CODEKS TA Kit application

INSTRUCTION MANUAL FOR ADMINISTRATORS
for the software version **Codeks TA Kit v10.2101.8.14982** and newer

CodeksTAKit V10

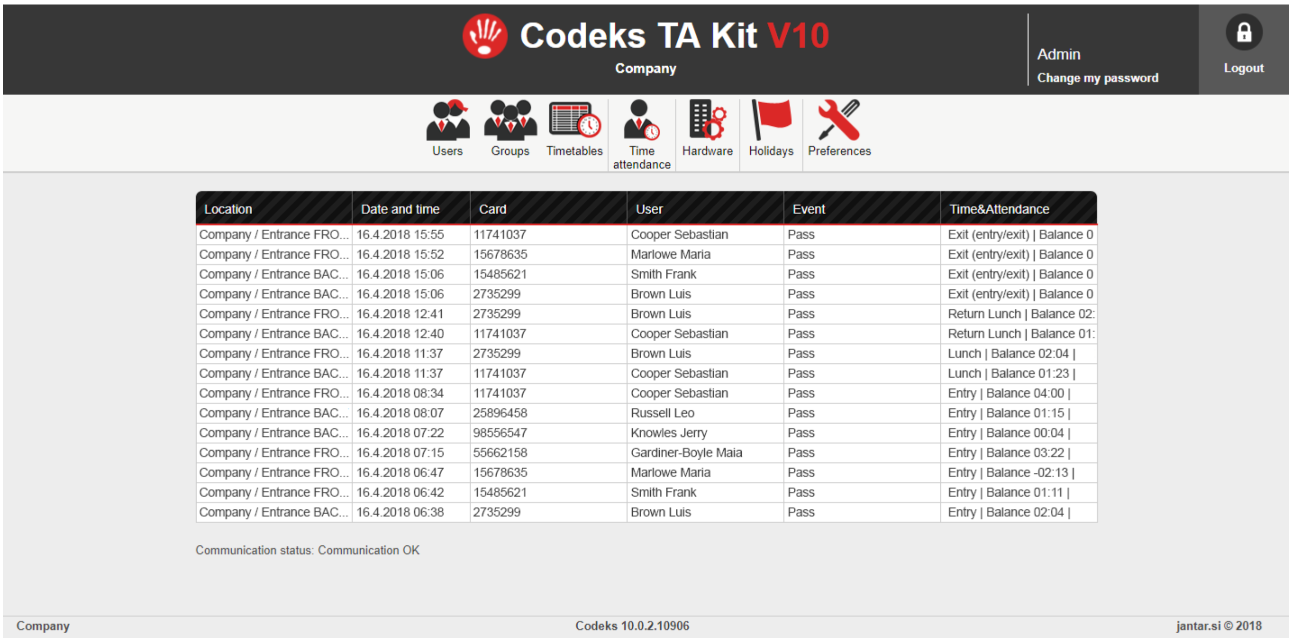
CONTENT

0 INTRODUCTION

This document contains user instructions for administrators of the **Codeks TA Kit application for time attendance registration**.

In this document, you will find simple instructions for basic procedures you encounter on a daily basis or very often.

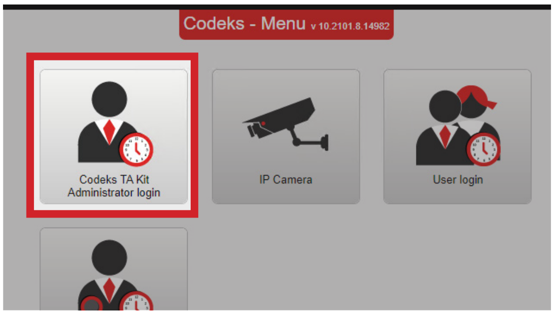
You can find more information in the software documentation available on our download page **https://jantar.si/en/documentation/**.



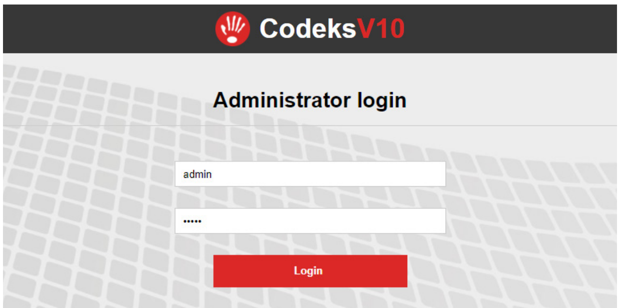
Location	Date and time	Card	User	Event	Time&Attendance
Company / Entrance FRO...	16.4.2018 15:55	11741037	Cooper Sebastian	Pass	Exit (entry/exit) | Balance 0
Company / Entrance FRO...	16.4.2018 15:52	15678635	Marlowe Maria	Pass	Exit (entry/exit) | Balance 0
Company / Entrance BAC...	16.4.2018 15:06	15485621	Smith Frank	Pass	Exit (entry/exit) | Balance 0
Company / Entrance BAC...	16.4.2018 15:06	2735299	Brown Luis	Pass	Exit (entry/exit) | Balance 0
Company / Entrance FRO...	16.4.2018 12:41	2735299	Brown Luis	Pass	Return Lunch | Balance 02:
Company / Entrance BAC...	16.4.2018 12:40	11741037	Cooper Sebastian	Pass	Return Lunch | Balance 01:
Company / Entrance FRO...	16.4.2018 11:37	2735299	Brown Luis	Pass	Lunch | Balance 02:04 |
Company / Entrance BAC...	16.4.2018 11:37	11741037	Cooper Sebastian	Pass	Lunch | Balance 01:23 |
Company / Entrance FRO...	16.4.2018 08:34	11741037	Cooper Sebastian	Pass	Entry | Balance 04:00 |
Company / Entrance BAC...	16.4.2018 08:07	25896458	Russell Leo	Pass	Entry | Balance 01:15 |
Company / Entrance BAC...	16.4.2018 07:22	98556547	Knowles Jerry	Pass	Entry | Balance 00:04 |
Company / Entrance FRO...	16.4.2018 07:15	55662158	Gardiner-Boyle Maia	Pass	Entry | Balance 03:22 |
Company / Entrance FRO...	16.4.2018 06:47	15678635	Marlowe Maria	Pass	Entry | Balance -02:13 |
Company / Entrance FRO...	16.4.2018 06:42	15485621	Smith Frank	Pass	Entry | Balance 01:11 |
Company / Entrance BAC...	16.4.2018 06:38	2735299	Brown Luis	Pass	Entry | Balance 02:04 |

1 MAIN MENU

Codeks administrators can log in to the Codeks application with their username and password using a web browser.



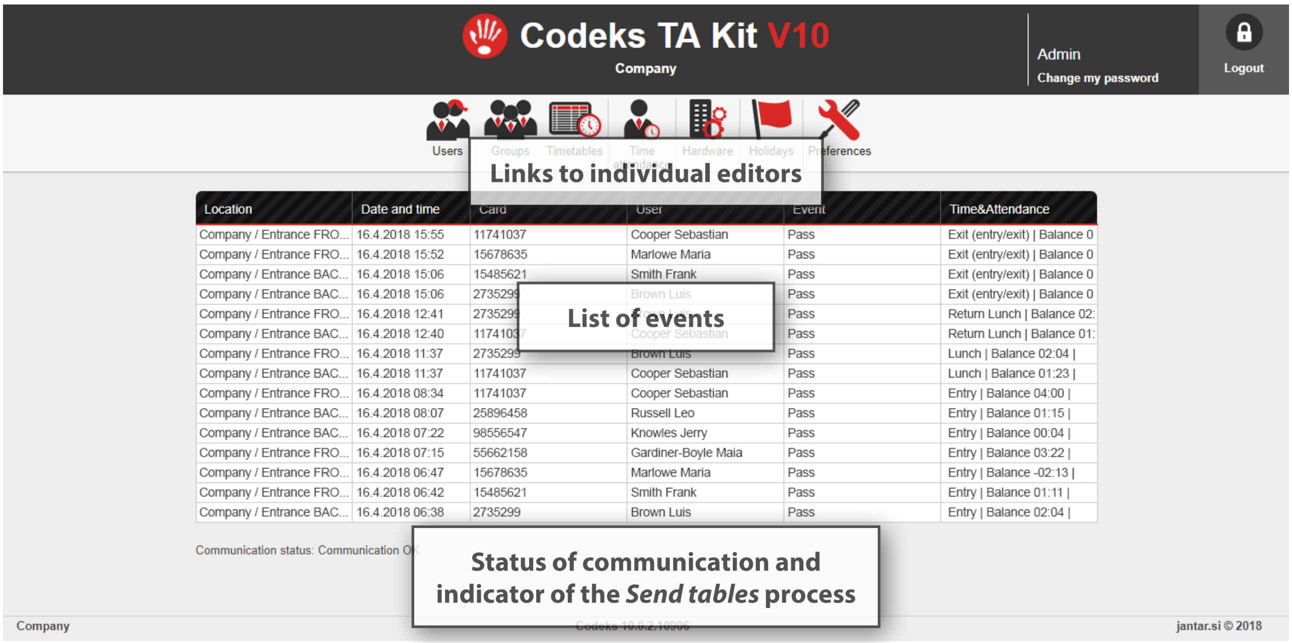
Link to the start menu:
***~IP address of your server~*:9090**



Link to the administrator login form:
***~IP address of your server~*:9090/takit/adminuserslogin.html**

NOTE
The default username and password for the Codeks administrator are:
Username: admin   Password: admin.
For security reasons, we recommend that you immediately change the default administrator login information. You can change the login username and password under the *Administrator settings* section in the *Program settings* tab of *Preferences*.

After a successful login, the **Main menu** of the Codeks TA Kit will be displayed:



In the *Main menu* you will find:

Links to all the editors	Icons in the toolbar are links to individual editors of the application.
List of recent events	The central *List of events* displays the 15 most recent events in the system.
Communication status line	The line at the bottom informs whether communication with controllers is established. The line will also display the status of the *Sending tables* process.

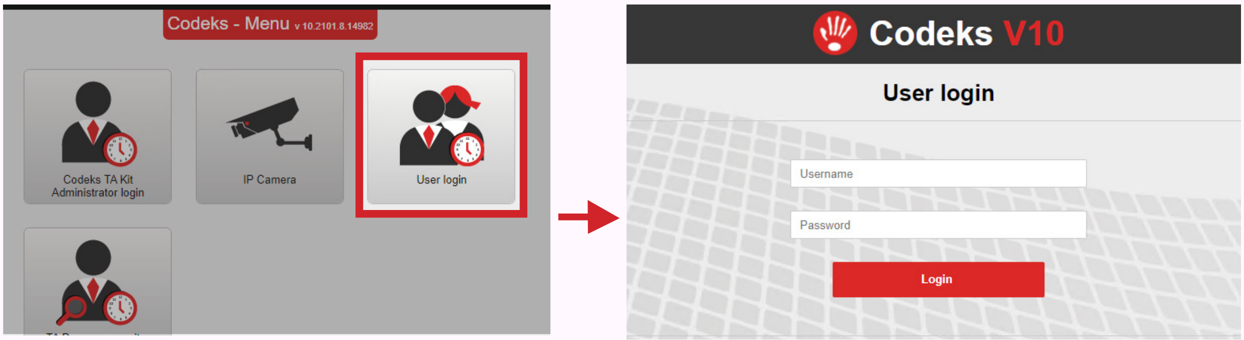
NOTE

The process of *Sending tables* is automatized in the Codeks Ta Kit application and will be triggered every time the administrator returns to the *Main menu* page.
The status of sending tables will be displayed in the *Communication status line*. During sending the database of the application is fully occupied, consequently, it is not possible to edit anything until sending is complete.

USER ACCESS

In addition to administrators, **users**, i.e. employees and heads of departments, can also login to the Codeks TA Kit application.

Users use their username and password to login to the Codeks application through the user login form:



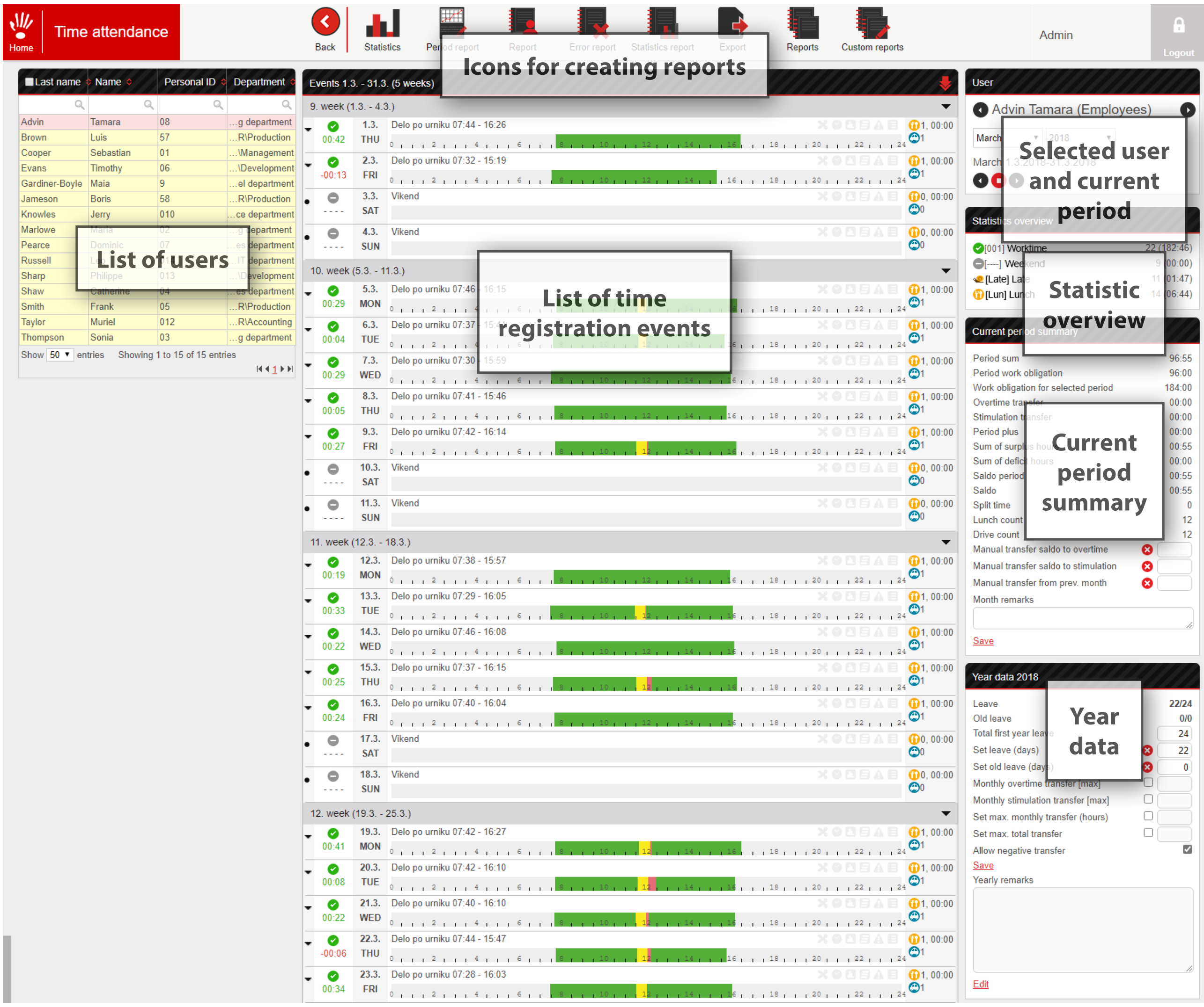
Link to the start menu:
~IP address of your server~ :9090

Link to the user login form:
~IP address of your server~ :9090/addons/userslogin.html

Instructions for users can be found in a separate document.

2 TIME ATTENDANCE

In the ***Time attendance*** editor, you can view and edit the employees' time registration as well as set additional settings which affect the recording of their work hours.



List of users	The list contains all users who clock their time registration. By right-clicking on a selected user or multiple selected users you can perform different functions or recalculations.
Icons for creating reports	By clicking different report icons you can create reports for all currently selected users in the list of users.
List of time registration events	The main part of the screen displays the daily time registration events of the selected user. The timeline and the icons indicating manual corrections enable quick overview and easy search for errors and anomalies in the time registration.
Selected user and current period	Displays the currently selected user and enables navigation between periods.
Statistic overview	Overview of all statistics and their values in the current period.
Current period summary	Saldo and hour transfer summary for the selected user in the current period.
Year data	Yearly data and settings for the time registration of the selected user.

ADDING STATISTIC FOR DAY AND PERIOD

To set daily absences (e.g. holiday leaves or sick leaves) use the ***Set statistic*** or ***Set statistic for period*** function.

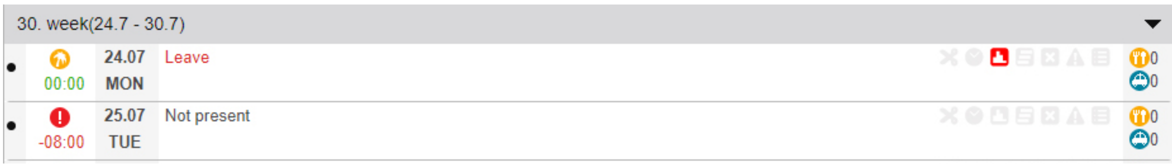
Set statistic

Use this function when you want to set a statistic for a single day.

1 *Right-click on the selected day* to display the edit menu and select ***Set statistic***.

2 In the new pop-up window *select the statistic you wish to set* and click ***Save***.

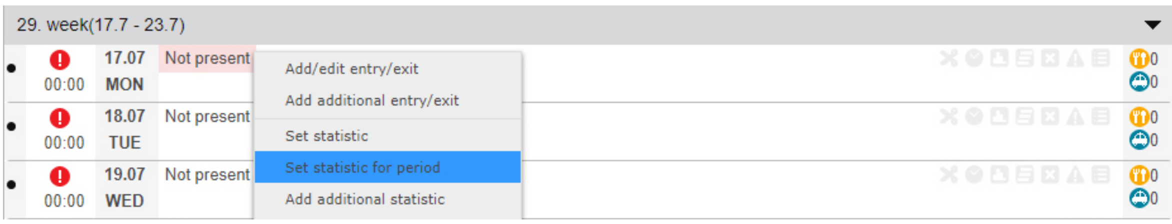
3 The selected statistic will be set for the day and will be colored red. Additionally, the *correction of statistic* icon ( ) will also color red, marking that the statistic had been manually added.



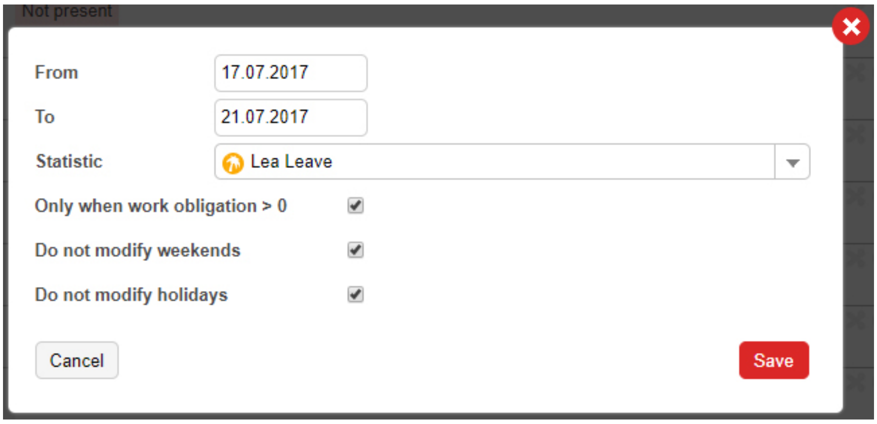
Set statistic for period

Use this function when you want to set a statistic for multiple successive days.

1 *Right-click on the selected day* to display the edit menu and select ***Set statistic for period***.



2 In the new pop-up window *select the start and end date, then also select the statistic you wish to set.*
Click ***Save***.

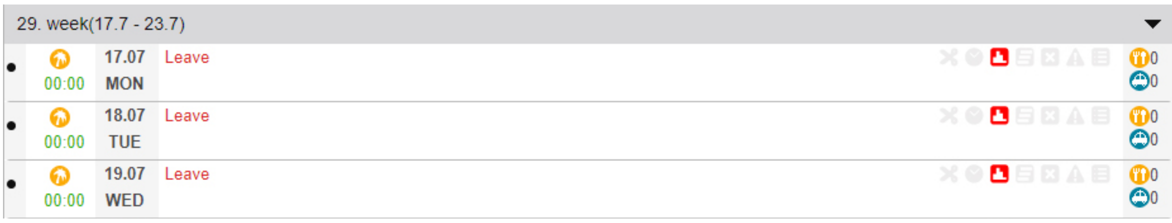


Only when work obligation > 0
If this setting is enabled, the statistic will only be set for days when the user's work obligation is greater than 0, i.e. all free days (e.g. weekends and holidays) will remain unchanged.

Do not modify weekends
If this statistic is enabled, the system will keep the originally set statistic for weekends and will not substitute it for the new one.

Do not modify holidays
If this statistic is enabled, the system will keep the originally set statistic for holidays and will not substitute it for the new one.

3 The selected statistic will be set for the days and will be colored red. Additionally, the *correction of statistic* icon () will also color red, marking that the statistic had been manually added.

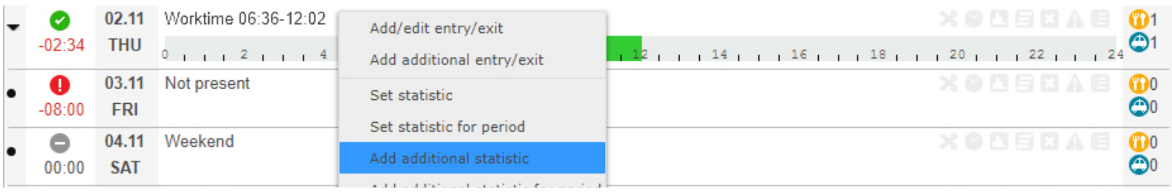


ADDITIONAL STATISTIC

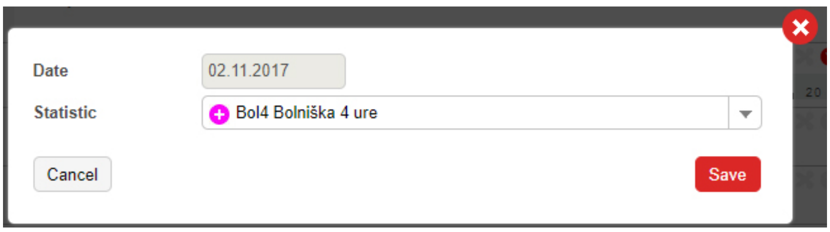
Add additional statistic

Use the ***Add additional statistic*** when setting additional overtime hours, work-from-home or part-time sick leaves.

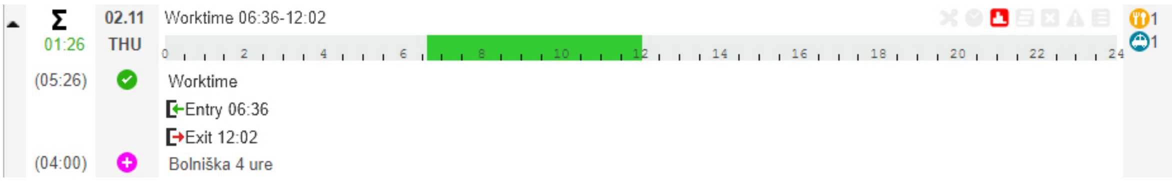
1 *Right-click on the selected day* to display the edit menu and select ***Add additional statistic***.



2 In the new pop-up window *select the start and end date, then also select the statistic you wish to set.*
Click ***Save***.



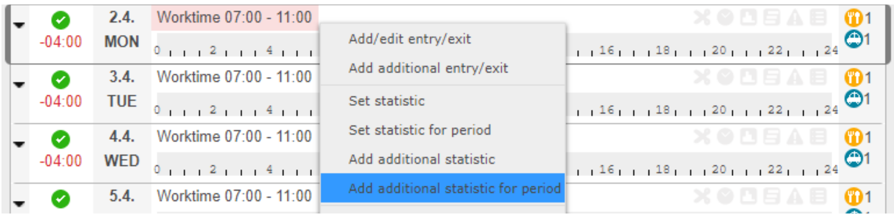
3 The selected statistic will be set for the day and will be colored red. Additionally, the *correction of statistic* icon ( ) will also color red, marking that the statistic had been manually added.



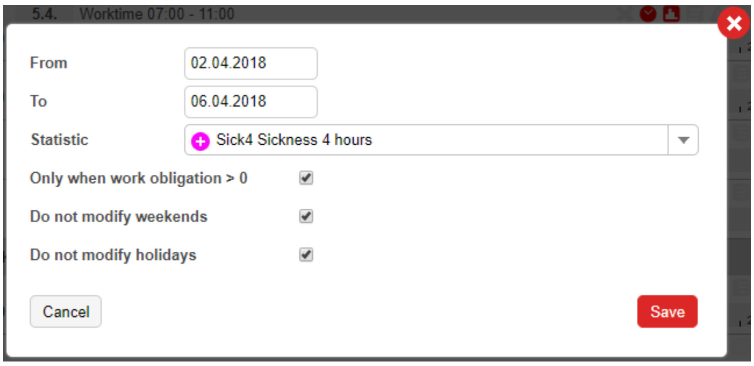
Add additional statistic for period

If you want to set an additional statistic for a number of consecutive days (e.g. set a 4-hour sick leave statistic for a period), use the ***Add additional statistic for period*** function.

1 Right-click on the selected day to display the edit menu and select ***Add additional statistic for period***.



2 In the new pop-up window select the *start and end date*, then also *select the statistic you wish to set*. Click ***Save***.

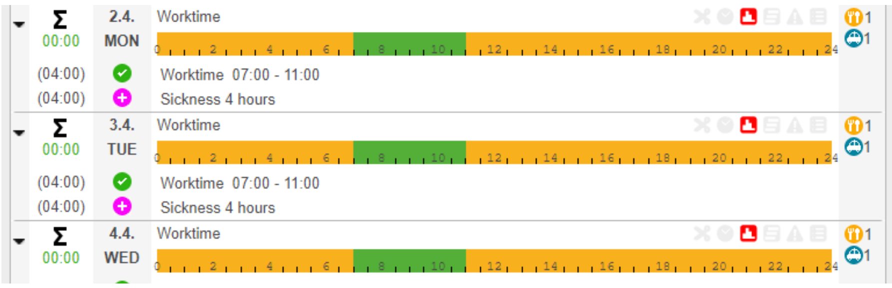


Only when work obligation > 0
If this setting is enabled, the statistic will only be set for days when the user's work obligation is greater than 0, i.e. all free days (e.g. weekends and holidays) will remain unchanged.

Do not modify weekends
If this statistic is enabled, the system will keep the originally set statistic for weekends and will not substitute it for the new one.

Do not modify holidays
If this statistic is enabled, the system will keep the originally set statistic for holidays and will not substitute it for the new one.

3 The selected additional statistic will be set for the day and will be colored red. Additionally, the *correction of statistic* icon ( ) will also color red, marking that the statistic had been manually added.

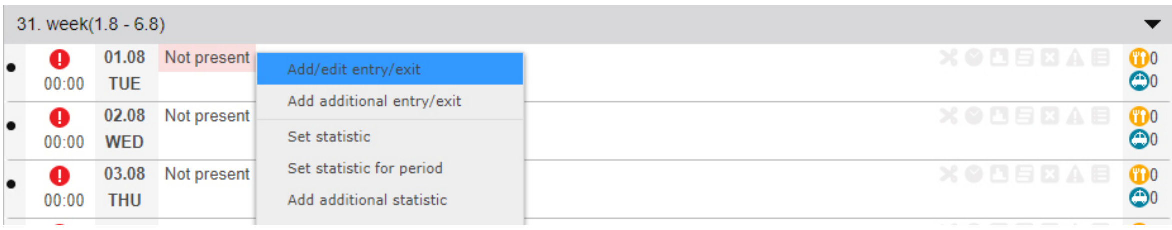


EDITING THE DAY

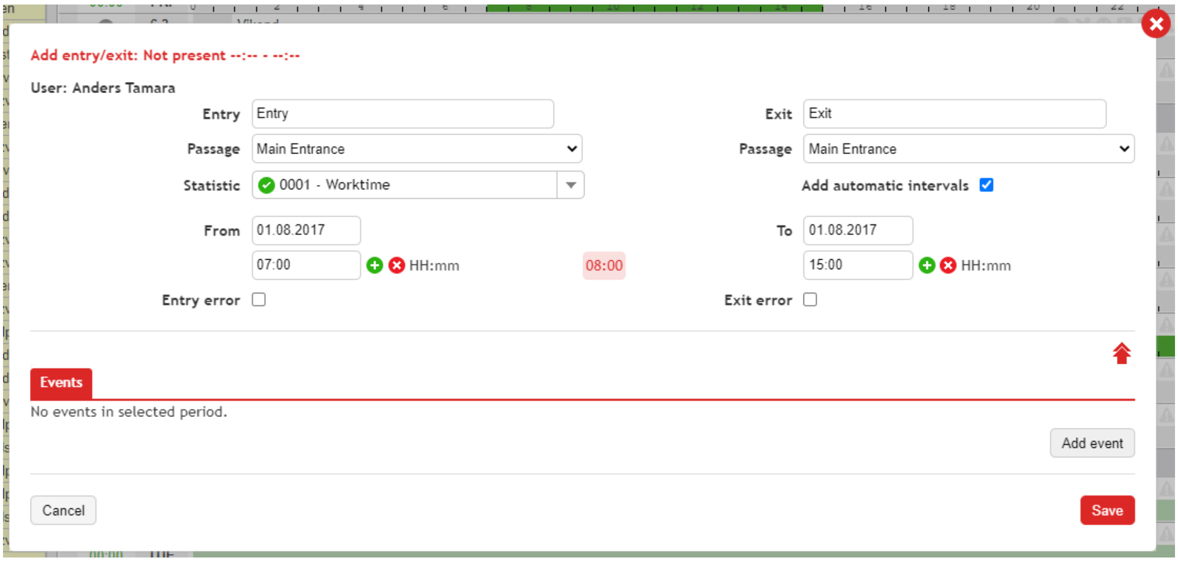
Add/edit entry/exit

If a user has forgotten to register at the controller or if he has registered incorrectly, you can manually edit his day, by setting his entry and exit time.

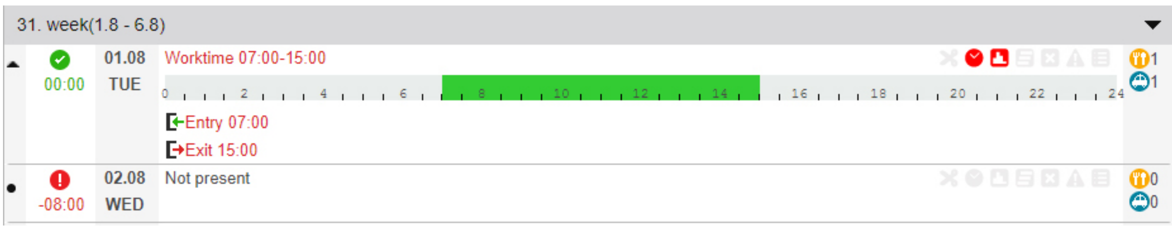
1 *Right-click on the selected day* to display the edit menu and select ***Add/edit entry/exit***.



2 In the new pop-up window *select the name of the event, the passage, and statistic for the day*, then **set the entry and exit time**. Click ***Save***.



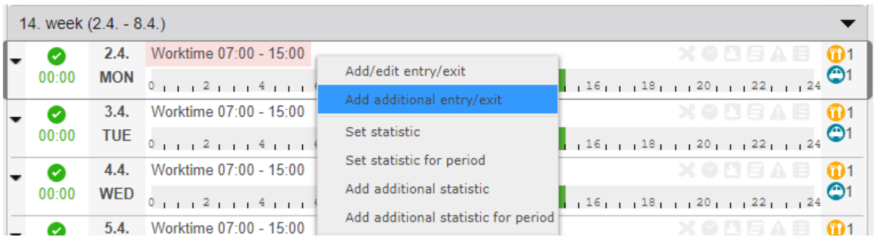
3 The edited daily events will be colored red.
Additionally, the *correction of time* icon () and the *correction of statistic* icon () will also color red, marking that the day had been manually edited.
You can access the *edit day* pop-up window at any time by double-clicking the selected day.



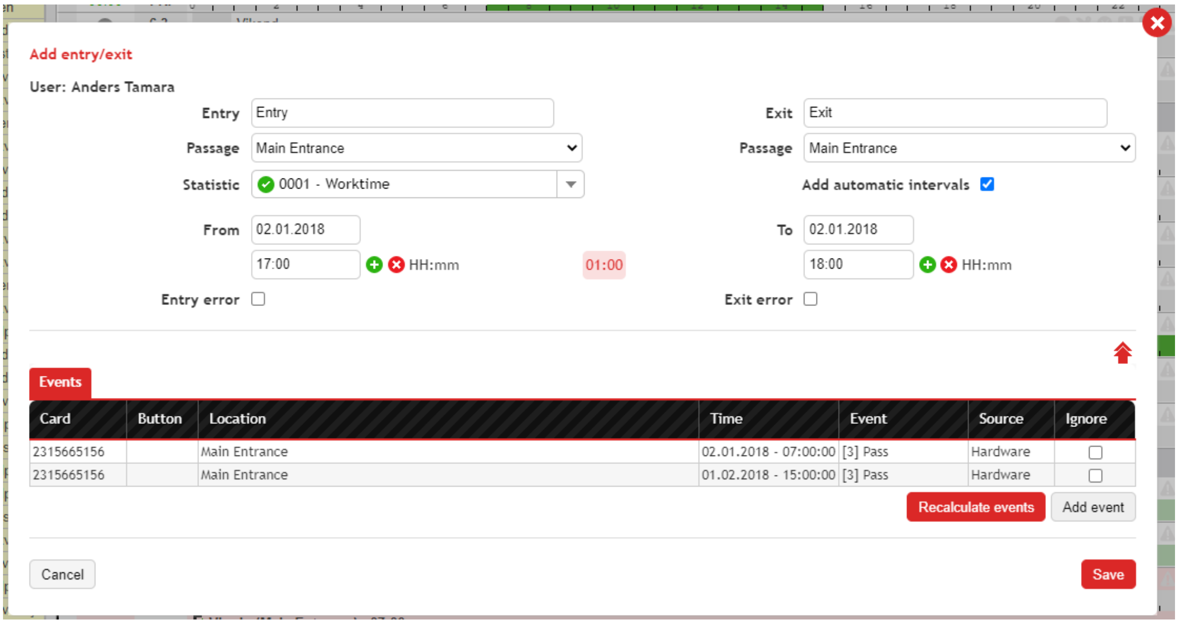
Add additional entry/exit

You can also manually set additional entries and exits to users, for example if a user returned to work in the afternoon but was unable to register his hours.

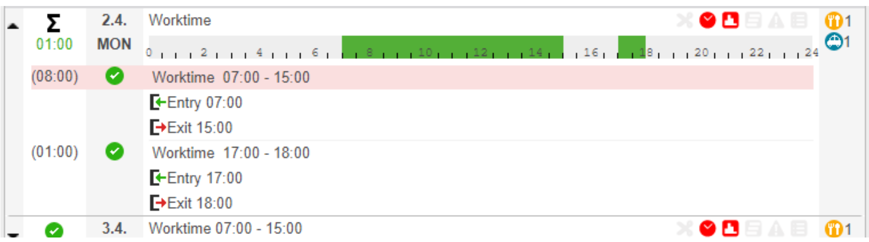
1 *Right-click on the selected day* to display the edit menu and select ***Add additional entry/exit***.



2 In the new pop-up window *select the name of the event, the passage, and statistic*, then ***set the entry and exit time***.
Click ***Save***.



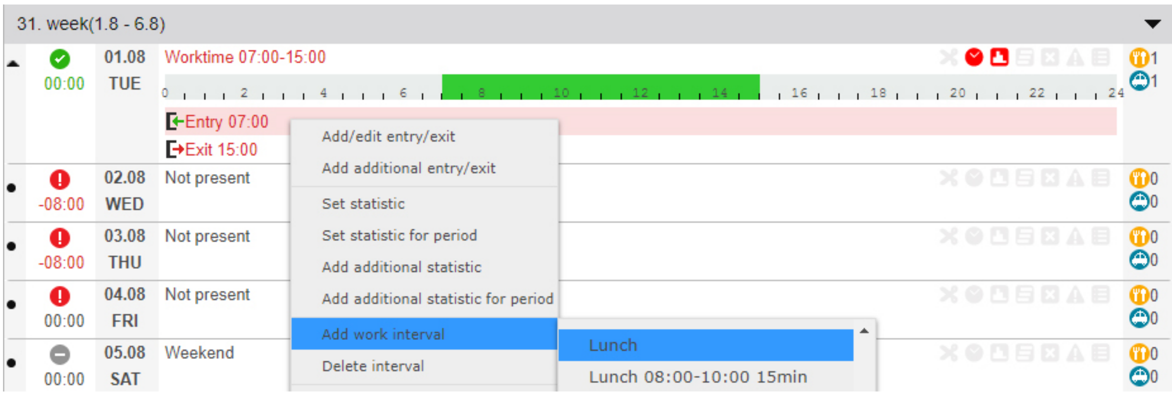
3 The added daily events will be colored red.
Additionally, the *correction of time* icon () and the *correction of statistic* icon () will also color red, marking that the day had been manually edited.
You can access the *edit day* pop-up window at any time by double-clicking the selected day.



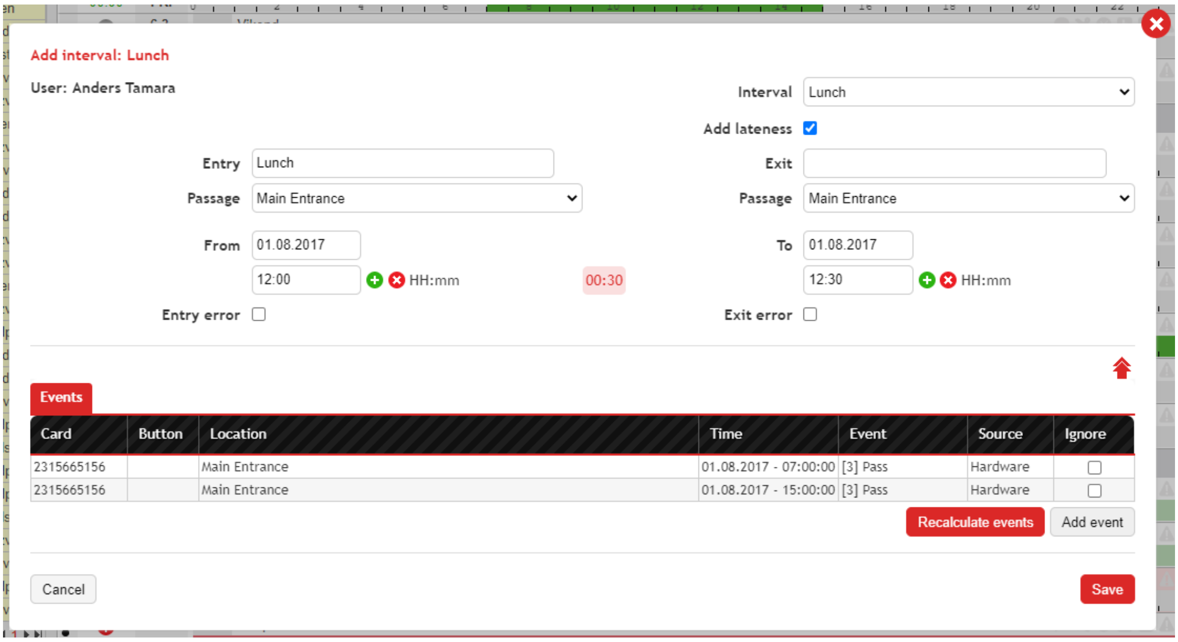
ADDING AN INTERVAL

Use the ***Add interval*** function to set an additional daily interval (e.g. a lunch break).

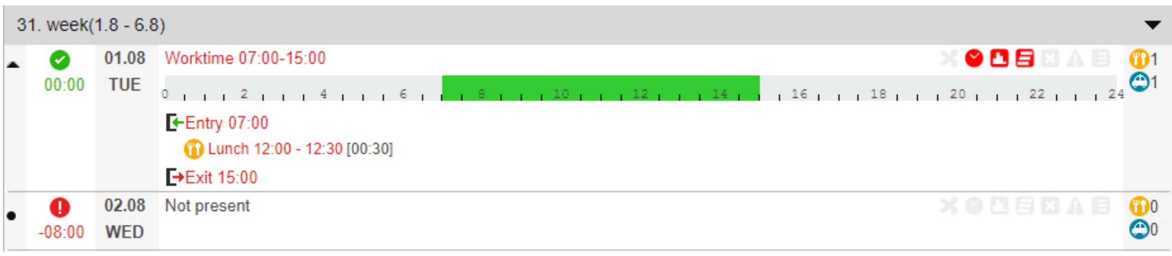
1 *Right-click on the selected day* to display the edit menu, select ***Add interval*** and *select the interval you wish to add*.



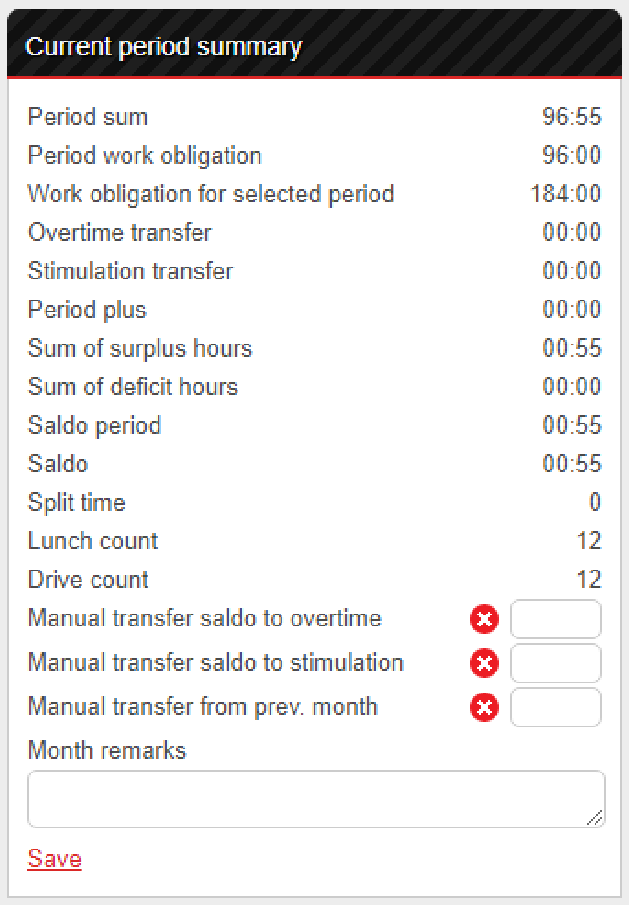
2 A new pop-up window will appear where you can s***et the start and end time*** of the selected interval.
Click ***Save***.



3 The newly added interval will be colored red. Additionally, the *correction of interval* icon ( ) will also color red, marking that the day had been manually edited.



CURRENT PERIOD SUMMARY



In the *Current period summary* section you can edit:

Period sum	The total number of hours recorded in the current period, i.e. work hours as well as absence hours.
Period work obligation	The number of hours the employee is obligated to clock in the current period.
Work obligation for selected period	The number of hours the employee is obligated to work up to the end of the period displayed in the *Time attendance* editor.
Overtime transfer	The number of hours, clocked during the current period, which will be recorded as overtime hours. (The value is dependent on the *Manual transfer saldo to overtime* and *Monthly overtime transfer [max]* settings.)
Stimulation transfer	The number of hours, clocked during the current period, which will be recorded as hours for stimulation. (The value is dependent on the *Manual transfer saldo to stimulation* and *Monthly stimulation transfer [max]* settings.)
Period plus	The number of saldo hours transfered from the previous period. (The value is dependent on the *Manual transfer from prev. month*, *Set max. monthly transfer (hours)* and *Set max. total transfer* settings.)
Sum of surplus hours	The total value of all excess hours in the period.
Sum of deficit hours	Total value of all hourly deficits in the period.
Saldo period	The (positive or negative) difference between the work obligation and clocked work hours for the current period.
Saldo	The total value of saldo including the values of the *Saldo period* and *Period plus*.

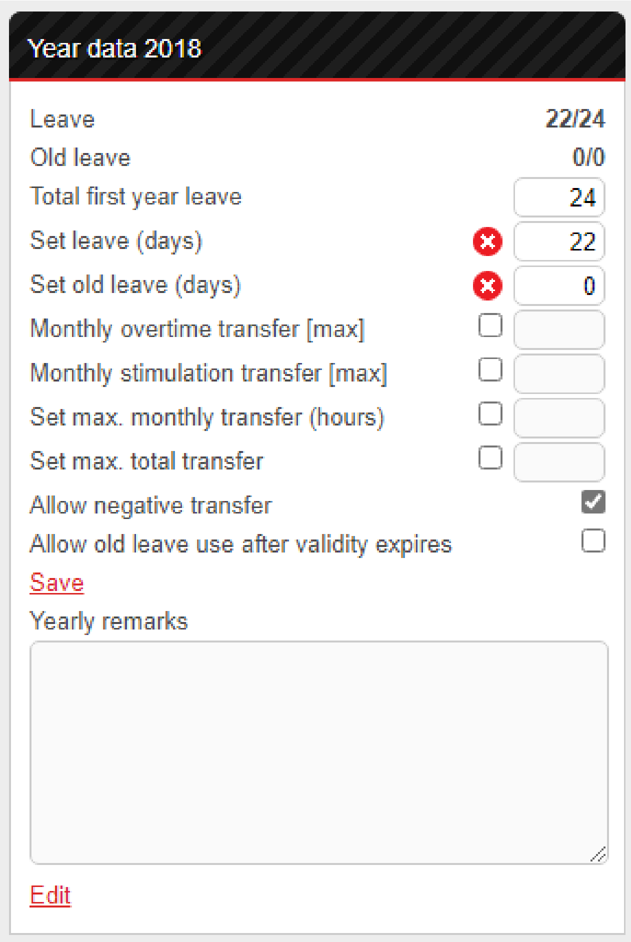
Split time	Number of days when more than one entry and exit was registered.
Lunch count	The number of (paid) lunches that the user is entitled to in the current period.
Drive count	The number of (paid) drives that the user is entitled to in the current period.
Manual transfer saldo to overtime	The number of hours (from the value of saldo) that will be manually transfered to overtime in the current period. Enter the number of hours you wish to transfer and click *Save*. The value of saldo will be reduced by the transferred number of hours and the transferred hours will be displayed in the *Overtime transfer* field.
Manual transfer saldo to stimulation	The number of hours (from the value of saldo) that will be manually transfered to stimulation in the current period. Enter the number of hours you wish to transfer and click *Save*. The value of saldo will be reduced by the transferred number of hours and the transferred hours will be displayed in the *Stimulation transfer* field.
Manual transfer from previous month	The number of saldo hours that will be manually transfered from the previous period. The transfered value will be displayed in the *Period plus* field.
Month remarks	Here you can (optionally) add a comment to the time registration.

1 To edit the *Year data* ***enter the desired values into the appropriate field.***

2 After editing, you must always click the ***Save*** button to save the changes.

3 You can cancel the manually entered values by clicking the red x-mark or by disabling the checkbox next to the appropriate field

YEAR DATA



If you are adding a new employee, also see chapter *ADDING A USER.*

In the *Year data* section you can edit:

Leave	Displays how many days of leave the user still has available from his total yearly number of leave days.
Old leave	Displays how many days of old leave the user still has available from his total yearly number of old leave days.
Total first year leave	Enter the total number of leave days assigned to a user in his first year of employment in your company (also enter the total number of leave days for all uses in the first year of using the Codeks application).
Set leave (days)	Enter the number of leave days the user still has available at the start of registration. ***NOTE*** ***For a new employee in your company, enter the number of available leave days in his first year of employment in your company.*** ***NOTE*** ***When entering the leave data for employees in the first year of using the Codeks application, enter the number of still available leave days for each employee. Enter the total number of leave days for each employee in the Set leave (days) filed.***
Set old leave (days)	Enter the number of still available old leave days for the first year of using the Codeks application. At the start of a new year, the number of available leave days will be automatically converted to available old leave days.
Monthly overtime transfer [max]	Enter the maximum number of overtime hours that can be transferred to the next month for a user.
Monthly stimulation transfer [max]	Enter the maximum number of stimulation hours that can be transferred to the next month for a user.

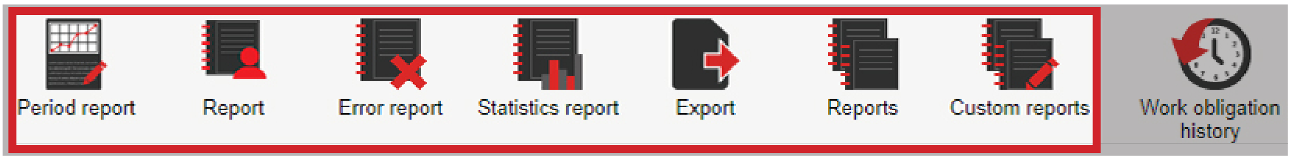
Set max. monthly transfer (hours)	Enter the maximum number of saldo hours that can be automatically transferred from the current to the next month for a user.
Set max. total transfer	Enter the maximum number of saldo hours that can be automatically transferred from all previous months to the next month.
Allow negative transfer	Enable this field if you would like to enable the transfer of negative saldo hours into the next months.
Allow old leave use after validity expires	If this setting is enabled, the user will be able to use their old leave days even after their validity has expired (i.e., in the second half of the year).
Yearly remarks	In this window, you can write a yearly remark for a specific user.

1. To edit the *Year data* ***enter the desired values into the appropriate field.***
2. After editing, you must always click the ***Save*** button to save the changes.
3. You can cancel the manually entered values by clicking the red x-mark or by disabling the checkbox next to the appropriate field.

ATTENTION
Changing or canceling the Year data in the current month affects the calculation of work hours for the following as well as for the previous months. Please consult your system administrator before changing or canceling any existing year data.

REPORTS

In the upper toolbar of the *Time attendance* editor, you will find several icons for creating different reports and data exports.



1. First, ***select the users*** you wish to make a report about from the *List of users*.
2. ***Click on the icon of the desired report*** and set the additional settings.
3. You can save the newly generated report or view it with a suitable program.

Period report

The *Period report* displays ***the daily recorded hours and number of repetitions for each individual statistic as well as the total sums for statistics***. The report contains data for the currently displayed period in the *Time attendance* editor.

Report

Use *Report* when you want to display ***a detailed list of entries and exits*** for selected users of the period currently displayed in the *Time attendance* editor.

Error report

The *Error report* offers different ***filtering options*** which enable you to display ***customized reports of various exceptions and deviations*** in the time attendance registration. This report is used primarily to locate errors in the time registration. You can custom set the period, filter parameters and report format.

Statistics report

The *Statistics report* for the period graphically displays the recorded daily statistics for the period currently displayed in the *Time attendance* editor.

Export

Export enables you to export the users' data into different text files (.xml or .csv) that can be imported and processed by a third-party program or application (for example, a payroll program).

Reports

Several special reports are grouped under the *Reports* icon. All the reports contain data of the currently displayed period in the *Time attendance* editor.

Custom reports

The drop-down list of the *Custom reports* icon contains reports, that were custom-made at the request of the user.

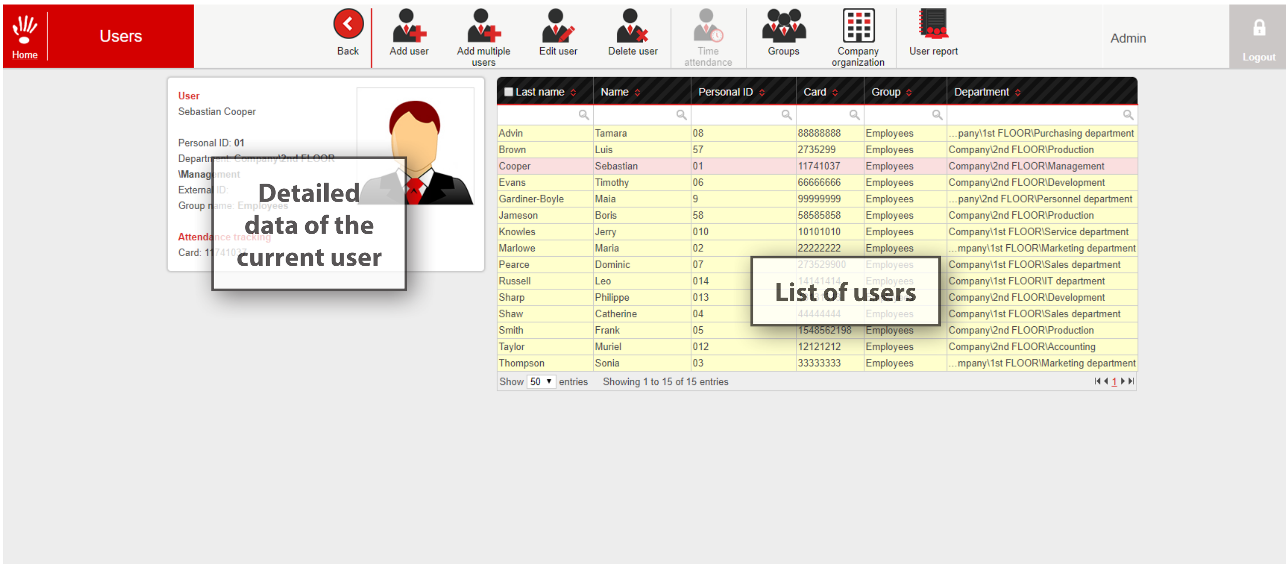
Custom reports are created in the *Custom Reports* editor.

ATTENTION!
Defining a new custom report definition is a very complex process that demands a detailed knowledge of the data structure within the Codeks database as well as the process of report generating. You can read more about *Custom reports* in the main documentation of the Codeks TA Kit software.

A more detailed description of the reports can be found in the documentation of the main **Codeks TA Kit application** or in the separate document **Codeks TA Kit Time Attendance Reports**.

3 USERS

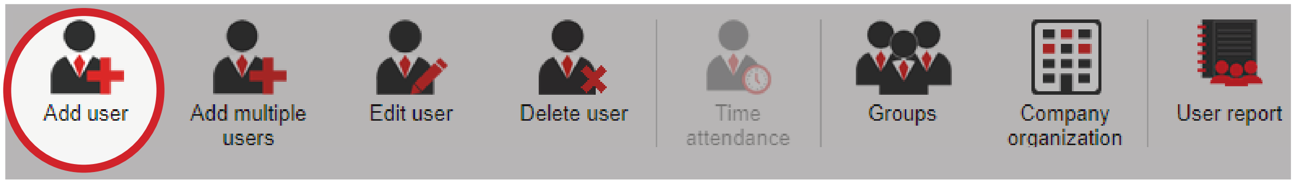
The ***Users*** editor enables you to manage users as well as edit their data and settings. Here you can add new employees, edit the data of existing users and assign cards to the users.



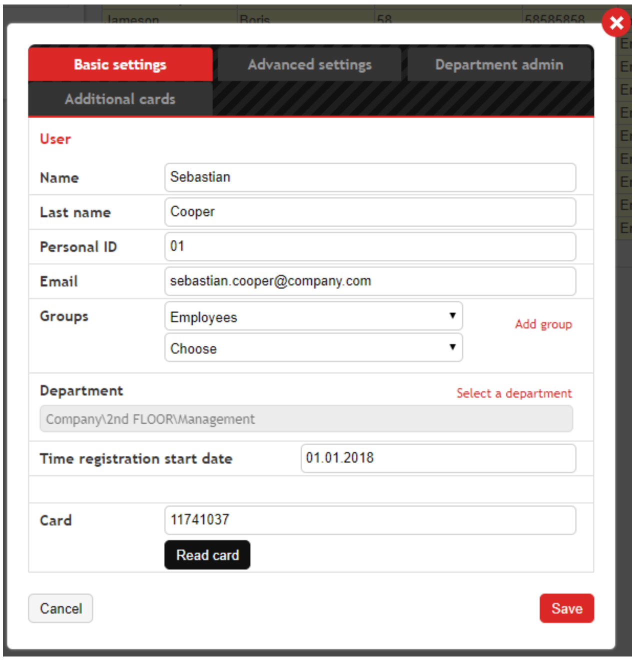
NOTE
Any changes made in the *Users* editor may change the recording of work hours in the *Time and attendance*.
You can find more about revisions in chapter *REVISIONS.*

ADDING A USER

1 To add a new user select and click the ***Add user*** icon in the upper toolbar.



2 A new window will open where you can ***enter the new user's data and other settings***.



Enter the ***user's personal data*** and assign the user a ***department***. (You can edit departments and other company units in the ***Company organization*** editor, which can be accessed through the *Company organization* icon in the toolbar of the *Time attendance* editor.)

You can also assign *time and attendance* groups to the user. Read more about groups and assigning groups to a user in chapter *GROUPS*.

NOTE

Any changes made to Time and attendance groups may change the recording of the user's work hours. When changing the user's groups the system will inquire into which revision you wish to save the changes made to the user.
You can find more about revisions in chapter *REVISIONS*..

3 ***Enable time registration for the user*** and ***set the start date of time registration.***

4 ***Assign a card*** for registration ***to the new user.*** Enter the number of the card or some other identification means into the *Card* field. Read more about assigning a card to a user in chapter *ASSIGNING A CARD TO AS USER*.

5 Click ***Save***.

6 Finally, return to the *Main menu* to **trigger the send tables process**.

ASSIGNING A CARD TO AS USER

The cards (or other identification means for time attendance registration) assigned to users in the Codeks application have a unique number, that can be read by the reader of a controller. The identification card itself ***does not contain any data of the user*** it is assigned to. The number read by the reader serves only as a ***reference to access data in a central database*** of the Codeks application, where all the users' data is stored. This means that even if a user's card is lost or stolen, the user's data cannot be accessed or abused.

If a user's card is lost or stolen you can simply assign the user a new one, by entering a new number. This action simultaneously disables the user's old card and assigns the user a new one.

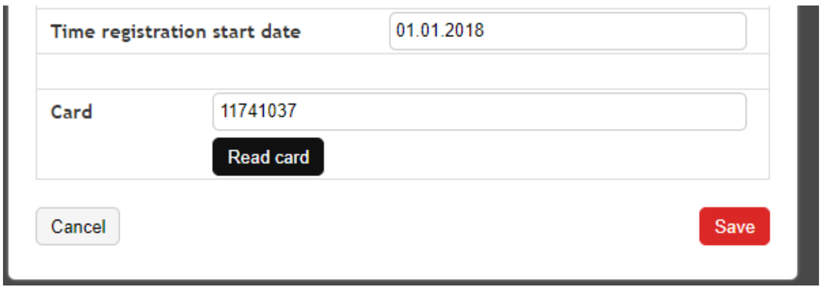
NOTE
You CANNOT assign the same card to two different users.
If you want to assign a card, previously already used by a different user, to a new user, you must, first, assign a different card number to the original user or erase him from the system.

NOTE
Users who are using the Codeks system, for time attendance registration or access control, must always have a card number entered in the *Card* field, even if they are using different identification means, e.g. identification tags or stickers.

1 Enter the number of the card (or other identification means for time attendance registration) in the window for ***entering the user's data and other settings***. There are two different ways to enter the number of a card:

a) ***manually enter the number*** printed on the card or other identification means,

b) ***use a reader and the*** *Read card* ***functionality***.



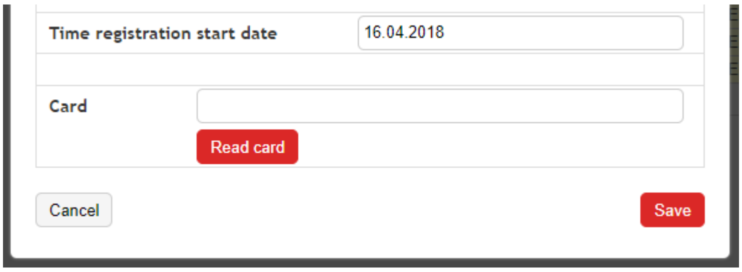
2 Click ***Save***.

3 Finally, return to the *Main menu* to **trigger the send tables process**.

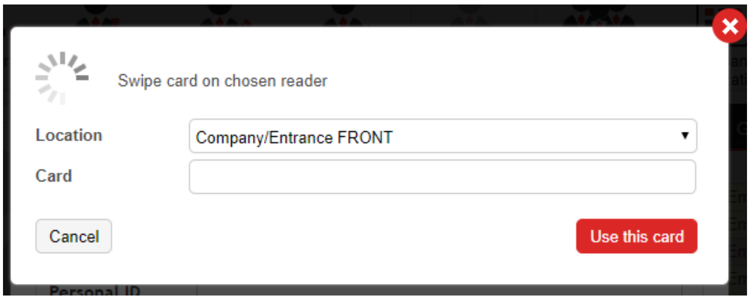
Read card

You can assign a card to a user by using the ***Read card*** functionality. This function enables you to assign the last read card on a selected reader to a user.

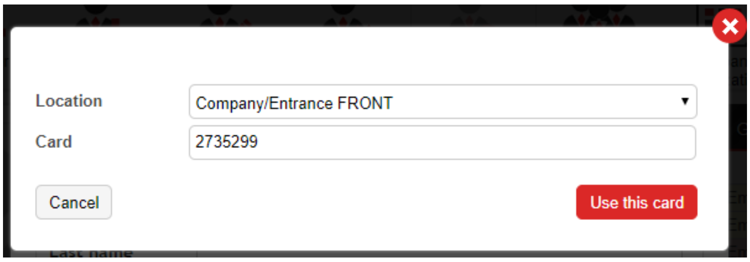
1 Click ***Read card*** in the *window for entering the user's data and other settings*



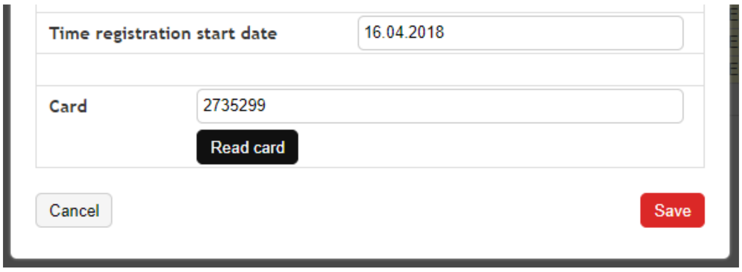
2 A new window for reading the card on a reader will appear.
First, ***select the location of the reader***, where the card will be read.



3 ***Position the pointer in the Card field and put the card on the reader.***
When the reader successfully reads the card a number will appear in the lower field.
Click ***Use this card***.



4 This will assign the last read card to the user.
To save the settings click **Save**.



5 Finally, return to the *Main menu* to **trigger the send tables process**.

CHANGING THE CARD

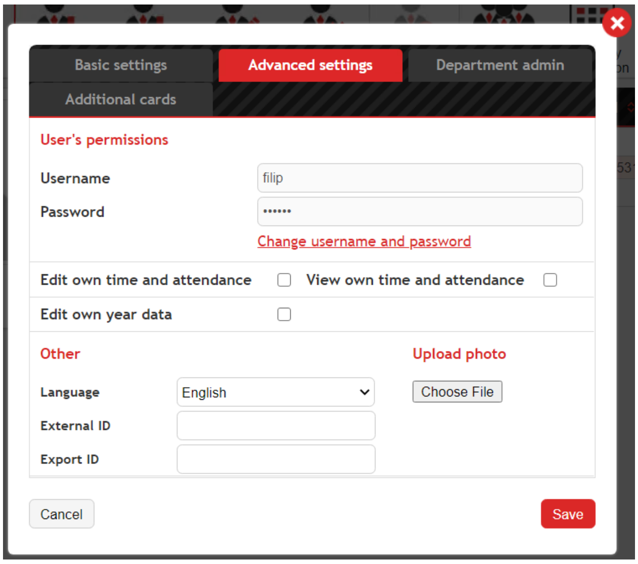
The process of changing the user's card is the same as ***assigning a card to a user*** (see *ASSIGNING A CARD TO AS USER*).

ADVANCED SETTINGS

In the *Advanced tab,* you can enter additional data about the user as well as grant him user access for the Codeks application and advanced editing rights within the application.

1. To set advanced setting for a user in the *Advanced settings* tab ***enter the desired data in the appropriate fields***.
2. Click ***Save*** after you are done editing to save the changes.
3. Finally, return to the *Main menu* to **trigger the send tables process**.

If you are adding a new user read chapter *ADDING A USER.*



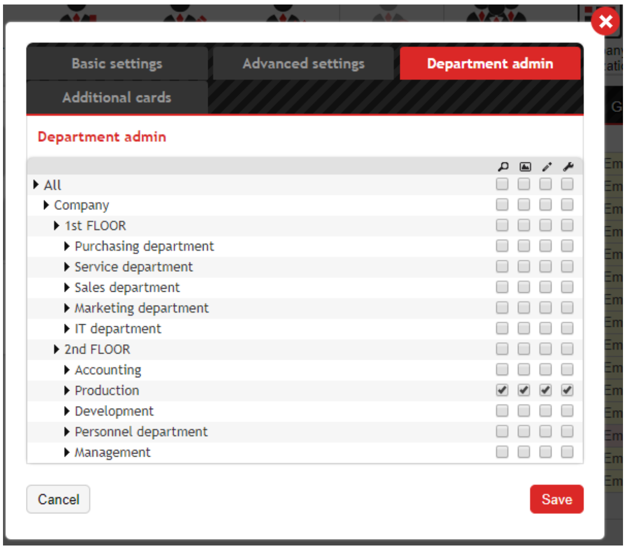
In the *Advanced settings* tab, you can edit:

Username	The username assigned to the employee which enables him to login into the Codeks application as a user.
Password	The user's password for the Codeks user login.
Edit own time and attendance	If this setting is enabled the user can edit his own time attendance data in the *Time attendance* editor.
View own time and attendance	If this setting is enabled the user can view his own time attendance data in the *Time attendance* editor.
Edit own year data	If this setting is enabled the user can edit his own year data in the *Time attendance* editor.
Language	Sets the language setting of the Codeks application for the user.
External ID	Optional setting that serves as additional identification data and is usually used when exporting data for third-party programs or applications.
Export ID	Optional setting that serves as additional identification data and is usually used when exporting data for third-party programs or applications.
***Picture**	Upload interface for the user's photo (.jpg or .png format) that will be shown in the *Users* editor.

MANAGING DEPARTMENTS

In the *Department admin* tab, you can assign the current user ***advanced rights to view and edit time registration data*** of other users. These settings are used to ***grant department managers the right to edit the time registration*** of their employees.

1 You can assign different editing rights to the current user (department manager) and limit them according to a specific department.
To assign a right, add a checkmark in the appropriate box:



- View time and attendance
The user can view the time registration data of other users in this department.

- Edit statistics in time and attendance
The user can edit the statistics in the time registration of other users in this department.

- Edit time and attendance
The user can edit the time registration data of other users in this department.

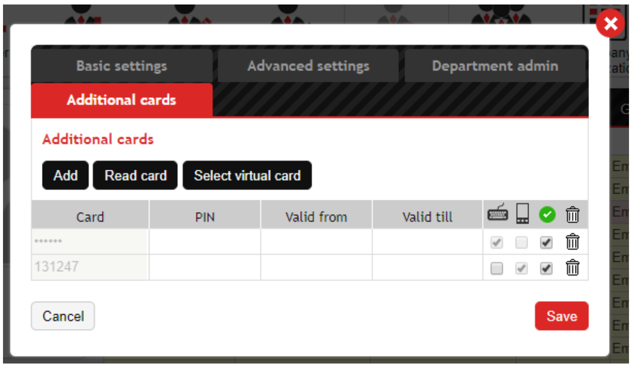
- Edit year data
The user can edit the year data of other users in this department.

2 Save the settings by clicking the ***Save*** button.

3 Finally, return to the *Main menu* to **trigger the send tables process**.

ADDITIONAL CARDS

In the ***Additional cards*** tab, you can assign a user additional identification cards or other identification means, such as identification tags, virtual cards or remote controls.

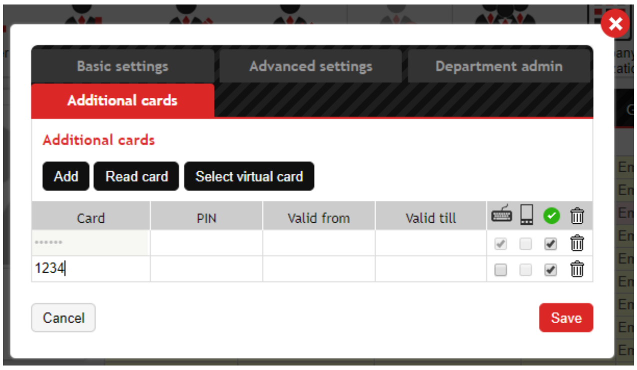


NOTE

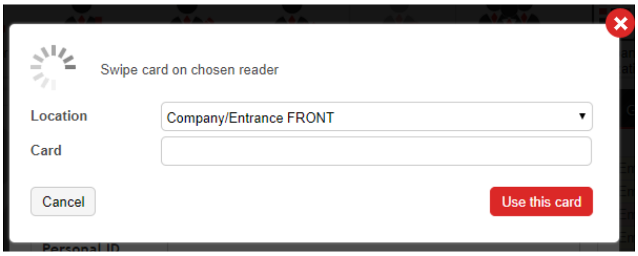
A user who uses the Codeks system for time attendance registration or access control **must have the number of the card entered in the (main) card field** in addition to the assigned additional cards (or other identification means), **otherwise, errors may occur when registering events at controllers**.

1 New means of identification can assign ***in several ways***:

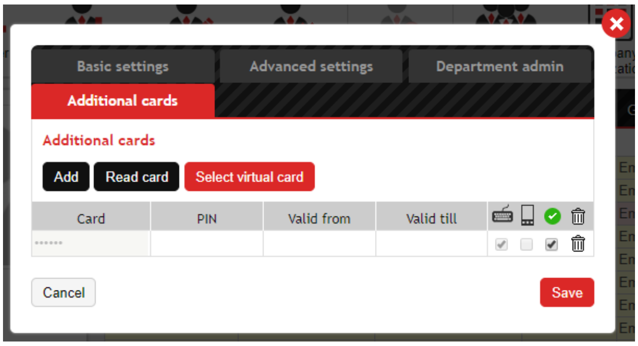
a) To manually add a new user card or tag click ***Add***.
A new row will be inserted into the table below. Manually ***enter the number printed on the identification means*** into the first field of the newly added row.



b) Use the ***Read card*** functionality to automatically assign a new card or tag to a user.
You can read more about the ***Read card*** function in chapter *Read card.*



c) To add a virtual card click ***Select virtual card***.



NOTE
To assign virtual cards to users, you need to purchase the Codeks Virtual Card license, which adds a specific number of virtual cards for employees to your Codeks system.

A new window will open. From the drop-down window select ***a number of a virtual card*** and click ***Use this card***.

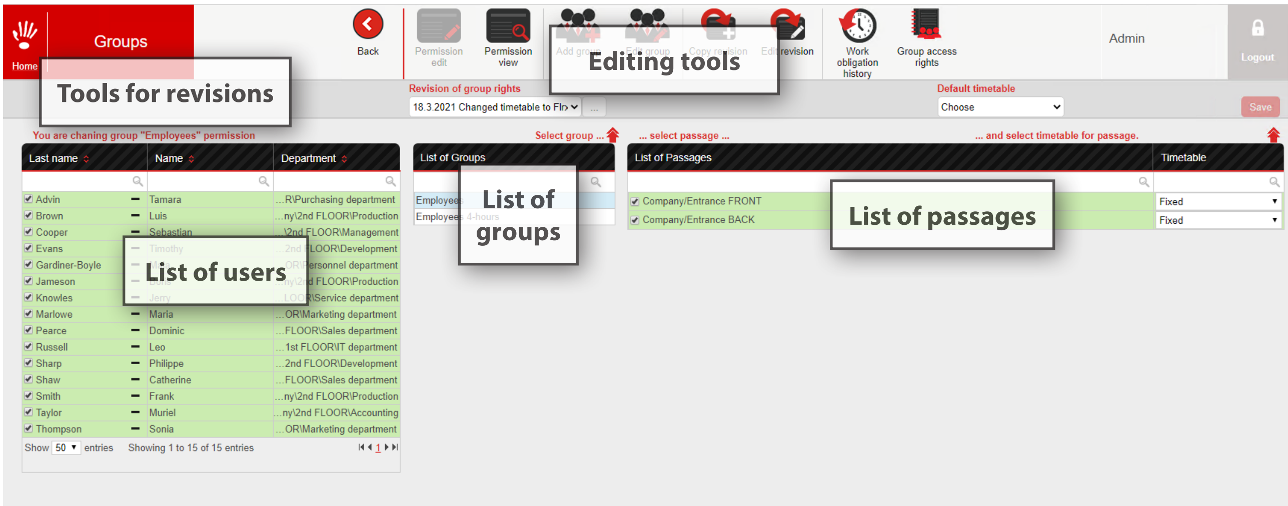
NOTE
The additional card has the same rights as the user's main card.

2 Click ***Save***.

3 Finally, return to the *Main menu* to **trigger the send tables process**.

4 GROUPS

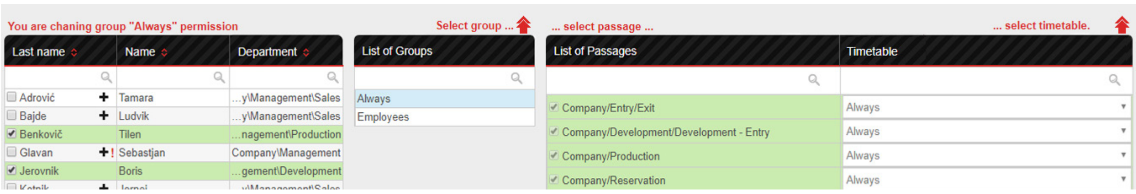
In the ***Groups*** editor, you can edit groups, assign users to different groups and edit the groups' rights at specific passages.



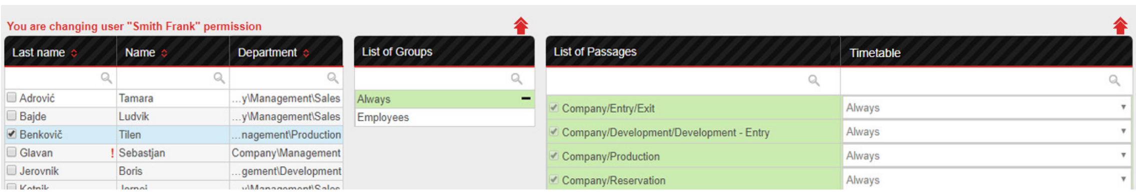
In the Codeks application, users are granted time attendance or access rights at specific passages through the groups they are assigned to.

The list of *users*, *groups*, and *passages* are displayed separately in the *Groups* editor. This enables you to see which users are assigned to a specific group and what kind of rights the group has, at the same time:

- When you ***mark a specific group in the List of groups***, all the ***users assigned to the group will be colored green***. At the same time ***all the passages, where the group's users have granted access will also be colored green***.



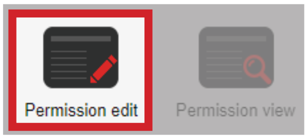
- When you ***mark a specific user in the List of users all the groups the user is assigned to will be colored green in the List of groups***. At the same time ***all the passages, where the user has granted access will also be colored green***.



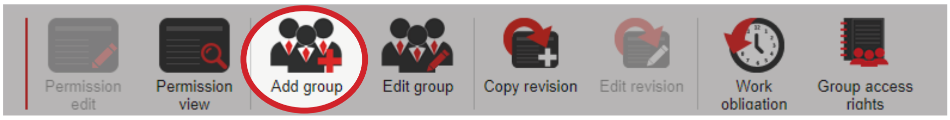
ADDING AND EDITING A GROUP

Add a group

1. First, click the ***Permission edit*** icon to enable editing in the *Groups* editor.



2. Then select the ***Add group*** button.

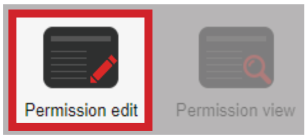


3. In the new pop-up window, ***enter the name of the new group*** and select the ***Default timetable***

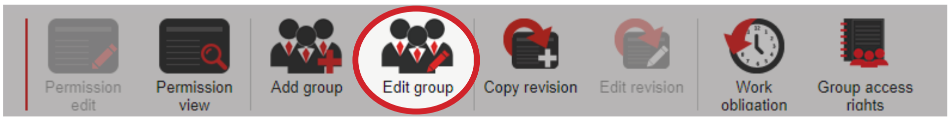
4. Click ***Save***.
   The new group will be displayed in the *List of groups*.

Edit a group

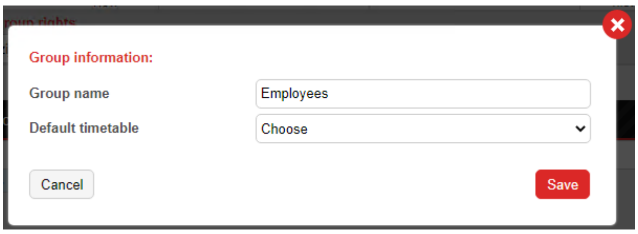
1. First, click the ***Permission edit*** icon to enable editing in the *Groups* editor.



2. Then ***select the group*** you wish to edit and select the ***Edit group*** icon.



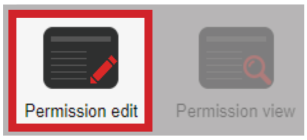
3. A pop-up window will appear where you can edit the name and default timetable of the group.
4. When you are done editing, click ***Save***.



ADDING AND EDITING ACCESSES

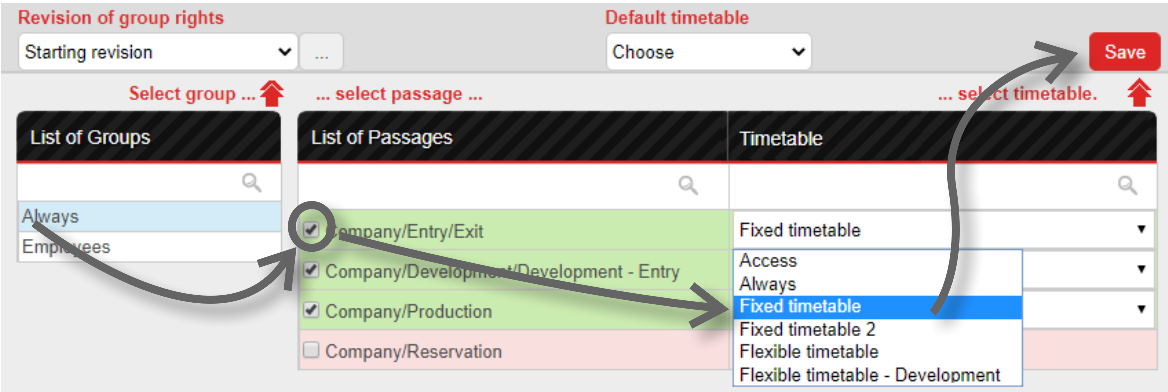
Assign access rights to a group of users by enabling the passage at a specific location and assigning a timetable, that defines when the users will be able to pass through the passage.

1 First, click the ***Permission edit*** icon to enable editing in the *Groups* editor.



2 In the *List of groups* ***select the group*** you wish to assign an access right at a passage. The selected group will be colored *blue*.

3 ***To add an access right at a passage enable the checkmark next to the name of the passage*** in the *List of passages*.



The passages, where the group's access rights are **enabled,** are colored **green** and passages, where the group's access rights are **disabled,** are colored **red** .

4 Set the ***Timetable*** that defines when the users will be able to pass through the passage.

5 When you are done editing, click ***Save.***

6 Finally, return to the *Main menu* to **trigger the send tables process**.

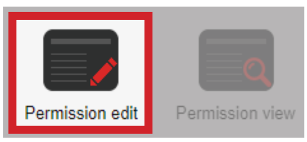
NOTE
Any changes made in the *Groups* editor may change the recording of work hours in the *Time and attendance*. You can find more about revisions in chapter *REVISIONS.*

ASSIGNING USERS TO GROUPS

You can assign the appropriate *time and attendance group* to users either in the *Groups* editor or the *Users* editor.

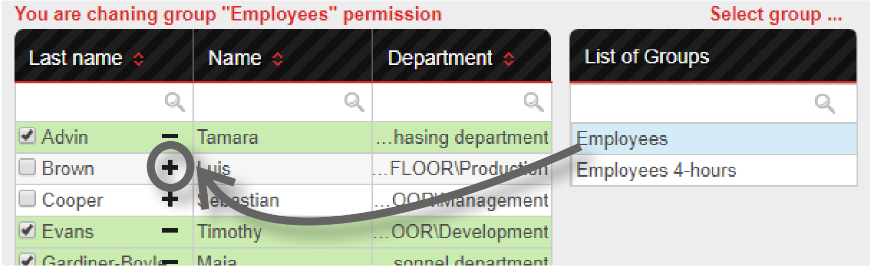
Assigning a user to a group

1 First, click the ***Permission edit*** icon to enable editing in the *Groups* editor.



NOTE
Any changes made in the *Groups* editor may change the recording of work hours in the *Time and attendance*. You can find more about revisions in chapter *REVISIONS.*

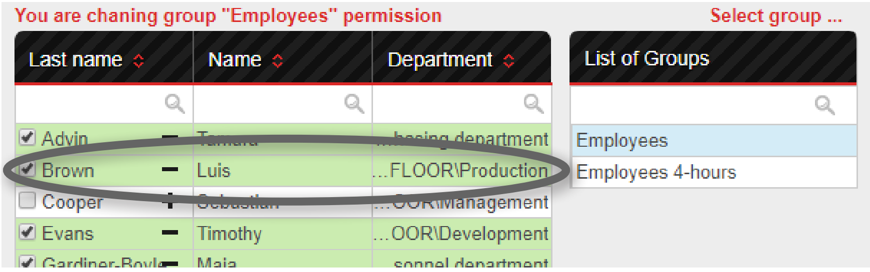
2 In the *List of groups* ***select the group*** you wish to assign a user to.



3 Then ***click the plus (+) icon next to the name of the user***.

4 The system will inform you that you are about to add a user to the selected group. The system will wait for your confirmation.

5 After confirming, the user will be assigned to the selected group and will be colored *green* in the *List of users*.



6 Finally, return to the *Main menu* to **trigger the send tables process**.

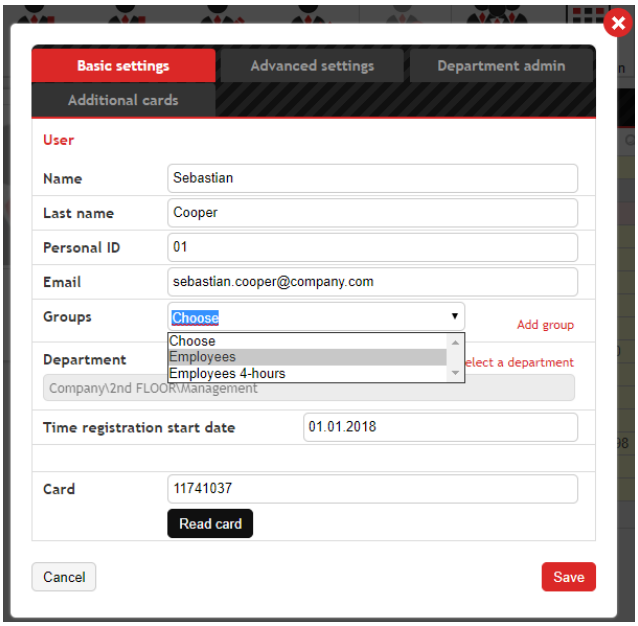
Assigning groups to a user

1 In the *Users* editor, find the selected user and open the user settings window.

2 ***Assign the appropriate group*** in the *Group* section of the window.

3 When you are done editing, click ***Save***.

4 Finally, return to the *Main menu* to **trigger the send tables process**.



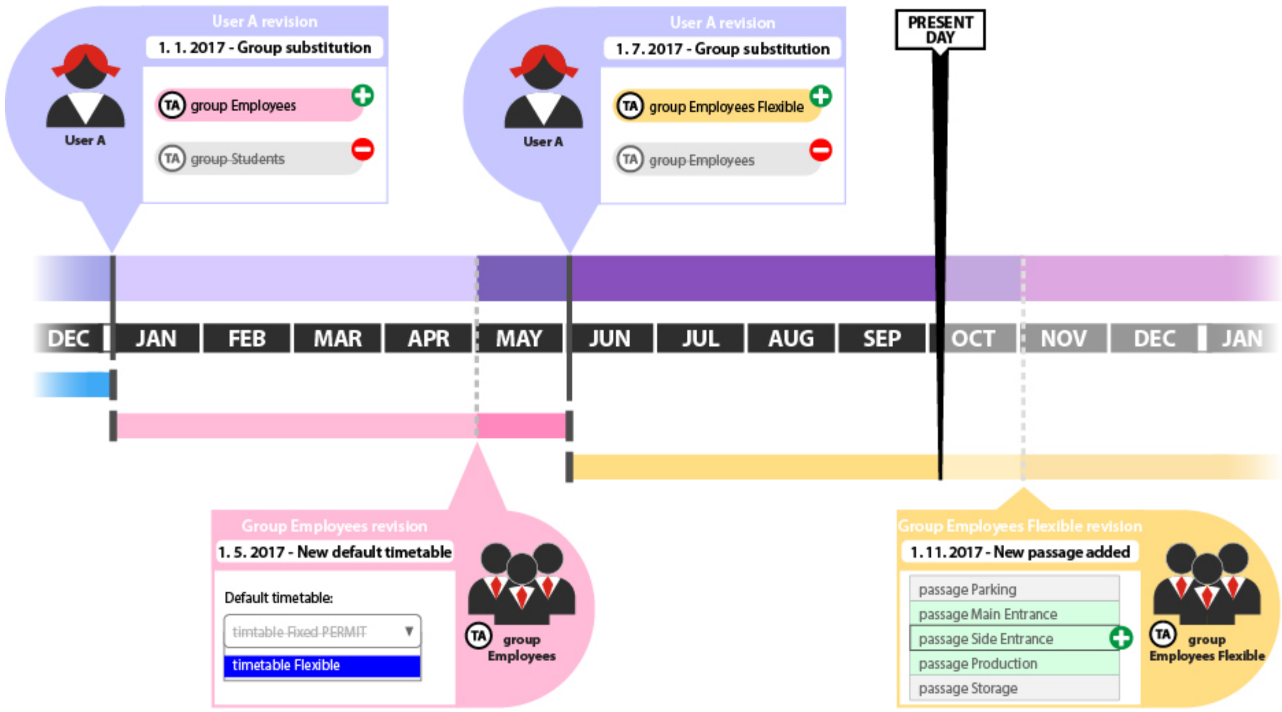
REVISIONS

Revisions are snapshots of the status of time&attendance rights of either an individual user or group. These snapshots (revisions) together form the history of changes made to the rights of users or groups. Revisions enable you to save and manage the past records of users' or groups' rights, and also set changes to these rights that will be put into effect sometime in the future.

There are two types of revisions: **user revisions** and **group revisions**. User revisions regulate and affect only the rights of a specific user, while group revisions simultaneously affect the rights of all users ("members") assigned to a particular group.

Changes that can be made using user or group revisions:

User revisions	Group revision
1 – Changing the user's "membership" in groups 2 – Setting right exceptions for a user at specific passages 3 – Changing the calendar 4 – Setting the end of the user's time registration	1 – Changing the default timetable assigned to the group 2 – Changing the rights at specific passages



Graphic depicting **user revisions** and **group revisions**. The group revisions indirectly also affect the rights of the user.

DESCRIPTION OF THE REVISION GRAPHIC

The graphic above presents a section of a user's rights, **which are affected by both the user's own revisions and the revisions of various groups, which the user belongs to:**

- At the end of the previous year the user was a member of the *Students* group, however, at the beginning of the new year she was transfered to the *Employees* group.
- At the beginning of May, the default timetable of the T&A group *Employees*, used by members to register their time and attendance using mobile devices, was changed.

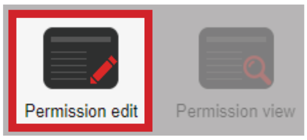
- In June the user was, again, transfered from the *Employees* T&A group to the *Employees Flexible* group.
- From November on all members of the *Employees Flexible* group will be also able to use the *Side Entrance* passage.

A user's rights on a specific day are therefore dependent on the current state of her "membership" in various groups and the state of the groups' rights on that same day.
In the example above, the user already has the right to register at certain passages at the beginning of October, because she became the member of the *Employees Flexible* in June. However, she will not be able to use the *Side Entrance* passage until November.

NOTE
Any changes made in the *Groups* editor may change the recording of work hours in the *Time and attendance*.
Whenever changing the rights of any revision (i.e. past, present or future revision) the system will issue a warning and offer you the option of creating a new revision so that you can save the current status for future reference.
We recommend extreme caution when editing currently valid revisions and revisions in the past!

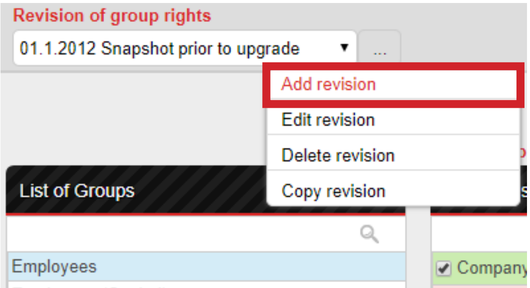
Add revision

1 First, click the ***Permission edit*** icon to enable editing in the *Groups* editor.

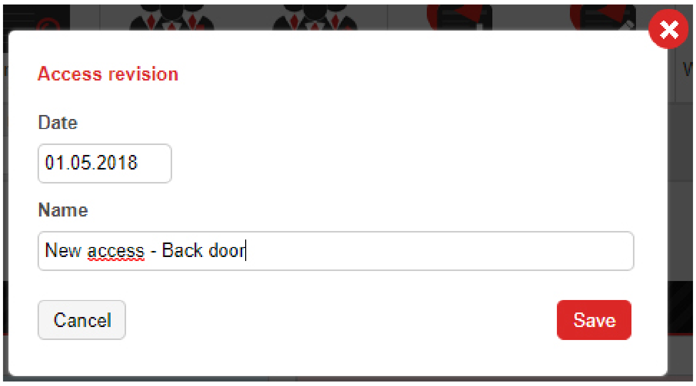


2 ***Select (mark) the group or user*** for whom you wish to create a new revision. The group or user will be colored *blue.*

3 Then select the ***Add revision*** option from the drop-down menu next to the *Revision of group rights* or *User rights revisions* field.



4 A new pop-up window will open where you can enter the ***Start date of the revision*** and add a comment.



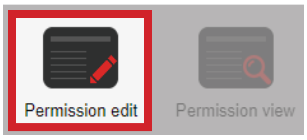
5 Click ***Save***.
A new "empty" revision will be created which will not contain any access rights at passages.

6 To add rights in the newly added revision start editing the displayed status in the *Groups* editor.

7 Finally, return to the *Main menu* to **trigger the send tables process**.

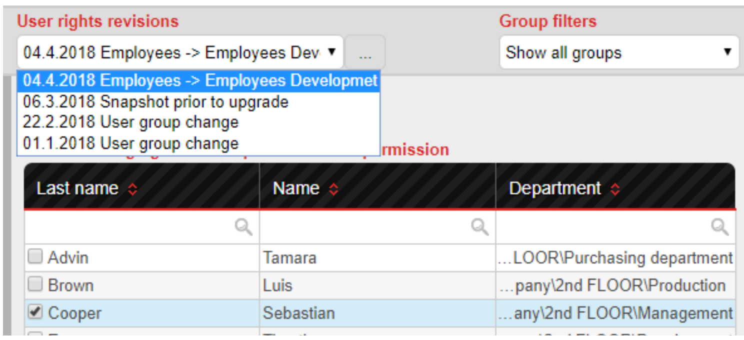
Edit revision

1 First, click the ***Permission edit*** icon to enable editing in the *Groups* editor.

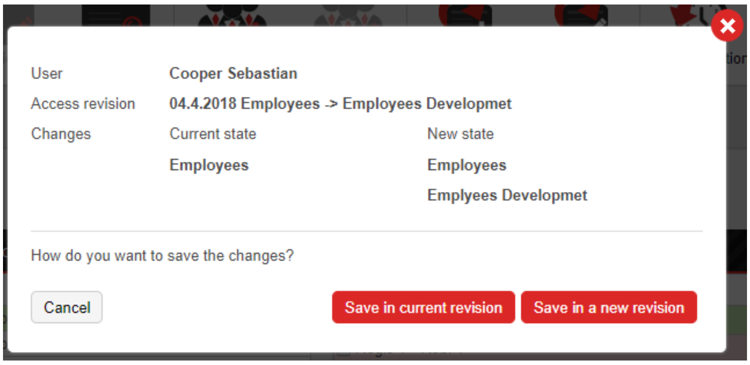


2 ***Select (mark) the group or user*** whose existing revision you wish to edit. The group or user will be colored *blue*.

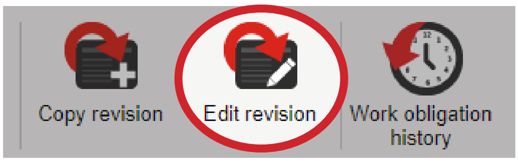
3 From the drop-down menu of the appropriate field (*Revision of group rights* or *User rights revisions*) select the revision you wish to edit.



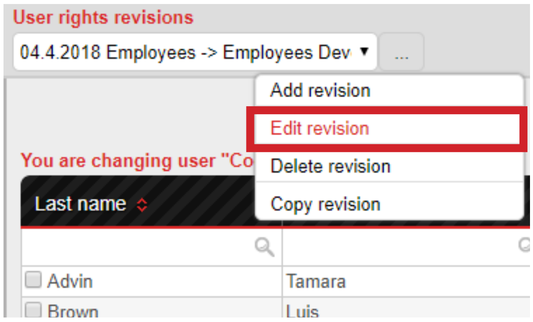
4 After a revision has been selected, the status of rights saved in the revision will be displayed in the *Groups* editor. To change the rights in the revision, start editing the displayed status.
After the first click, the system will inquire whether you wish to save the changes in the currently displayed revision or whether you wish to create a new revision.
To edit the currently selected revision click ***Save in current revision*** and continue editing.



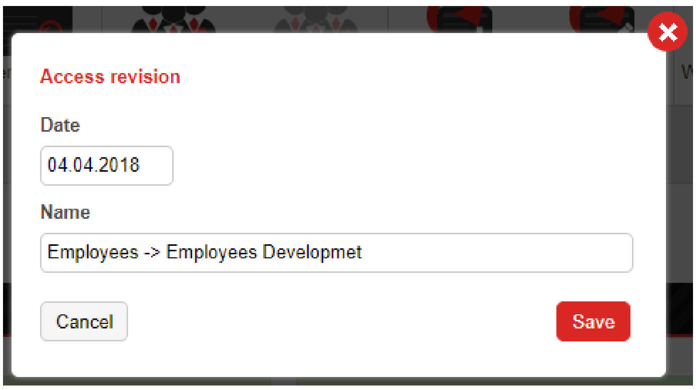
5 To edit the basic settings of the revision click the ***Edit revision*** icon from the toolbar or select the ***Edit revision*** option from the drop-down menu next to the *Revision of group rights* or *User rights revisions* field.



or



6 A new pop-up window will open where you can change the ***Start date of the revision*** and add a comment.



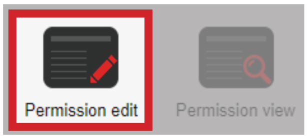
7 Click ***Save***.

8 Finally, return to the *Main menu* to **trigger the send tables process**.

Delete revision

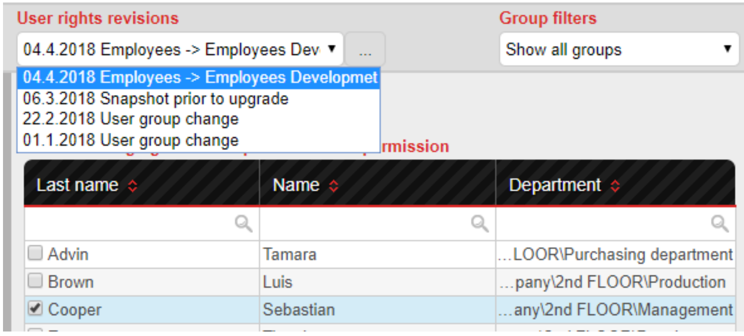
NOTE
Deleting a revision can change the recorded events of the time registration. We recommend extreme caution when deleting currently valid revisions and revisions in the past!

1 First, click the ***Permission edit*** icon to enable editing in the *Groups* editor.

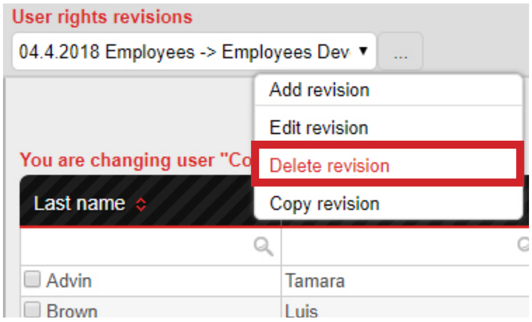


2 ***Select (mark) the group or user*** for whom you wish to delete a new revision. The group or user will be colored *blue*.

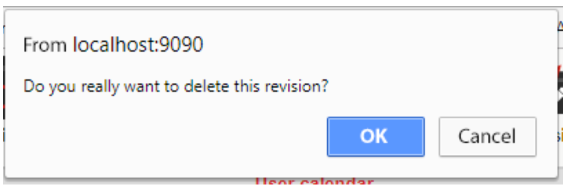
3 From the drop-down menu of the appropriate field (*Revision of group rights* or *User rights revisions*) select the revision you wish to delete.



4 To delete the revision click the ***Delete revision*** option from the drop-down menu next to the *Revision of group rights* or *User rights revisions* field.



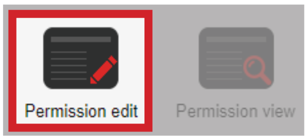
5 The system will warn you that you are about to delete a revision. To confirm the deletion click ***OK***.



6 Finally, return to the *Main menu* to **trigger the send tables process**.

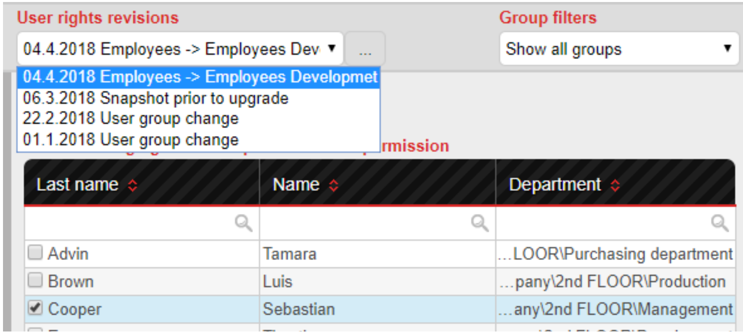
Copy revision

1 First, click the ***Permission edit*** icon to enable editing in the *Groups* editor.

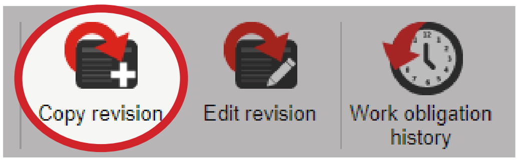


2 ***Select (mark) the group or user*** for whom you wish to create a copy of a revision. The group or user will be colored *blue.*

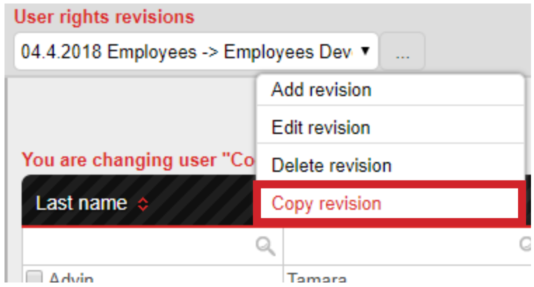
3 From the drop-down menu of the appropriate field (*Revision of group rights* or *User rights revisions*) ***select the revision you wish to copy***.



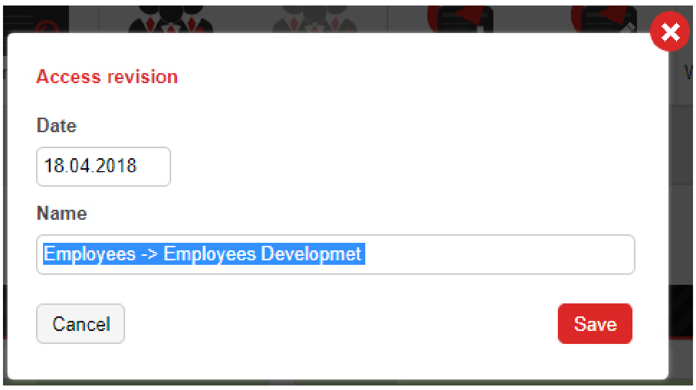
4 To copy the selected revision click the ***Copy revision*** icon from the toolbar or select the ***Copy revision*** option from the drop-down menu next to the *Revision of group* rights or *User rights revisions* field.



or



5 A new pop-up window will open where you can enter a new ***Start date of the revision*** and ***the revision name***.



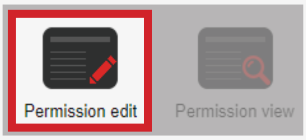
6 Click ***Save***.
After copying, the *Groups* editor will display the status or rights in the newly copied revision which is the same as defined by the original revision. To change the rights in the newly copied revision, start editing the displayed status.

7 Finally, return to the *Main menu* to **trigger the send tables process**.

EXAMPLES OF USING REVISIONS

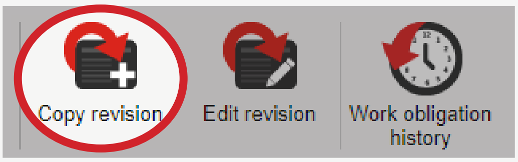
Changing the user’s work obligation from 8 hours to 4 hours

1 First, click the ***Permission edit*** icon to enable editing in the *Groups* editor.

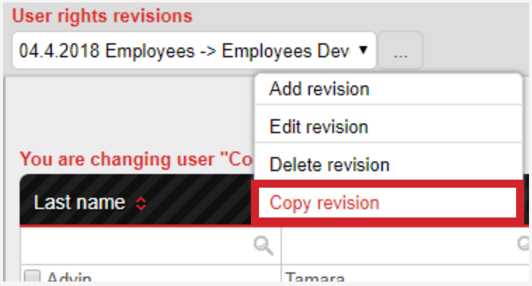


2 To change a user's work obligation from 8 hours to 4 hours, first, find and select the user on the *List of users*.

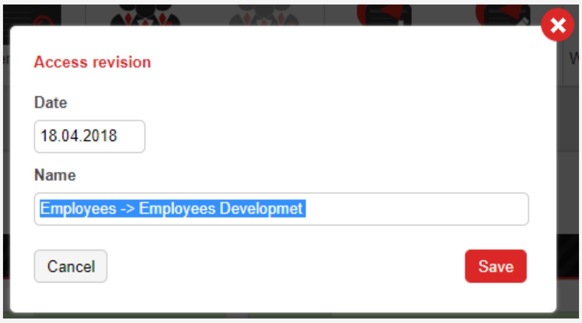
3 Click the ***Copy revision*** icon from the toolbar or select the ***Copy revision*** option from the drop-down menu next to the *User rights revisions* field.



or



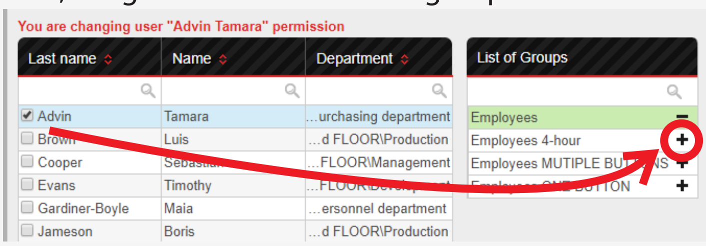
4 In the new pop-up window set a new ***Start date of the revision***, which in cases such as this one is usually in the past, and add ***the revision name***.



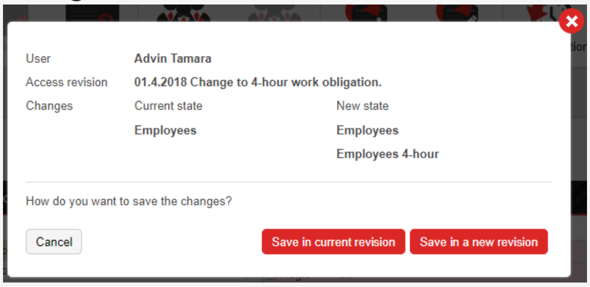
Click ***Save***.

5 The *Groups* editor will display the status or rights in the newly copied revision which is the same as defined by the original revision.
At this stage, you can start to edit the displayed rights of the user.

a) First, assign the user to the T&A group with a 4-hour work obligation.

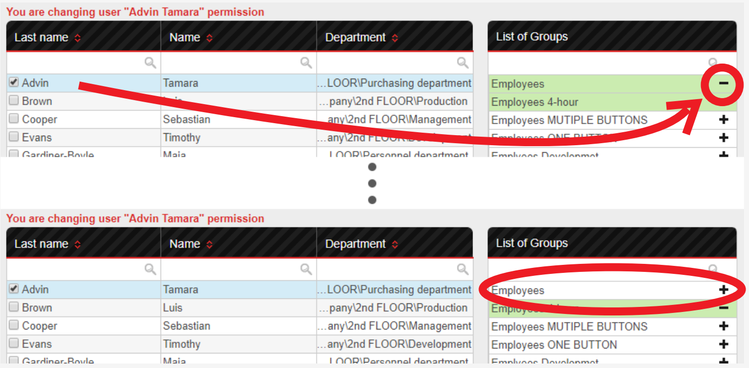


b) The system will inquire into which user revision you wish to save the entered changes.



Select ***Save in current revision***.

c) Then, remove the user from the group with an 8-hour work obligation.



The edited rights will be saved to the newly created user revision.

6 In order for the newly assigned rights of the user to take effect in the *Time attendance*, you must also ***recalculate events for the appropriate period*** in the *Time attendance* editor:

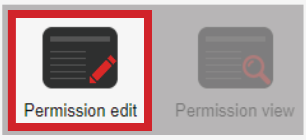
a) In the *Time attendance* editor, first, select the user on the *List of users*.

b) Then right-click and select the ***Recalculate events*** option from the menu.

The users time and attendance events will be recalculated in regard to the new defined work obligation.

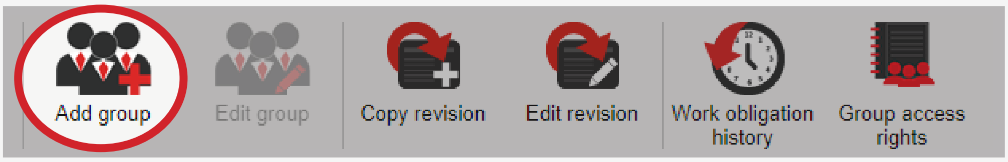
End of employment

1 First, click the ***Permission edit*** icon to enable editing in the *Groups* editor.

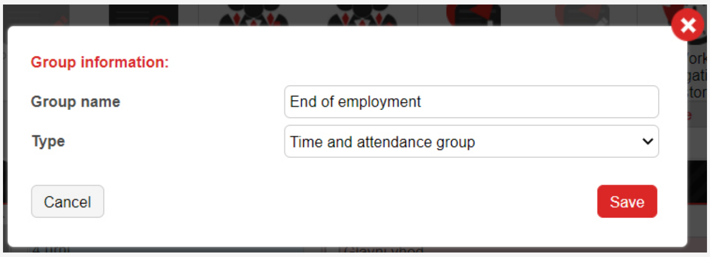


2 Next create a group for the end employment:

a) First, click on the ***Add group*** button in the *Groups* editor toolbar.

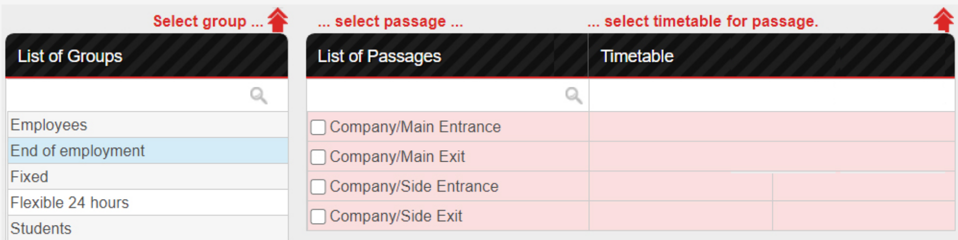


b) A pop-up window will open for adding a new group, where can you specify the group name, e.g. *End of employment*.
Click ***Save***.



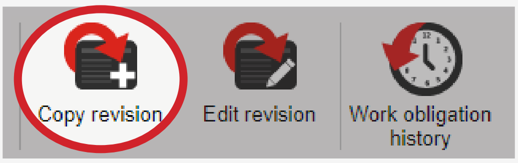
c) The new group will appear on the *List of all groups*.

To terminate the employment relationship, the group deprives the user of the work obligation, so do not add any access rights i.e. timetables at passages.

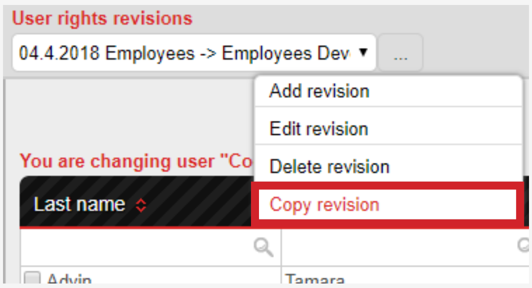


3 **Then find and select the user on the *List of users*.**

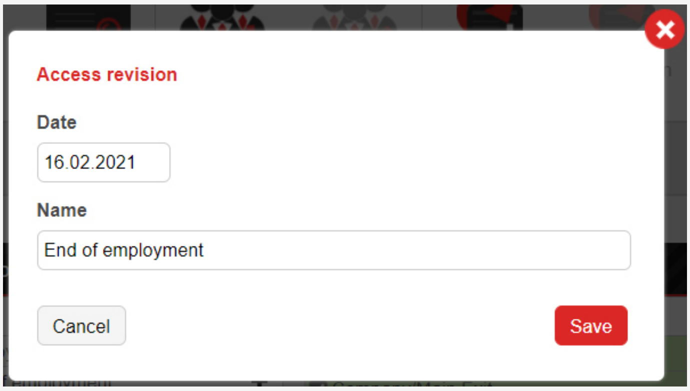
4 Click the ***Copy revision*** icon from the toolbar or select the *Copy revision* option from the drop-down menu next to the *User rights revisions* field.



or



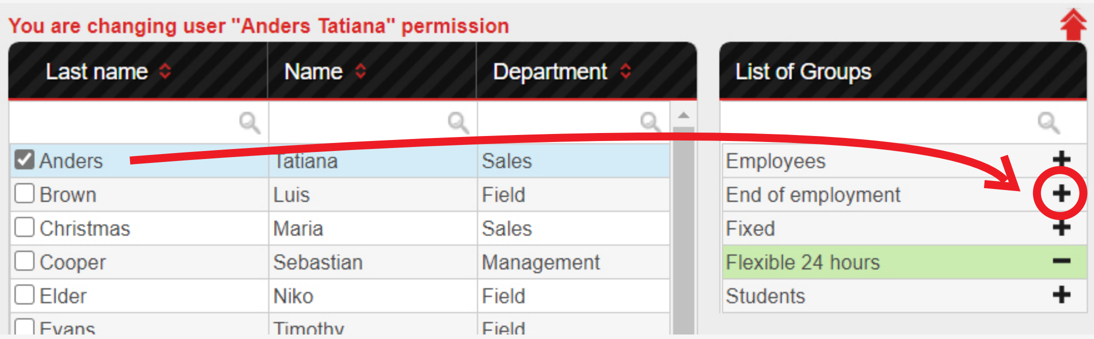
5 In the new pop-up window set a new Start date of the revision to the day after the termination of employment and add the revision name.



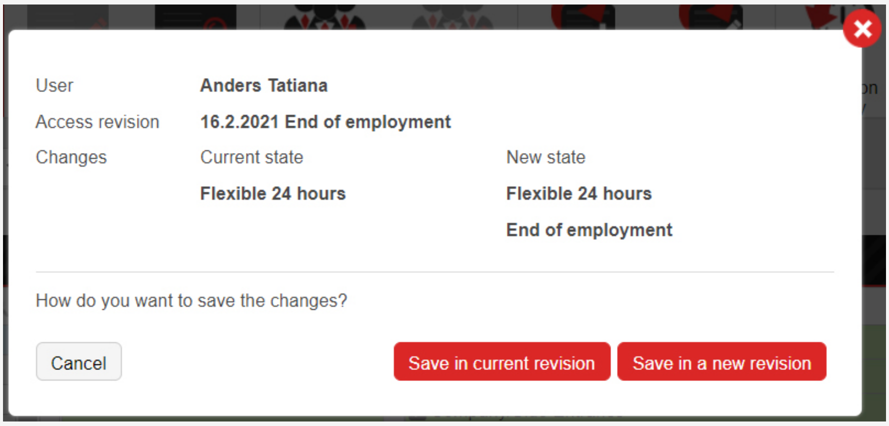
6 Click ***Save***.

7 The Groups editor will display the status or rights in the newly copied revision which is the same as defined by the original revision.
At this stage you can start to edit the displayed rights of the user.

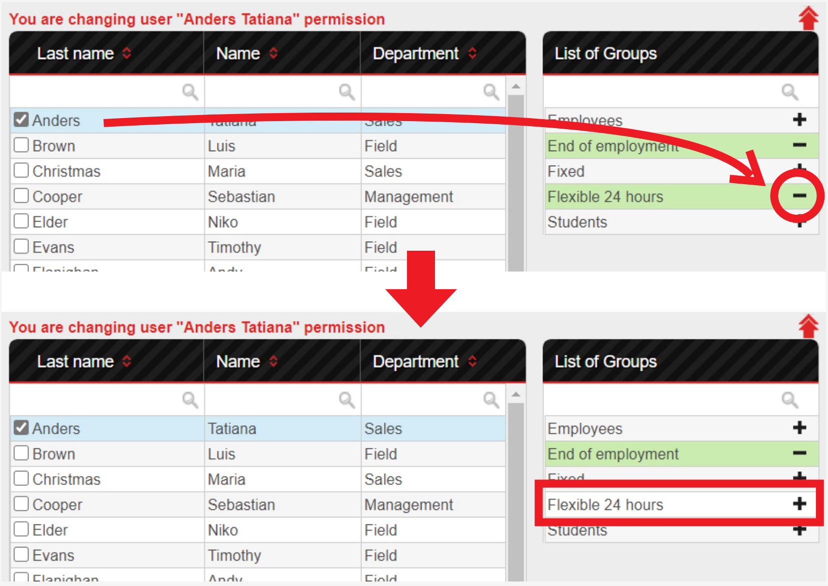
a) First, assign the user to the time&attendance group with no specified work obligation (i.e., the newly added End of employment group).



b) The system will inquire into which user revision you wish to save the entered changes. Select ***Save in current revision***.



c) Then, remove the user from their former T&A group.



The edited rights will be saved to the newly created user revision.

8 In order for the newly assigned rights of the user to take effect in the Time attendance, you must also ***recalculate events for the appropriate period*** in the *Time attendance* editor:

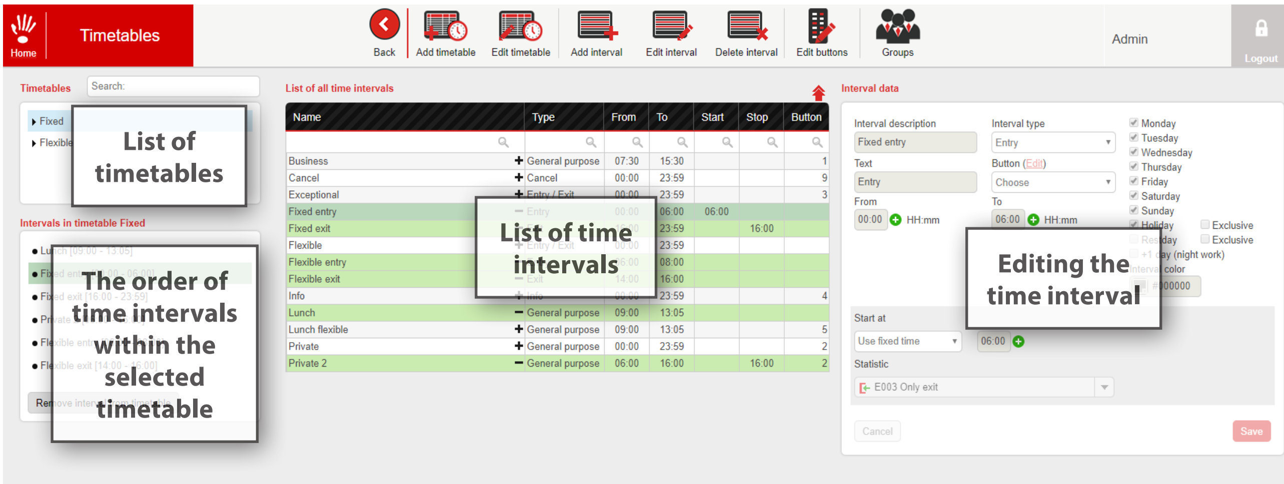
a) In the T*ime attendance* editor, first, select the user on the *List of users*.

b) Then right-click on it and select the ***Recalculate period*** function from the menu (with the *Reset manual changes* option disabled), which allows you to specify the recalculation period more precisely.

The users time and attendance events will be recalculated in regard to the new defined work obligation.

5 TIMETABLES

In the ***Timetables*** editor, you can view, create and edit timetables. Timetables in the Codeks application define when users can pass through specific passages and when they can access certain functionalities of controllers.

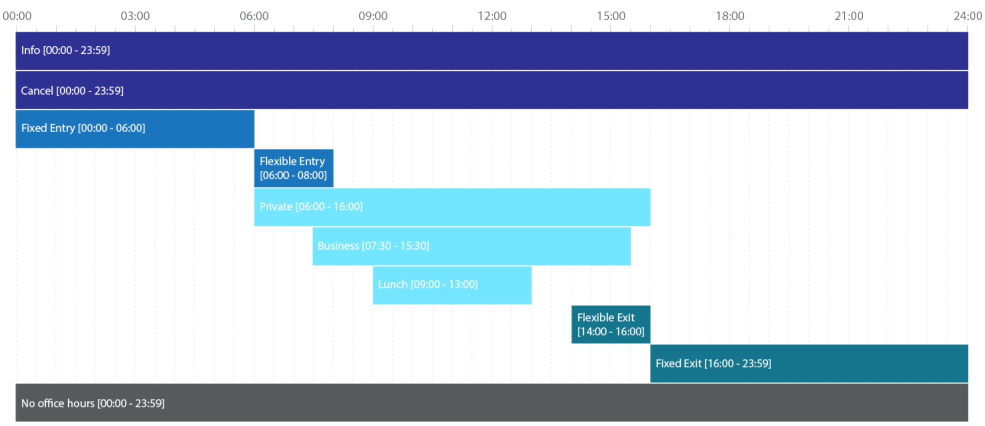


The structure of timetables

Timetables are, in essence, ***collections of multiple time intervals*** that determine the classification of registered events through the day. The time intervals are defined independently and can be assigned to several timetables simultaneously.

NOTE

The same time intervals can be simultaneously assigned to several timetables. By making changes to a selected time interval you are affecting all the timetables the time interval is assigned to.



Graphic representation of a typical timetable.

Terms fixed and flexible

The terms ***fixed*** and ***flexible*** are used to describe how time intervals are set to record the start or end of their duration:

- ***If an interval has a fixed way of recording work hours,*** this means that ***a fixed pre-defined time will be recorded*** and used for calculations, ***instead of the actual time*** a user registered at a controller.

  Example:
  A *Fixed entry* interval is defined, that records any entry events registered before 6 a.m. The term "fixed" applies to how the start of the user's work hours is recorded. Regardless of the actual time, the event was recorded, the start of the Entry interval is always set to 6:00 if the user registered his arrival before 6 a.m.

- ***If an interval has a fixed way of recording work hours,*** this means that ***the actual time of event registration will be used*** every time a user registers an event at a controller during the interval duration.

  Example:
  An *Entry flexible* interval is defined, that records any entry event registered between 6 and 8 a.m. The term "flexible" describes how the start of the user's work hours will be recorded. When a user registers an entry event between 6 and 8 a.m. the actual time of the event registration will be recorded as the start of the interval.

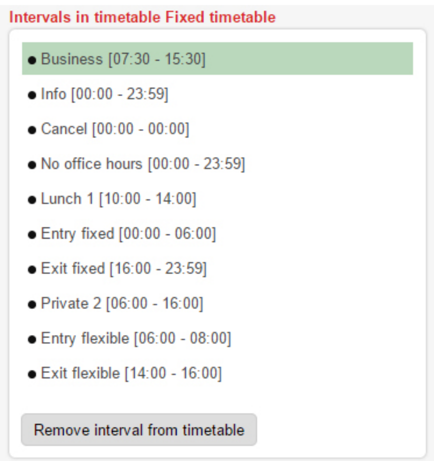
Companies often use ***a combination of intervals with a fixed and flexible way of recording the start of intervals.***

Example:
All users in a company must be present at their workplace at 8 a.m. in the morning.
The start of their workday is defined by two intervals:

- **fixed, if the users arrive at work before 6:00 in the morning**
  If a user arrives at work before 6:00, his work hours start to record at 6:00, regardless of when exactly the user recorded his Entry event.
- **flexible, if the users arrive at work between 6:00 and 8:00 in the morning**
  If the user arrives at work between 6:00 and 8:00, his work hours start to record from the actual time of registering his Entry event at the controller.

Interval hierarchy

When planning and using time interval also ***keep in mind the intervals' hierarchical order in the selected timetable.*** The current hierarchical order of the intervals can be seen in the *Intervals in timetable* window on the left side of the *Timetables* editor.



Time intervals assigned to a timetable determine how a specific registered event at a time attendance controller will be recorded. **When a user registers at a controller the system looks for the highest ranking time interval that is valid at that time of day. If more than one time interval is valid at a specific** time of day, the system will record events using the highest ranking one (e.g. for the timetable presented in the picture above, the system would record an event registered at 10:30 using the *Business interval* not the *No office hours* interval).

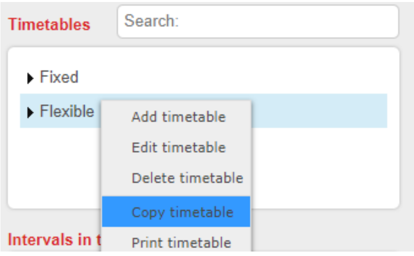
NOTE
The interval hierarchy does not apply to time intervals with assigned buttons. To activate an interval with an assigned button a user must select the appropriate button before registering at the controller.

ADDING AND EDITING A TIMETABLE

ADVICE
When creating a new timetable, first, make a copy of a similar existing timetable, then edit the copy according to your specifications. This will save time when adding a new timetable.

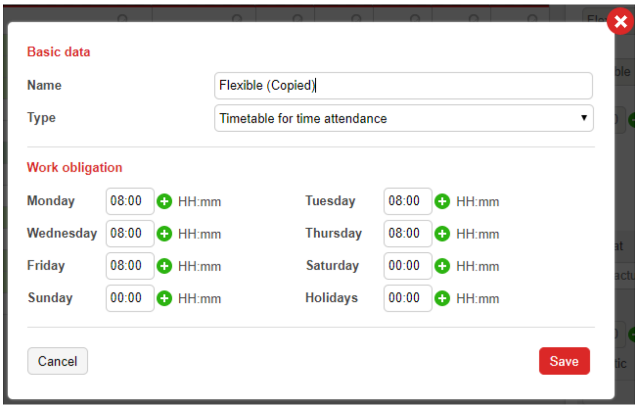
ADVICE
When creating a new timetable, first, make a copy of a similar existing timetable, then edit the copy according to your specifications. This will save a backup copy of the original timetable.

1 Select a ***similar existing timetable***, right-click and ***copy*** it.



2 ***Double-click the new copy of the timetable*** to open the timetable settings pop-up window.

3 Change the name of the timetable and set the daily work obligation for each day.



You can read more about the *Timetables* in the main documentation of the Codeks TA Kit application.

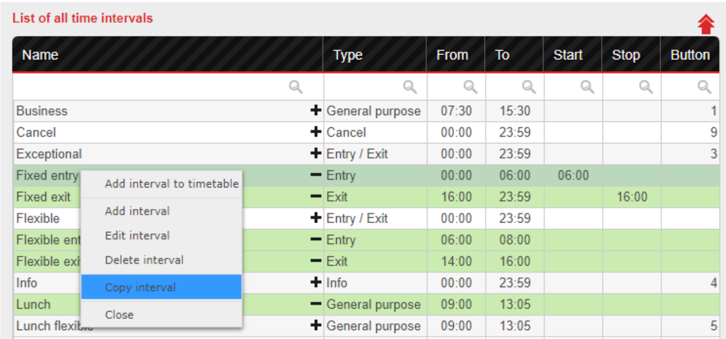
4 When you are done editing the timetable, click ***Save***.

ADDING AND EDITING AN INTERVAL

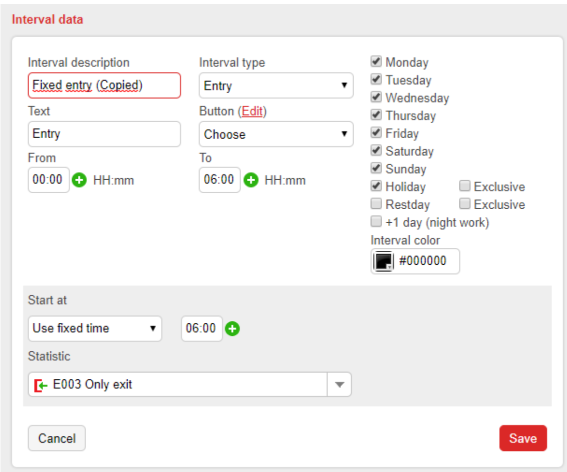
ADVICE
When creating a new time interval, first, make a copy of a similar existing interval, then edit the copy according to your specifications. This will save time when adding a new time interval.

ADVICE
When creating a new time interval, first, make a copy of a similar existing interval, then edit the copy according to your specifications. This will save a backup copy of the original time interval.

1 Select a ***similar existing interval***, right-click and ***copy*** it.



2 ***Double-click the new copy of the time interval*** to enable the interval edit window.



3 Enter the desired changes. You can read more about individual setting in the main documentation of the Codeks TA Kit application.

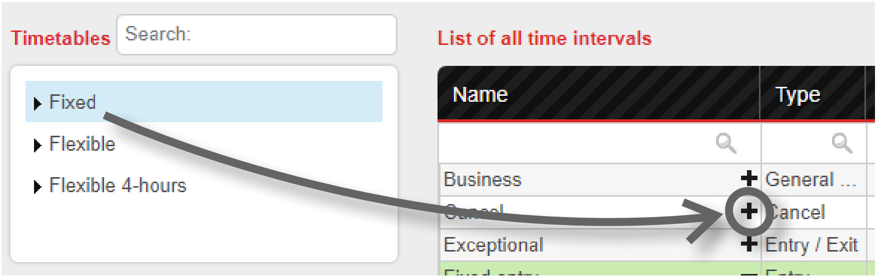
4 When you are done editing the time interval, click ***Save***.

The new time interval is still not assigned to any timetable at this stage. The process of assigning a time interval to a selected timetable is described in chapter *ASSIGNING AN INTERVAL TO TIMETABLE*.

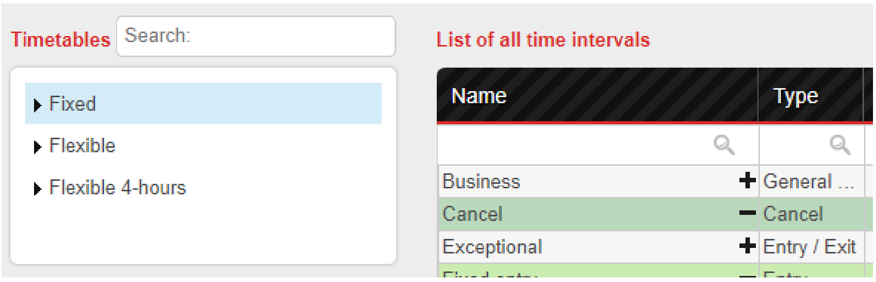
ASSIGNING AN INTERVAL TO TIMETABLE

1 In the *List of timetables*, ***select the timetable*** you wish to assign a time interval to.

2 Then ***locate the desired time interval*** in the *List of time intervals* and click the ***plus (+) icon*** next to its name.



3 When the time interval has been successfully added to the selected timetable, it will be colored *green* in the *List of time intervals.*



NOTES

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