



Infor LN Attendance User Guide

Release 2022.x

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Chapter 1: Introduction

The Attendance functionality can be used to plan the working day(s) for an employee. This plan can be defined using the **Attendance Plan (bpxtm2100m000)** session.

Using the attendance functionality, the presence of the employee at the workplace is recorded. This can be recorded using actual attendance, an API, mobile, tablet, scanner, or manually. This data can be reviewed by period, employee, or department. The attendance data (start and stop time of the employee's presence) can be sent to the payroll system after adjusting time or processing, based on the Day Type in the attendance plan.

The attendance data of an employee includes these information:

- The exact time when the employee clocks in and clocks out
- The time when the employee takes break or works overtime
- The time spent on the offsite work, travel time, and standby time
- The holidays or absencne, if any.

Processing attendance data to payroll

These are the steps to process the attendance data to the payroll:

- 1 Capture the attendance data for an employee or employee group based on the availability or planned presence, using the **Attendance Overview by Employee (bpxtm3600m000)** session.
- 2 Generate the attendance period data using the **Generate Data to Payroll** option from the **Actions** menu in the **Attendance Periods (bpxtm0170m000)** session.
- 3 Process data to the payroll for remuneration to the employee using the **Runs to Payroll** from the **References** menu in the **Attendance Periods (bpxtm0170m000)** session.

Chapter 2: Master Data

To use the Attendance functionality:

- The **Attendance** check box must be selected in the **Implemented software component (ttcom0500m000)** session.
- Define the parameters such as the number group and series in the **Attendance Parameters (bpxtm0100m000)** session

You must also define the master data in these sessions before processing the attendance details to the payroll:

- **Day Type(bpxtm1100m000)**
- **Employee Group (bpxtm0620m000)**
- **Time Types (bpxtm1110m000)**
- **Nonworking Days(bpxtm1140m000) session**
- **Attendance Types (bpxtm1150m000)**

Chapter 3: Day Types

You can use the **Day Type(bpxtm1100m000)** session to define a Day Type. A Day Type describes how an employee attends work in a day. The day type consists of different types of attendance used to calculate the actual attendance of the employee. The hours of work are calculated based on the planned or expected presence at work, and the planned hours of work.

For a day type, a color code and a search key can be assigned that is used in attendance planning and the capacity schedule for an employee.

The day type can be linked to an employee group. It indicates the day type is valid for the specified employee group.

These settings can be defined in the **Day Type(bpxtm1100m000)** session:

Preference

The preference is used when generating the actual attendance for an employee.

Possible options:

- Employee group
- Site/Company

Example: 1st of January 2021 is on Friday. The recurrence linked to the employee group can indicate this as a regular working day. The site or company can indicate this as a holiday. If the Preference option is set to Employee Group, 1st of January is considered as a regular working day. If the Preference option is set to Site/Company, 1st of January is considered as a holiday.

Duration

A standard duration defined for a Day Type. The duration is defined in hours, for planned presence and planned absence.

Threshold

A threshold can be defined for a Day Type (in minutes), both at the clock-in and clock-out time. The threshold is used when calculating or reporting a basic shift difference.

Lockout Time

The lockout time is end time for production hours or attendance period. This is the default clock-out time used when the clock-out time is not registered by the employee at the end of a day. This value must be specified for each Day Type. Else, the Day Type cannot be approved.

Active Indicator

If this check box is selected, the data related to a Time Type is considered during attendance calculation.

Planning to Actual Indicator

If this check box is selected, the planned attendance can be copied to the actual attendance when no data is specified for the day. This value is defaulted from the **Time Type (bpxtm1110m000)** session.

Note: The planned attendance can be copied to actual attendance if the **Active** check box is selected.

Action Correctness Check

You can use the **Correctness Check** option on the **Action** menu to validate the Day Type data. A warning message is displayed in case there is an overlap of the timings.

Search path and priority of day types

The search path is used when generating the planned attendance for an employee. Using the **Preference** option in the **Day Type (bpxtm1600m000)** session, the working day type or non-working day type preference can be defined.

Rounding

Rounding can be defined for a day type on the **Rounding** tab in the **Day Type (bpxtm1600m000)** session. Rounding of the clock-in and clock-out time of the employee is used to ensure smooth operation. The value used for rounding the punch time can be a multiple of 5 or 15.

The three rounding possibilities that can be used:

- Up
The punched time is rounded to the upper value. For example, 8:02 is rounded up to 8:05, 21:34 is rounded up to 21:45.
- Down
The punch time is rounded to the lower value. For example, 15:04 is rounded to 15:00, 9:06 is rounded to 9:00, 7:54 is rounded to 7:45.
- Nearest
The punch time is rounded to the nearest value. For example, 15:02 is rounded to 15:00, 15:03 is rounded to 15:05, 19:37 is rounded to 19:30.

Time Type

The Time Type is a classification of the time spent by an employee at the workplace in a day, week, or month. Time type is used to generate availability and calculate actual attendance of the employee.

You can define a **Start Time** and **End Time** for a Time Type in the **Time Type (bpxtm1110m000)** session. Infor LN allows you to define various Time Types that can be used to define a Day Type for an employee or employee group.

The **Planning to Actual** check box can be selected in this session to indicate if time registrations are specified for an employee on a specific day. Consequently, Infor LN considers the planned attendance data as the actual attendance for the employee. If the **Planning to Actual** check box is not selected for a time type, Infor LN does not consider this data for planning even if the check box is selected for the associated Day Type in the **Day Type(bpxtm1100m000)** session.

The Planning to Actual check box can be selected for these time types:

- Normal Shift
- To Attendance Type
- To Day Type
- Auto Break
- Punched Break

A time type can be used more than once a day with different settings.

Example:

- Rounding can be set up to 5 minutes in the morning and up to 15 minutes in the afternoon.
- A basic shift can be defined from 8:00 to 12:00 and then from 13:00 to 17:00.

A Time type consists of these options:

- Posting Time: The preset posting time is considered irrespective of the clock-in time registered by the employee.
- Basic Shift: It is required to post the basic shift difference. For example, the normal working hours are from 8:00AM to 17:00PM. If the employee clocks in any time after 8:00 AM or clock-out anytime before 17:00 PM is posted to Basic Shift.
- Normal Shift: The regular working hours are considered.
- Flexible Time: Used to indicate different work time or flexible time at the start and end of a working day. This is used for temporary workers.
- Automatic Break: An automatic break time is recorded using this option when the clock-in time completely overlaps with the break time.
- Punched Break: During this period an employee can take a break. The maximum duration of the break is defined in the setting. If the break time is shorter or longer than the time set for a break, the time is recalculated when generating the actual attendance.
- Planned attendance: The planned attendance is the base data for availability and capacity calculations. Planned attendance is used in the calculation of work force capacity.

Nonworking Days

You can define the nonworking days in the **Nonworking Days(bpxtm1140m000)** session. Nonworking days are weekends, public holidays, training days, or other days when there is no work activity. Other type of nonworking day are absence days that can be specified manually or through time-off requests specified in **Actual Attendance (bpxtm2150m000)** session.

Note: An absence day can be linked only to an employee and not to another level of nonworking day.

A nonworking day can also be defaulted from Infor HCM. The **Time Off Request** check box indicates if the nonworking day is defaulted from Infor HCM. The data cannot be modified.

Nonworking days can be defined at four levels:

- Company: Applicable to the attendance data of all employees in the company.
- Site: Applicable to employees linked to the site based on the department of the employee.
Note: This level is not applicable if the Site is not implemented in the **Implemented Software Components (tccom0500m000)** session.
- Employee group: Applicable to all employees linked to an employee group.
Note: If an employee linked to an employee group from 01/01/2022 to 31/01/2022, the days in January is applicable to the employee and not the days after the specified period.
- Employee: Applicable to an individual employee.

Chapter 4: Employee Group

You can define the default data and settings for an employee group in the **Employee Group (bpxtm0620m000)** session. The data and the settings in this session are applicable to all employees linked the employee group. You can define the data such as priorities for overlapping times and the default attendance types.

This allows to simplify and speed up the administrative work.

These sessions are displayed as satellite sessions:

- **Employees by Employee Group (bpxtm0130m000)**
- **Day Type by Employee Group (bpxtm0140m000)**
- **Processing Instructions (bpxtm0160m000)**

These settings are defined for an employee group and cannot be modified for an individual employee. This reporting period data is used for attendance balances and sending data to the payroll:

- Processing instructions
- Date types
- Hour types
- Recurrence period on processing

Priorities of overlapping times

The priorities can be set for overlapping times in the **Employee Group (bpxtm0620m000)** session.

Example: An employee's normal work time starts at 8:00AM, Travel time starts at 10:00AM and Stops at 11:00 AM, and finally the normal time stops at 12:00PM. There are multiple times punched and it overlaps as well. The priorities can be set for this overlapping time by specifying the exact number of hours into each time category. While generating actual attendance, the highest number takes priority over the lowest number that is registered.

Employees by Employee Group

You can link employees to the employee group using the **Employees by Employee Group (bpxtm0130m000)** session. This link is time related, with an effective and an expiry date indicating if the employee is active in the linked Employee Group.

An employee cannot be linked to two employee groups at the same time. If the employee is not linked to an employee group, planning data and actual attendance cannot be specified for the employee or exported to the payroll system.

The **Use Employee Group** check box in the **Employee – Time Data (bpxtm0110m000)** session decides if the parameter setting specified for the employee or employee group to be used. If the **Use Employee Group** check box is selected, the settings of the employee group are copied to the employee.

Day Types by Employee Group

You can link Day Types to the employee group using the **Day Type by Employee Group (bpxtm0140m000)** session. The Day Types can be used for the planned availability of the employees linked to the employee group. The **Effective Date** and **Expiry Date** can be set for the Day Type to facilitate flexible shifts.

Recurrence

You can define recurrence (weekdays, weekends, national holidays, and so on) for a Day Type using the **Recurrences (tcccp0143m000)** session.

Note:

- If the **Expiry Date** is not specified, it indicates the day type is not expired for the employee group.
- A Day Type can be linked to an employee group multiple times, with different recurrences.

Processing instructions

You can maintain processing instructions for an employee group using the **Processing Instructions (bpxtm0160m000)** session. These instructions are used to adjust time in the actual attendance or to split the working hours based on the rules and regulations of the organization. Each processing instruction has one or more rules to process the actual attendance in working hours.

The processing instructions are defined in a sequence, as the result of one processing instruction is used as input for the subsequent processing instruction.

Processing instructions can be executed at different times with a focus on different time frame. The time frame can never be more than an attendance period or start and end date of an attendance period.

- Includes daily data such as the normal and overtime hours for a day.
- Weekly data based on the period specified in the **People Parameters (bpmdm0100m000)** session.

- Attendance period
- Generate attendance planning
- Generate attendance periods
- Generate attendance
- Change status of an attendance period

Examples of processing instructions

These are the scenarios where the processing instruction can be used to adjust actual attendance depending upon the company's policies:

- When an employee reports more than 10 hours on a day, this can be split into 8 hours of normal working hours and 2 hours of overtime, depending upon the company's policy.
- When an employee clocks-out after 22:00 PM on Monday and before 8:00 AM on Tuesday, then a remark is created. It indicates that the employee got very less time to rest. (This is applicable to very specific countries)
- When an employee reports more than 12 hours on a day, this can be split into 8 normal hours, 2 overtime hours and the rest to illegal overtime. And a remark must be created for the illegal overtime hours.

Employees - Time Data

You can maintain the attendance and production hours of an employee in the **Employees - Time data (bpxtm0110m000)** session. The data defined for an employee in this session overrides the data defined for the employee in the **Employee Groups (bpxtm0120m000)** session.

Creating time data for employee group

To assign an employee to an employee group:

- 1 Access the **Employee Group (bpxtm0120m000)** session to create an employee group.
- 2 Assign the employee to the employee group using the **Employee-by-Employee Groups (bpxtm0130m000)** session.
- 3 Select the **Use Employee Group** check box and the corresponding employee options in the **Employee Group (bpxtm0120m000)** session for the employee assigned to the group.

Chapter 5: Attendance Types

Attendance types are kinds of attendance. A day spent at work (recorded in time) is reported to one or more attendance types.

The attendance hours are exported to a payroll system with an export code, in hours and day's value. If the **Export Code** is not specified in the field, the **Attendance Type** code is considered for the export.

Note: The data is exported to a payroll system only if the **Export** check box is selected.

You can use the **Attendance Type (bpxtm1150m000)** session to specify the data that can be used for reporting. This includes:

- Paid
- Include in balance
- Count into normal
- Overtime
- Planned absence

For each attendance type, you can indicate the type of Presence. Possible values:

- Normal: This includes the normal working hours such as 8:00 to 17:00 HRS.
- Offsite: This includes working hours that are spent at places other than the workplace. For example, from home, at a customer or partner site, or a construction area.
- Travel: This includes travel hours to reach to the workplace, return from the workplace, or travel between two jobs.
- Absence: This includes all absence hours due to illness, holidays, paid time off, doctor's visit, and so on.
- Standby Time: This includes the hours when an employee is not at work but on standby to go to work.

Chapter 6: Attendance Periods

Attendance periods are used to control processing actual attendance data to the payroll system or to an API. You can use the **Attendance Periods (bpxtm0170m000)** session to view, report, and generate actual attendance for an employee group, period, and year.

The periods are defined using the **Period Tables (tcccp0160m000)** session.

These are the status of the attendance period:

- Open
The actual attendance can be generated and the attendance period data can be modified
- Locked
The actual attendance data cannot be generated and the attendance period data cannot be modified. The status is set to locked only if the **End Date** is specified in the attendance period.
- Approved
The actual attendance cannot be generated and the attendance period data cannot be modified.
- Closed
The attendance period data is sent to a payroll system. The data cannot be modified.

Chapter 7: Attendance Planning

The **Attendance Plan (bpxtm2100m000)** session displays the availability schedule for the selected employee based on the Day Types. This consists of the daily attendance planning of the employees, based on the planning for the employee group they are associated with. It also based on the data of the site and company.

The attendance plan can be generated periodically for an employee using the **Generate Attendance Plan** from the **Actions** menu.

There can be restrictions to view and modify the attendance plan based on these settings:

- If the **User Registration Authorization** check box is selected in the **People Parameters (bpmdm0100m000)** session, the authorization to modify the attendance plan is restricted. The logged in employee can only modify his or her attendance plan.

Note: An employee log on code can be linked to one, multiple, or all departments in the **Registration Authorization (bpmdm0110m000)** session. In such case, the employee can edit the attendance plan of the employees in the departments to which the employee is linked.

- If the **Restrict Access** check box is selected, the employee can only view his or her attendance plans. The employee cannot navigate through other employee's attendance plan.

Note: An employee log on code can be linked to one, multiple, or all departments in the **Registration Authorization (bpmdm0110m000)** session. In such case, the employee can edit the attendance plan of the employees in the departments to which the employee is linked.

Generate Attendance Plan

You can use the **Generate Attendance Plan (bpxtm2200m000)** session to generate attendance plan for the employee periodically. This session can also be accessed using the **Generate Attendance Plan** option from the **Actions** menu in the **Attendance Plan(bpxtm2100m000)** session.

The attendance plan is generated based on the data of the Day Type specified for the employee.

When generating the attendance plan, you can select a range of dates, employees, and departments.

Note: The data generated automatically from a previous run is replaced with the new data.

Chapter 8: Attendance overview

You can use the **Attendance Overview by Employee (bpxtm3600m000)** session to view, modify, and generate the attendance data for an employee.

To generate the actual attendance data these are the three major components:

- Time registrations
- Actual attendance
- Attendance periods

The attendance plan is the planned presence scheduled for an employee for a certain period. The attendance plan can be generated periodically.

Attendance is recorded using the **Time Registrations (bpxtm2220m000)** session. Time can also be registered using another device or application (outside punch), manually, or by Info LN. The data can also be adjusted. A line created for the registered time can be set to invalid using the **Attendance Overview by Employee (bpxtm3600m000)** session if there is a wrong entry in the time registration.

Note: When the time is registered using the **Time Registrations (bpxtm2220m000)** session, the **Origin** is automatically set to **Punched** on the **Time Registrations** tab in the **Attendance Overview by Employee (bpxtm3600m000)** session.

The actual attendance is generated based on the time registrations, data settings in the employee group, day types, and non-working days. Actual attendance data can be generated periodically as per the company's requirements in case, there is a need for a correction or manipulation.

The attendance periods control the status of the actual attendance lines which is used for reporting. Actual attendance is posted to a payroll system based on the attendance period.

Attendance events are created or captured based on the discrepancies in the start and stop times punched during a day, which does not align with the normal on-site kind of time.

Attendance balance is a summary of the actual attendance registered. Attendance balances cannot be modified manually.

Remarks are created if there is a wrong entry, or an illegal overtime registered by the employee. Sometimes, a manager may need to communicate to the employee regarding the time registration or actual attendance can create a remark.

Chapter 9: Record Actual Attendance

You can Use the **Time Registrations(bpxtm2120m000)** session to record the actual attendance of an employee. Time can also be registered using the **Time Registration (bpxtm2220m000)** session.

A time registration can be set to invalid by an authorized supervisor if there is an overlap, repetition, or wrong entry registered by an employee.

Note: The data can be accessed based on the **Restrict Access** check box in the **People Parameters (bpmdm0100m000)** session.

The time registration origin can be set manually, punched (using API or file upload), or system generated (preset lockout time or processing instruction).

The kind of time is also maintained in the time registration. These are:

- Normal on site: Time spent at the regular workplace. By default, this time is used. If nothing is specified, the kind of time is set to Normal time.
- Time offsite: Time spent outside of the regular workplace.
- Travel time: Time spent in travelling.
- Standby time: Time spent on standby call.
- Absence: Attendance is not taken but is expected to be registered.
- Other: This time type is used when no other kind is applicable.

Record time - Team Registrations: It is possible to record time for a team. One member of the team can record time which is applicable to everyone in the team. An ID card number is used for the team instead of the employee code.

Adjusting time: The time registration data can be entered manually by a supervisor. The data can be manipulated using the options specified on the Time registrations tab in the **Attendance Overview by Employee (bpxtm3600m000)** session.

Export actual attendance: Exporting actual attendance is to send the data to the payroll system. The data that are to be sent to the payroll system is controlled by the attendance period.

Remarks

Remarks are created if there is a wrong entry, or an illegal overtime registered by the employee. A manager can create a remark for communicating to the employee regarding the time registration or actual attendance.

Remarks can be created manually using the Remarks (bpxtm4100m000) session. A remark can also generated automatically in these scenarios:

- During time registrations
- When generating actual attendance
- During processing instructions

The number group and series are defined in the **Attendance Parameters (bpxtm0100m000)** session are used to generate remarks during the time registrations and when generating actual attendance.

The manually created remarks can be deleted using the Delete Remarks (bpxtm4200m000) session.

Note:

- The data can be accessed based on the **Restrict Access** check box in the **People Parameters (bpmdm0100m000)** session. The logged in employee can only view his or her own data if the **Restrict Access** check box is selected.
- An employee must be authorized for one, multiple, or all departments to view or edit remarks.
- Remark can be generated only once for the same issue.

Generate Actual Attendance

Using the **Generate Actual Attendance(bpxtm2250m000)** session, you can generate actual attendance from time registrations. You can generate data for a range of periods, a specific date, or for attendance periods with a status Open.

After generating actual attendance, the data is reflected in actual attendance and in attendance balances in the **Attendance Overview by Employee (bpxtm3600m000)** session.

Calculate Actual Attendance

The time registration data is calculated and stored in actual attendance after generating actual attendance. Multiple lines can be created based on the number of punch times registered for a day. The calculation can be done multiple times till the **Attendance Period Status** is **open**. If the status is set to Locked, the calculations cannot be done on time registrations on that period.

If the time registration data is not available for an employee on a date, a check is done if planned attendance is available. If the **Planning to Actual** checkbox is selected for the attendance plan, the planned data is copied to the actual attendance data.

Note: Generally, the time registrations data is given priority over the planned attendance (if the Planning to actual indicator selected)

Generate Data to Payroll

The attendance period data can be generated using the **Generate Data to Payroll** option from the **Actions** menu in the **Attendance Periods (bpxtm0170m000)** session. You can generate data for a range of employee group, year, period code, and period before processing the data to payroll.

Note:

- The periods with a status set to **Approved** and **Closed** can only be included when generating the data to a payroll system.
- The data of the attendance period is included when generating the data to payroll if the **Export** check box is selected in the **Attendance Types(bpxtm1150m000)** session.

After generating the attendance period data, you can click **Runs to Payroll** from the **References** menu in the **Attendance Periods (bpxtm0170m000)** session to process the data to payroll.

Note:

- If the **Planning to Actual** check box is selected, the data specified in time registrations takes precedence over the data specified in the planned attendance.
- Actual attendance can be generated only if the transactions are specified in the **Attendance Periods (bpxtm0170m000)** session.
- The reporting fields are also included in the payroll data only if the related options are selected in the **Attendance Types (bpxtm1150m000)** session.