

Feature Description Document

Understanding IXM Time Shift Settings



Purpose

This document explains the various configurations available for Shift Settings as part of IXM Time.

Applies to

TITAN	TFACE	TOUCH 2	SENSE 2	MERGE 2	MYCRO
All Devices					

Description

Shift Settings allows users to create, modify, and delete shifts and schedules. IXM WEB application users can assign and change the Shifts & Schedule for employees.



Shift Configuration

1. From **Home** >> Click the **IXM TIME** tab on the top >> Click **Shift Settings** >> Navigate to the **Shift** tab.

The screenshot shows the 'IXM Time Shift Settings' page. At the top, there are statistics: 'Total Shifts: 5' and 'Total Schedules: 5'. Below this are tabs for 'Shift', 'Schedule', and 'Shift Changer'. A search bar is present with the text 'Type to search' and a 'Search' button. To the right of the search bar are 'Add New' and 'Transfer' buttons. Below the search bar is a table with one row for 'Shift1'. The table has columns for Code, Start Time, End Time, and Duration. To the right of the table are 'Edit' and 'Delete' buttons.

Code	Start Time	End Time	Duration
S1	10:00	19:00	9:00 (hrs)
Break Start Time	Break End Time	Break Duration	Deduct Break
--	--	--	No
2+ Punch Policy	2+ Punch Policy	Tolerance time (Entry)	Tolerance time (Exit)
None	None	0 (mins)	0 (Pre) - 0 (Post) (mins)
Overtime	Min. Half day	Min. Full day	Max Early-IN Allowed
0 (mins)	4:00 (hrs)	9:00 (hrs)	360 (mins)
Max Late-OUT Allowed			
240 (mins)			

2. One shift will be created by default in the software. You can either modify the available shift or add a new shift.



3. Click **Add New** to add a new shift or Click **Edit Shift** to edit an existing Shift.

Add Shift

SHIFT DETAILS

Code *	Name *	Start Time *	End Time *	Duration (hrs)
MAX. 3 CHARACTERS		HH:mm	HH:mm	

BREAK DETAILS

Start Time	End Time	Duration (hrs)	2 Punch Policy	2+ Punch Policy
HH:mm	HH:mm		None	None

Deduct Break

TOLERANCE TIME DETAILS(FOR SENDING EMAILS)

Entry Punch	Exit Punch (Pre)	Exit Punch (Post)	Overtime
0	0	0	0

OTHER DETAILS

Min. Half day (hrs) *	Min. Full day (hrs) *
HH:mm	HH:mm

MAXIMUM TIME ALLOWED

Max Early-IN Allowed (mins)	Max Late-OUT Allowed (mins)
0	0

Save **Cancel**

Edit Shift

SHIFT DETAILS

Code *	Name *	Start Time *	End Time *	Duration (hrs)
S1	Shift1	10:00	19:00	9:00

BREAK DETAILS

Start Time	End Time	Duration (hrs)	2 Punch Policy	2+ Punch Policy
13:00	14:00	1:00	Fixed	Actual

Deduct Break

TOLERANCE TIME DETAILS(FOR SENDING EMAILS)

Entry Punch	Exit Punch (Pre)	Exit Punch (Post)	Overtime
30	30	30	60

OTHER DETAILS

Min. Half day (hrs) *	Min. Full day (hrs) *
04:00	08:00

MAXIMUM TIME ALLOWED

Max Early-IN Allowed (mins)	Max Late-OUT Allowed (mins)
360	360

Save **Cancel**

4. The various fields and their details are explained below:



- **Shift Details:**
 - **Code:** Unique identification for this shift. Maximum 3 characters allowed.
 - **Name:** Shift's name.
 - **Start Time:** Start time of the shift.
 - **End Time:** End time of the shift.
 - **Shift Duration:** Duration will be calculated automatically based on the provided shift start and end time.
- **Break Details:**
 - **Break Start Time:** Start time of the break.
 - **Break End Time:** End time of the break.
 - **Break Duration:** Duration will be calculated automatically based on the provided break start and end time.
 - **Deduction for 2 Punch Policy:**
 - No deduction: There will be no deduction in the total hours worked daily by an employee based on the break duration.
 - Fixed deduction: The defined break duration will be deducted from the daily hours worked for each employee.
 - **Deduction for 2+ Punch Policy:**
 - Fixed: The defined break duration will be deducted from the daily hours worked for each employee regardless of the Break related transactions.
 - Actual: The actual break duration will be deducted from the daily hours worked for each employee based on their actual transactions for each break.
 - Fixed if less otherwise actual: If the break duration for the employee is less than the defined break duration then the defined break duration will be deducted for daily hours worked. If the break duration is more than the defined break duration then the actual break duration will be considered for the calculation of daily hours worked.
- **Tolerance Time Details (For Sending Emails):**
 - **Entry Punch:** Enter the duration after shift start time when an email for Missing IN punch will be sent if the punch for an employee is not found in that duration.



- **Exit Punch:** Enter the duration in before shift end time (Pre) and after shift end time (Post) when an email for Missing OUT punch will be sent if a punch is not found in that duration.
- **Overtime:** Enter duration after Max Late OUT period to send an overtime email to the reporting manager.
- **Other Details:**
 - **Min. Half Day:** Minimum working hours required to consider as a half-day present.
 - **Min. Full Day:** Minimum working hours required to consider a full day present.
- **Maximum Time Allowed**
 - **Max Early-IN Allowed:** Specify duration before shift start time to consider punch valid for attendance calculation.
 - **Max Late-OUT Allowed:** Specify duration after shift end time to consider punch valid for attendance calculation.



Transfer Selected Shift(s)

Transfer of Shift and Schedule to a device may be required for Shift Based Access feature (Controlling employee's access to areas, based on shift timings)

1. Select shift(s) that need to be transferred to the device. To select multiple shifts, tap and hold CTRL and select the required shifts. Click **Transfer** on the top right and click on a device group or device to start the transfer of selected shift(s).

The screenshot shows the 'Shift Settings' page in the IXM Time system. It displays a list of shifts with their respective details. The 'Transfer' button is highlighted with a red box.

Shift	Code	Start Time	End Time	Duration
Shift1	S1	10:00	19:00	9:00 (hrs)
Break Start Time	13:00	Break End Time	14:00	Break Duration
2+ Punch Policy	Fixed	2+ Punch Policy	Actual	Deduct Break
Overtime	0 (mins)	Min. Half day	4:00 (hrs)	30 (mins)
Max Later-OUT Allowed	360 (mins)	Min. Full day	8:00 (hrs)	30 (Pre) - 30 (Post) (mins)
				Max Early-IN Allowed
				360 (mins)
Canda Shift	CN	9:00	17:00	08:00 (hrs)
Break Start Time	13:00	Break End Time	14:00	Break Duration
2+ Punch Policy	None	2+ Punch Policy	None	Deduct Break
Overtime	0 (mins)	Min. Half day	4:00 (hrs)	0 (mins)
		Min. Full day	8:00 (hrs)	0 (Pro) - 0 (Post) (mins)
				Max Early-IN Allowed
				240 (mins)

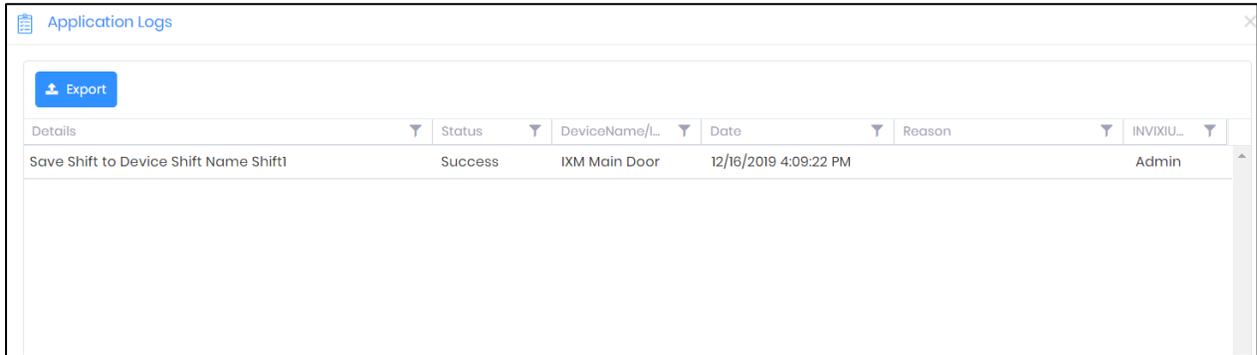
The screenshot shows the 'Transfer Schedule' dialog box. It displays a list of device groups and devices that have been selected for transfer. The 'Send' button is highlighted.

Select Device(s)

- Device Group
 - TA
 - IXM Main Door



2. Upon completion, a log will display the transfer status.

A screenshot of a web application window titled "Application Logs". The window has a close button in the top right corner. Below the title bar is a blue "Export" button with a download icon. Below that is a table with columns: "Details", "Status", "DeviceName/L...", "Date", "Reason", and "INVIXIU...". The table contains one row of data: "Save Shift to Device Shift Name Shift", "Success", "IXM Main Door", "12/16/2019 4:09:22 PM", and "Admin".

Details	Status	DeviceName/L...	Date	Reason	INVIXIU...
Save Shift to Device Shift Name Shift	Success	IXM Main Door	12/16/2019 4:09:22 PM		Admin



Schedule Configuration

The purpose of a schedule or roster is to define shift, weekly offs, and the rotation of employees at work by assigning a pattern for a defined period.

1. From **Home** >> Click the **IXM TIME** tab on the top >> Click **Shift Settings** >> Navigate to the **Schedule** tab.

IXM Time Shift Settings Total Shifts: 4 Total Schedules: 5

Shift **Schedule** Shift Changer Shift Assigned

Q Type to search Search Add New Transfer

Schedule	Start Date	Default	Day Off 1	Day Off 2	Deny Access On Weekoff	Deny Access On Holiday	Actions
Schedule1	01/01/2018	Yes	Sunday	None	No	No	Edit Delete
CN	01/01/2019	No	Sunday	Saturday	No	No	Edit Delete
IN	07/01/2019	No	Sunday	Saturday	No	No	Edit Delete



2. Click **Add New** to add a new Schedule or Click **Edit** to edit an existing Schedule.

Add Schedule

SCHEDULE DETAILS

Name *

Start Date *

Default

WEEKLY OFF

Day Off 1 Day Off 2

Off 2 on Week

Week 1 Week 2 Week 3

Week 4 Week 5

Access Rule

Deny Access On Weekoff Deny Access On Holiday

SHIFT PREFERENCES

Remove	Selected	Rotation

Add	Available
+ <input type="checkbox"/>	SI
+ <input type="checkbox"/>	CN
+ <input type="checkbox"/>	IN
+ <input type="checkbox"/>	SB

Add Schedule

SCHEDULE DETAILS

Name *

Start Date *

Default

WEEKLY OFF

Day Off 1 Day Off 2

Off 2 on Week

Week 1 Week 2 Week 3

Week 4 Week 5

Access Rule

Deny Access On Weekoff Deny Access On Holiday

SHIFT PREFERENCES

Remove	Selected	Rotation
<input checked="" type="checkbox"/>	CN	1
<input checked="" type="checkbox"/>	IN	1

Add	Available
+ <input type="checkbox"/>	SI
+ <input type="checkbox"/>	CN
+ <input type="checkbox"/>	IN
+ <input type="checkbox"/>	SB



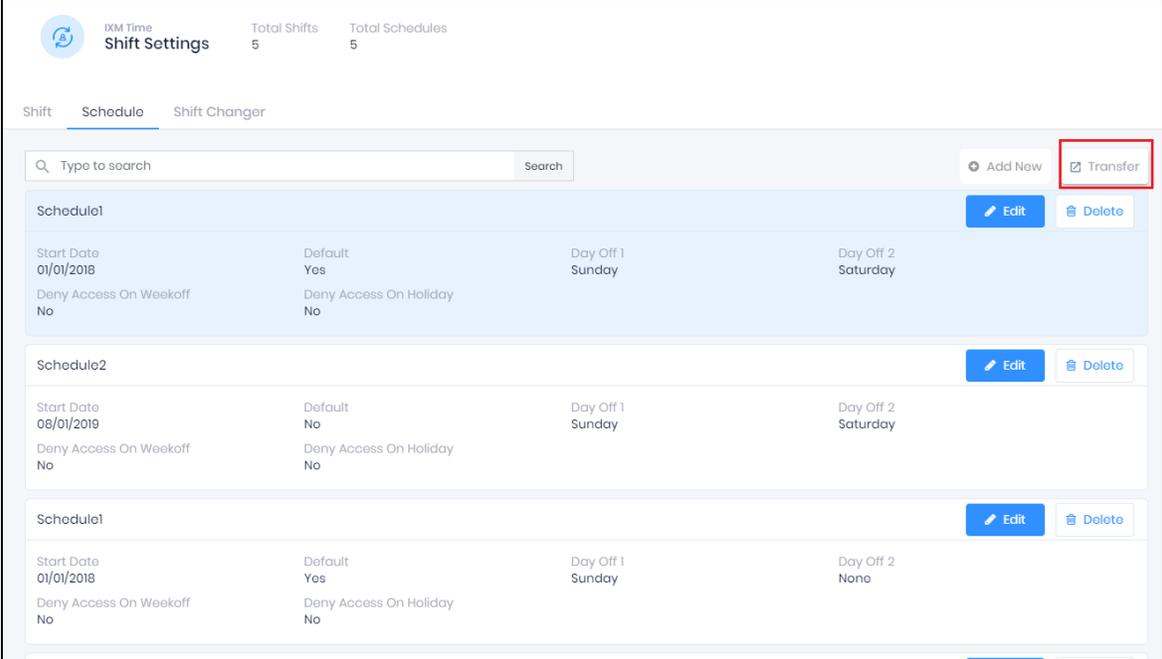
3. The various fields and their details are explained below:

- **Schedule Details:**
 - **Name:** Name of the Schedule.
 - **Start Date:** Date from which schedule will come into effect.
 - **Default:** Enable it if you want to set this schedule as the default schedule.
- **Shift Preferences:** Add all the shifts which need to be applied under this schedule.
 - **Add Shift:** Click on the respective “+” icons to add Shifts to this schedule. Shifts on the right side of the shift preferences are currently added to this schedule.
 - **Add Rotation:** Provide some days (including a week off and holiday) after which shift should be changed.
- **Weekly Off:**
 - **Day Off 1:** Provide the first week-off day.
 - **Day Off 2:** Provide second week-off day. The Day Off 2 can be selected for specific weeks if needed. E.g. If Week 2 & Week 4 is selected then Day 2 Week off will be considered for those 2 weeks only.
- **Access Rule:**
 - **Deny Access on Week off:** Enabling this option will not allow employees access on Week off days.
 - **Deny Access on Holiday:** Enabling this option will not allow employees access on Holidays.

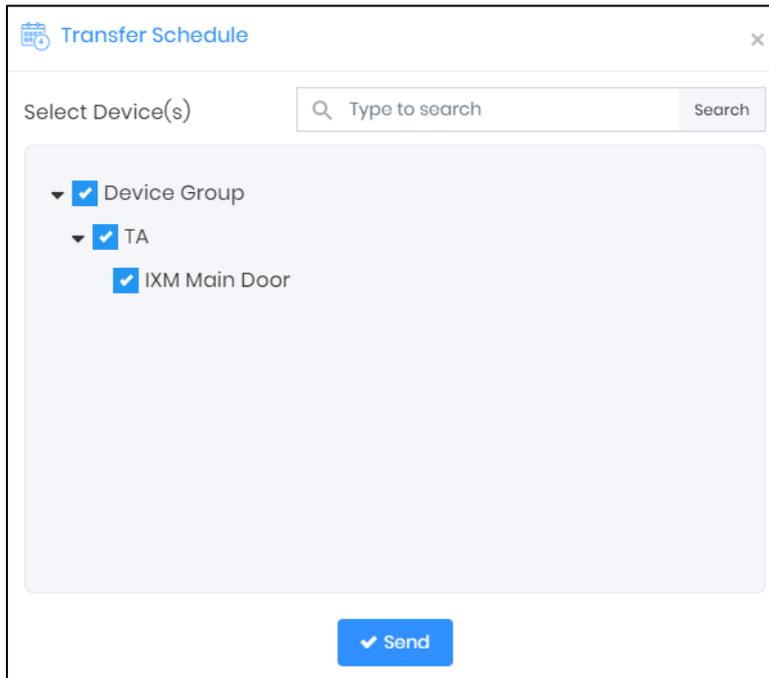
4. Make the necessary selections and click **Save**.

Transfer Selected Schedule(s)

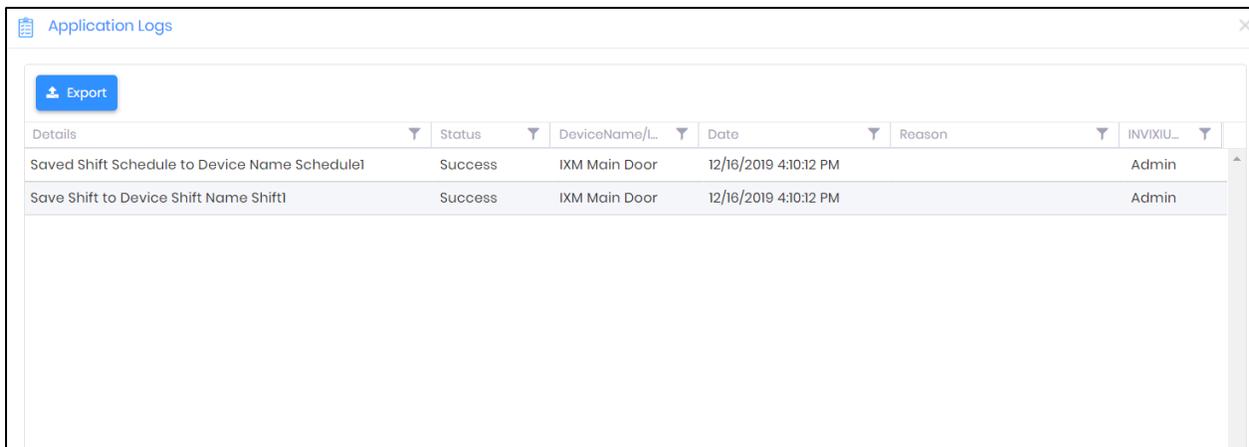
1. Select Schedule(s) that need to be transferred to the device. To select multiple schedules, tap and hold CTRL and select the required schedules. Click **Transfer** on the top right and click on a device group or device to start the transfer.



The screenshot shows the 'Shift Settings' page in the INVIXIUM application. At the top, there are statistics for 'Total Shifts' (5) and 'Total Schedules' (5). Below this is a navigation bar with 'Shift', 'Schedule', and 'Shift Changer' tabs. A search bar is present with the placeholder text 'Type to search'. To the right of the search bar are two buttons: 'Add New' and 'Transfer'. The 'Transfer' button is highlighted with a red rectangular box. Below the search bar is a list of three schedule entries, each with an 'Edit' and 'Delete' button. The first entry is 'Schedule1' with a start date of '01/01/2018', 'Default' set to 'Yes', 'Day Off 1' as 'Sunday', and 'Day Off 2' as 'Saturday'. The second entry is 'Schedule2' with a start date of '08/01/2019', 'Default' set to 'No', 'Day Off 1' as 'Sunday', and 'Day Off 2' as 'Saturday'. The third entry is 'Schedule1' with a start date of '01/01/2018', 'Default' set to 'Yes', 'Day Off 1' as 'Sunday', and 'Day Off 2' as 'None'.



2. Upon completion, a log will display the transfer status.

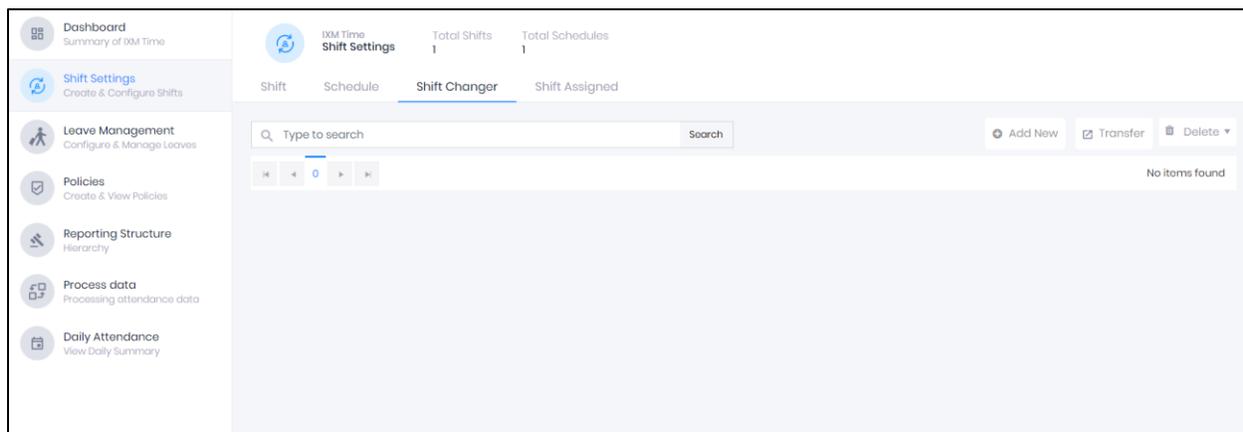


3. After Shift and Schedule configuration admin can assign it to applicable T&A employees from the **Employees** Tab in IXM WEB.

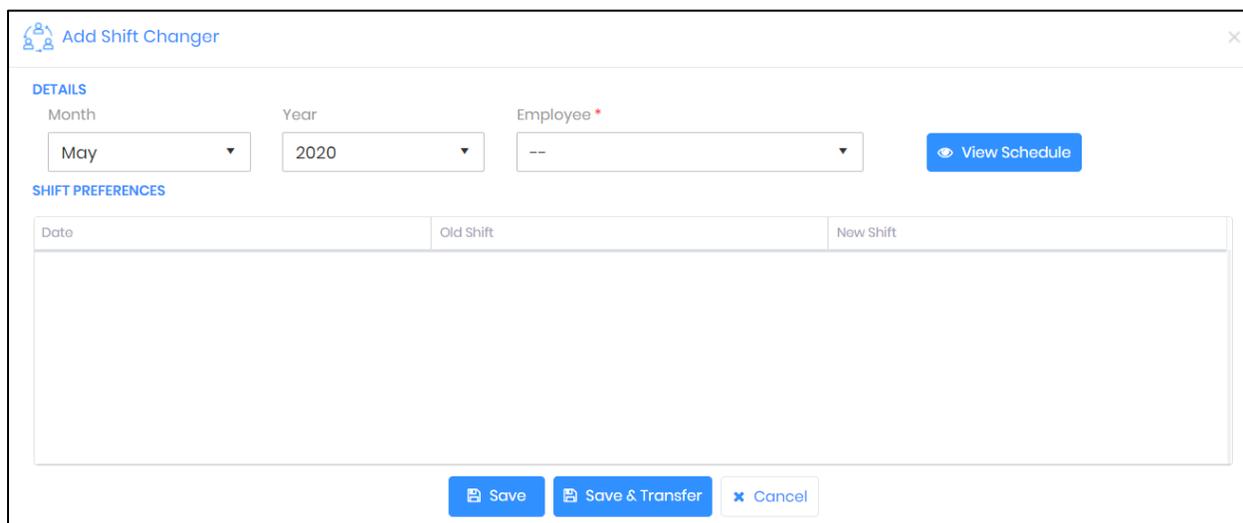


Shift Changer

1. This option allows IXM WEB users to change and update employee's shifts for a selected month.
2. From **Home** >> Click the **IXM TIME** tab on the top >> Click **Shift Settings** >> Navigate to the **Shift Changer** tab.



3. Click **Add New** to add a new Shift Change.





4. Select the required Month, Year and Employee from the dropdowns and click **View Schedule** to view the existing schedule for the employee.

The screenshot shows the 'Add Shift Changer' window for Christopher Mendoza in December 2019. The 'DETAILS' section includes dropdowns for Month (December), Year (2019), and User (Christopher Mendoza), with a 'View Schedule' button. The 'SHIFT PREFERENCES' table shows the following data:

Date	Old Shift	New Shift
12/17/2019	CN	IN
12/18/2019	IN	CN
12/19/2019	CN	Select Shift
12/20/2019	IN	Select Shift
12/21/2019	CN WO	Select Shift
12/22/2019	IN WO	Select Shift
12/23/2019	CN	Select Shift

Buttons at the bottom: Save, Save & Transfer, Cancel.

5. For the dates where the Shift needs to be changed, click the New Shift tab for the respective dates and select the new shift for that date for the employee

The screenshot shows the 'Add Shift Changer' window for William Roy in May 2020. The 'DETAILS' section includes dropdowns for Month (May), Year (2020), and Employee (William Roy), with a 'View Schedule' button. The 'SHIFT PREFERENCES' table shows the following data:

Date	Old Shift	New Shift
05/01/2020	S1	Select Shift
05/02/2020	S1	Select Shift
05/03/2020	S1 WO	Select Shift
05/04/2020	S1	Select Shift
05/05/2020	S1	Select Shift
05/06/2020	S1	Select Shift
05/07/2020	S1	Select Shift

A dropdown menu is open for the 'New Shift' column on 05/02/2020, showing 'Select Shift' as the selected option. Buttons at the bottom: Save, Save & Transfer, Cancel.



6. After updating the shift, click **Save & Transfer** to update the changes in the device and the database.

Application Logs

Export

Details	Status	DeviceName/L.	Date	Reason	INVIXIUM
Shift Changer saved on Device: Date 12/19/2019 for User ID 11014 with Shift Code IN	Success	TITAN FV Input	12/16/2019 4:04:15 PM		Admin
Shift Changer inserted in Database: Date 12/19/2019 , for User ID 11014 with Shift Code IN	Success		12/16/2019 4:04:14 PM		Admin

7. Employee's shift changer records will be displayed in the **Shift Changer** tab.

IXM Time
Shift Settings

Total Shifts: 4 Total Schedules: 6

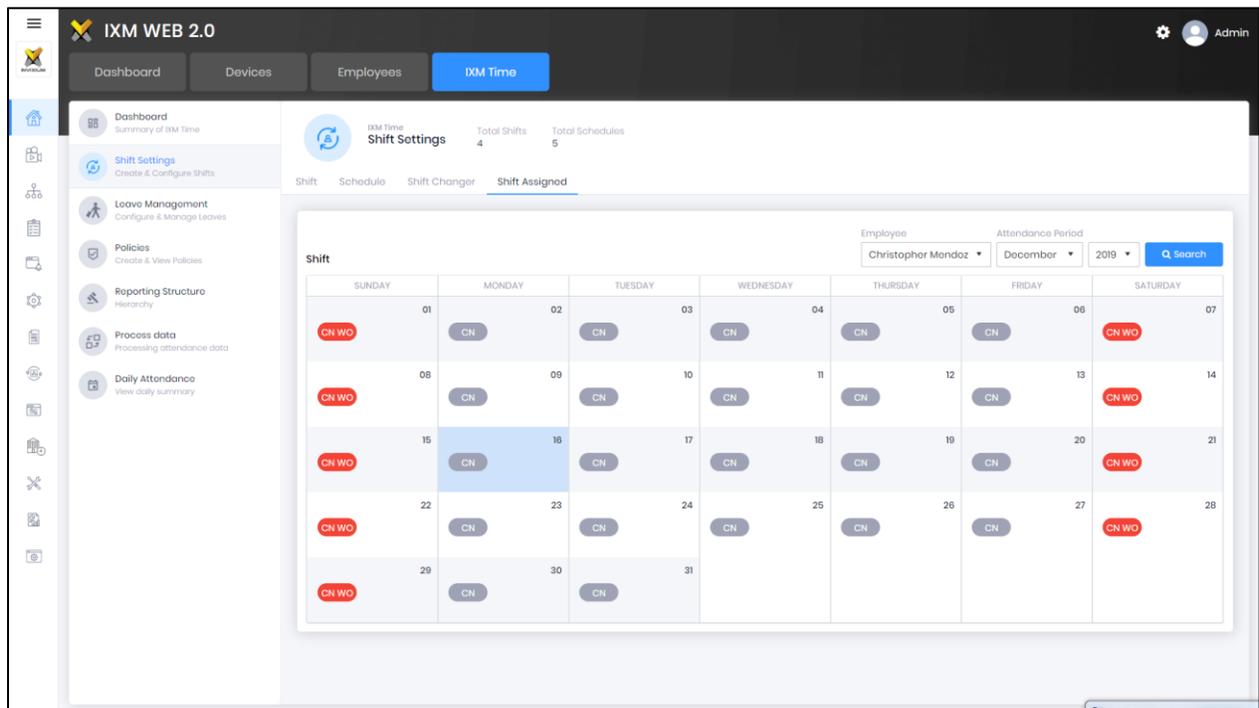
Shift Schedule **Shift Changer** Shift Assigned

Type to search Search Add New Transfer Delete

Christopher Mendoza		
Date	Old Shift	New Shift
17/12/2019	CN	IN
Christopher Mendoza		
Date	Old Shift	New Shift
18/12/2019	IN	CN
Christopher Mendoza		
Date	Old Shift	New Shift
19/12/2019	CN	IN
Christopher Mendoza		
Date	Old Shift	New Shift
21/12/2019	CN	IN

Shift Assigned

1. Shift Assigned options allow the user to view the shift chart or roster assigned for each employee for selected month-year.
2. From **Home** >> Click the **IXM TIME** tab on the top >> Click **Shift Settings** >> Navigate to the **Shift Assigned** tab to view the chart.



The screenshot displays the 'IXM WEB 2.0' interface. The top navigation bar includes 'Dashboard', 'Devices', 'Employees', and 'IXM Time'. The left sidebar contains various management options like 'Dashboard', 'Shift Settings', 'Leave Management', 'Policies', 'Reporting Structure', 'Process data', and 'Daily Attendance'. The main content area shows 'Shift Settings' for 'Christopher Mondoz' in 'December 2019'. It features a 'Shift Assigned' tab with a calendar grid showing shifts for each day of the month. The grid includes columns for days of the week and rows for dates. Shifts are indicated by 'CN' (Current) and 'CN WO' (Current with Overtime) labels.

SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
01 CN WO	02 CN	03 CN	04 CN	05 CN	06 CN	07 CN WO
08 CN WO	09 CN	10 CN	11 CN	12 CN	13 CN	14 CN WO
15 CN WO	16 CN	17 CN	18 CN	19 CN	20 CN	21 CN WO
22 CN WO	23 CN	24 CN	25 CN	26 CN	27 CN	28 CN WO
29 CN WO	30 CN	31 CN				



Support

For more information relating to this Feature Description document, please contact us at support@invixium.com

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