enter a date in the 'As At' field, and select a Leave type.
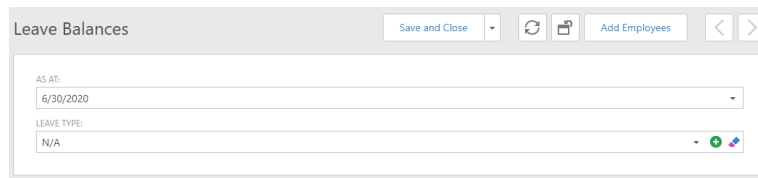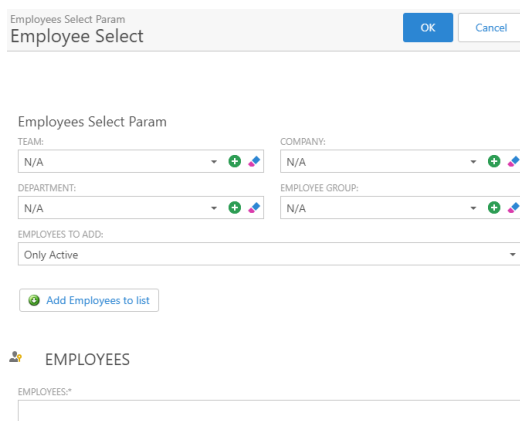

Figure 141: Leave Balances

In order to select which employees are to be shown on the balances table, click 'Add Employees'.

Now select which criteria to use in order to filter out employees, with the criteria being:

- Team.
- Company.
- Department.
- Employee Group.
- Whether to only select employees who are active or all employees.
- Employee name.

Once you have completed the list of employees you wish to add, click 'OK' and the employee balances should now be displayed.
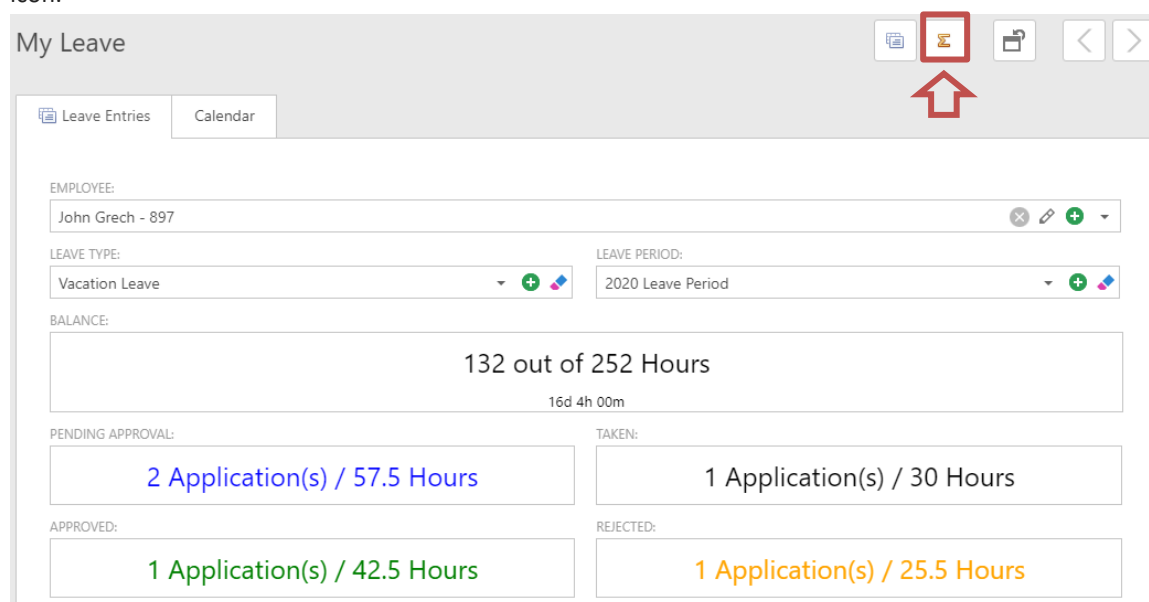
Figure 142: Employee Select

Click 'Save and Close' to exit 'Leave Balances'.

7.6.2   Check Leave Balance from My Leave.

This can be done by first clicking 'My Leave' in the Navigation Pane, followed by clicking the 'Balance Details' icon.

Figure 143: Balance Details icon in My Leave

Depending on the Leave type selected in 'My Leave', your Leave balance transactions will be shown for the given Leave type.

Figure 144: Leave Balance Transactions

Click 'OK' or 'Cancel' in order to exit 'Leave Balance' and return to 'My Leave'.

7.7   Calendar

7.7.1   View Leave with Calendar

Apart from the conventional view, employees may opt for a Calendar view in order to view and manage their Leave.

In order to access this feature, click on 'My Leave' in the Navigation Pane and click on the 'Calendar' tab.

Figure 145: Calendar tab in My Leave

Once clicked, you will be able to see a number of options. Firstly, you may select dates on the calendar itself. By selecting a date, the below view is filled with any Leave that may exist on the chosen date.
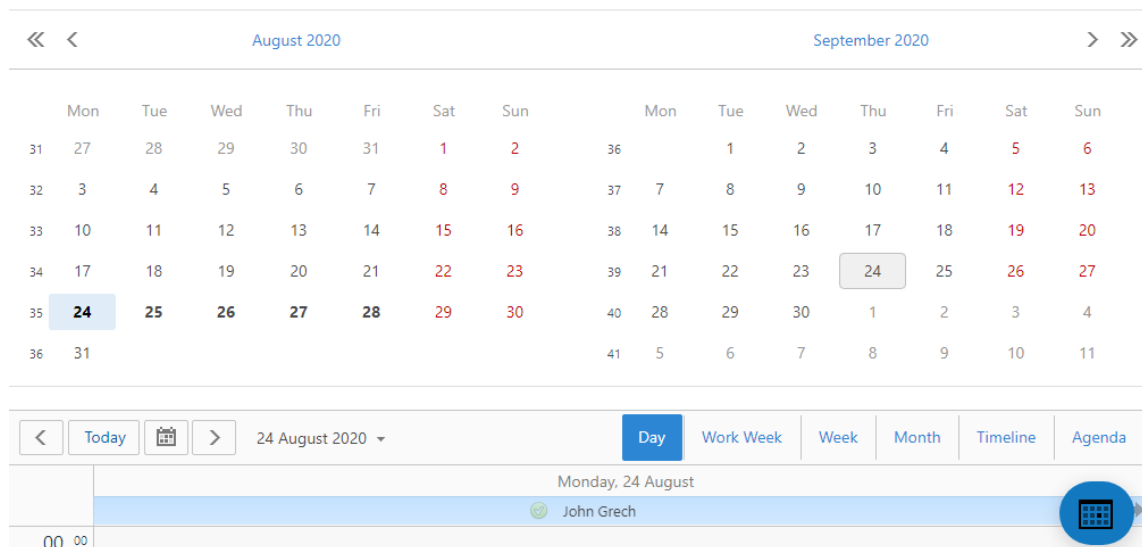
Figure 146: Calendar View

The display for Leave below the calendar may be organized in a number of ways, all that is required is to click on which of the options you would like to set.

Figure 147: Viewing options

The options for viewing Leave are categorized by:

- Day.
- Work Week.
- Week.
- Month.
- Timeline.
- Agenda.

Starting with Day, this option allows you to view Leave on a daily basis. Therefore, you are able to view Leave that may have been taken by the hour or for the entire day.
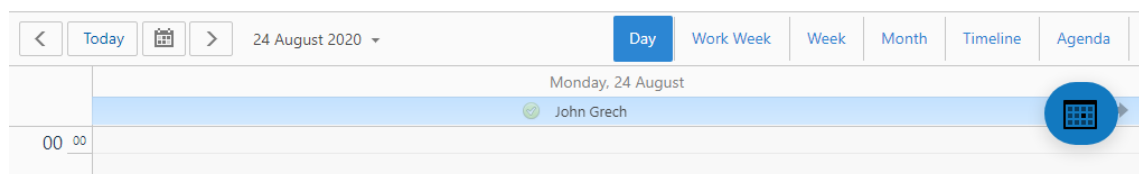

Figure 148: Calendar by Day

Next is Work Week, meaning that you are able to view Leave requested on working days for any given week on the Calendar.

Figure 149: Calendar by Work Week

The following is the Week option. This is similar to Work Week, however in this case the entire week is displayed, including non-working days.

Figure 150: Calendar by Week

You may also view the calendar by Month. This allows you to view Leave across a month-long period.

Figure 151: Calendar by Month

Timeline permits the viewing of Leave over a ten-day period. Leave data is displayed spanning the period specified.

Figure 152: Calendar by Timeline

Lastly, you may set your calendar to the Agenda view type. An agenda is a compressed view with each Leave date and its details. This permits the display of Leave details and calendar dates in an organized manner.

Figure 153: Calendar by Agenda

7.7.2   Add Leave request through the Calendar.

If you wish to add a Leave request from the 'Calendar' view, it is possible to do so by means of clicking the blue icon found to the bottom right of the calendar.

Figure 154: Blue Calendar Icon

Once you have clicked the blue calendar icon, you will see a second icon appear below the blue icon. Click on this new icon to begin a new Leave Application.
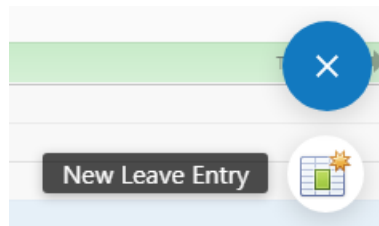

Figure 155: New Leave Entry from Calendar

8.0   Additional Help

8.1   The Help Widget

Spektrum offers a help widget which you can see on the bottom-right of every screen.

You can search and browse through the FAQ articles and get in touch through our ticketing system.

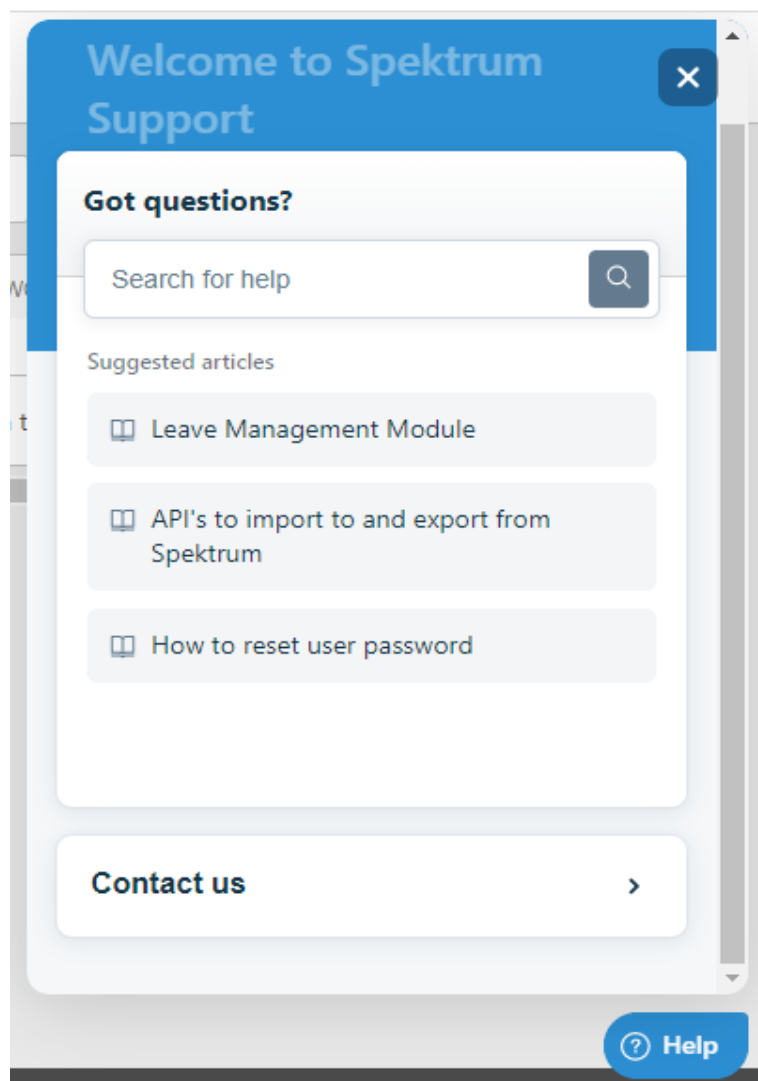Please use it for your everyday needs as this is our first level of support.

Figure 156: The Help Widget

Other ways to contact us:

Spektrum Support - support@ais.com.mt