

SmartPSS Lite Attendance Solution

User's Manual



V1.1.1






Foreword

General

This manual introduces the functions and operations of the attendance solution of the SmartPSS Lite (hereinafter referred to as "the Platform"). Read carefully before using the platform, and keep the manual safe for future reference.

Safety Instructions

The following signal words might appear in the manual.

Signal Words	Meaning
 DANGER	Indicates a high potential hazard which, if not avoided, will result in death or serious injury.
 WARNING	Indicates a medium or low potential hazard which, if not avoided, could result in slight or moderate injury.
 CAUTION	Indicates a potential risk which, if not avoided, could result in property damage, data loss, reductions in performance, or unpredictable results.
 TIPS	Provides methods to help you solve a problem or save time.
 NOTE	Provides additional information as a supplement to the text.

Revision History

Version	Revision Content	Release Time
V1.1.1	<ul style="list-style-type: none">Updated person management function.Updated attendance manager function.	March 2023
V1.1.0	<ul style="list-style-type: none">Updated person management function.Updated attendance manager function.	December 2022
V1.0.1	Updated staff display image.	August 2022
V1.0.0	First release.	April 2022

Privacy Protection Notice

As the device user or data controller, you might collect the personal data of others such as their face, fingerprints, and license plate number. You need to be in compliance with your local privacy protection laws and regulations to protect the legitimate rights and interests of other people by implementing measures which include but are not limited: Providing clear and visible identification to inform people of the existence of the surveillance area and provide required contact information.

About the Manual

- The manual is for reference only. Slight differences might be found between the manual and the product.
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- If there is any uncertainty or controversy, we reserve the right of final explanation.

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1 Overview

The attendance solution is helpful for attendance management, such as shift arrangement, attendance query and attendance exception. It is also available for management of attendance terminal, management of user authority and log viewing.

2 Attendance Guide

You can quickly use the common functions of attendance here.

Procedure

- Step 1 Click **Attendance Solution** in the left navigation bar.
- Step 2 Click **Attendance Guide** on the lower-right corner of the home page.
- Step 3 Configure functions in the order from top to bottom and from left to right. For details on how to use these functions, see the corresponding chapters.

Figure 2-1 Attendance guide

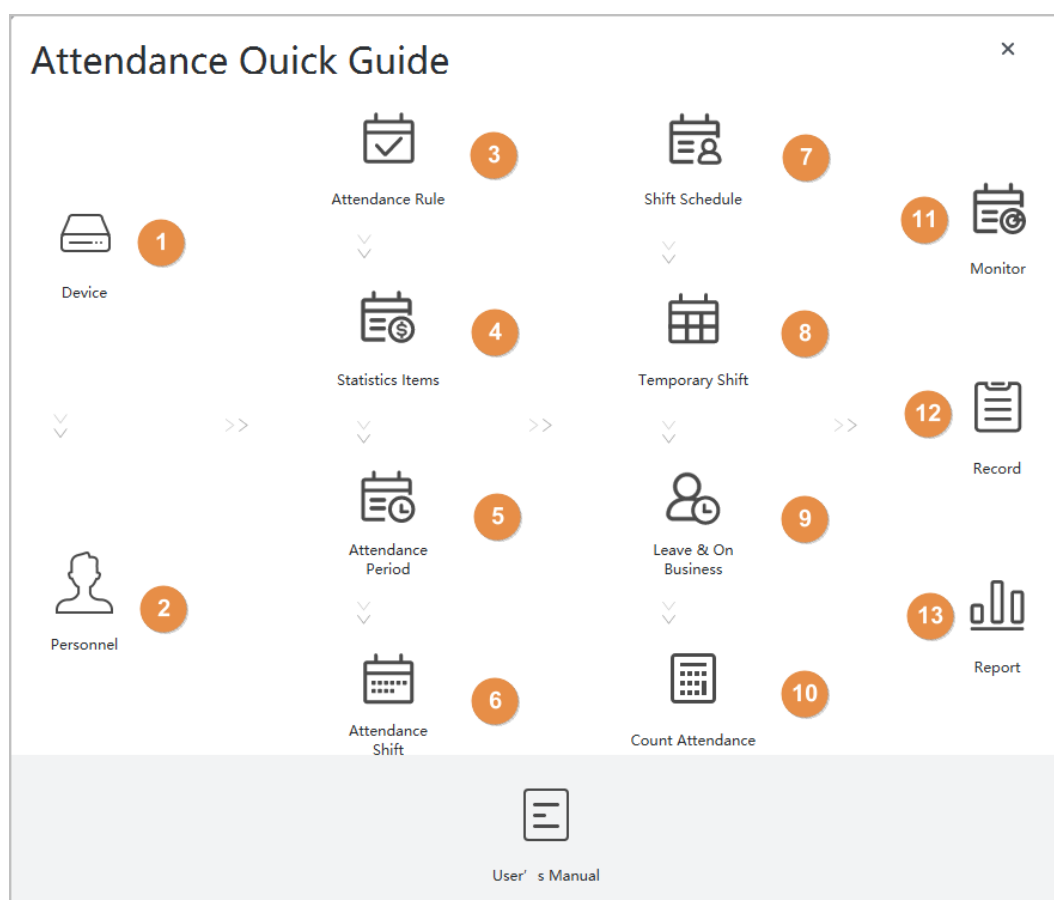



Table 2-1 Functions of attendance guide

No.	Functions	Description
1	Device	For details, see <i>SmartPSS Lite_General_User's Manual</i> .
2	Personnel	For details, see "3 Personnel Management".
3	Attendance Rule	For details, see "4.1 Attendance Rule Settings".
4	Statistics Items	For details, see "4.2 Statistics Items".
5	Attendance Period	For details, see "4.3 Attendance Period".
6	Attendance Shift	For details, see "4.4 Attendance Shifts".
7	Shift Schedule	For details, see "4.5 Shift Schedule".

No.	Functions	Description
		 <p>Configure Holiday before arranging shift schedule, and then the shift schedule will skip the holiday automatically. For details on about holiday setting, see “4.1.4 Adding Holidays”.</p>
8	Temporary Schedule	For details, see “4.6 Temporary Shift”.
9	Leave & On Business	For details, see “4.7 Leave & On Business” .
10	Count Attendance	For details, see “4.8 Count Attendance”.
11	Monitor	For details, see “5 Attendance Monitor”.
12	Attendance Record	For details, see “6 Record Query”.
13	Attendance Report	For details, see “7 Report Query”.

3 Personnel Management

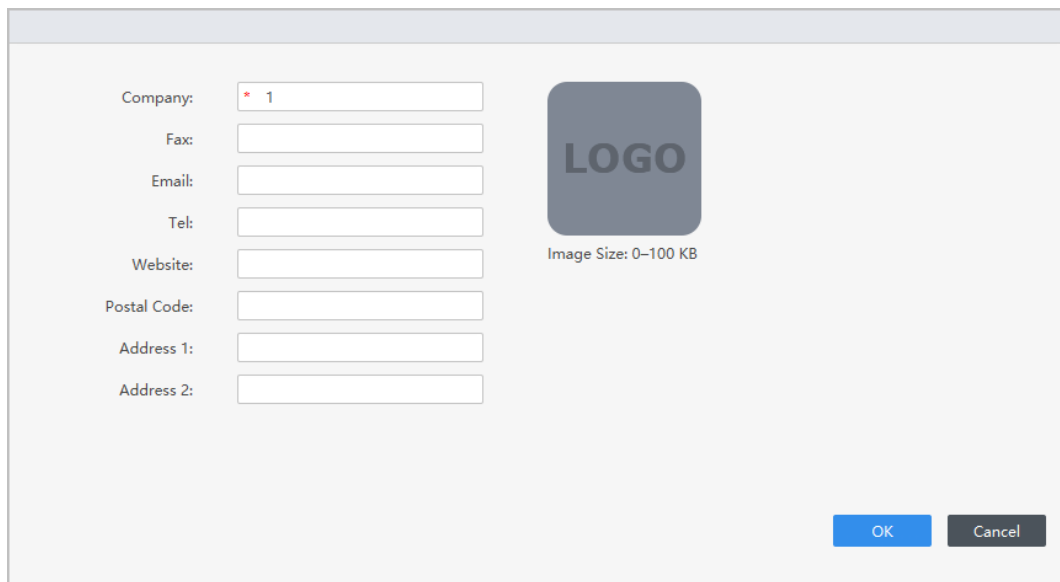
You can manage department information and staff information.

3.1 Adding Company

Procedure

- Step 1 Select **Personnel** > **Company** .
- Step 2 Enter the company name, fax, email, telephone number, website, postal code and address.
- Step 3 Upload the company logo, and then click **OK**.

Figure 3-1 Add company



3.2 Department Management

You can add, modify or delete department. Here uses the department adding as an example.

Procedure

- Step 1 Select **Personnel** > **Personnel Management** .
- Step 2 Click **+** in the **Department List** to add.
- Step 3 Select a superior department, and then add a new sub-department.
- Step 4 Click **OK** to confirm.

Figure 3-2 Add department

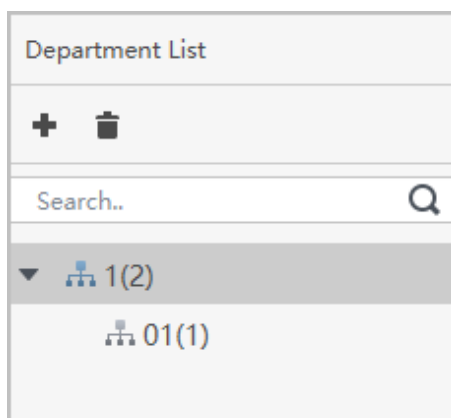
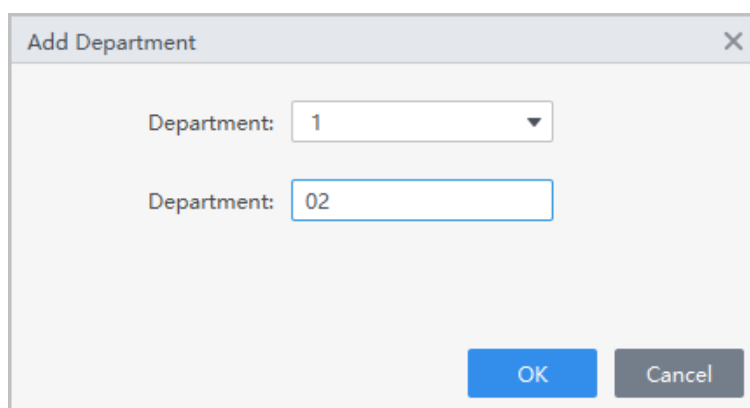




Figure 3-3 Add department information



Related Operations

- (Optional) Click  in the **Department List** to delete.
- (Optional) Select the department, and then click  in the **Department List** to rename the department.

3.3 Setting Card Type

Select **Personnel** > **Personnel Management** > **Card Issuing Type** .

Before issuing a card, set the card type first. For example, if the issued card is ID card, select type as ID card.




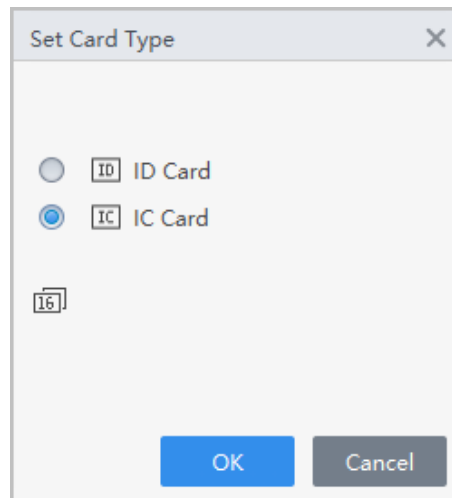
- The system uses hexadecimal card number by default. Click  to change to decimal card number.
- When the card type is changed, the card number in the **Access Manger** , user's card, and **History Event** will also be changed.

Figure 3-4 Set card type



3.4 Adding Personnel

Select one of the methods to add staff.

- Add staff one by one manually.
- Add staff in batches.
- Extract staff information from other devices.
- Import staff information from the local.

3.4.1 Adding Personnel One by One

Procedure

- Step 1 Select **Personnel** > **Personnel Management** > **Add** .
- Step 2 Enter basic information of personnel.
1. Select **Basic Info**.
 2. Add basic information of personnel.

Figure 3-5 Add basic information

Add User

Basic Info | Extended information | Permission

User ID: *

Name: *

Department: Default Company

User Type: General User

Validity Time: 2022/11/29 0:00:00 3654 Days

Times Used: Unlimited

Image Size: 0-100 KB

Image Size: 0-100 KB

Image Size: 0-100 KB

Password Add ! For the 2nd-generation access controller, it is the person password; otherwise it is the card password.

Card Add ! The card number must be added if non-2nd generation access controller is used.

Fingerprint

+ Add - Delete

	Fingerprint Name	Operation
<input type="checkbox"/>		

Add More Finish Cancel

Step 3 Configure authentication methods.

Supports 5 authentication methods, including face recognition, password, card, and fingerprint.

- Configure face recognition: Take snapshots or upload face images in the last 2 image areas.

Figure 3-6 Register face images

- Configure password: The password must consist of 6–8 digits.
- Configure card: The card number can be read automatically or entered manually. To read the card number automatically, select a card reader, and then place the card on the card reader.
 - a. Click to select **Device** or **Card issuer** as card reader.
 - b. Add card. The card number must be added if the non-second generation access controller is used.
 - c. After adding, you can set the card as the main card or duress card, or replace the card with a new one, or delete the card.
 - d. Click to display the QR code of the card.

Only 8-digit card number in hexadecimal mode can display the QR code of the card.
- Configure fingerprints
 - a. Click to select **Device** or **Fingerprint Scanner** as the fingerprint collector.
 - b. Add fingerprint. Select **Add** > **Add Fingerprint**, and then place the finger on the scanner 3 times in a row.

Step 4 Click **Extended information** to add other information of personnel, and then click **Finish**.

Figure 3-7 Add extended information

The screenshot shows a web-based 'Add User' dialog box with three tabs: 'Basic Info', 'Extended information' (selected), and 'Permission'. The 'Extended information' tab contains a 'Details' section with various input fields. The 'Gender' field has radio buttons for 'Male' (selected) and 'Female'. The 'Title' field is a dropdown menu with 'Mr' selected. The 'Date of Birth' field is a date picker showing '1985/3/15'. The 'Tel' field is a text input. The 'Email' field is a text input. The 'Mailing Address' field is a text input. The 'ID Type' field is a dropdown menu with 'ID' selected. The 'ID No.' field is a text input. The 'Company' field is a text input. The 'Occupation' field is a text input. The 'Employment Date' field is a date picker showing '2022/11/28 19:38:45'. The 'Termination Date' field is a date picker showing '2032/11/29 19:38:45'. The 'Administrator' field has a toggle switch that is currently turned on. The 'Remark' field is a large text area. At the bottom right, there are three buttons: 'Add More', 'Finish', and 'Cancel'.

Field	Value
Gender	Male
Title	Mr
Date of Birth	1985/3/15
Tel	
Email	
Mailing Address	
ID Type	ID
ID No.	
Company	
Occupation	
Employment Date	2022/11/28 19:38:45
Termination Date	2032/11/29 19:38:45
Administrator	On
Remark	

Step 5 Configure permissions.

Permission groups are a collection of time attendance or access control permissions on defined devices. Create a permission group and then associate users with the group, so that users can be granted corresponding permissions.

Figure 3-8 Permission configuration

Add User

Basic Info Extended information **Permission**

☒ Group ☐ Device

Permission group is a combination of various devices including attendance check and access control devices. After selecting the permission group, the person information will be sent to corresponding devices and used for functions related to access control and attendance check.





Add Group

<input type="checkbox"/>	Permission Group	Memo
<input type="checkbox"/>	Permission Group1	

Add More Finish Cancel

Step 6 Click **Finish**.

Related Operations

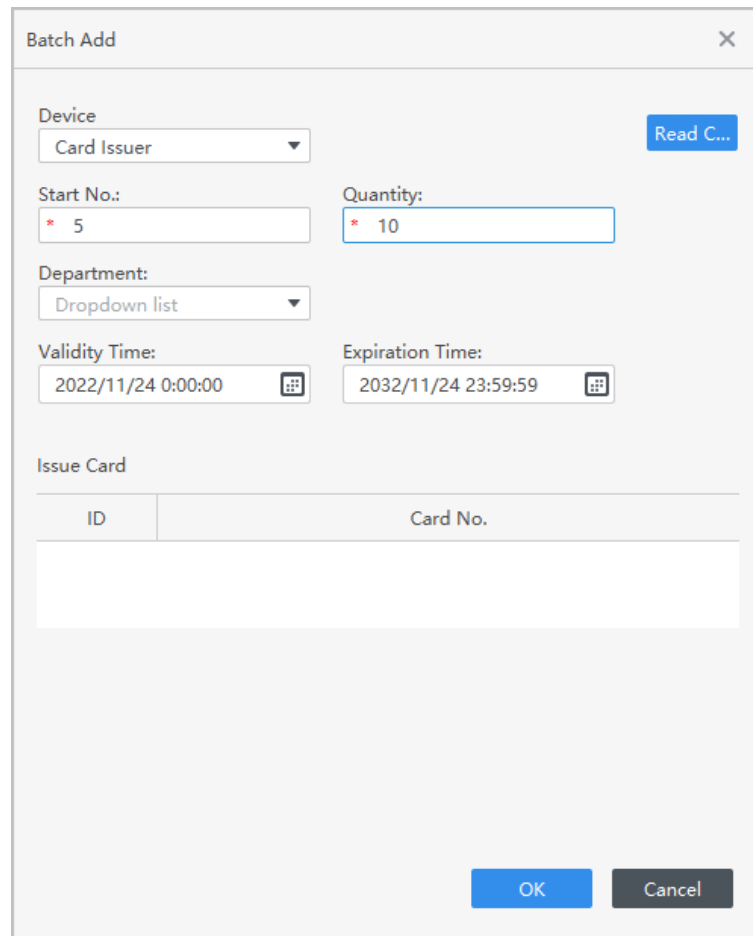
- Click  to modify information of personnel.
- Click  to delete personnel.
- Click  to freeze the card, and then the card cannot be used.
- Click  to configure permissions.

3.4.2 Adding Personnel in Batches

Procedure


- Step 1 Select **Personnel** > **Personnel Management** > **Batch Update** > **Batch Add** .
- Step 2 Select card reader and the department of staff. Set the start number, number of card, effective time and expired time of card.
- Step 3 Click **Read Card No.**, and then the card number will be read automatically.
- Step 4 Click **OK**.

Figure 3-9 Add staff in batches



The 'Batch Add' dialog box contains the following fields and controls:

- Device:** A dropdown menu currently showing 'Card Issuer'. A 'Read C...' button is located to its right.
- Start No.:** A text input field containing '5' with a red asterisk icon on the left.
- Quantity:** A text input field containing '10' with a red asterisk icon on the left.
- Department:** A dropdown menu currently showing 'Dropdown list'.
- Validity Time:** A date-time picker showing '2022/11/24 0:00:00'.
- Expiration Time:** A date-time picker showing '2032/11/24 23:59:59'.
- Issue Card:** A section header above a table.
- Table:** A table with two columns: 'ID' and 'Card No.'. The table body is currently empty.
- Buttons:** 'OK' and 'Cancel' buttons are located at the bottom right.

Step 5 In the list of staff, click  to modify information or add details of staff.

3.4.3 Extracting Personnel Information

Procedure

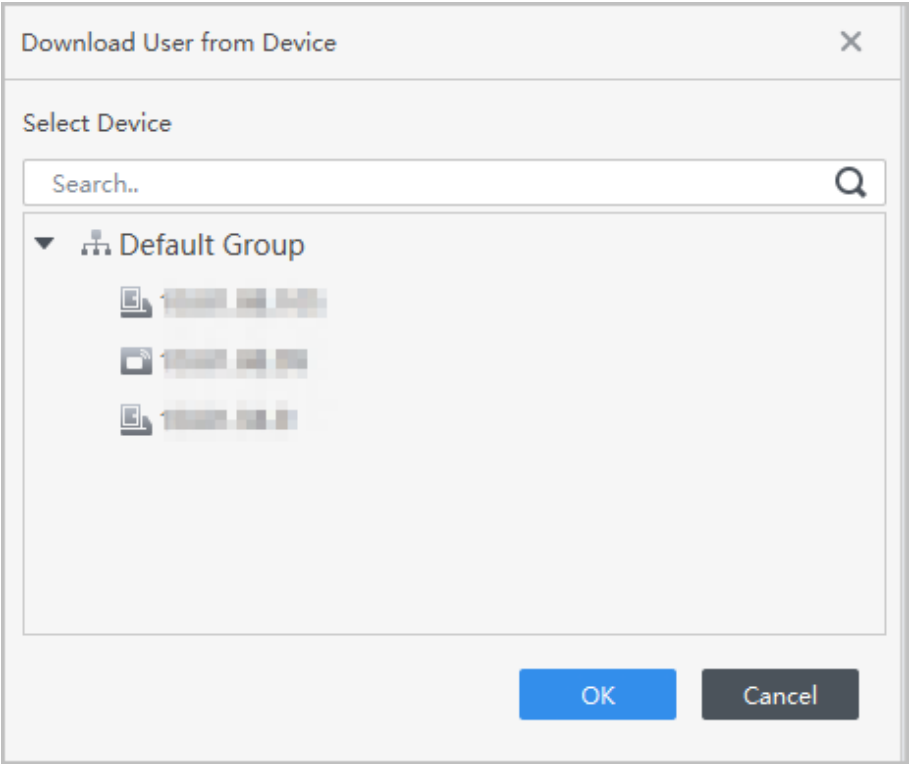
Step 1 Select **Personnel** > **Personnel Management** > **Extract**.

Step 2 Select the device, and then click **OK**.



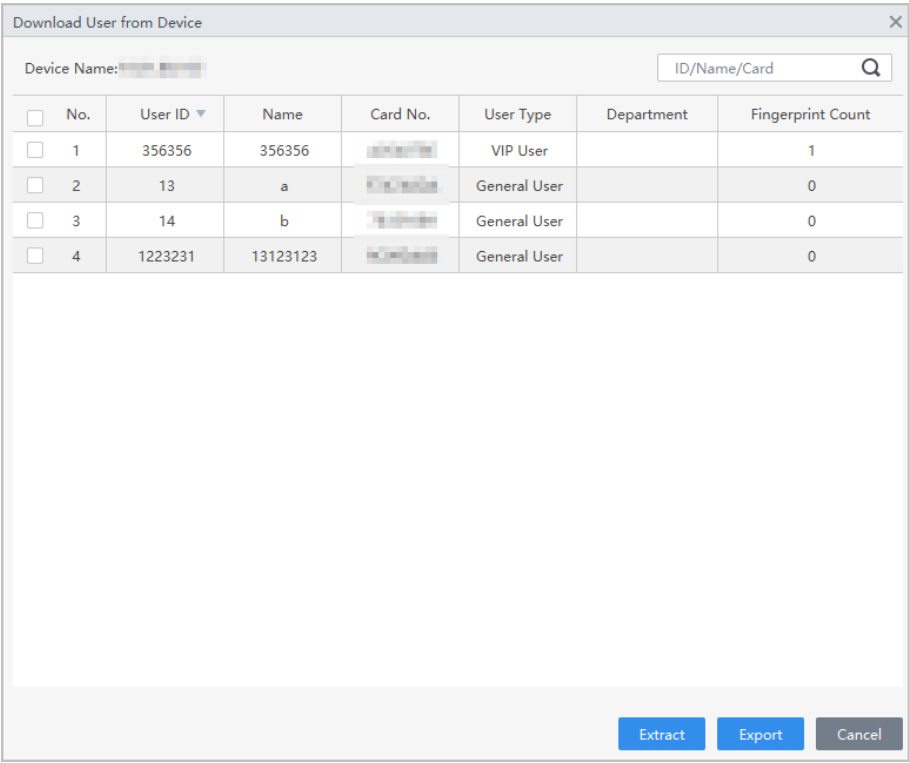
You can select to extract the user of **All**, **Success** or **Failure** from the drop-down list next to **Extract**.


Figure 3-10 Devices with staff information



Step 3 Select the needed staff information, and then click **Extract** to extract the cards to user manager. Click **Export** to export the user information to the computer.

Figure 3-11 Extract users



Step 4 In the list of staff, click  to modify information or add details of staff.

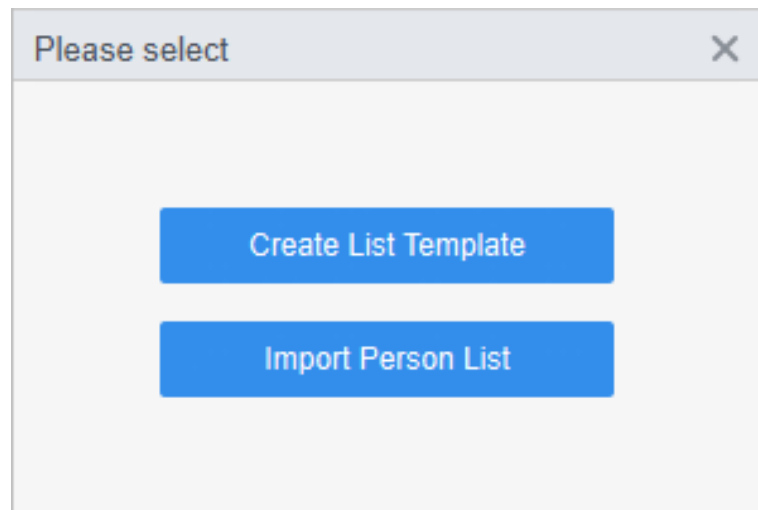
3.4.4 Importing Personnel Information

Procedure

Step 1 Select **Personnel** > **Personnel Management** > **Import** .

Step 2 Import staff information according to instructions.

Figure 3-12 Import staff information



3.5 Issuing Cards in Batches

Issue cards to personnel in batches.

Procedure

Step 1 Select **Personnel** > **Personnel Management** .

Step 2 Select personnel, and then select **Batch Update** .

Step 3 Issue card in batches. Card number can be read automatically or entered manually.

- a. Select **Batch Issue Card**, and then select personnel.
- b. Select card issuer or card reader device, and then click **Read Card No.**. Make sure a card issuer or a card reader has been connected to your computer.
- c. Place the cards on the card reader in sequence.

The card number is read automatically.

Figure 3-13 Issue card in batches

Batch Issue Card

Device:

Card Issuer

Read C...

ID:

1

Name:

1

Card No.:

Press Enter after entering t...

Department:

1

Start Time:

2022-11-23 00:00:00

End Time:

2032-11-23 23:59:59

Card List

User ID	Name	Card No.	Operation
1	1		
2	2		

OK

Cancel

Step 4 Add users in batches.

14

Figure 3-14 Add users in batches

Batch Add

Device

Card Issuer

Read C...

Start No.:

* 2000

Quantity:

* 10

Department:

Default Company

Validity Time:

2023/5/8 0:00:00

Expiration Time:

2023/5/8 23:59:59

Issue Card

ID	Card No.
2000	
2001	
2002	
2003	
2004	
2005	
2006	
2007	
2008	
2009	

OK

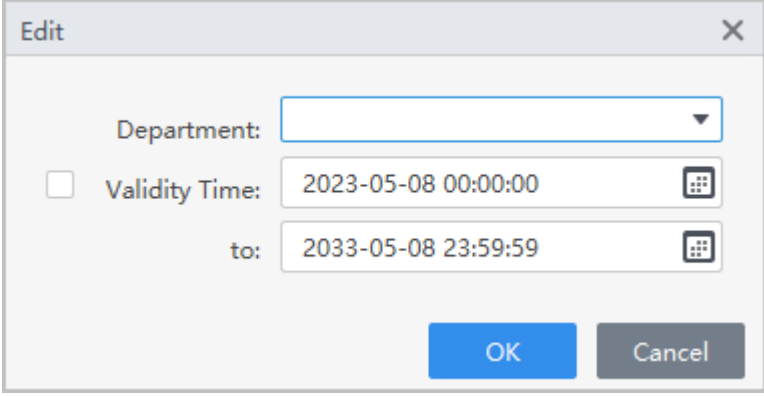
Cancel

- Select **Batch Add**.
- Enter the starting user ID and the number of users.
- Select the department.

Users will be generated from the starting user ID.

Step 5 Change department in batches.

Figure 3-15 Change department in batches



The image shows a dialog box titled "Edit" with a close button (X) in the top right corner. Inside the dialog, there is a "Department:" label followed by a dropdown menu. Below this, there is a checkbox labeled "Validity Time:". To the right of the checkbox are two date and time input fields. The first field is labeled "2023-05-08 00:00:00" and the second field is labeled "2023-05-08 23:59:59", with a "to:" label between them. Each input field has a calendar icon to its right. At the bottom right of the dialog are two buttons: "OK" (blue) and "Cancel" (gray).

- Select personnel, and then click **Batch Edit**.
- Select a department.

Department will be changed for the selected personnel.

Step 6 Click **OK**.

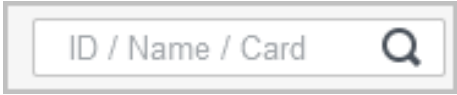
3.6 Exporting Personnel Information

Select personnel, and then click **Export** to export personnel information to your local computer.

3.7 Searching for Personnel

Search for personnel according to ID, name or card.

Figure 3-16 Search for personnel



The image shows a search bar with the placeholder text "ID / Name / Card" and a magnifying glass icon on the right side.

3.8 Personnel Display

You can select display modes: card display and list display.



Click  to display in cards; click  to display in list.

Figure 3-17 Card display

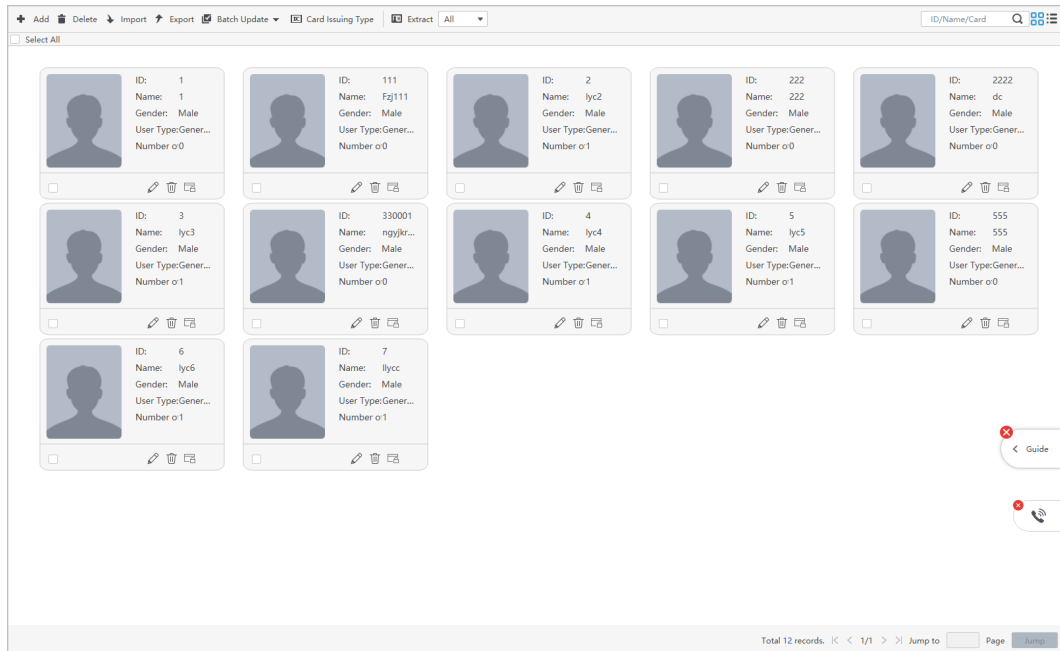


Figure 3-18 List display

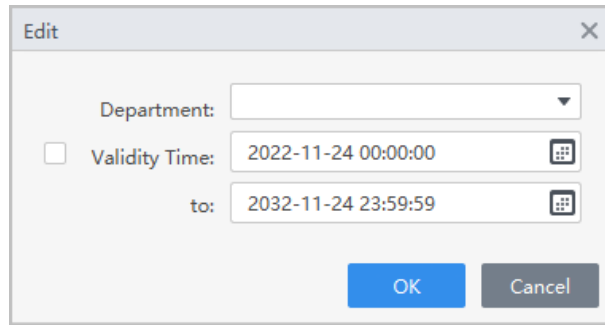
<div> + Add 🗑️ Delete 📁 Import 📤 Export 🔄 Batch Update 📄 Card Issuing Type 📄 Extract All </div> <div>ID/Name/Card 🔍 📄 📄</div>						
<input type="checkbox"/>	Photo	User ID	Name	User Type	Department	Number of Fingerprints
<input type="checkbox"/>		1	1	General User	2	0
<input type="checkbox"/>		111	Fgj111	General User	2	0
<input type="checkbox"/>		2	lyc2	General User	01	1
<input type="checkbox"/>		222	222	General User	2	0
<input type="checkbox"/>		2222	dc	General User	2	0
<input type="checkbox"/>		3	lyc3	General User	2	1
<input type="checkbox"/>		330001	ngykruduytki...	General User	2	0
<input type="checkbox"/>		4	lyc4	General User	2	1
<input type="checkbox"/>		5	lyc5	General User	2	1
<input type="checkbox"/>		555	555	General User	2	0
<input type="checkbox"/>		6	lyc6	General User	2	1
<input type="checkbox"/>		7	lycc	General User	2	1

3.9 Editing Personnel in Batches

Select **Personnel** > **Personnel Management** .

Select the needed staff, and then select **Batch Update** > **Batch Edit** to edit department and valid time of users in batches.

Figure 3-19 Edit department



The 'Edit' dialog box contains the following fields:

- Department:** A dropdown menu.
- Validity Time:** A checkbox followed by a date and time field set to '2022-11-24 00:00:00'.
- to:** A date and time field set to '2032-11-24 23:59:59'.
- Buttons:** 'OK' (blue) and 'Cancel' (grey).

3.10 Permission Configuration

3.10.1 Adding Permission Groups

Procedure

Step 1 Select **Personnel** > **Permission Configuration** .

Step 2 Click **+** to add a permission group.

Step 3 Set permission parameters.

1. Enter group name and remark.
2. Select the needed time template.



For details on time template setting, see *SmartPSS-Lite_Access Control Solution_User's Manual*.

3. Select the verification method.
4. Select the corresponding device, such as door 1.

Figure 3-20 Add permission group (1)



<div> + 🗑️ <div>Search.. 🔍</div> </div>		
<input type="checkbox"/>	Permission Group	Operation
<input type="checkbox"/>	Permission Group1	✎ 👤 🗑️
<input type="checkbox"/>	Permission Group2	✎ 👤 🗑️
<input type="checkbox"/>	Permission Group3	✎ 👤 🗑️

Figure 3-21 Add permission group (2)

The screenshot shows the 'Add Permission Group' dialog box. It includes a 'Basic Info' section with input fields for 'Group Name' (filled with 'Permission Group4'), 'Remark', and 'Time Templ...' (set to 'All Day Time Ten'). Below this is a 'Verification Method' section with four checked checkboxes: 'Card', 'Fingerprint', 'Password', and 'Face'. At the bottom left, there is a tree view under the heading 'All Device' with a search bar. The tree shows 'Default Group' expanded, containing a sub-item, and 'Door 1'. To the right of the tree is a 'Selected (0)' area. At the bottom right are 'OK' and 'Cancel' buttons.

Step 4 Click **OK** to save operations.

Related Operations


- Click  to delete group.
- Click  to modify group information.
- Double-click permission group name to view group information.

3.10.2 Configuring Permissions

The method to configure permission for department and for personnel is similar, and here takes department as an example.

Procedure

Step 1 Select **Personnel** > **Permission Configuration**.

Step 2 Click , and then select the department to be configured permission.

Step 3 Click **OK**.

Figure 3-22 Configure permission

Add Person

Permission Group1

User List

Search..

1(2)

01(1)

1

Selected (2)

ID

Name

2


2

1

1

OK

Cancel

Step 4 (Optional) Click  in the left navigation bar to view the authorization progress.



If authorization failed, click  in the list to view the possible reason.

Figure 3-23 Authorization progress

Permission Group	Device Name	Progress	Status	Result of Issuing	Operation
Permission Group1	<div></div>	<div>1/1</div>	Error issuing	Successful: 0, Failed: 1	

20

4 Attendance Manager

4.1 Attendance Rule Settings

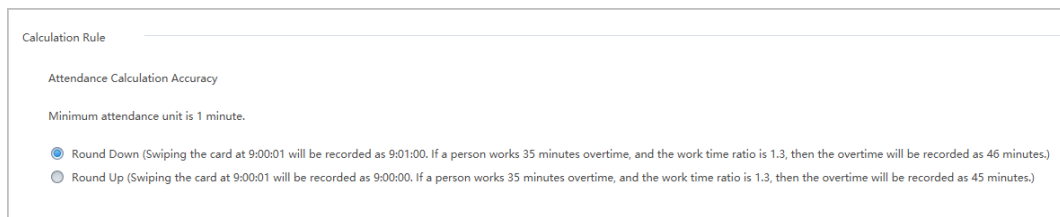
4.1.1 Setting Calculation Rules

You can set the calculation rule to adjust attendance accuracy.

Procedure

- Step 1 Select **Attendance** > **Attendance Rule** > **Advance Config** .
- Step 2 Adjust the attendance accuracy. There are two kinds of rules.
- **Round Down**: For example, you swipe the card at 9:00:01, it will be recorded as 9:01:00. If you work 35 minutes overtime, and the word ratio is 1.3, then the overtime will be recorded as 46 minutes.
 - **Round Up**: For example, you swipe the card at 9:00:01, it will be recorded as 9:00:00. If you work 35 minutes overtime, and the word ratio is 1.3, then the overtime will be recorded as 45 minutes.
- Step 3 Click **OK**.

Figure 4-1 Set calculation rule



4.1.2 Setting Fixed Day Mode

Procedure

- Step 1 Select **Attendance** > **Attendance Rule** > **Advance Config** .
- Step 2 Select whether to use the attendance status of the device, or set the minimum interval between two records.
- **Use Device Attendance Status** : After enabling, the attendance status is determined by the status reported by the device, including check in/out and break/come back.
 - **Minimum interval between two records** : After enabling, the attendance status is not determined by the status reported by the device, but depends on the sequence of the check in/out time. Meantime, the check in/out time between the minimum interval you set will be neglected.



You cannot enable the **Use Device Attendance Status** and **Minimum interval between two records** at the same time.

- Step 3 Select whether it is required to check in/out for leave, and then click **OK**.

If you enable **Must Check In/Out for leave** , when you ask for a leave, you need to check in within the time of asking for a leave. Otherwise, you will be counted as asking for leave without check in. If you do not enable **Must Check In/Out for leave**, the system will

automatically add a leave record when entering the exception information (including leave, business trip and paid leave), and you do not need to check in/out by yourself.

Figure 4-2 Set fixed day mode

Fixed Day Mode

☐ Use Device Attendance Status

Minimum interval between two records: 5.0 Minutes (1-30)

☒ Must Check In/Out for Leave

OK Cancel

4.1.3 Setting Overtime Rules

You can set overtime rules for weekdays and weekends. After setting the overtime rules, set the schedule rule as **Valid Overtime** when arrange schedules.

Background Information

- For weekday, calculate working hours according to overtime ratio of different periods. For example, set the ratio of Monday as: 1 time for 0-2 h; 2 times for 2-4 h; 3 times for 4-24h. If staff A works overtime on Monday for 8 h, and then the calculated overtime hour is $2 \times 1 + 2 \times 2 + 4 \times 3 = 18$ h.
- For weekend, calculate working hours according to one pre-defined overtime ratio. For example, set the ratio of weekend as 2 times. If staff A works overtime on Weekend for 8 h, and then the calculated overtime hour is $2 \times 8 = 16$ h.

Procedure

Step 1 Select **Attendance** > **Attendance Rule** > **Overtime Rule** .

Figure 4-3 Set overtime rules

Advanced Config **Overtime Rule** Holiday

Overtime Settings

Working Day Overtime Level

Overtime Level ☒ OT1 ☒ OT2 ☒ OT3

Time	0min	120min	240min	360min	480min	600min	720min	840min	960min	1080min	1200min	1320min	1440min
Monday													
Tuesday													
Wednes...													
Thursday													
Friday													
Saturday													
Sunday													

Work Hour Ratio ⓘ

OT1 1.0 OT2 1.0 OT3 1.0

Weekend Overtime Rule ⓘ

Calculating Method ☒ Normal Work ☐ OT1 ☐ OT2 ☐ OT3

Step 2 Select the overtime rule that you want to display on the timetable.

Step 3 Set the overtime rules for weekdays. Drag the borders of the color areas to set overtime ratio for different overtime hours.

Step 4 Set the work hour ratio for each overtime level, and then select the calculating method for weekend overtime rule.

Step 5 Click **OK**.

4.1.4 Adding Holidays

Procedure

Step 1 Select **Attendance** > **Attendance Rule** > **Holiday**.

Step 2 Click **Add**.

Figure 4-4 Add holiday

The screenshot shows a software interface with three tabs: 'Advanced Config', 'Overtime Rule', and 'Holiday'. The 'Holiday' tab is active. On the left, there is a table with columns: 'Name', 'Holiday Length', and 'Operation'. Above the table are buttons for '+ Add' (highlighted with an orange box) and 'Delete'. The main area on the right is titled 'Holiday Details' and contains a calendar icon with a '+' sign, the text 'Please add a holiday first.', and an 'Add Now' button (highlighted with an orange box). A red 'x' icon and a phone handset icon are visible in the bottom right corner.

- Step 3** Set the holiday name and holiday mode, and then click **Save**. The holiday will be displayed in calendar.
- For the fixed date mode, you need to set the holiday start date and end date.
 - For the unfixed cycle mode and fixed cycle mode, you need to set the holiday time and holiday length.

Figure 4-5 Fixed Date

The screenshot shows the 'Fixed Date' configuration form within the 'Holiday Details' section. It includes the following fields and controls:

- Name:** A text input field with a red asterisk (*) indicating it is required.
- Holiday Mode:** Three radio buttons: 'Fixed Date' (selected), 'Unfixed Cycle', and 'Fixed Cycle'.
- Holiday Start Date:** A date picker showing '2022-11-24'.
- Holiday End Date:** A date picker showing '2022-11-24'.

At the bottom right, there are 'Save' and 'Cancel' buttons. A red 'x' icon and a phone handset icon are also visible in the bottom right corner.

Figure 4-6 Unfixed Cycle

Holiday Details ?

Name

* 1

Holiday Mode

Fixed DateUnfixed CycleFixed Cycle

Holiday Time

JanThe 1stSunday

Holiday Length

1Days

SaveCancel

Figure 4-7 Fixed cycle

Holiday Details ?

Name

* 1

Holiday Mode

Fixed DateUnfixed CycleFixed Cycle

Holiday Time

Jan1

Holiday Length

1Days

SaveCancel

Figure 4-8 Holiday in calendar

Today ◀ 2022-11 ▶						
Sun.	Mon.	Tue.	Wed.	Thu.	Fri.	Sat.
30	31	1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
			Rest		08:30-17:30	08:30-17:30
27	28	29	30	1	2	3
08:30-17:30	08:30-17:30	Rest	Rest			
4	5	6	7	8	9	10

4.2 Statistics Items

4.2.1 Setting Statistical Objects



You can set objects to represent statistics in the reports. For example, use A to represent absent status.

Procedure

Step 1 Select **Attendance** > **Statistics Items** > **Statistical Object** .

Figure 4-9 Set statistical object

Statistical object		Leave Type
Name	Display Symbol	Statistics Item Details
Required Work	Z	<p>Original Name: Required Work</p> <p>Change Name: <input type="text"/></p> <p>Display Symbol: <input type="text" value="Z"/> Configured symbols will be used for thumbnail display of reports</p>
Valid Work	S	
Actual Work	Y	
LeaveAndTrip	L	
LateTime	E	
EarlierTime	U	
Absent	G	
Overtime Level 1		
Overtime Level 2		
Overtime Level 3		

Step 2 Select one kind of statistics, enter the name you want to change, and then set the display symbol.

Step 3 Click **OK**.

When you export this statistic as report, it will be displayed as the set symbol.

4.2.2 Adding Leave Types

It provides some common leave types. You can also add new leave types.

Procedure

Step 1 Select **Attendance** > **Statistics Items** > **Leave Type**.

Step 2 Select **Leave**, **Business Trip** or **Paid Leave**, and then click **Add**.

Step 3 Click the name in the new added type list to enter the name of leave.

Step 4 Click **OK** to confirm operation.

Figure 4-10 Add leave type

Statistical object

Leave Type

1 Leave Type

2 + Add Delete

Type	Operation
Leave	
On Business	
Paid Leave	
Annual Leave	
Personal Lea...	
Sick Leave	
Maternity Le...	
Paternity Le...	
Childcare Le...	
Home Leave	
Bereavemen...	
Please enter ...	

3

OK Cancel

4.3 Attendance Period

Set attendance schedules and attendance rules for fixed attendance mode or flexible attendance mode. Up to 32 attendance schedules can be added.

4.3.1 Configuring Fixed Attendance Schedules

Procedure

Step 1 Select **Attendance** > **Attendance Period**.

Step 2 Click **Add**, and then add an attendance schedule.

You can mark the attendance schedule in different color. When you arrange and apply shifts, the color will be displayed on the calendar.

Figure 4-11 Fixed attendance

Mode

☒ Fixed Attendance
☐ Flexible Attendance

Basic Info

Time Name
Color:

Attendance Period:

Work Time: - The time span must not exceed 24 hours.

Record as:

Valid Check-in Time: - Valid Check-out Time:

☒ Use First Check-In and Last Check-Out Only

Attendance Rule:

The last card swiping time is minutes later than off duty time is recorded as valid work time.

Must not be late for more than Minutes

Late sign in over minutes is recorded as absence.

Early leave within minutes is permitted.

Must not leave earlier than minutes is recorded as absence.

Overtime Rule ☒

The minimum overtime is Minutes, Not enough as no Overtime

The maximum overtime is Minutes, Over Max Time Will Be Minutes

Table 4-1 Fixed attendance parameters

Item	Parameter	Description
Attendance period	Work time	The start time and the end time of a workday.
	Valid check-in time-Valid check-out time	Specify a time range when people can clock-in and clock-out for the workday.
	Use First Check-In and Last Check-Out Only	If a person clocks in and out multiple times in a day, the earliest and latest times will be valid.
Attendance Rule	The last card swiping time is "N" minutes later than off duty time is recorded as valid work time	The defined time period will not be included in the total hours worked. For example, if the "N" is set to 60 minutes and the specified clock-out time is 17:00, when you clock out at 19:00, only

Item	Parameter	Description
		one extra hour will be added to your total hours worked.
	Must not be late for more than "N" Minutes	A "tolerance time" is given if employee's clock-in is late by the set time, For example, if the "N" is set to 5 minutes and the clock-in time for the beginning of the work days is 8:00, when you clock in at 8:05, it will not be considered late.
	Late sign in over "N" minutes is recorded as absence	If the person clocks in after the time limit, they will be considered as absent. For example, if "N" is set as 30 minutes, and the clock-in time for the beginning of the work day is 9:00, when a person clocks in at 9:40, they will be considered as absent for one day.
	Early leave within N minutes is permitted	A "tolerance time" is offered so that when employees clock out earlier than the time set to end the work day, and they will not be considered as leaving too early. For example, if "N" is set as 5 minutes, and the clock-out time for the end of the work day is 17:00, if a person clocks out at 16:55, they will not be considered as clocking out too early.
	Must not leave earlier than "N" minutes is recorded as absence	If the person clocks in before the time limit, they will be considered as leaving too early. For example, if "N" is set as 30 minutes, and the clock-out time for the end of the work day is 17:00, when a person clocks out at 16:20, they will be considered as leaving early by 40 minutes.
Overtime Rule	The minimum overtime is "N" minutes, Not enough as no Overtime	If the time a person works is less than the defined time, they will not be considered as working overtime.
	The maximum overtime is "M" minutes, Over Max Time Will Be "N" Minutes	If the time a person works exceeds the defined limit, it will be considered as overtime. For example, if "M" is set as 540 minutes, and "N" is set as 600 minutes, when the overtime exceeds 540 minutes, the overtime will be recorded as 600 minutes.

Step 3 Configure rest periods.

For the fixed attendance mode, you can add up to 7 rest periods.

- Click **Management**.
- Click **Add**, enter the name of the break, and then set the start time and the end time of the rest.

During this time a break may be taken.

- Select the rest rule.
 - **Auto Deduction:** The set rest time is automatically deducted from an employee's total hours worked.

- **Must Check In/Out:** The actual rest time is calculated according to the time the employee clocks in and out.
 - ◇ **Validity Start Time/Validity End Time:** Set a time period when employees can clock out for the break time, and clock back in for the end of the break.
 - ◇ **Convert Unused Rest Time to Work Time:** If employees only rest 30 minutes out of the defined 1-hour break period, the remaining 30 minutes will be added to their total hours worked.
- Click **OK**.

Figure 4-12 Add rest periods

The screenshot shows a 'Management' window with a sidebar and a main form area. The sidebar has a '+ Add' button, a trash icon, and a 'Delete' button. Below these is a table with a header 'Rest Name' and one row with '01'. The main form area contains the following fields and options:

- Break Name:** * 01
- Start Time:** 18:00
- End Time:** 19:00
- Rest Period:** 60.00 Minutes
- Auto Deduction:** ☐
- Must Check In/Out:** ☒
- Validity Start Time:** 18:00
- Validity End Time:** 19:00
- Convert Unused Rest Time to Work Time:** ☒
- Rest Exceeds:** ☐ 120.00 Minutes As **Late for Work** (dropdown)

At the bottom right are 'OK' and 'Cancel' buttons.

Step 4 Click **Select** to select a rest schedule.

Step 5 Click **OK**.

4.3.2 Configuring Flexible Attendance Schedules

Procedure

Step 1 Select **Attendance** > **Attendance Period**.

Step 2 Select **Flexible Attendance**, click **Add**, and then add an attendance schedule.

You can mark the attendance schedule with colors. When you arrange and apply shifts, the color will be displayed on the calendar.

Figure 4-13 Flexible attendance

Period Details ?

Mode

☐ Fixed Attendance
☒ Flexible Attendance

Basic Info

Time Name * flexible time 01
Color: Blue

Required work hours 480.0 Minutes

Cross Day Punch Change ... 00:00 Minutes

☒ Use First Check-In and Last Check-Out Only

Overtime Rule ☒

The minimum overtime is 60.00 Minutes, Not enough as no Overtime

The maximum overtime is 300.00 Minutes, Over Max Time Will Be 240.00 Mini

Table 4-2 Fixed attendance parameters

Item	Parameter	Description
Basic Info	Required work hours	The minimum set of hours required to complete a work day. The time to clock in and out are not fixed.
	Cross Day Punch Change	The period for people to clock in and out. For example, if the time for Cross Day Punch Change is 23:00, then another work day begins at 23:00.
	Use First Check-In and Last Check-Out Only	If a person clocks in and out multiple times in a day, the earliest and latest times will be valid.
Overtime Rule	The minimum overtime is "N" minutes, Not enough as no Overtime	If the time a person works is less than the defined time, they will not be considered as working overtime.
	The maximum overtime is "M" minutes, Over Max	If the time a person works exceeds the defined limit, it will be considered as overtime. For example, if "M" is set as 540 minutes, and "N" is

Item	Parameter	Description
	Time Will Be "N" Minutes	set as 600 minutes, when the overtime exceeds 540 minutes, the overtime will be recorded as 600 minutes.

Step 3 Click **Save**.

4.4 Attendance Shifts

You can arrange shift by day or week. Here uses the weekly shift as an example.

Procedure

Step 1 Select **Attendance** > **Attendance Shift**.

Step 2 Click **Add** on the upper-left corner of page.

Step 3 Set the shift name, start date, cycle mode and cycle period, and then drag the period to the calendar to arrange the shift.

Click **Clear All** to clear all the settings.

Figure 4-14 Set attendance shift

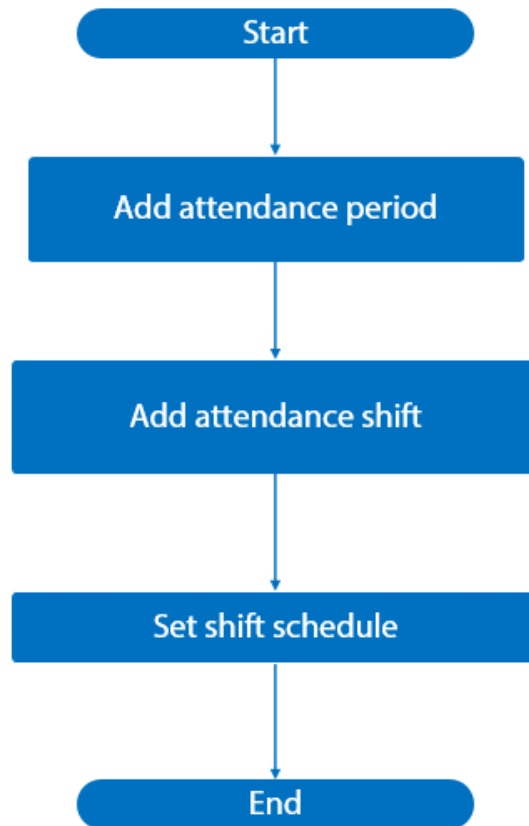
Step 4 Click **Save**, and then click **OK** to confirm operation.

4.5 Shift Schedule

You can arrange shift schedules for department or staff.

4.5.1 Flowchart for Configuring Shift Schedules

Figure 4-15 Flowchart for configuring shift schedules




- Add attendance period: For details, see “4.3 Attendance Period”.
- Add attendance shift: For details, see “4.4 Attendance Shifts”.
- Set shift schedule: For details, see “4.5 Shift Schedule”.

4.5.2 Configuring Shift Schedules

4.5.2.1 Configuring Shift Schedules for Department

Procedure

- Step 1 Select **Attendance** > **Shift Schedule**.
- Step 2 Click **Assign to Department**.
- Step 3 Select a shift and a department, and then click **OK**. The shift will be assigned to the department automatically.
- Step 4 Select the department in the list, and then click  to save the settings.



After department schedule is applied, the existing schedules are being affected. The newly added personnel of the department is arranged to the department schedule by default.

Priority: Department schedule < Single Person < Holiday < Temporary.

Figure 4-16 Arrange shift schedule for department

The interface is titled 'By Employee'. It features a search bar and a list of employees on the left. The right side contains a table with configuration details.

Shift	Department	User ID	Person name	Start Date	End Date	Operation
Default	2	1	1	2022-11-23	2032-11-23	
Default	01	2	lyc2	2022-11-23	2032-11-23	

At the bottom, there is a pagination bar showing 'Every page shows 20' and 'Total 2 records'. There are also navigation buttons for 'Page' and 'Jump'.

4.5.2.2 Configuring Shifting Schedules for Personnel

Procedure

- Step 1 Select **Attendance** > **Shift Schedule**.
- Step 2 Click **Assign to Person**.
- Step 3 Select a shift and personnel.
- Step 4 Click **OK**. The shift will be added automatically.
The shift will be assigned to the personnel automatically.
- Step 5 Select the person in the list, and then click to save the settings.

Figure 4-17 Assign shift schedules to personnel

By Employee		Configuration Details						
Department		Shift	Department	User ID	Person name	Start Date	End Date	Operation
Search..								
▼ <input checked="" type="checkbox"/> 2		Default	2	1	1	2022-11-23	2032-11-23	
▶ <input checked="" type="checkbox"/> 01		Default	01	2	lyc2	2022-11-23	2032-11-23	
<input checked="" type="checkbox"/> 02		Default	2	111	Fzj111	2022-11-23	2032-11-23	
<input checked="" type="checkbox"/> 1		Default	2	222	222	2022-11-23	2032-11-23	
<input checked="" type="checkbox"/> 222		Default	2	555	555	2022-11-23	2032-11-23	
<input checked="" type="checkbox"/> 555		Default	2	3	lyc3	2022-11-23	2032-11-23	
<input checked="" type="checkbox"/> Fzj111		Default	2	4	lyc4	2022-11-23	2032-11-23	
<input checked="" type="checkbox"/> dc		Default	2	5	lyc5	2022-11-23	2032-11-23	
<input checked="" type="checkbox"/> llycc		Default	2	6	lyc6	2022-11-23	2032-11-23	
<input checked="" type="checkbox"/> lyc3		Default	2	7	llycc	2022-11-23	2032-11-23	
<input checked="" type="checkbox"/> lyc4		Default	2	330001	ngyjkruduytki...	2022-11-23	2032-11-23	
<input checked="" type="checkbox"/> lyc5		Default	2	2222	dc	2022-11-23	2032-11-23	
<input checked="" type="checkbox"/> lyc6								
<input checked="" type="checkbox"/> ngyjkruduytkiy,luj								

4.6 Temporary Shift

Procedure

- Step 1** Select **Attendance** > **Temporary Shift**.
- Step 2** Select the personnel.
- Step 3** Set the work type and attendance period.
- Step 4** Click **Assign**.

You can click **Clear** to cancel the operation.

Figure 4-18 Arrange temporary schedule

Department

Search.. Q

Default Company

☒ 1

☐ 10

☐ 100

☐ 1000

☐ 101

☐ 102

☐ 103

☐ 104

☐ 105

☐ 106

☐ 107

☐ 108

☐ 109

☐ 11

☐ 110

☐ 111

☐ 112

☐ 113

☐ 114

☐ 115

☐ 116

Today 2022-12

Sun.	Mon.	Tue.	Wed.	Thu.	Fri.	Sat.
27	28	29	30	1	2	3
				08:30-17:30	08:30-17:30	Rest
4	5	6 Nor...	7 OT1	8	9 OT2	10 OT3
Rest	Rest	08:30-17:30	08:30-17:30	Rest	08:30-17:30	08:30-17:30
11 Rest	12	13	14	15	16	17
00:00-23:59	08:30-17:30	Rest	Rest	Rest	08:30-17:30	08:30-17:30
18	19	20	21	22	23	24
08:30-17:30	08:30-17:30	Rest	Rest	Rest	08:30-17:30	08:30-17:30
25	26	27	28	29	30	31
08:30-17:30	08:30-17:30	Rest	Rest	Rest	08:30-17:30	08:30-17:30
1	2	3	4	5	6	7

Schedule Details

Work Type:

Rest

Attendance Per...

Assign

Clear

4.7 Leave & On Business

Procedure

Step 1 Select **Attendance** > **Leave & On Business** .

Step 2 Select the personnel who needs to ask for a leave or go on a business trip.

Step 3 Select the leave type, shift type and then enter the remark.

It supports three types, including leave, business trip and paid leave. You can also customize your own types.



Only staff who have been assigned shifts can set the leave type.

Step 4 Set the start date and end date, and then enter the remarks.

Step 5 Click **Assign** to add the leave and business trip.

Click **Clear** to cancel the operation.

Figure 4-19 Ask for leave and on business

Department	Today 2023-01							Leave
Search.. Q	Sun.	Mon.	Tue.	Wed.	Thu.	Fri.	Sat.	Type:
▼ Default Company <input checked="" type="checkbox"/> 1 <input type="checkbox"/> 10 <input type="checkbox"/> 100 <input type="checkbox"/> 1000 <input type="checkbox"/> 101 <input type="checkbox"/> 102 <input type="checkbox"/> 103 <input type="checkbox"/> 104 <input type="checkbox"/> 105 <input type="checkbox"/> 106 <input type="checkbox"/> 107 <input type="checkbox"/> 108 <input type="checkbox"/> 109 <input type="checkbox"/> 11 <input type="checkbox"/> 110 <input type="checkbox"/> 111 <input type="checkbox"/> 112 <input type="checkbox"/> 113 <input type="checkbox"/> 114 <input type="checkbox"/> 115 <input type="checkbox"/> 116	25	26	27	28	29	30	31	Paid Leave <input type="text"/> Shift: <input type="text"/> <input checked="" type="checkbox"/> Working Day: Start Date: <input type="text"/> End Date: <input type="text"/> Remarks: <input type="text"/> <input type="button" value="Assign"/> <input type="button" value="Clear"/>
	1	2	3	4	5	6	7	
	08:30-17:30	08:30-17:30	Rest	Rest	Rest	08:30-17:30	08:30-17:30	
	8	9	10	11	12	13	14	
	Rest	08:30-17:30	08:30-17:30	08:30-17:30	08:30-17:30	Rest	Rest	
	15	16	17	18	19	20	21	
	Rest	08:30-17:30	08:30-17:30	08:30-17:30	08:30-17:30	Rest	Rest	
	22	23	24	25	26	27	28	
	Rest	08:30-17:30	08:30-17:30	08:30-17:30	08:30-17:30	Rest	Rest	
	29	30	31	1	2	3	4	
	Rest	08:30-17:30	08:30-17:30					

4.8 Count Attendance

You can search for the statistics collected by the SmartPSS Lite.

Procedure

- Step 1 Select **Attendance** > **Count Attendance**.
- Step 2 Select the needed time, department and staff, and then select the attendance status, such as **Absent** and **Overtime**.
- Step 3 Click **Calculate**.

Figure 4-20 Count attendance

Time:
2022/11/05-2022/12/05
Department:
All
Personnel/Name:
Status:
☐ Normal ☐ Absent
☐ Late for ... ☐ Early Le...
☐ Overtime ☐ Left with...
☐ Leave fo... ☐ Break St...
☐ Rest
Calculate

Abnormality Export

Department	User ID	Name	Date	TimeZone	Sign
Default Company	1010	tian	2022-12-05		Not Si

Summary Items	Time (Minute)
Required Work	540
Actual Work	0
Valid Work	0
Late In	0
Early Out	0
Absent	540
Actual Overtime	0
Overtime	0
Overtime Level 1	0
Overtime Level 2	0
Overtime Level 3	0
Leave & On Bus...	0
Left without Ch...	0
Break Time	0
Break Status	Normal

Every page shows 20 Total 1 records. < < 1/1 > > Jump to Page Jump

Step 4 (Optional) Click **Export** to export the analyzed attendance statistics to the computer.

Step 5 (Optional) Click **Abnormality** to deal with the abnormal attendance.

Figure 4-21 Deal with abnormality

Edit Records

Department
Add Delete

Search..
Date: 2022-11-23 Time: 8:30 Work Type: Check In

1
01
1
222
555
Fzj111
dc
llycc
lyc3
lyc4
lyc5
lyc6
ngyjkrduytkiy,l

Remark:

	User ID	Name	Record Time	Attendance Status	Device	Record Type
<input type="checkbox"/>	111	Fzj111	2022-11-23 14:...	Check In/Out		(automatic)Passw...
<input type="checkbox"/>	111	Fzj111	2022-11-23 11:...	Check In/Out		(automatic)Passw...
<input type="checkbox"/>	111	Fzj111	2022-11-23 11:...	Check In/Out		(automatic)Passw...
<input type="checkbox"/>	111	Fzj111	2022-11-23 11:...	Check In/Out		(automatic)Passw...
<input type="checkbox"/>	111	Fzj111	2022-11-23 11:...	Check In/Out		(automatic)Passw...
<input type="checkbox"/>	111	Fzj111	2022-11-23 11:...	Check In/Out		(automatic)Passw...
<input type="checkbox"/>	111	Fzj111	2022-11-23 11:...	Check In/Out		(automatic)Passw...
<input type="checkbox"/>	111	Fzj111	2022-11-23 11:...	Check In/Out		(automatic)Passw...
<input type="checkbox"/>	111	Fzj111	2022-11-23 10:...	Check In/Out		(automatic)Card ...

Every page shows 100 Total 10 records. < < 1/1 > > Jump to Page Jump

OK Cancel

1. Select the staff who has attendance abnormality, and then set the date, time and work type.
2. Select one record, and then enter the remark to note the reason.

3. Click **OK** to confirm operation.

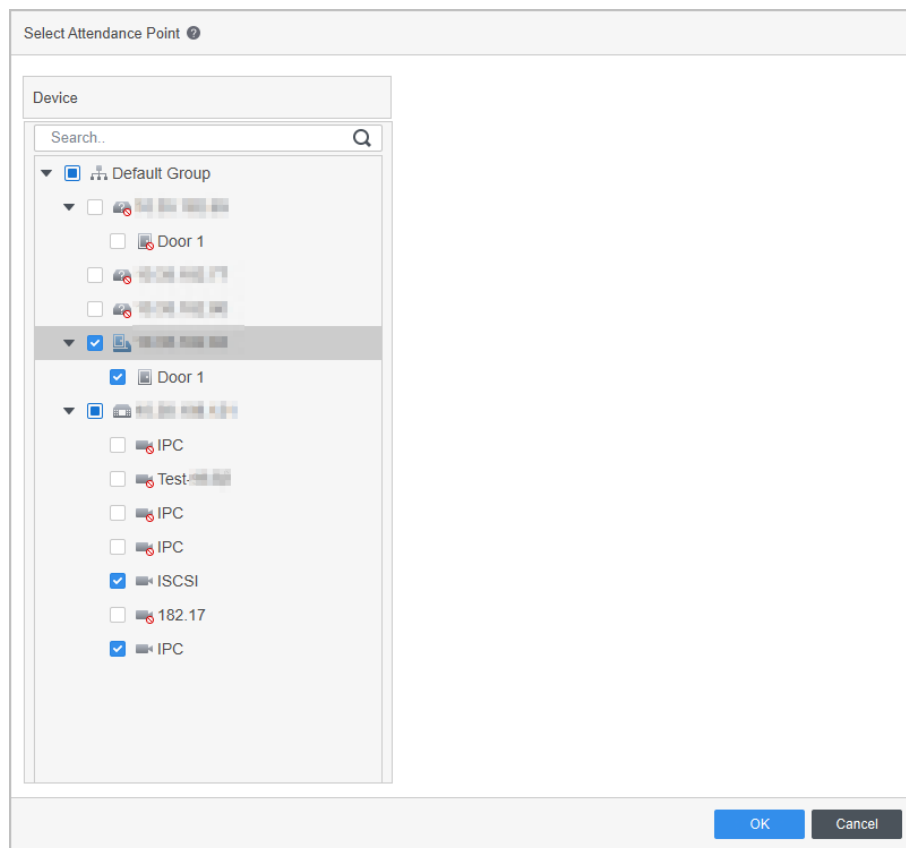
4.9 Setting Attendance Points

For access controllers and attendance standalone, they need to be set as attendance points in advance, and then the platform receives attendance records after configuration.

Procedure

- Step 1 Select **Attendance** > **Attendance Point Settings**.
- Step 2 In the device list, select the device that you want to be used as an attendance point.
- Step 3 Click **OK**.

Figure 4-22 Setting attendance point



5 Attendance Monitor

You can view the real-time attendance data of the staff on the **Monitor** page.



To view real-time attendance data on the **Monitor** page, the following conditions must be met:

- Add staffs to the platform.
- Add devices to the platform. If you need to use access controllers to check attendance data, you need to set the devices as attendance points in advance, and then the platform receives attendance records after configuration. For details, see "4.9 Setting Attendance Points".
- Give staffs attendance permission on the device.

Figure 5-1 Attendance monitor page

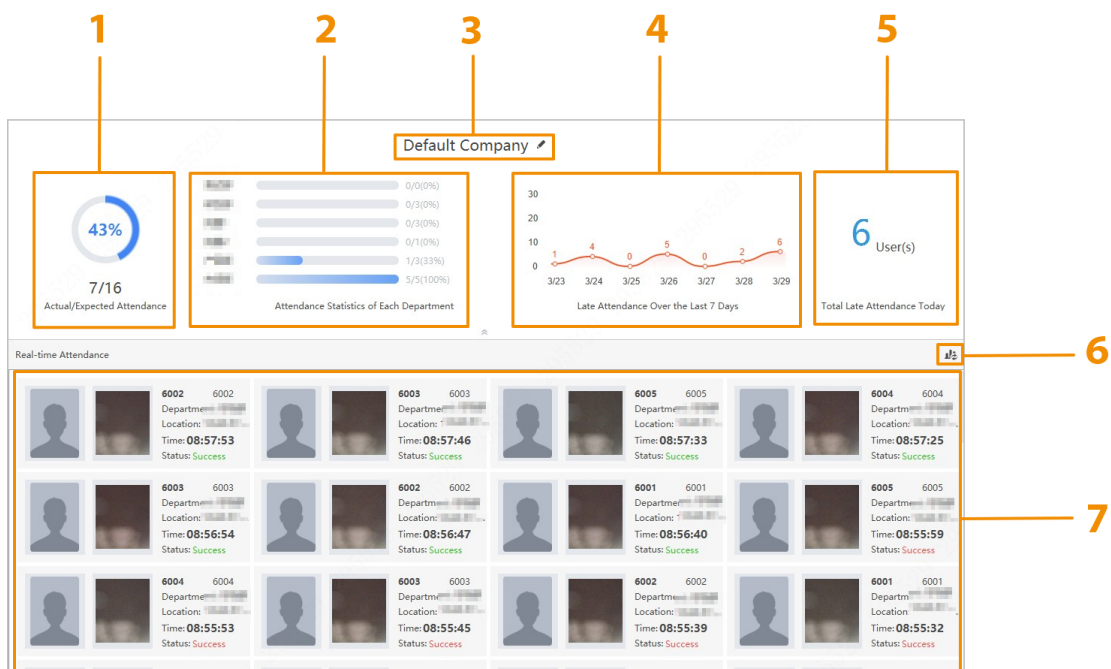



Table 5-1 Description of attendance monitor page

No.	Parameter	Description
1	Actual/Expected Attendance	Displays the number and percentage of the actual/expected attendance. Click light/dark area of the pie chart to view the staff information of attendance/non-attendance.
2	Attendance Statistics of Each Department	Displays the number and percentage of the attendance statistics of each department.
3	Default name	Click to modify the name of the page. Click to close the viewing board.
4	Late Attendance Over the Last 7 Days	Displays the number of late attendances over the last 7 days as a graph. Point to the graph to view the number of late arrivals per day.

No.	Parameter	Description
5	Total Late Attendance Today	Displays the number of total late attendance today. Click the number to view the staff information of late attendance.
6	Sync Data	<p>Click  to synchronize list information.</p> <ul style="list-style-type: none"> ● Synchronize staff information: Synchronize the information when the staff information and staff shift schedules are changed. ● Synchronized punch-card data: Synchronize the data of offline devices to the platform after the device goes online.
7	Real-time Attendance	Displays real-time staff attendance information.

6 Record Query

You can search for the original records collected by terminal or the records analyzed by the SmartPSS Lite.

Procedure

- Step 1 Select **Record** > **Attendance Record** .
- Step 2 Select the time, department and staff.
- Step 3 Click **Search**.



If the time zone of the computer supports DST (Daylight Saving time), the attendance event reported to the platform will be the device UTC (Universal Time Coordinated) time +1 hour.

Figure 6-1 Record searching

Time:
2022/10/23-2022/11/23

Department:
All

Personnel/Name:
111

Search

- Step 4 (Optional) Click **Import** to import attendance data to the SmartPSS Lite.

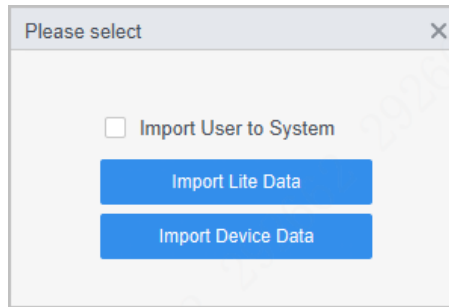
After the personnel in the platform are scheduled, the attendance statistics can be generated according to the imported data.

1. Import platform data or device data to the platform.
2. When importing data, you can select **Import new user**. If selected, you can add new users to the platform while importing data; If not selected, no new users will be added and the attendance data of new users will not be imported to the platform.



Only selected type of device data can be added to the platform

Figure 6-2 Import data

A dialog box titled "Please select" with a close button (X) in the top right corner. Inside the dialog, there is a checkbox labeled "Import User to System" which is currently unchecked. Below the checkbox are two blue buttons: "Import Lite Data" and "Import Device Data".

Step 5 (Optional) Click **Export** to automatically export attendance data to local computer.



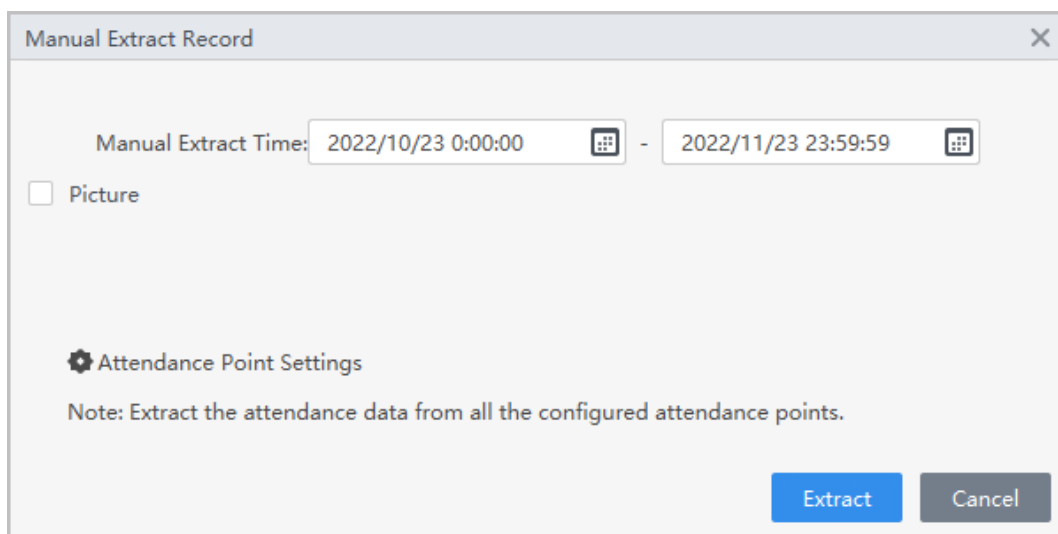
You can export attendance data from the web client of the device.

Step 6 (Optional) Click **Data Extraction**, set extract time, and then click **Extract**.



You can set attendance points when selecting **Attendance Manager > Attendance Point Settings**. For details, see "4.9 Setting Attendance Points".

Figure 6-3 Manual extract record

A dialog box titled "Manual Extract Record" with a close button (X) in the top right corner. Inside the dialog, there is a section labeled "Manual Extract Time:" followed by two date and time pickers. The first picker shows "2022/10/23 0:00:00" and the second shows "2022/11/23 23:59:59", separated by a minus sign. Below this is a checkbox labeled "Picture" which is unchecked. Further down is a section titled "Attendance Point Settings" with a gear icon. Below this section is a note: "Note: Extract the attendance data from all the configured attendance points." At the bottom right of the dialog are two buttons: "Extract" (blue) and "Cancel" (gray).

7 Report Query

You can view the normal attendance, attendance abnormality, overtime attendance and employee information here. The statistics can be exported as reports.

Click **Report** on the attendance home page, and then select the time, department and statistic type to view the corresponding reports.



It is available to use symbols to represent statistic in the reports. For example, use A to represents absent. For details, see “4.2.1 Setting Statistical Objects”.

Figure 7-1 Report query

Time

User Select

2022/10/29-2022/11/29

All People

Normal

Records

Statistics of the Attendance Statuses in the Device

Daily Summary Table

Time Card

Total Time Card

Hourly Overview

Time Card List

Daily Attendance

Monthly Overview

Attendance Card

Flexible Attendance

Abnormality

Early Leave

Late

Absent

Attendance Processing

Overtime

Overtime Statistics

Employee

Employee Details

Employee Information

Employee Schedule

Appendix 1 Cybersecurity Recommendations

The necessary measures to ensure the basic cyber security of the platform:

1. Use Strong Passwords

Please refer to the following suggestions to set passwords:

- The length should not be less than 8 characters.
- Include at least two types of characters; character types include upper and lower case letters, numbers and symbols.
- Do not contain the account name or the account name in reverse order.
- Do not use continuous characters, such as 123, abc, etc.
- Do not use overlapped characters, such as 111, aaa, etc.

2. Customize the Answer to the Security Question

The security question setting should ensure the difference of answers, choose different questions and customize different answers (all questions are prohibited from being set to the same answer) to reduce the risk of security question being guessed or cracked.

Recommendation measures to enhance platform cyber security:

1. Enable Account Binding IP/MAC

It is recommended to enable the account binding IP/MAC mechanism, and configure the IP/MAC of the terminal where the commonly used client is located as an allowlist to further improve access security.

2. Change Passwords Regularly

We suggest that you change passwords regularly to reduce the risk of being guessed or cracked.

3. Turn On Account Lock Mechanism

The account lock function is enabled by default at the factory, and it is recommended to keep it on to protect the security of your account. After the attacker has failed multiple password attempts, the corresponding account and source IP will be locked.

4. Reasonable Allocation of Accounts and Permissions

According to business and management needs, reasonably add new users, and reasonably allocate a minimum set of permissions for them.

5. Close Non-essential Services and Restrict the Open Form of Essential Services

If not needed, it is recommended to turn off NetBIOS (port 137, 138, 139), SMB (port 445), remote desktop (port 3389) and other services under Windows, and Telnet (port 23) and SSH (port 22) under Linux. At the same time, close the database port to the outside or only open to a specific IP address, such as MySQL (port 3306), to reduce the risks faced by the platform.

6. Patch the Operating System/Third Party Components

It is recommended to regularly detect security vulnerabilities in the operating system and third-party components, and apply official patches in time.

7. Security Audit

- Check online users: It is recommended to check online users irregularly to identify whether there are illegal users logging in.
- View the platform log: By viewing the log, you can get the IP information of the attempt to log in to the platform and the key operation information of the logged-in user.

8. The Establishment of a Secure Network Environment

In order to better protect the security of the platform and reduce cyber security risks, it is recommended that:

- Follow the principle of minimization, restrict the ports that the platform maps externally by firewalls or routers, and only map ports that are necessary for services.

- Based on actual network requirements, separate networks: if there is no communication requirement between the two subnets, it is recommended to use VLAN, gatekeeper, etc. to divide the network to achieve the effect of network isolation.