

# Overview Video

<https://www.youtube.com/embed/25H1e2j4N28>

## Step-by-Step Tutorial Guide

### Step 1: Open the Advance Shift Management Module

1. Log in to the TankhaPay dashboard.
2. From the left-side navigation panel, navigate to **Attendance Management**.
3. Click **Advance Shift Management**.
4. The **Shift Policies** page opens, displaying all configured shift policies.

This module allows administrators to create and manage advanced shift policies with customized attendance rules.

### Step 2: Select or Create a Shift Policy

1. Review the list of available shift policies.
2. To modify an existing policy, click the **Edit** icon on the desired shift policy.
3. Alternatively, click **Create Shift Policy** to configure a new policy.
4. The **Update Advance Shift Policy** window opens.

This page contains multiple configuration tabs for defining shift rules.

# Step 3: Configure Basic Shift Details

1. Under the **Basic** tab, enter the required shift information.
2. Configure details such as:
  - Shift Name
  - Shift Code
  - Shift Category
  - Shift Duration
  - Shift Start Time
  - Shift End Time
  - Working Hours
3. Save the basic configuration before proceeding.

These settings define the overall schedule for the shift.

# Step 4: Configure Time Calculation Rules

1. Open the **Time Calculation** tab.
2. Configure the attendance calculation settings.
3. Define options such as:
  - Clock-in and clock-out rules
  - Grace period
  - Early arrival settings
  - Late arrival settings
  - Minimum working hours
4. Save the configured rules.

These settings determine how employee attendance is calculated for the selected shift.

# Step 5: Configure Penalty Rules

1. Navigate to the **Penalty Rules** tab.
2. Configure rules for attendance deviations.
3. Define settings such as:
  - Late coming rules
  - Early leaving rules
  - Grace limits
  - Penalty applicability
4. Save the penalty configuration.

Penalty rules help organizations enforce attendance policies consistently.

# Step 6: Configure Cross-Period Settings

1. Scroll to the **Cross Period Configuration** section.
2. Configure the required cross-period rules.
3. Specify:
  - Cross-period duration
  - Maximum allowed hours
  - Applicable conditions
4. Save the configuration.

This feature supports shifts that continue beyond a single calendar day.

# Step 7: Configure Payroll Rules

1. Open the **Payroll Rules** tab.

2. Configure payroll-related attendance settings.
3. Define:
  - Payroll calculation basis
  - Attendance eligibility
  - Leave deductions
  - Payroll applicability
4. Save the payroll rules.

These settings ensure attendance data is processed correctly during payroll.

## Step 8: Configure OT (Overtime) Settings

1. Navigate to the **OT Config** tab.
2. Configure overtime eligibility.
3. Specify:
  - Overtime type
  - Overtime calculation method
  - Minimum qualifying hours
  - Maximum overtime limits
  - Rounding rules
4. Save the overtime configuration.

This determines how employee overtime is calculated and processed.

## Step 9: Configure OT Rule Conditions

1. Under the overtime configuration, define the applicable OT rules.
2. Select the required:
  - Attendance status
  - Working day type
  - Shift applicability
  - Holiday or weekly off conditions
3. Configure the overtime calculation method as required.
4. Save the updated settings.

These rules ensure overtime is calculated according to the organization's policy.

# Step 10: Save the Shift Policy

1. Review all configured settings across each tab.
2. Verify:
  - Basic shift details
  - Time calculation rules
  - Penalty rules
  - Payroll rules
  - Overtime configuration
3. Click **Update Shift Policy** or **Save**.
4. A confirmation message is displayed after the policy is successfully updated.

The configured shift policy is now available for employee shift assignments.

# Key Benefits of Advance Shift Management

- Configure multiple shift policies for different employee groups.
- Customize attendance calculation rules.
- Manage late coming and early leaving policies.
- Support overnight and cross-day shifts.
- Configure payroll-specific attendance rules.
- Automate overtime eligibility and calculations.
- Improve attendance accuracy and payroll compliance.

# End of Tutorial

You have now completed the **Advance Shift Management** configuration in TankhaPay.

This module enables organizations to create flexible shift policies with customized attendance, payroll, penalty, and overtime rules, ensuring accurate workforce scheduling and streamlined

attendance management.

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