Punch In Datasheet

Contents

1. Introduction

Punch In Application is best suited for attendance needs of smallest to very big Enterprises (staff only), Factories (staff) and Educational Institutions (staff and students). Special Menus gets enabled for Education Institutions to track staff & Student enrollment and attendance.

Employer signs up, configure policies, manage employees data, approvals & reports. Employees log attendance & apply leaves. The data access or visibility is dependent on reporting hierarchy privileges

2. Punch In rollout steps

Employer subscribes, configure policies, Branches, Leaves and add employees with pictures. Below table shows high level details

Employer (Super User):

1. Subscribe >	2. Configure Policies >	3. Add Employees/Students
✓ Mobile/Web	✓ Branches with GPS & Designations ✓ Shifts & Leave settings ✓ Holidays ✓ Timetable (for educational institutions)	✓ Add Individual or Bulk load Employees & Students data. ✓ Upload reference picture for each. Supervisor/Admin/HR can upload or employee can confirm with first selfie picture ✓ Supervisor/Admin/HR need to upload or take camera picture of Students

Note: Mail goes to each employee on successful employee data upload

Employee (Manager/Admin/HR/Employee):

✓ Download Punch In App, Install and login ✓ Start using the application for Attendance logging ✓ Supervisor can mark staff attendance thru "Punch In Others" or "Live Match" ✓ Teachers can mark attendance of Students by specifying class and subject

3. Punch In Roles:

Punch In Application has seven user types and below are the actions that they can perform. Special Menus gets enabled for educational institutions. The seven user types include Super User, Manager, Admin, HR, Employee, Attendance Supervisor and Student.

SL#	Action	Super User	Manager	Admin	HR	Employee	Attendance Supervisor
1	Subscribe and configuration company (Menu Company Configuration)	Yes					
2	Company Leaves (Menu Admin Activities -> Company Leave configure)	Yes	Yes	Yes	Yes		
3	Employee Leave management (Menu Admin Activities -> Employee Leave configure)	Yes	Yes	Yes	Yes		
4	Manage Shifts (Menu Admin Activities -> Manage Shifts)	Yes	Yes	Yes	Yes		
5	Employee Shift roaster loading (Menu Admin Activities -> Employee Roaster upload)	Yes	Yes	Yes	Yes		
6	Staff/Students data management (Menu Manage Employees or Manage Students)	Yes	Yes	Yes	Yes		
7	Bulk load employees/Students/Timetable data (Menu Bulk upload)	Yes	Yes	Yes	Yes		
8	Manage **Branches & GPS** (Manage Branch)	Yes	Yes	Yes	Yes		
9	Manage class **Time Table** (Menu Time Table)	Yes	Yes	Yes	Yes		
10	Leave Approvals (Menu Approvals)	Yes	Yes				
11	Configure Holidays (Menu Holiday List)	Yes	Yes	Yes	Yes		
12	Mark self attendance (Menu Log Timesheet)	Yes	Yes	Yes	Yes	Yes	
13	Mark Staff/Students attendance (Menu Punch In Others -> Punch In Staff/Punch In Student) - Only direct staff or marked as Attendance Supervisor staff attendance marking is allowed	Yes	Yes	Yes	Yes	Yes	Yes
14	Live attendance kiosks for Staff/Students(Menu Live Match) - Only direct staff or marked as Attendance Supervisor staff attendance marking is allowed	Yes	Yes	Yes	Yes	Yes	Yes
15	Send Notifications (Menu Notify)	Yes	Yes				
16	View Notifications (Menu Notifications)	Yes	Yes	Yes	Yes	Yes	
17	View Reports (Menu Reports)	Yes	Yes	Yes	Yes		
18	Employee dashboard (Menu Employees Dashboard)	Yes	Yes	Yes	Yes		
19	Students dashboard (Menu Students Dashboard)	Yes	Yes	Yes	Yes		
20	Apply Leave	Yes	Yes	Yes	Yes	Yes	
21	My Log to view attendance	Yes	Yes	Yes	Yes	Yes	
22	View As Employee	Yes	Yes	Yes	Yes		

Note:
1. Teacher/Professor can Mark Students attendance if "Is Teacher flag is enabled". This is special option for educational institutions
2. Manage - Add/Edit/Delete

4. Punch In Features:

1. **Mark Self Attendance** - Employee takes selfie with own Mobile App/system/laptop to mark attendance. Geo-fencing will be applied if enabled by Supervisor.

    Note:

    a) Mobile App will prompt employee confirming first picture would be taken as reference picture if it was not loaded by supervisor. Reference picture can be changed by supervisor/Admin/HR only if available already in the system. This makes the on boarding faster where Admin can load employee data and employees load their reference pictures.
    b) Lat & Lng of employee's Branch will be used for Geo-fencing

2. **Mark Staff/Students Attendance** - Manager or Attendance Supervisor can mark attendance by taking live picture of employee/Student or group of employees/students. Mobile App /system/laptop can be used.

    Note:

    a) Geo-fencing will be applied if enabled by supervisor
    b) Manager or Attendance Supervisor constraints will be applied
    c) Students attendance can be marked by teacher/professor only

3. **Live Attendance (Staff & Students)** - No Touch attendance with Mobile/system/laptop. Manager or Attendance Supervisor logs and opens live attendance for employee/students. Employees stand in front of camera either Single or in group (for a sec) to mark their attendance

    Note:

    a) Geo-fencing will be applied if enabled by Manager
    b) Manager or Attendance Supervisor constraints will be applied
    c) Students attendance can be marked by teacher/professor only

4. **Offline attendance** - Allows marking attendance offline when internet is not available. Data will be sent to server when connected with network.

    Note:

    a) Geo-fencing will be applied if enabled by Manager
    b) Manager or Attendance Supervisor constraints will be applied
    c) Students attendance can be marked by teacher/professor only

5. **Geo-fencing** - Enable or disable geo-fencing for each employee

6. **Automatic attendance logouts** - Applicable only when geo-fencing is enabled. Employee will be logged out automatically when goes out of defined limits when login is active

7. **Leave Management** - Company can configure Leaves types, set frequency of additions and accrual limits. App will automate the leaves management. Employees can check leave balance and apply for leave

8. **Notifications** - Manager can send messages to individuals, specific team(s) & complete staff

5. How it works?

SL#	Menu/Feature functionality	Who can perform?
1	**Employee Dashboard -** Shows employee attendance statistics for that day. Each stat is clickable to see details of the employees. Admin & HR can see their manager's dashboard **Students Dashboard** - Shows Students attendance statistics	Super User, Manager, Admin, HR
2	**Punch In Others -** Manager & Attendance Supervisor uses to mark staff attendance Click on "Take Photo" button to capture picture of employee(s)- Shows names of attendance marked people. **Note:** Attendance log of Employee is allowed only after 10mins from previous log **Punch In Students -** Teacher marks attendance by taking group pictures of students. Teacher/professor to chose class & subject to mark attendance	Super User, Manager, Admin, HR, Attendance Supervisor
3	**View as Employee -** Menu available for employees other than "Employee". Helps to switch and perform employee specific actions like Mark attendance, Apply Leave, check logs etc	Super User, Manager, Admin, HR
4	**Admin Activities -** to manage Shifts & Leave Management **Shift Roaster upload** - Bulk load feature to upload Employee shifts data, downloaded current shifts data, modified and uploaded. **Note:** Keeps newly uploaded employee shifts by arching previous shifts. Employees not in the upload file will be retained with their current shifts **Manage Shift -** Individual employee shifts can be viewed & managed **Company Leave configuration -** to configure company specific leaves. Each leave type can be configured with Name, frequency of allocating leaves, no of leaves added and max no of leaves cap **Employee Leave configuration -** Employee Leave settings. only once required and the application will automatically takes care of future additions	Super User, Manager, Admin, HR
5	**Manage Employees** - Add new employee(s), Edit or delete existing employees. a) **Add New employee** - Employee details Salutation, First Name, Last Name, Employee id, Designation, Branch/Location, Role of the employee, Picture of employee (camera/file), select shift or type new shift, Is Teacher, Is GPS enablement and attendance supervisor. Multi Device login flag is available for Admin, HR & Manager for them enable Live Match at multiple devices/locations	Super User, Manager, Admin, HR

	b) **Edit Employee** - Click on edit button to update details of employee **c)** **Delete employee** - Click on delete button to delete employee **Note: Admin & HR can perform these actions to their manager's staff** **Manage Students** - Manage students data (add/edit/delete)	
6	**Live Match -** Manager/Attendance Supervisor logs into the application and opens it for live attendance. Attendance of all employees who stands in front of camera automatically happens and their names will be shown. Geo-fencing and supervisor restrictions will be applied **Students** - Class and subject to be selected by teacher/professor	Super User, Manager, Admin, HR, **Employee (Teacher/professor)**
7	**Bulk upload -** Bulk employee enrollment data can be uploaded through csv. User id and password will be sent to respective employee email. Supervisor can share the details as well. Supervisor can reset the password on employee request. Students - Provision to bulk load Students data but pictures have to be added either through file/camera	Super User, Manager, Admin, HR
8	**Reports -** Various reports can be generated based on reporting hierarchy and their privileges	Super User, Manager, Admin, HR
9	**Holiday List -** Company holiday list can be configured. Employees can view the list of holidays	Super User, Manager, Admin, HR, **Employee**
10	**Approvals** - Supervisor can approve or reject leaves applied by employees. Leaves are passively approved. Supervisor can reject before the date passed	Super User, Manager
11	**Notify -** Notifications can be sent to individual/team/entire reporting organization	Super User, Manager, Admin, HR
12	**Notifications -** Inbox Notifications sent by supervisors	Super User, Manager, Admin, HR, **Employee**
13	**Designation -** Manage (Add/Edit/Delete) designations.	Super User, Manager, Admin, HR
14	**Manage Branch -** Manage branch details including lat & lng. Lat & Lng specified are used for geo-fencing	Super User, Manager, Admin, HR
15	**Log Timesheet -** Individual to log attendance	Employee
16	**My Logs -** to view attendance log	Employee
17	**My Leave approval status -** to check leave approval status	Employee
18	**Change Password -** employee can change their password	Employee
19	**Time Table** - Special Menu for educational institutions to manage class time table	Super User, Manager, Admin, HR
20	**Configure Company** - Basic company details	Super User