CrossChex Cloud User Menu

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Welcome

Welcome to **CrossChex Cloud**! This manual is designed to help you navigate your product. Whether you are a long-time user that just upgraded or implementing your company's first time and attendance software, this document is provided to answer any questions you may have.
If you have any questions, please contact our technical support team to: support @anviz.com.

About CrossChex Cloud
The CrossChex Cloud system is based on Amazon Web Server (AWS) and composed of hardware and applications to provide you with the best possible time and attendance and access control solution. The CrossChex Cloud with
Worldwide Server: https://us.crosschexcloud.com/
Asia-Pacific Server: https://ap.crosschexcloud.com/

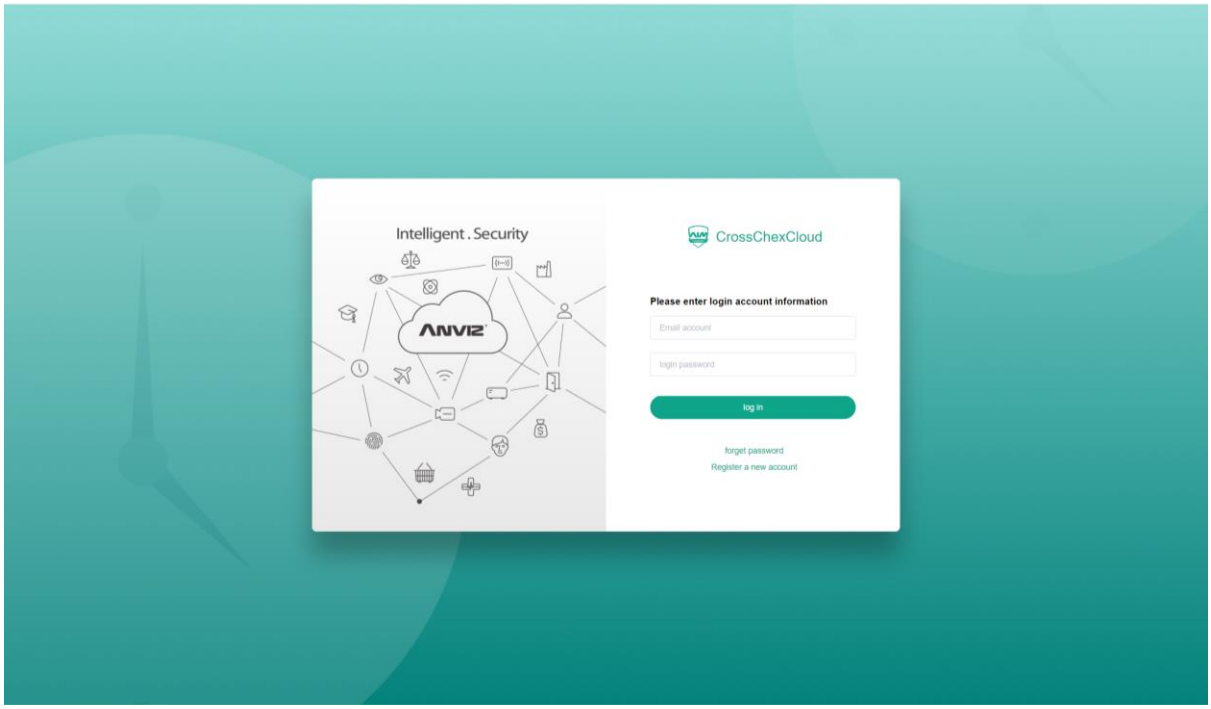
Hardware:
Remote Data Terminals are biometric recognition devices that employees use to perform clock and access control operations. These modular devices use Ethernet or WIFI to connect to CrossChex Cloud via the internet. The detail hardware module please refer to the website:

System Requirements:
The CrossChex Cloud System has a specific set of requirements for the best performance.

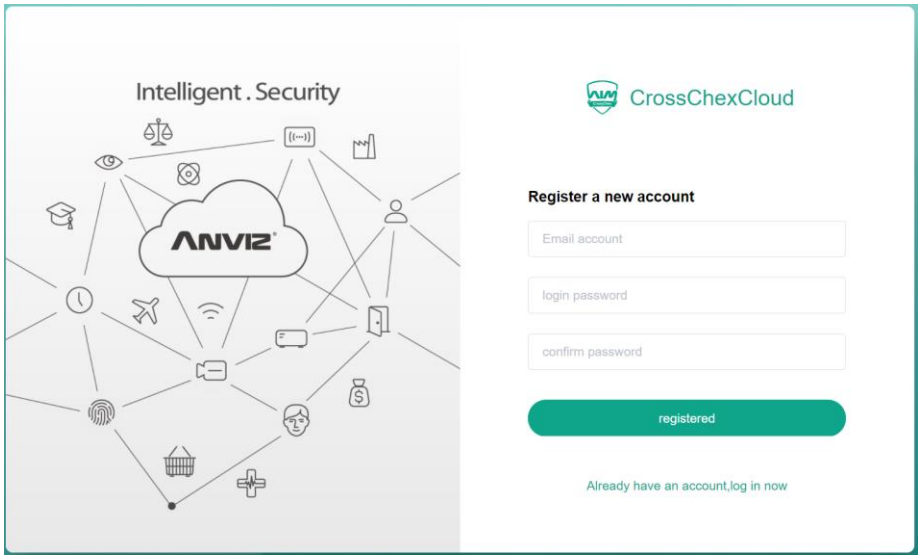
Browsers
Chrome 25 and above.
Resolution of at least 1600 x 900

Start with a new CrossChexCloud account

Please visit the Worldwide Server: https://us.crosschexcloud.com/ **or Asia-Pacific Server:** https://ap.crosschexcloud.com/ **to stating your CrossChex Cloud system.**

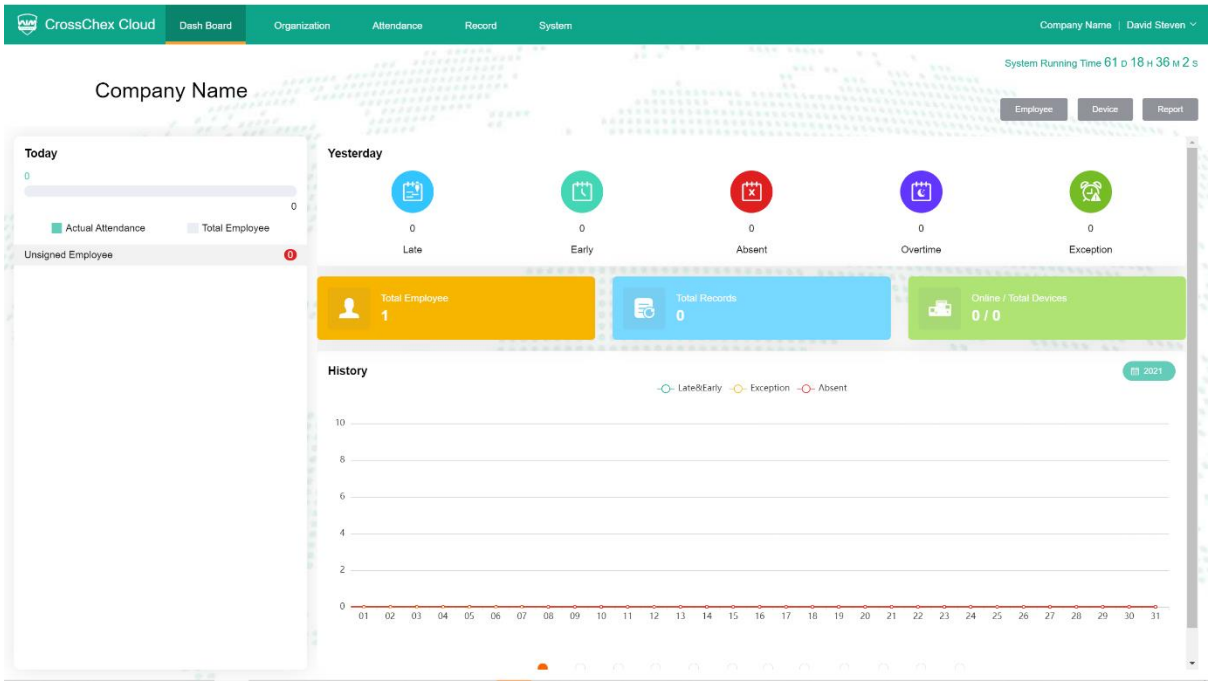


Click "Register a new account" to start your new cloud account.



Please adopts the E-mail as the CrossChex Cloud. The CrossChex Cloud need be active by E-mail and to get back the forget password.

Home Page

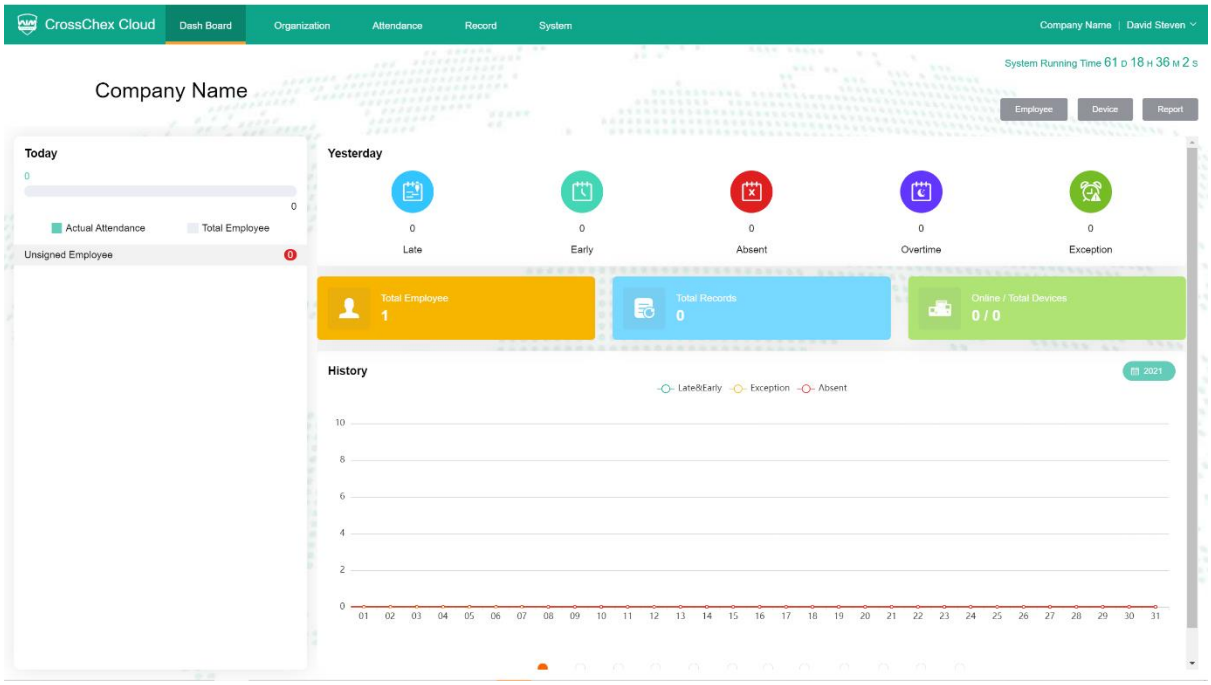


Once you've logged into CrossChexCloud, you will be greeted with several elements that will assist you in navigating the application and tracking your employee hours. The primary tools you will use to navigate CrossChexCloud are:

Basic Information: The top-right corner contains manager account information, change password, Language Optional, Help Center, Account logout and System running time.

The Menu Bar: This strip of options, beginning with the **Dash Board** icon, is the main menu within CrossChexCloud. Click on any of the sections to view the various sub-menus and features contained within.

Dash Board



When you first log into CrossChexCloud, the Dashboard area will appear with widgets that will provide you with quick access to information,

Widget Types

Today: Current employee time attendances status

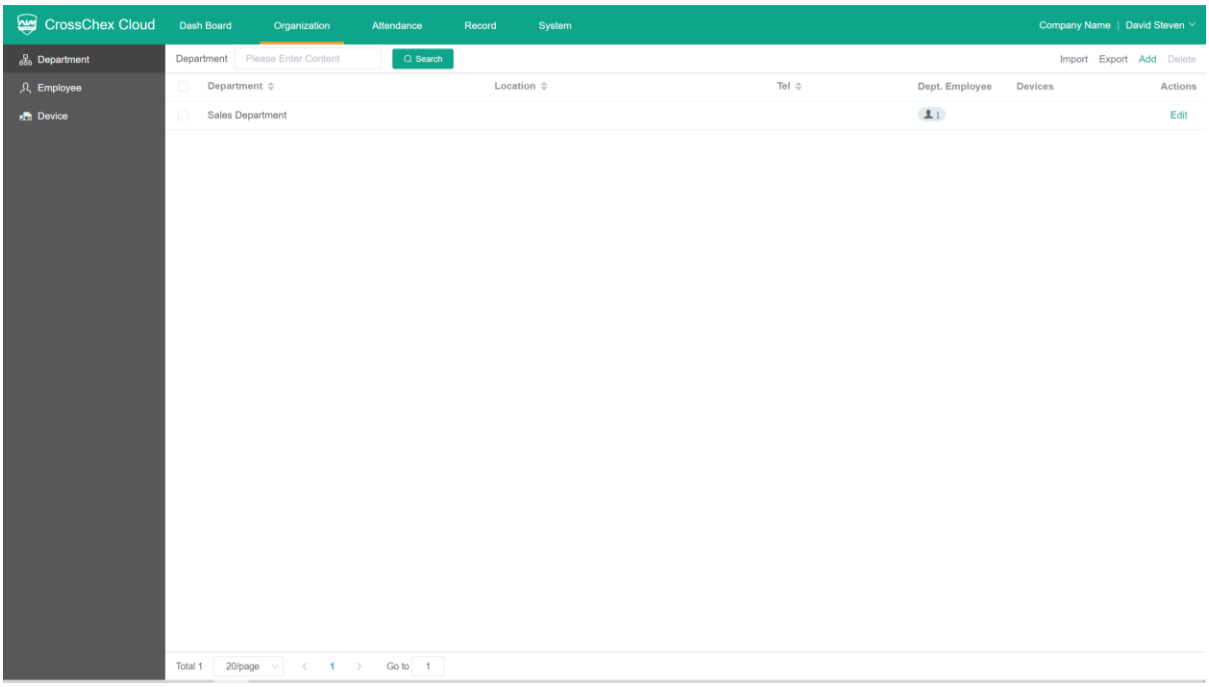
Yesterday: Time attendance statistics for yesterday.

History: Monthly time attendance data overview

Total: total number of the employee, records and devices (online) in the system.

Shortcut button: quick access to **Employee**/ **Device** / **Report** sub-menus

Organization

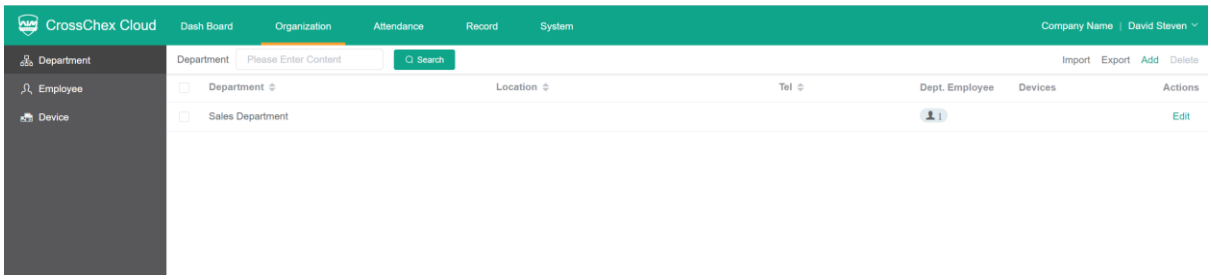


The organization sub-menu is where you will set many of the global settings for your company. This menu allows users to:

Department: This option allows you to create a department in the system. After created department, you can select from a list of your departments.
Employee: is where you will add and edit employee information. It is also where to enroll employee's biometric template.
Device: is where you will check and edit the device information.

Department

The department menu is where you can check the number of employees in each department and devices status in each department. The top-right corner contains department edit functions.

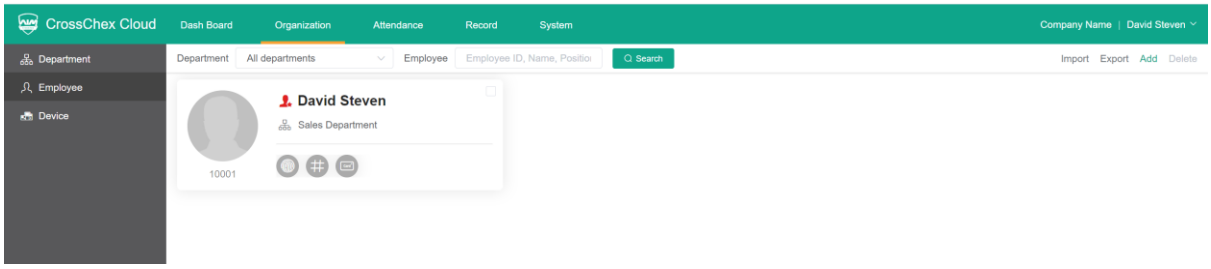


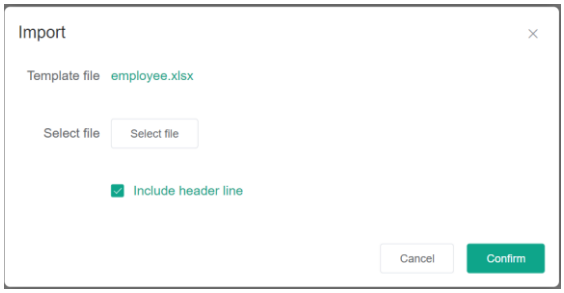
Import: This will import department information list to the CrossChexCloud system. The format of the import file must be .xls and with fixed format. (Please download the template file from the system.)

Export: This will export department information list from the CrossChexCloud system.
Add: Create a new department.
Delete: Delete the selected device.

Employee

The Employee menu is checking the employee information. On the screen, you will see employee list where the first 20 employees will appear. Specific employees or a different range can be set using the **Search** button. Employees can also be filtered by typing a name or number into the Search bar.
The employee information appears in the bar. This bar shows some basic information about the employee, such as their name, ID, Manager, Department, Job position and verify mode on the device. Once you have an employee selected to expand out the employee edit and delete options.



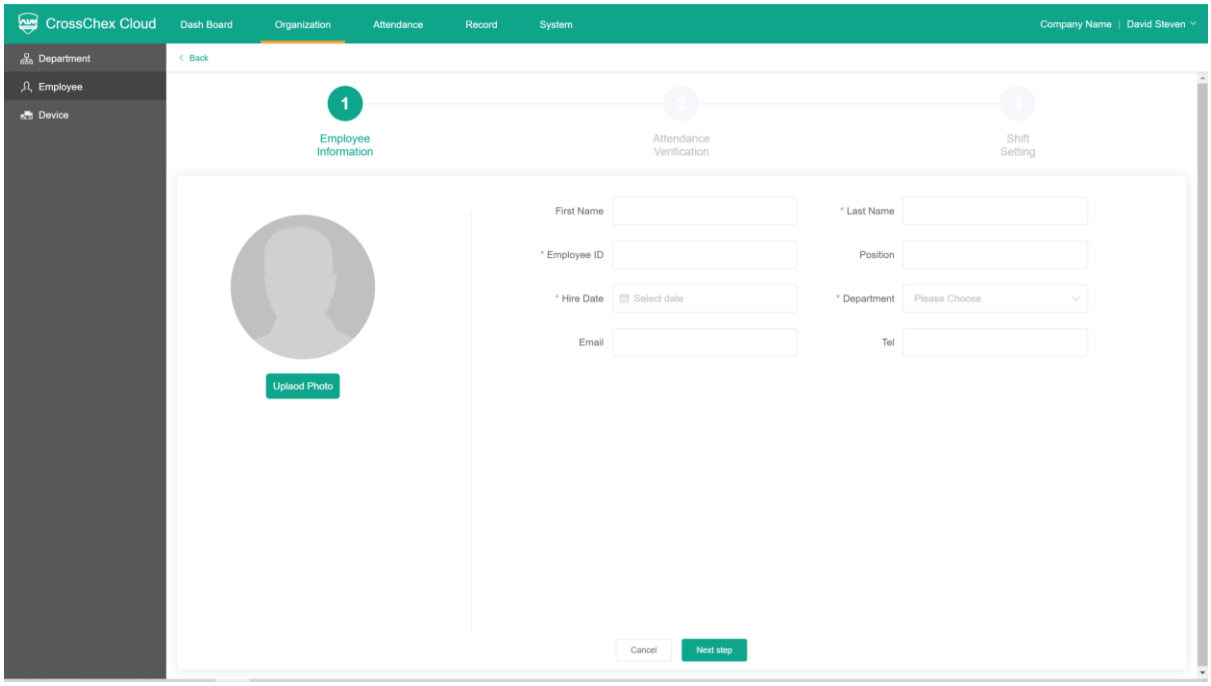




Import: This will import employee's basic information list to the CrossChexCloud system. The format of the import file must be .xls and with fixed format. (Please download the template file from the system.)
Export: This will export employee information list from the CrossChexCloud system.

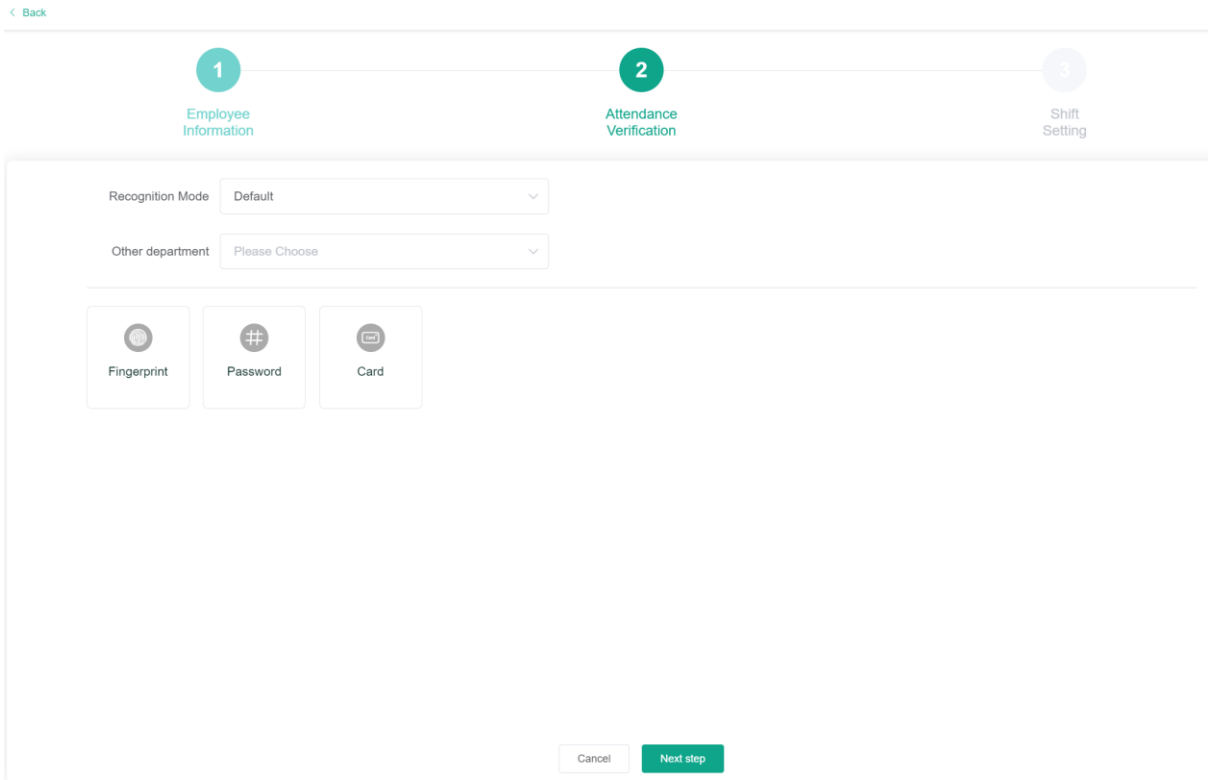
Add an Employee

Click the **Add** button in the top right corner of the **Employee** window. This will bring up the add employee Wizard.



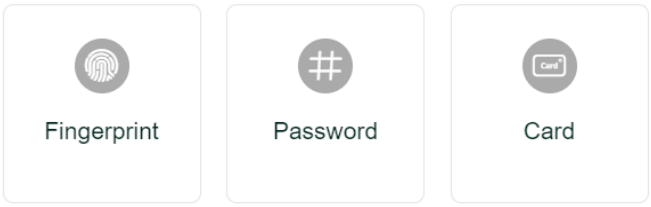
Upload Photo: Click **Upload Photo** to browse and locate an employee image and save to upload the image.

Please input employee information on the **Employee Information** screen. The pages required to add an employee are **First Name**, **Last Name**, **Employee ID**, Position, **Hire Date**, **Department**, Email and Telephone. Once you have input the required information, click **Next.**

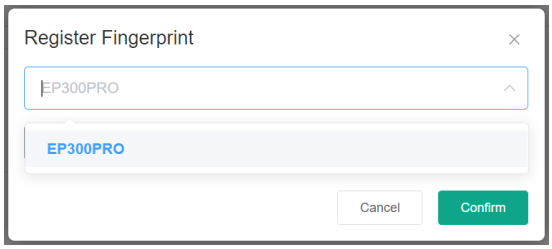


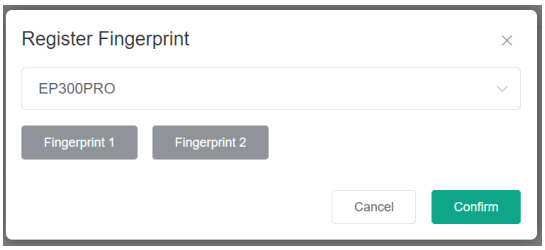
To register verification mode for employee. The verification hardware provides the multiple verification methods. (Include the Fingerprint, Facial, RFID and ID+Password etc.)
Choose the **Recognition Mode** and the **Other Department** when performed by employee.

The **Other Department** is the employee not only can be verified one department's device also can be verified on another departments.



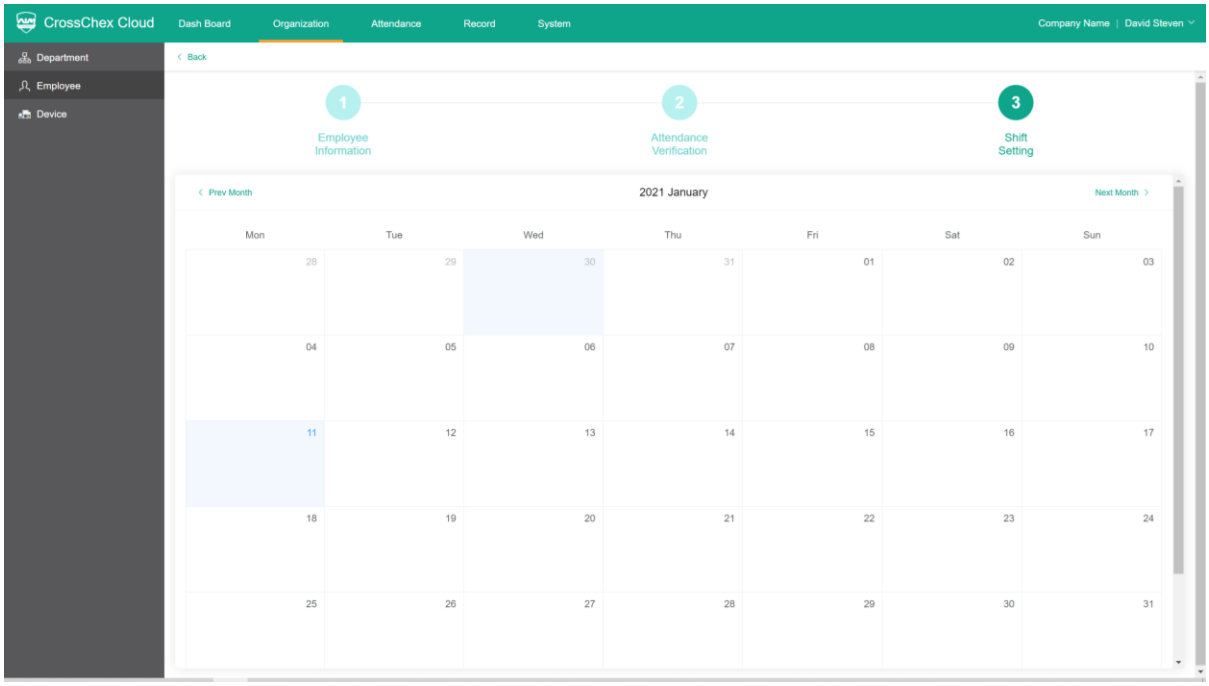
Click the icon to register employee verification mode.
Such as register fingerprint:
1 Select the hardware which is installed near the employee.





2 Click the "**Fingerprint 1**" or "**Fingerprint 2**", the device will be in registering mode, according to the promoting to press same fingerprint three times on the device. The CrossChex Cloud system will be accepted register successful message from the device. Click "**Confirm**" to save and finish the employee fingerprint registration. The CrossChex Cloud system will automatic to upload the employee's information and biometric template to the hardware devices, click **Next.**

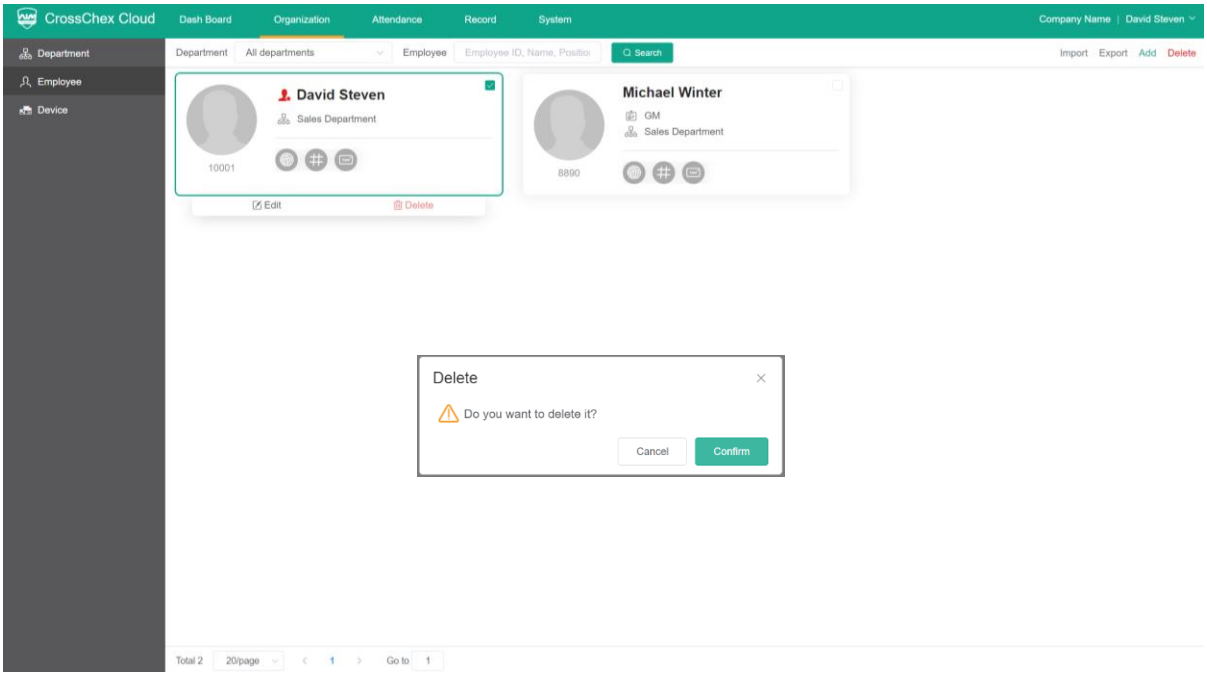
3 To schedule the shift for employee
The schedule shift allows you to build schedules for your employees, not only to allow them to know when they are working, but also to help you plan and keep track of staffing for any particular span of time.



The detail setup schedule for employee please checks the **Schedule.**

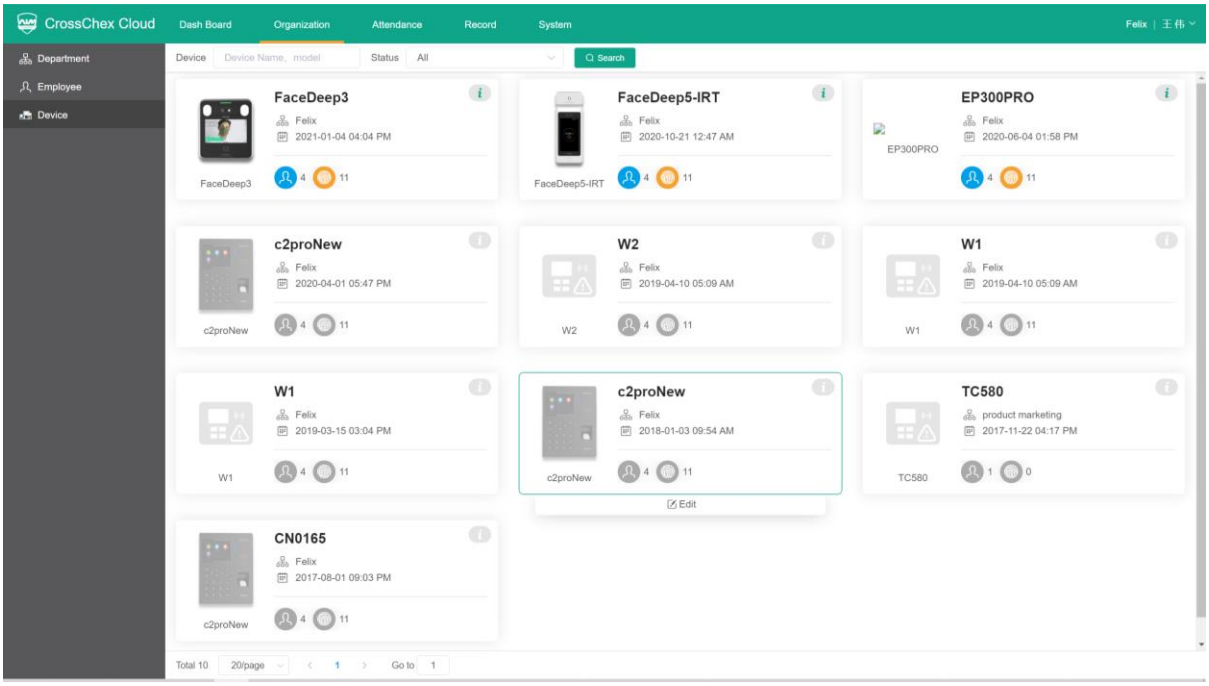
Delete an Employee

Once you selected an employee bar to expand out the **Delete** options to delete user.

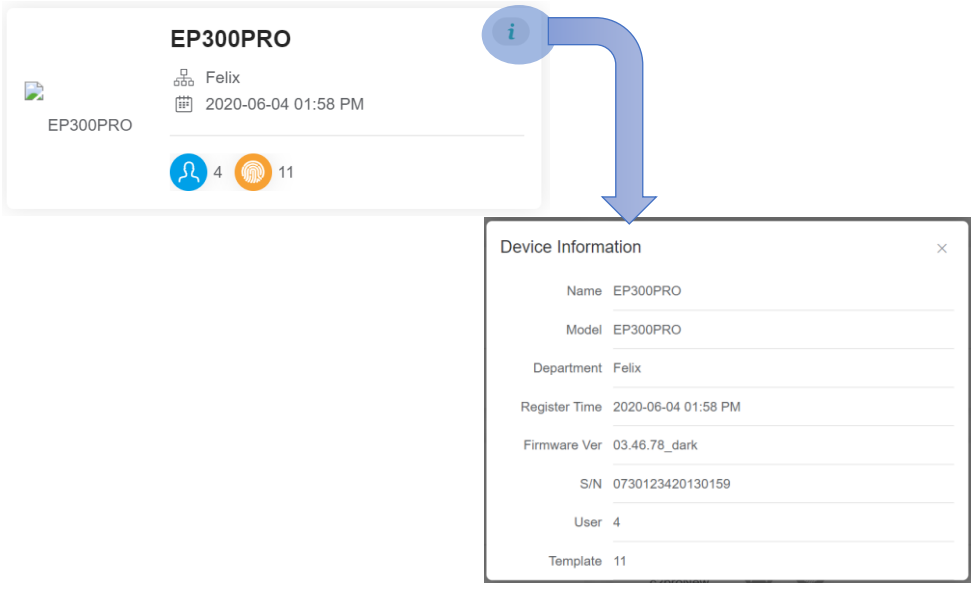


Device

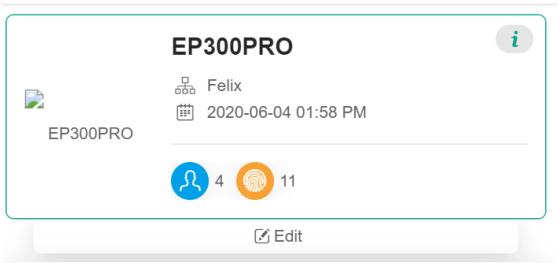
The Device menu is checking the device information. On the right side of the screen, you will see device list where the first 20 devices will appear. Specific device or a different range can be set using the Filter button. Devices can also be filtered by typing a name into the Search bar.



The device bar shows some basic information about the device, such as device image, name, model, department, the device first register time, number of user and number of fingerprint template. Click the top-right corner of the device bar, will appear with detail information for the device include (device serial number, firmware version, IP address etc.)



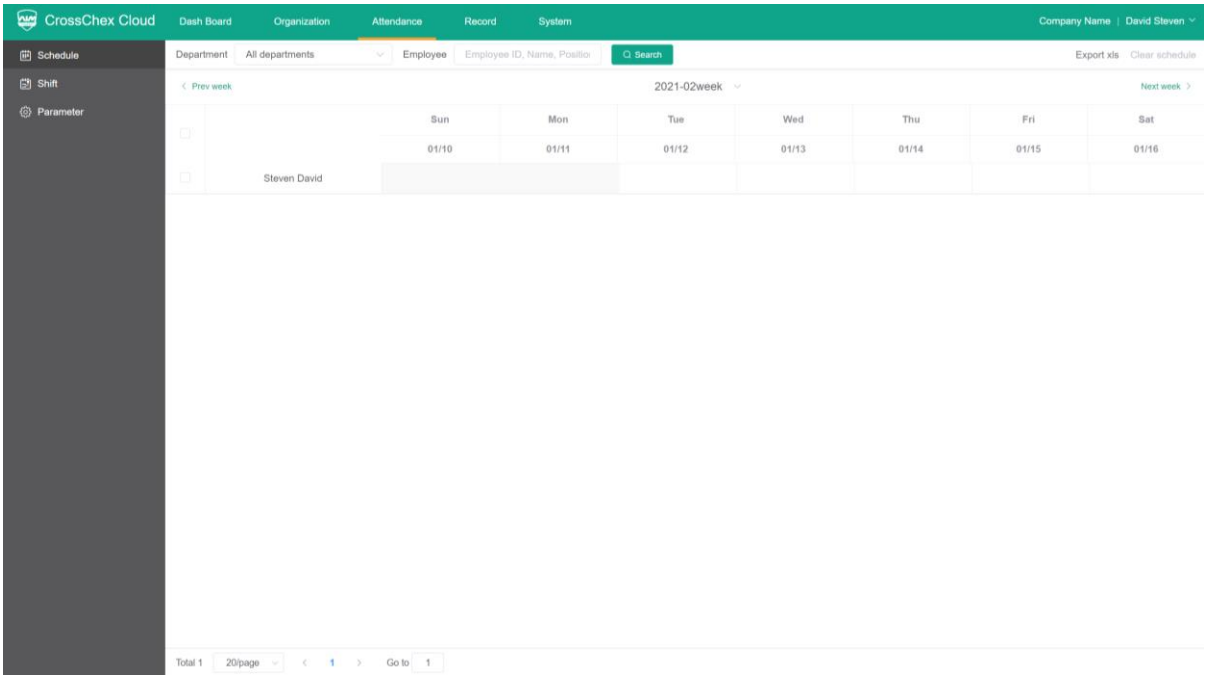
Once you have a device selected to expand out the device edit options to edit device name and setup device belongs to which department.



For more information how to add the device please check Page **Add the device to the CrossChex Cloud System**

Attendance

The attendance sub-menu is where you schedule employee's shift and create the time range of the shift. This menu allows users to:



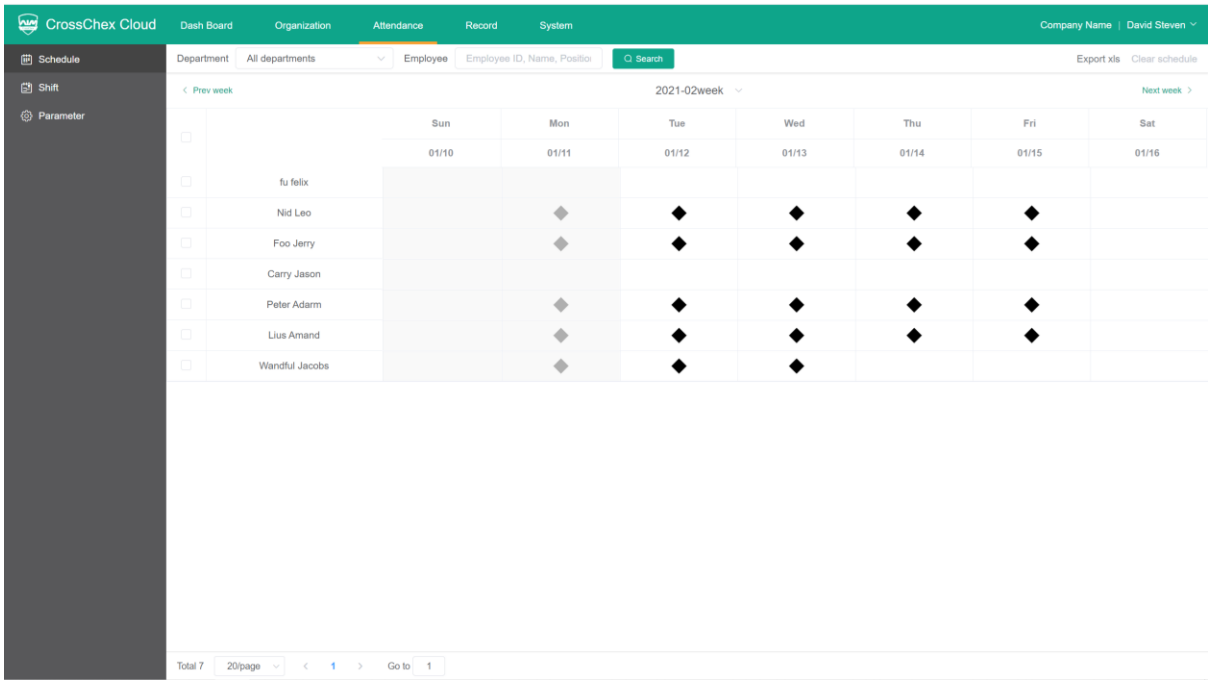
Schedule: allows you to build schedules for your employees, not only to allow them to know when they are working, but also to help you plan and keep track of staffing for any particular span of time.

Shift: allows you to edit individual shift as well as override recurring shifts to meet the needs of your workforce.

T&A Parameter: allows user self-define minimum time unit for statistic and calculate employee attendance time.

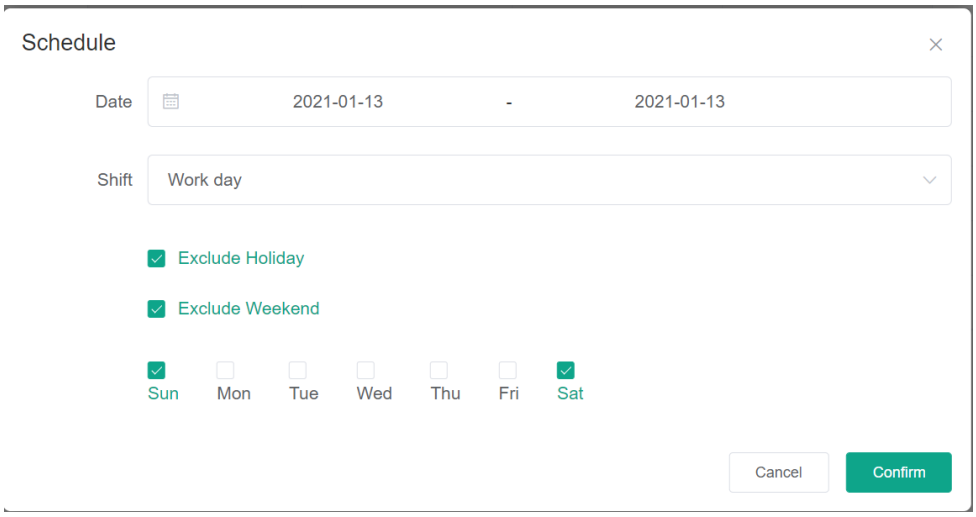
Schedule

The employee maximum support schedule 3 shifts and time range of each shift can not overlap.



Schedule shift for employee

1 Select the employee and click the calendar to setup the shift for employee.

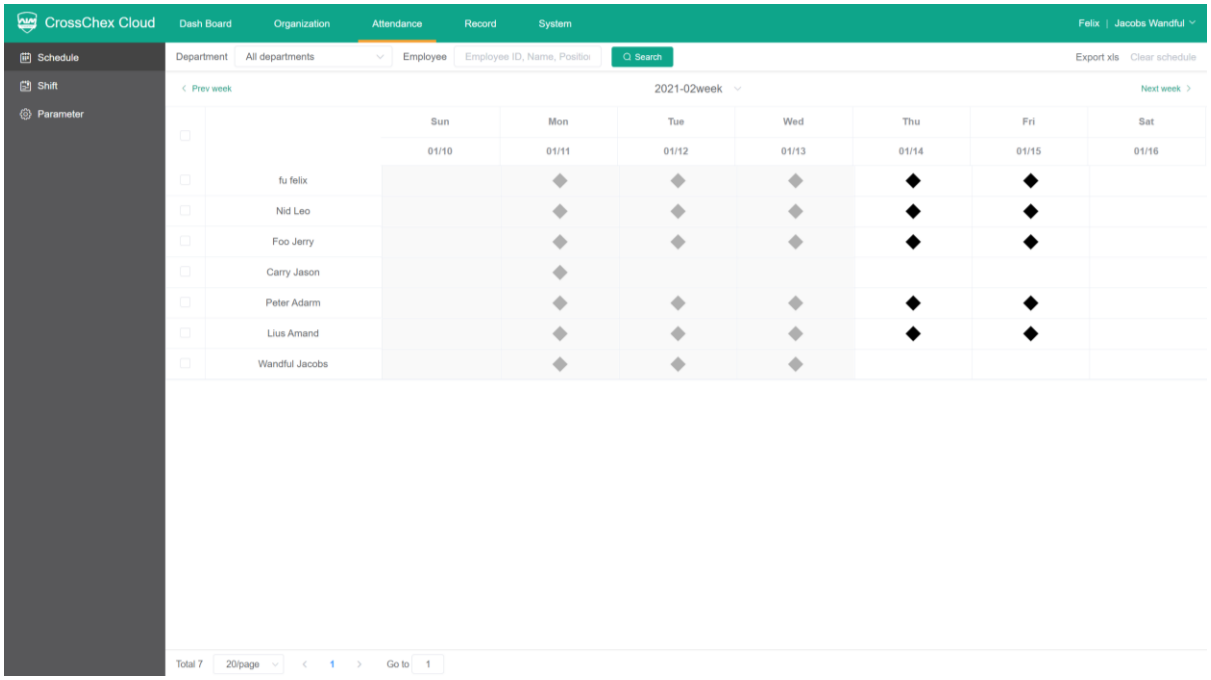


2 Input the start date and end date for the shift.

3 Select the shift in the **shift drop-down box**

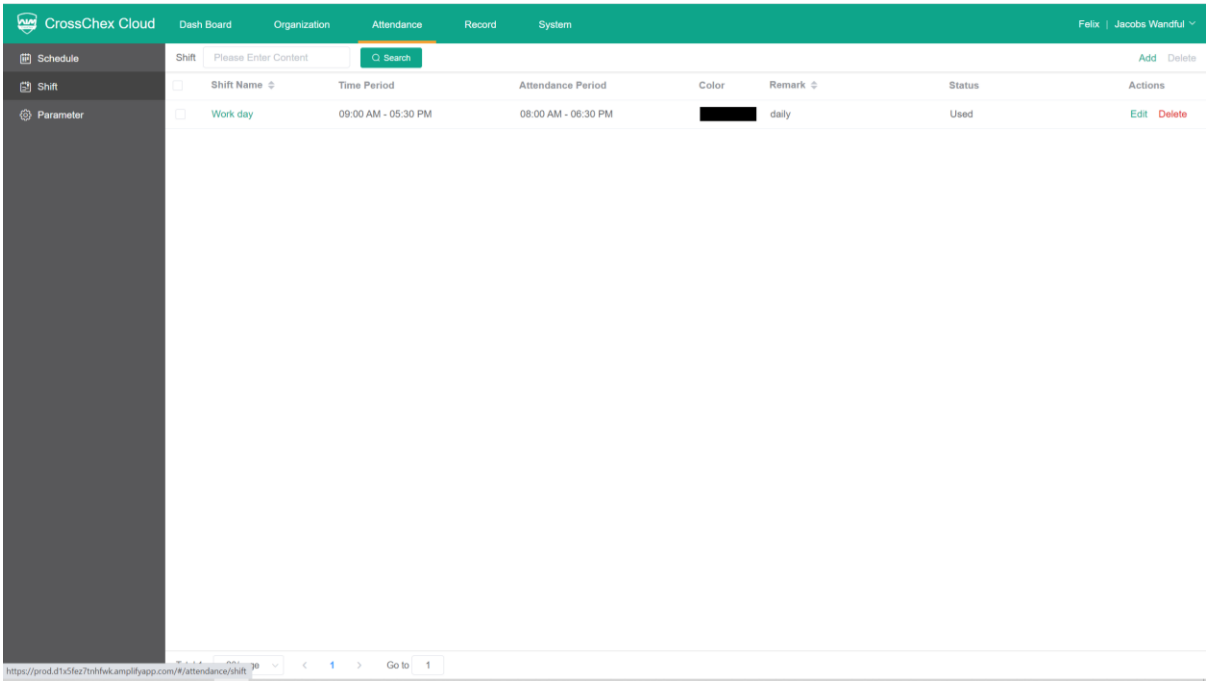
4 Select the **Exclude Holiday** and **Exclude Weekend**, the shift schedule will avoid the holiday and weekend.

5 Click **Confirm** to save the shift schedule.



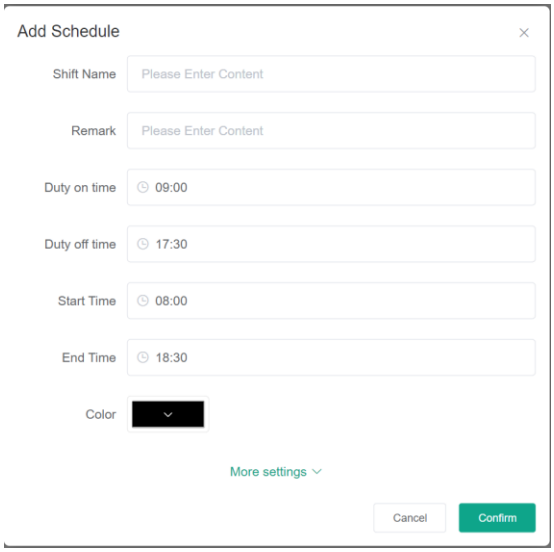
Shift

The shift module creates a shift time range for the employee.



Create a shift

1 Click the **Add** button in the top right corner of the **shift** window.



2 Enter a shift name and enter a description in the **Remark.**

3 Setup **Duty on time** and **Duty off time**. This is the working hours.

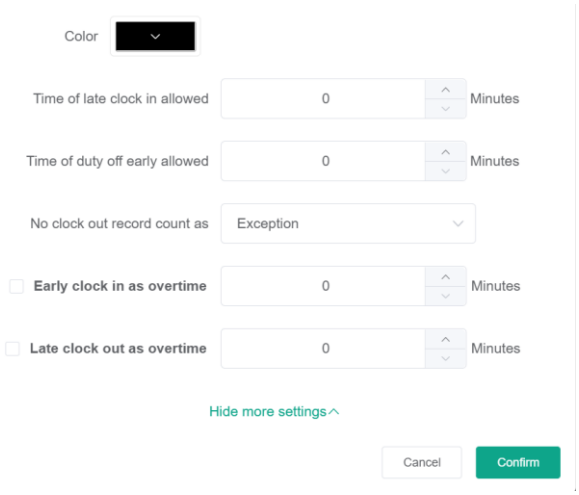
4 Setup **Start Time** and **End Time**. The employee verification in the time period (Start time~ End time), time attendance records are valid in the CrossChex Cloud system.

5 Select the **Color** to mark a shift display in the system when the shift already assigns to employee.

6 Click **Confirm to save the shift.**

More shift setting

Here to setup the more time attendance calculation conditions and rules.



Time of late clock in allowed XXX Minutes

Allow employees to be a few minutes late and don't calculate into attendance records.

Time of duty off early allowed XXX Minutes

Allow employees to be a few minutes early to off duty and don't calculate into attendance records.

No record out counts as:

The employee without checking out record in the system will considered as **Exception** or **Duty off early** or **Absent** event in the system.

Early clock in as overtime XXX Minutes

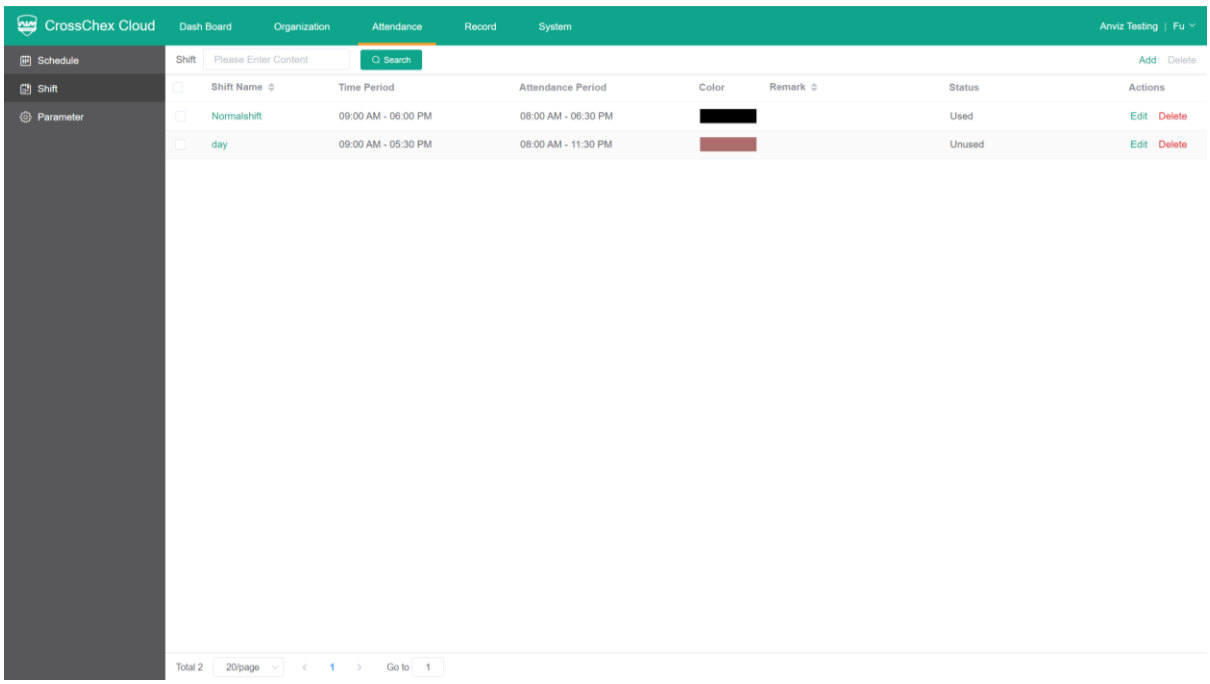
Overtime hours will be calculated XXX minutes earlier than working hours.

Later clock out as over time XXX Minutes

Overtime hours will be calculated XXX minutes later than working hours.

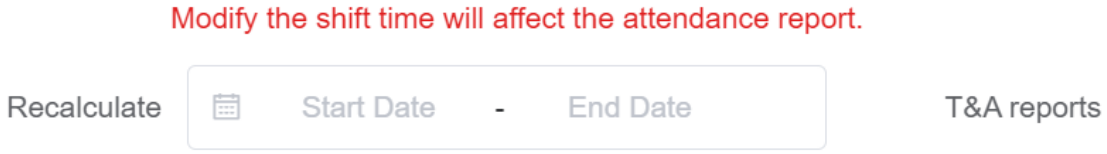
Edit and Delete the Shift

The shift already used in the system, click **Edit** or **Delete** at right side of the shift.



Edit Shift

Because the modify already used shift in the system will affect the pervious time attendance results. When you modify the time of the shift. **The CrossChex Cloud system will request to recalculate time attendance records not more than the previous 2 months.**



Delete Shift

Delete already used shift will do not affect the pervious time attendance records and will cancel the shift already assigned to employee.

Parameter

The parameter is setup the minimum time unit for calculating attendance time. There are five basic parameters to setup include:

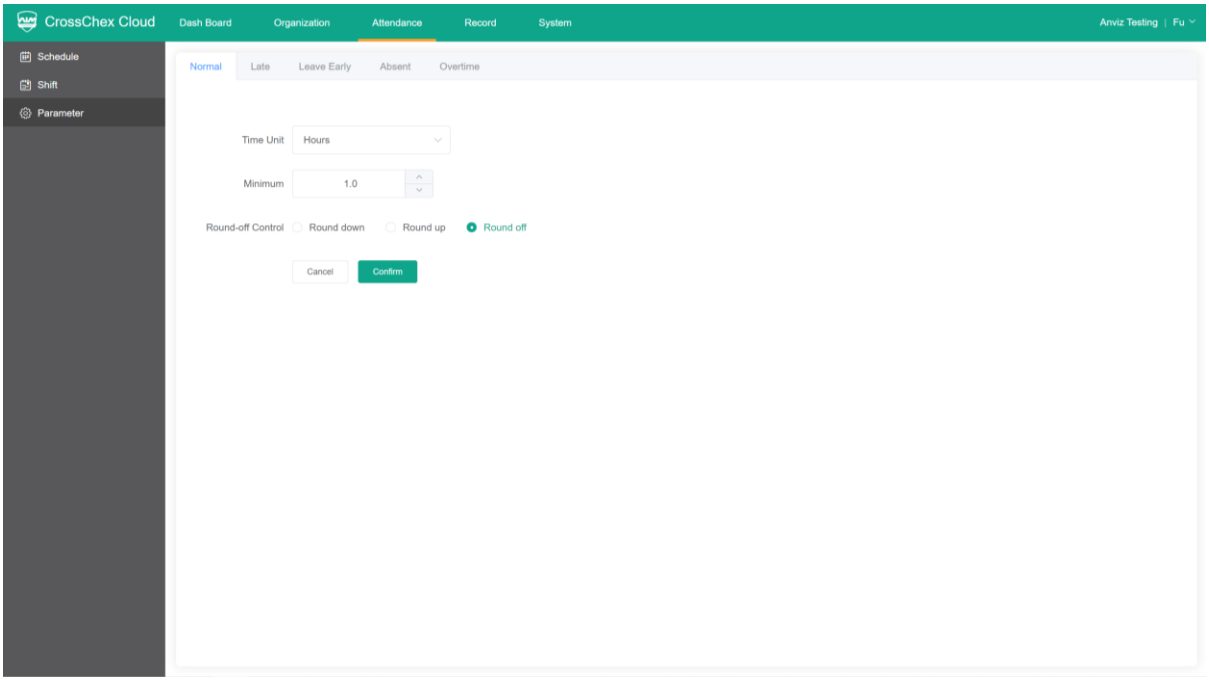
Normal: Setup the minimum time unit for general attendance time records. (Recommend: hours)

Later: Setup the minimum time unit for later records. (Recommend: Minutes)

Leave Early: Setup the minimum time unit for leave early records. (Recommend: Minutes)

Absent: Setup the minimum time unit for absent records. (Recommend: Minutes)

Overtime: Setup the minimum time unit for overtime records. (Recommend: Minutes)

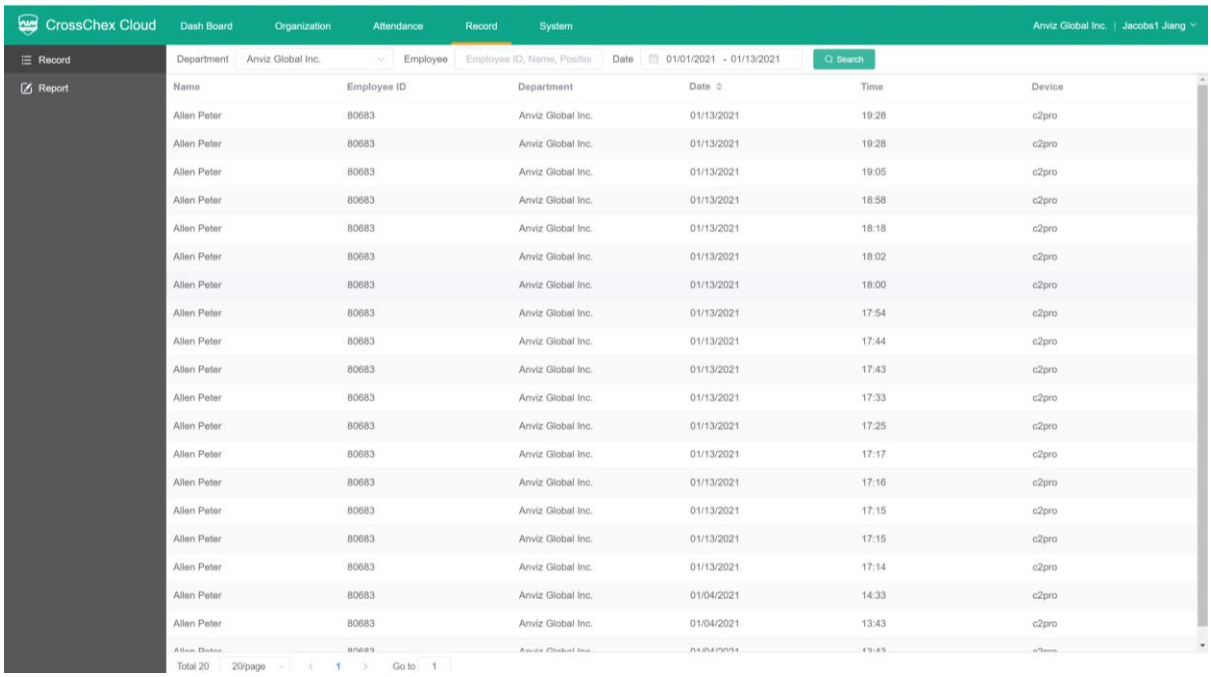


Report

The report sub-menu is where you check employee's time attendance records and output the time attendance reports.

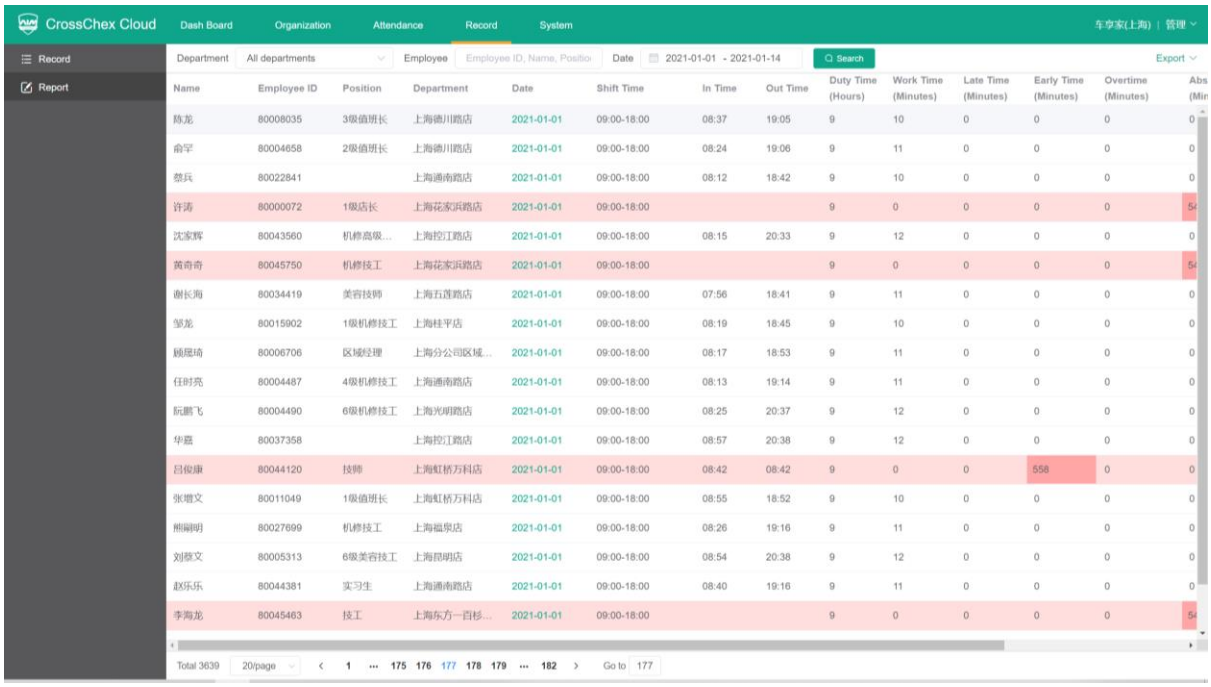
Record

The record menu is checking the employee detail time attendance records. On the screen, you will see the latest 20 records will appear. Specific department employee's records or a different time range can be set using the Filter button. Employee's records can also be filtered by typing an employee name or number into the Search bar.

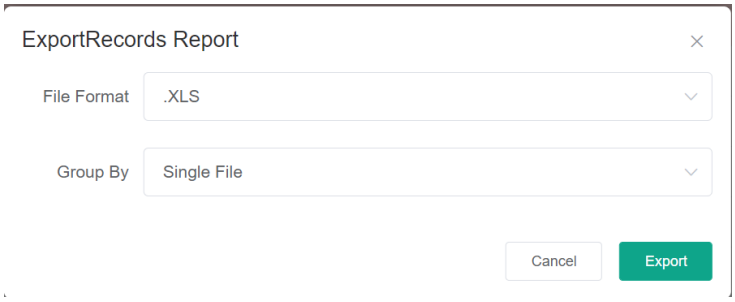


Report

The report menu is checking the employee's time attendance records. On the screen, you will see the latest 20 reports will appear. Employee's report can also be filtered by typing an employee name or department and time range into the search bar.



Click **Export** at the top-right corner of the report bar, will export multiple reports to excel files.

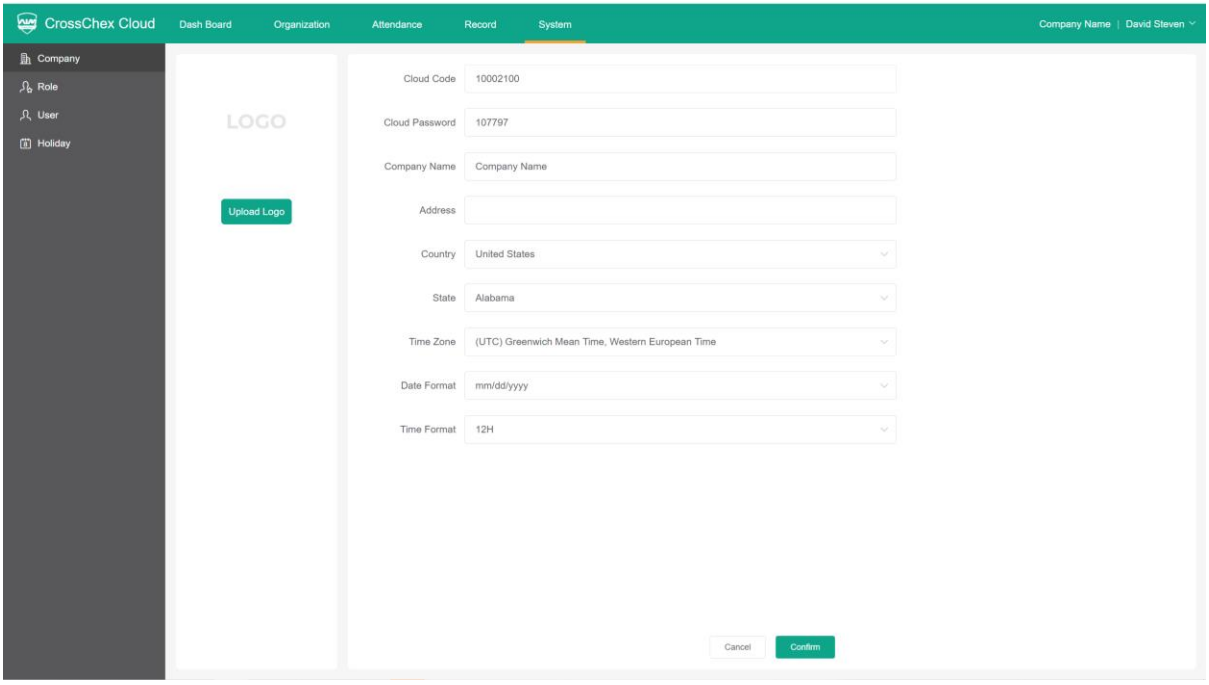


Export Current Report: export the report which appeared in current page.
Export Record Report: export the detail records which appeared in current page.
Export Monthly Attendance: export the monthly report to excel files.
Export Attendance Exception: export the exception report to excel files.

System

The system sub-menu is where you will set the company basic information, create individual accounts for system manager users and CrossChex Cloud system holiday setting.

Company



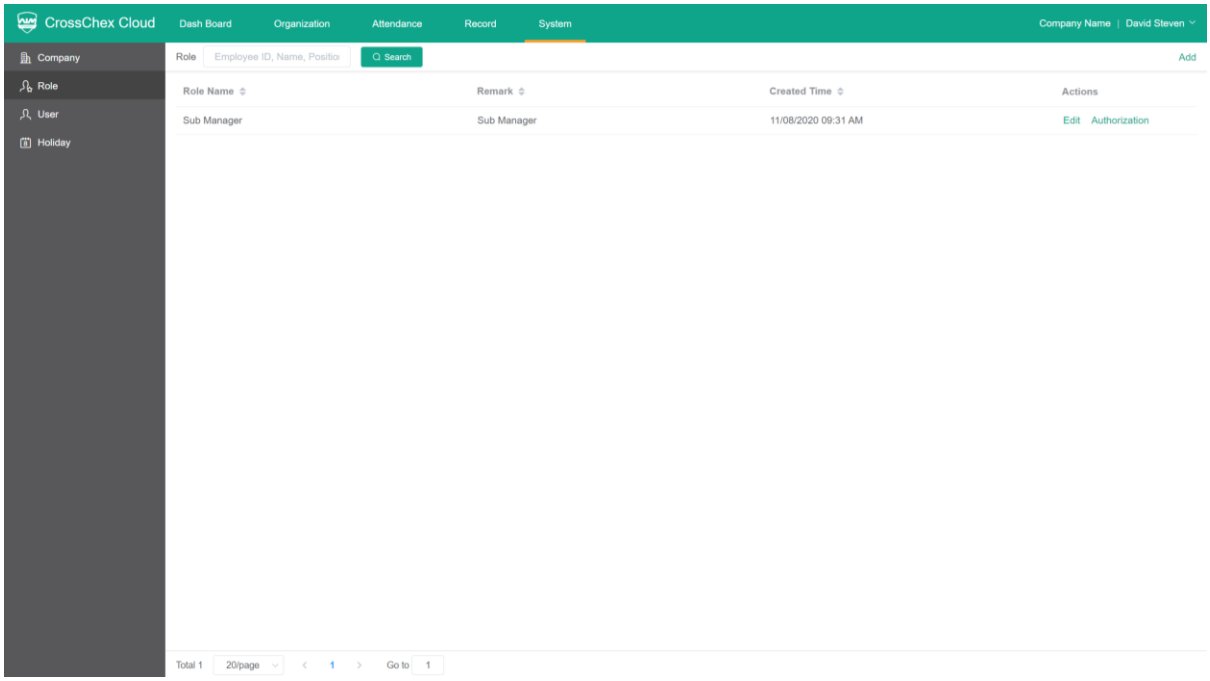
Upload Logo: Click **Upload Logo** to browse and locate an image of the company's logo and save to upload the company logo to system.

Cloud Code: it is the unique number of hardware connect with your cloud system,

Cloud Password: it is the device connect password with your cloud system.

Input the general company and system information include: **Company Name, Company Address, Country, State, Time Zone, Date Format** and **Time Format.** Click "Confirm" to save.

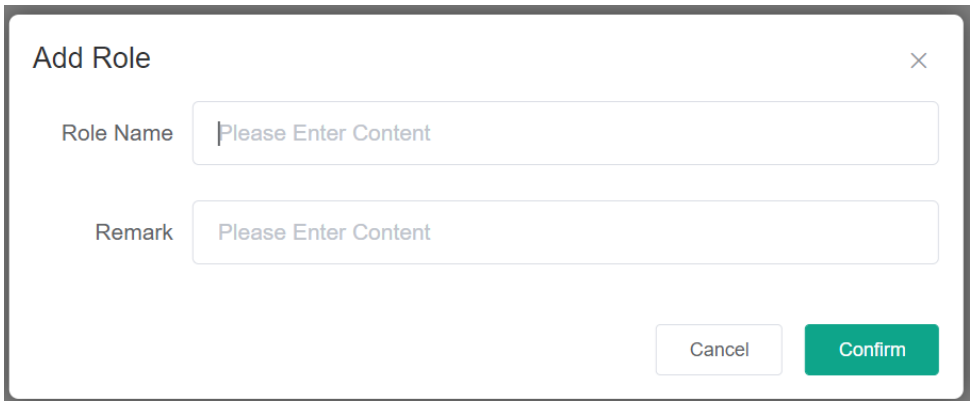
Role



The **Roles** feature allows users to create and configure roles. Roles are predefined settings in system that can be assigned to multiple employees. Roles can be created for different types of employees, and information changed in an employee role will automatically be applied to all employees that the role has been assigned to.

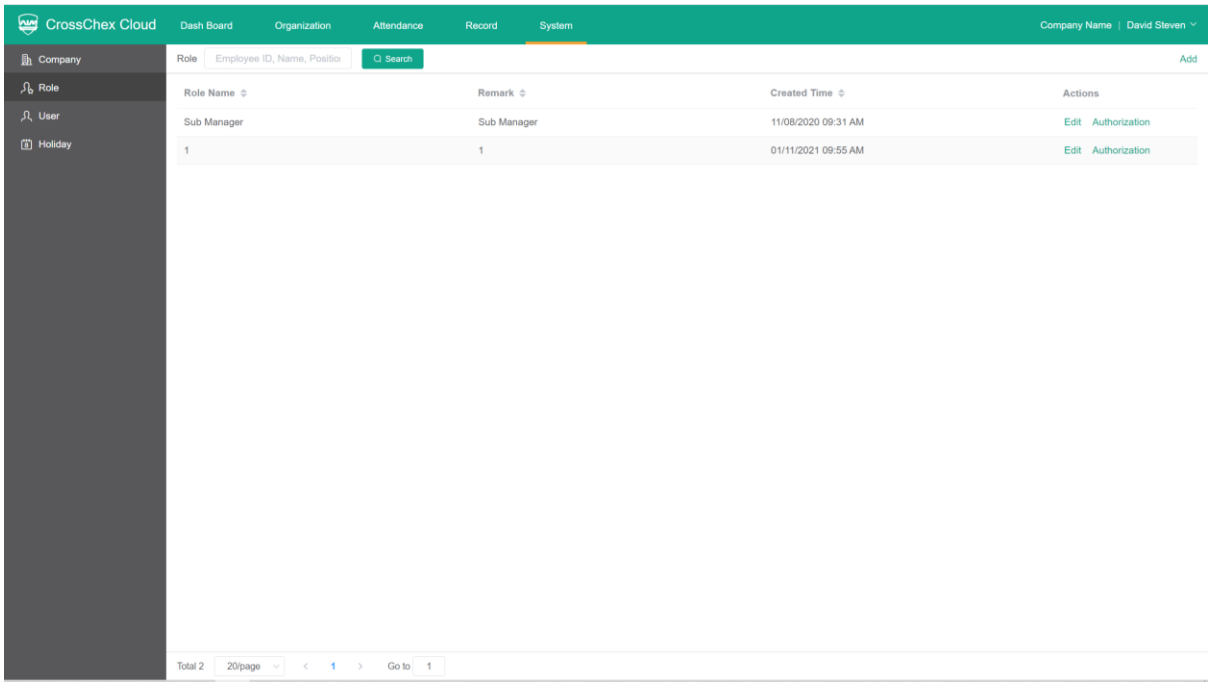
Create a Role

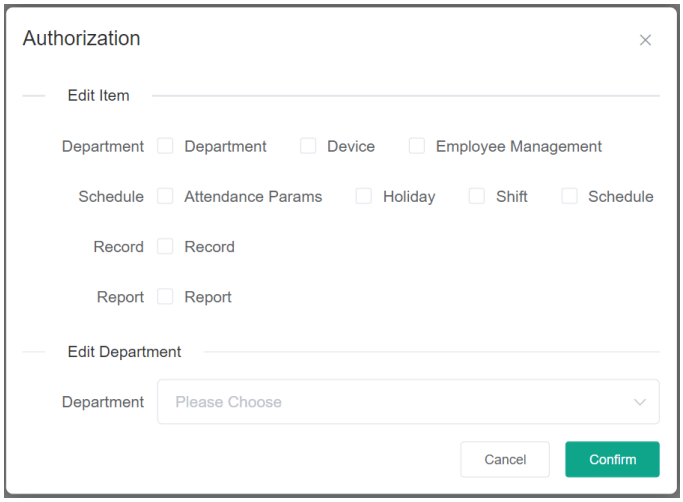
1 Click the **Add** at top-right corner of the role menu.



Enter a name for the Role and a description for the Role. Click the Confirm to save the Role.

2 Back to the role menu selected the role you could like to edit, click the Authorization to authorized the role.





Edit Item

Each item is the function permission, select items which could like to assign to the role.

Department: department edits and manage permissions.

Device: device edits permissions.

Employee Management: edit employee information and employee register permissions.

Attendance Params: setup attendance params permissions.

Holiday: setup holiday permissions.

Shift: created and edit shift permissions.

Schedule: modify and schedule employee's shift permissions.

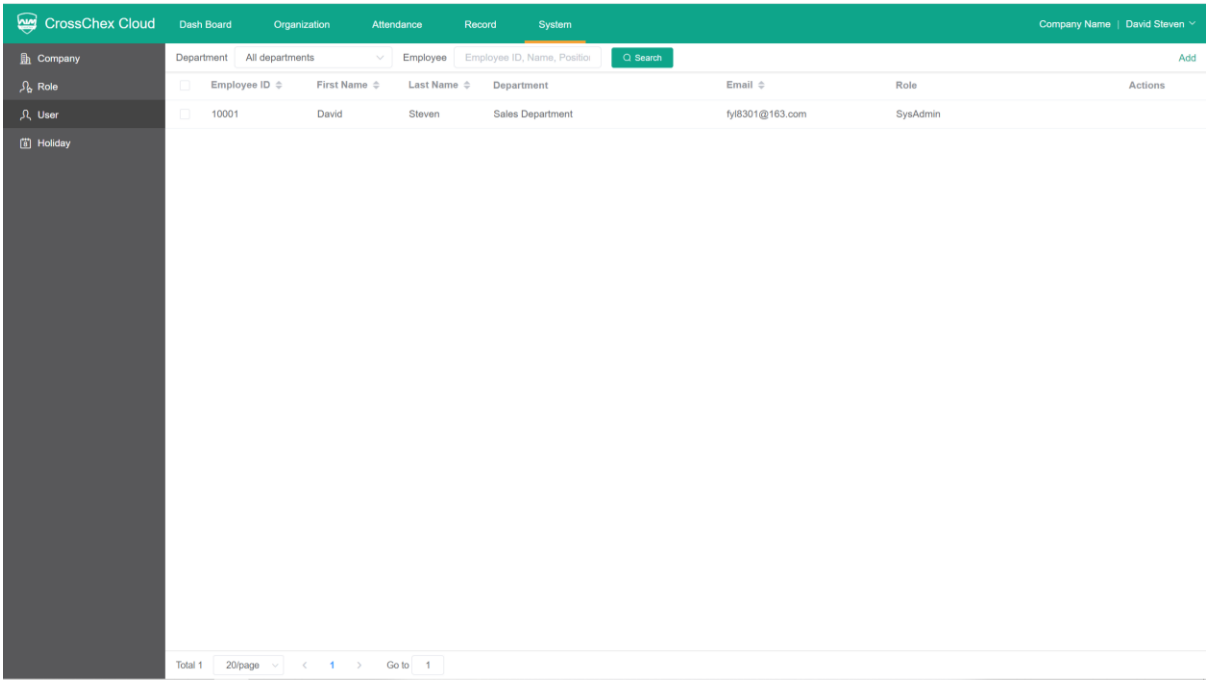
Record/Report: search and import record/report permissions

Edit Department

Select departments the role could like to manage and the role only could manage these department.

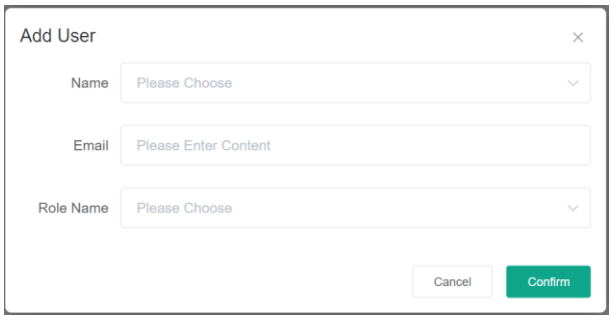
User

Once a role has been created and saved, you can assign it to an employee. And the employee will be admin **User**.



Creating a User

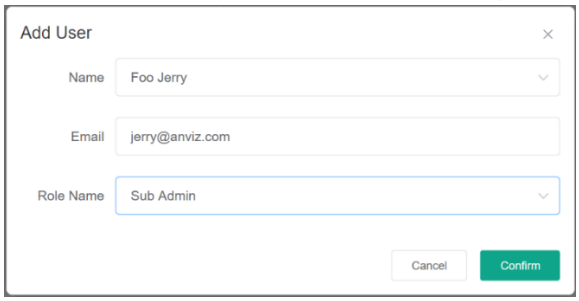
1 Click the **Add** at top-right corner of the role menu.

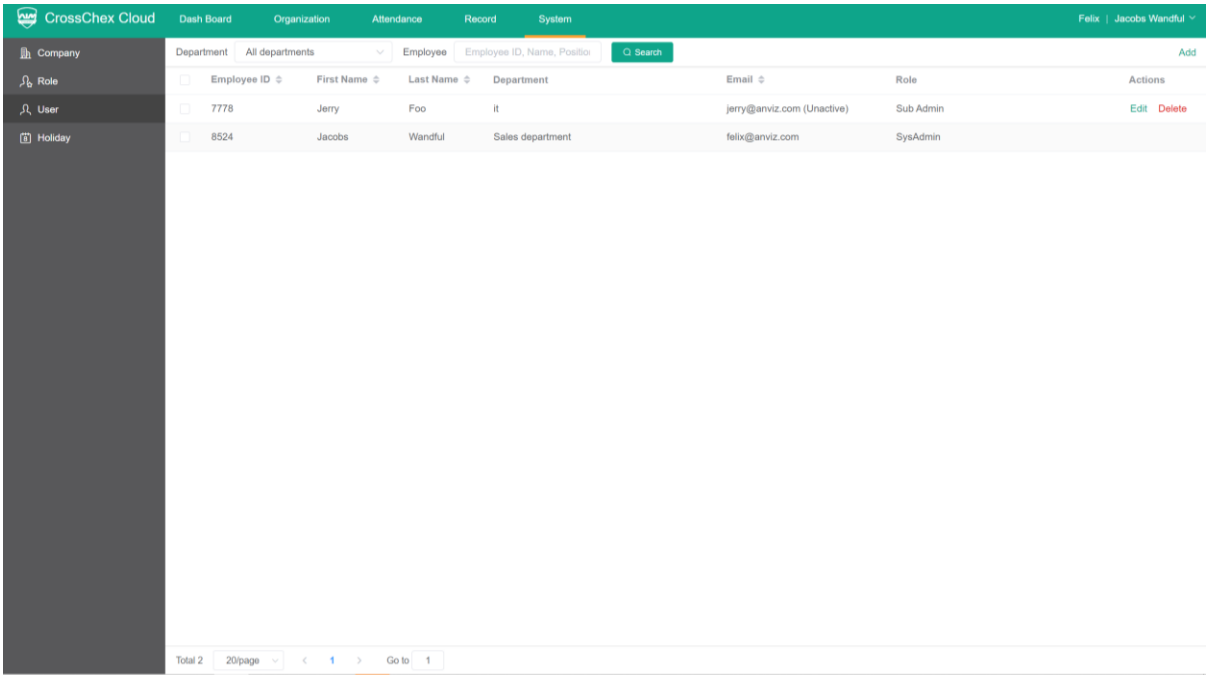


2 Select the employee in the **Name** drop-down box.

3 Please input selected employee's E-mail. The E-mail will receive active mail and the employee will use e-mail as CrossChex Cloud login account.

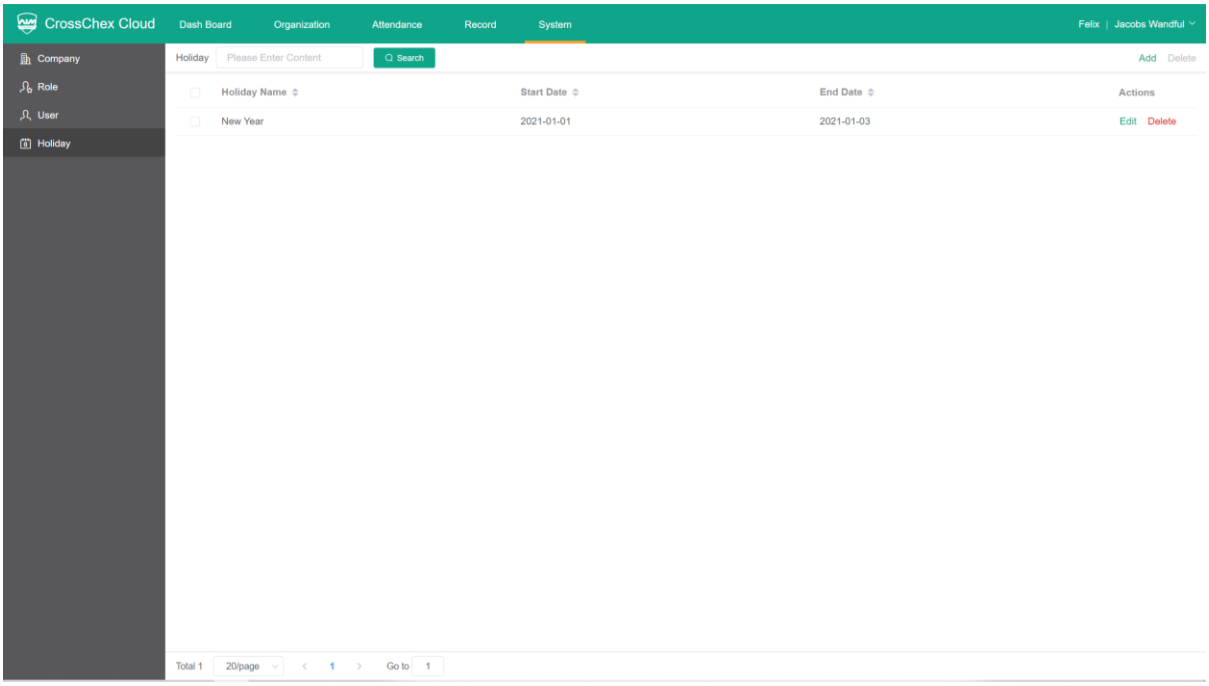
4 Select the role you would like to assign to this employee and click **Confirm**.





Holiday

The holidays feature allows you to define holidays for your organization. Holidays can be set up as represent time off or other days notable within your company for time attendance schedule.



Creating a Holiday

1. Click on **Add**.



2. Enter a name for the holiday
3. Select the start date and end date of the holiday, then click on **Save** to add this holiday.

Add the device to the CrossChex Cloud System

Setup Hardware network – Ethernet

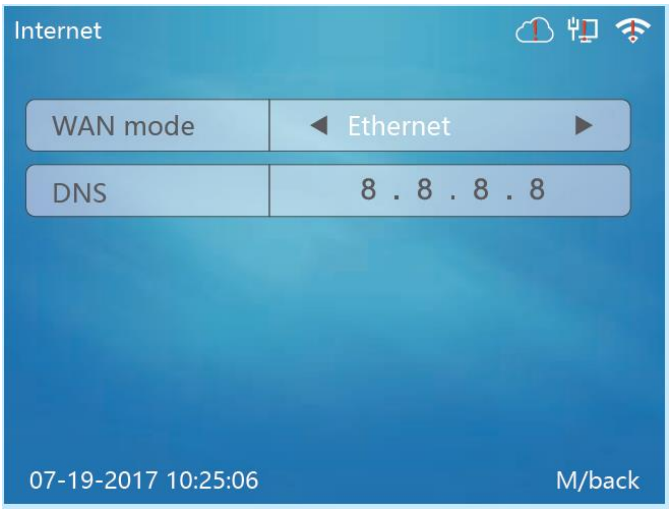
1 Go to device management page (put user:0 PW: 12345, then ok) to select network.



2 Select Internet button



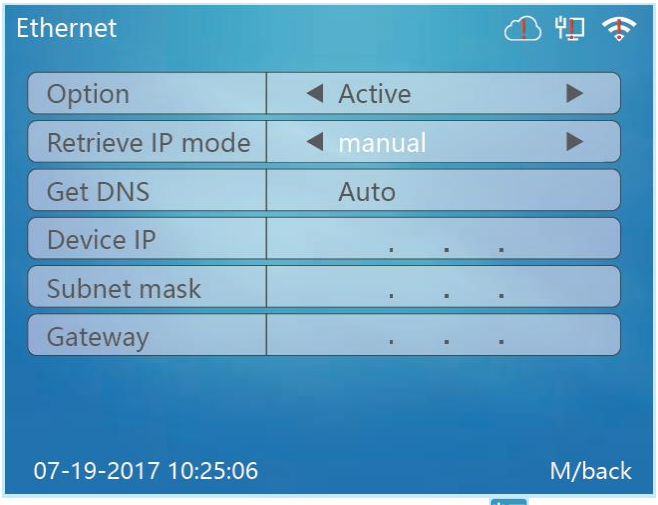
3 Select **Ethernet** in WAN Mode



4 Back to the network and select **Ethernet**.



5 Active Ethernet, If Static IP address input IP address, or DHCP.



Note: After Ethernet connected, the on right corner Ethernet logo will disappear;

Setup Hardware network – WIFI

1 Go to device management page (put user:0 PW: 12345, then ok) to choose network



2 Select Internet button



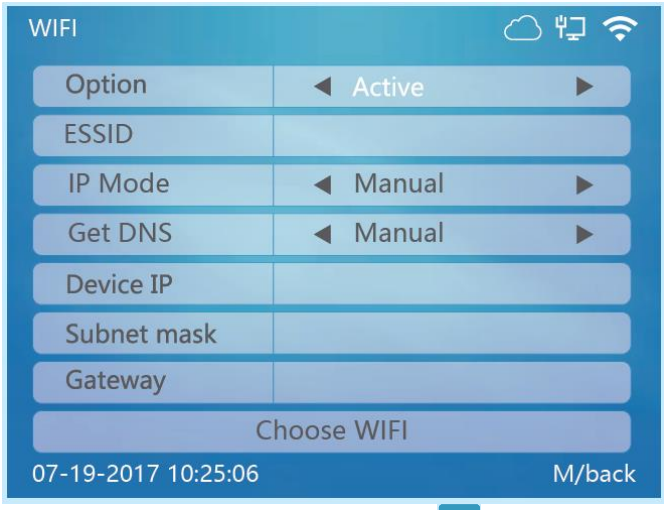
3 Select WIFI in WAN Mode



4 Back to the Network and select WIFI



5 Active WIFI and select the DHCP and Choose WIFI to search WIFI SSID to connect.



Note: After WIFI connected, the on right corner Ethernet logo will disappear;

Cloud Connection Setup

1 Go to device administration page (put user:0 PW: 12345, then ok) to choose network.

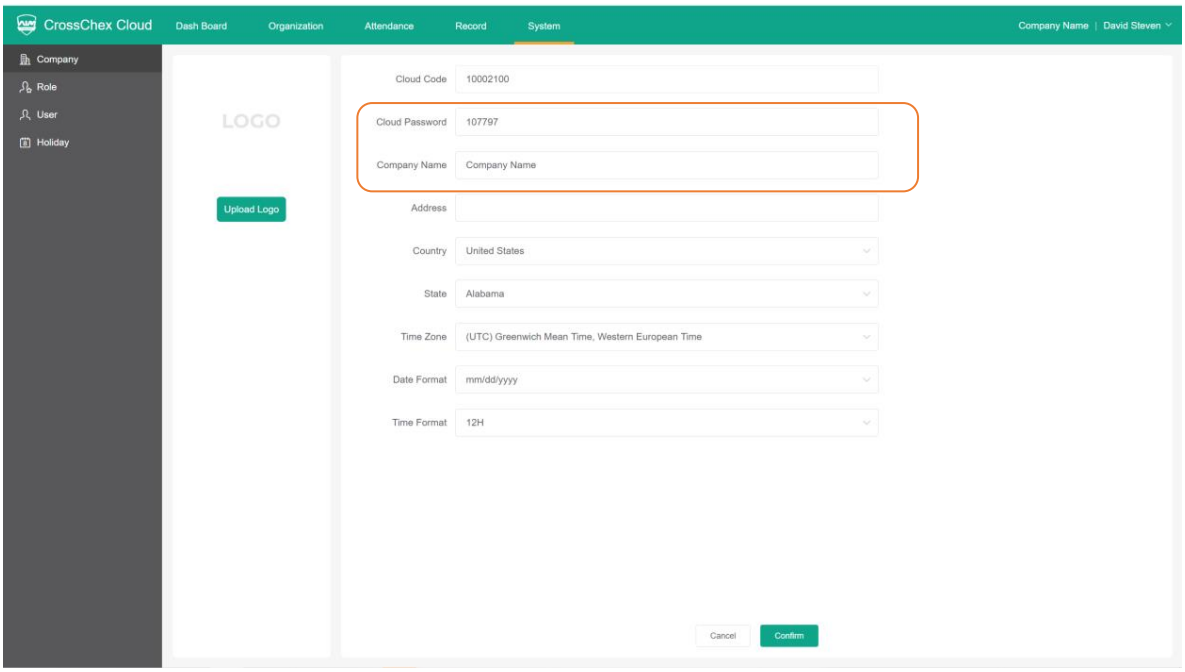


2 Choose Cloud button.



3 Input User and Password which is same as in the Cloud System, **Cloud Code** and **Cloud Password**



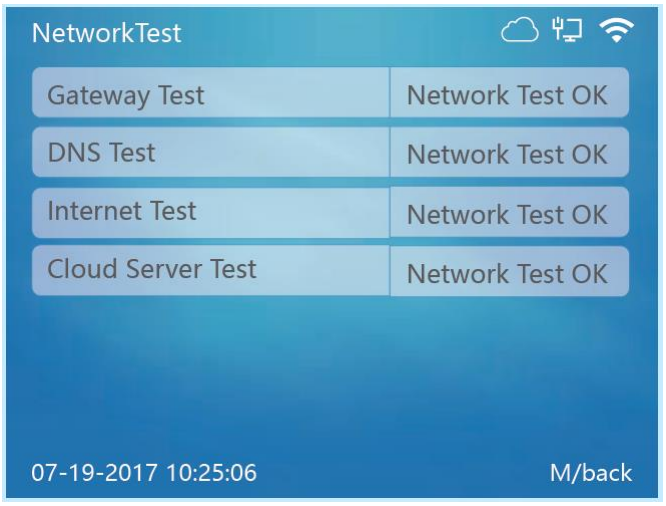


4 Select the server

US - Server: Worldwide Server: https://us.crosschexcloud.com/

AP-Server: Asia-Pacific Server: https://ap.crosschexcloud.com/

5 Network Test



Note: After device and CrossChex Cloud connected, the  on the right corner Cloud logo will disappear;

When device was connected with CrossChex Cloud, we can see the statues of added device in "Device" in software.

