Instructions for USER ACCESS

INSTRUCTION MANUAL FOR USER ACCESS to the **Codeks system**

User login

CONTENT

0 INTRODUCTION

This document contains instructions for users who log in to the Codeks application using their user access username and password.

Logging in with user access enables:

- employees to view their own time and attendance information,

- department heads to manage and edit time and attendance information of their employees,

- * the use of Codeks add-ons and additional applications:
  TA Presence monitor, *TA Leave Announces*, *ePermits*, *Reservations*, *FrontDesk* and *Lunch*.

  NOTE
  To use the Codeks add-ons and additional applications you need the appropriate additional license codes for each Codeks program extension. Users who will be able to use the functionality of the Codeks program extensions must have the necessary settings and rights assigned in the main Codeks application.

- * employees to register their time attendance using a web browser.

  NOTE
  Each user who will be able to register their time attendance using a web browser must be assigned a virtual (additional) card.
 **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.**

You can find more information about the Codeks software, its add-ons, and additional applications in the software documentation available on our download page **https://jantar.si/en/documentation/**.

1 USER LOGIN INTO THE CODEKS SYSTEM

All employees and heads of departments (users) log into the Codeks application using their username and password for user access.

1 To access the *User login form* click the **User statistics** icon in the start menu of the Codeks application.
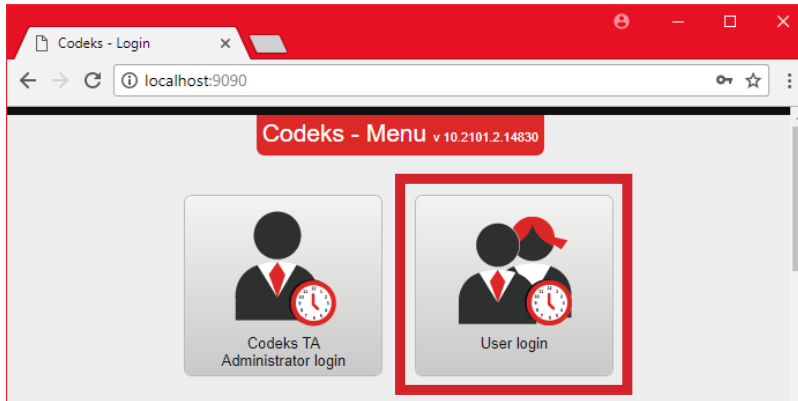
Link to the start menu:
~IP address of your server~ :9090

2 In the login form, enter your username and password, then, click **Login**.
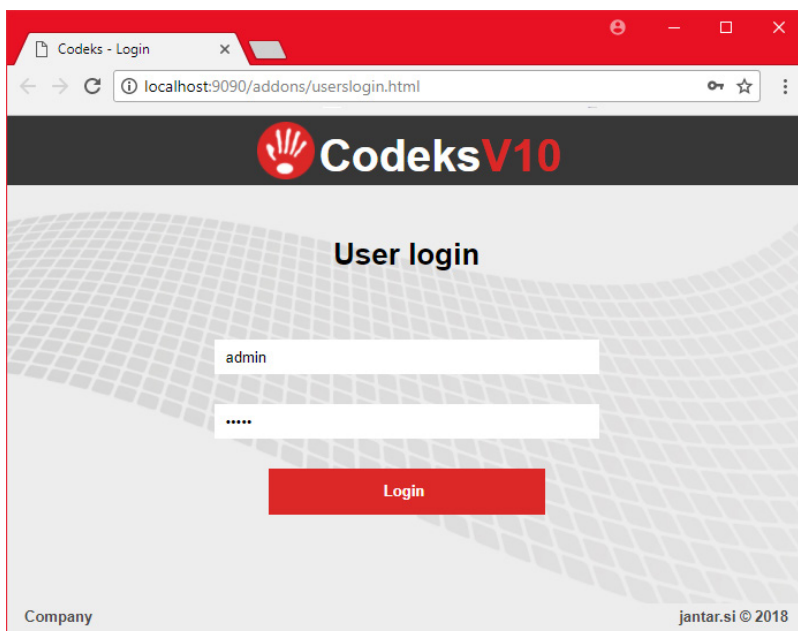
Link to the user login form:
~IP address of your server~ :9090/addons/userslogin.html

3 After a successful login, the user access menu will be displayed. The number of items displayed within the menu is dependent on the settings and rights you are granted as a user, as well as on the add-ons and additional applications added to your Codeks system.

Codeks - Menu v 10.2101.2.14830

Menu Item	Description
T&A Registration statistics	Link to the **Time attendance** editor where users can view and edit their own time registration and the time registration of other users.
Extraordinary saldo transfer requests	Link to the editor where heads of departments can **process extraordinary saldo transfer requests**.
Presence	✳ The link to the viewer of the **Codeks TA Presence monitor** add-on is displayed only when using the add-on.
Absence overview	✳ The link to the absence viewer for the **Codeks TA Leave announces** and **ePermits** add-ons is displayed only when using the add-ons.
Announce absence	
Check absence announce status	
Show pending absence announces	✳ Links for the **Codeks TA Leave announces** add-on are displayed only when using the add-on.
Request exit permit	
Check exit permits status	
Show pending exit permits requests	✳ Links for the **Codeks ePermits** add-on are displayed only when using the add-on.
Reservations	✳ Link to the editor of the **Codeks Reservations** add-on are displayed only when using the add-on.
Lunch ordering	
Guest announcement	
Manage lunches	✳ Links for the **Codeks Lunch** add-on are displayed only when using the add-on.
Visitor announce	
Show visitor announces	✳ Links for the **Codeks FrontDesk** add-on are displayed only when using the add-on.
Change my password	Enables users to change their password.

10/03
11:02:17

Company

Register	
Business	Private
Extra	Info
Lunch	Cancel

The simulated Time & attendance controller enables users to register their time and attendance through a web browser.
Time registration is only possible for users with an assigned virtual card.
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.

✳ You can read more about the Codeks add-ons and additional applications in the documentation of each program extension.
(Link to the documentation of the program extensions: https://jantar.si/en/documentation/)

2 T&A REGISTRATION STATISTICS

By clicking **T&A Registration statistics**, users and department heads can access the *Time attendance* editor. Here they can view or even edit the time attendance data, depending on the user rights they are assigned in the main Codeks application.

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.

NOTE
Rights to view or edit the time attendance information are assigned to each user or department head through their user settings set in the Users editor. The users' settings can be edited by a Codeks system administrator.
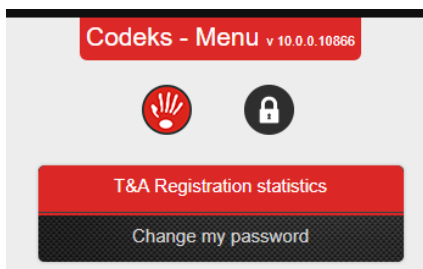
3 EXTRAORDINARY SALDO TRANSFER REQUEST

USER'S REQUEST FOR EXTRAORDINARY SALDO TRANSFER

If employees accumulate more saldo hours in a month than they can transfer to the next month, they can send a request for more hours to be transferred before months end. The request is sent to the employees' head of department, who can, in turn, confirm the request and thus transfer more of the employees' hours to the next month.

NOTE
*The tools for the **extraordinary saldo transfer request** functionality are **disabled by default** in the Codeks application. To enable the described functionality, enable the **Enable saldo transfer requests** setting in the Preferences of the Codeks application. Preferences can only be edited by a Codeks administrator.*

1 In the user access menu click **T&A Registration statistics**.

2 In the *Current period summary* section located on the right side of the editor, **find and click the *Extraordinary saldo transfer request* option**.
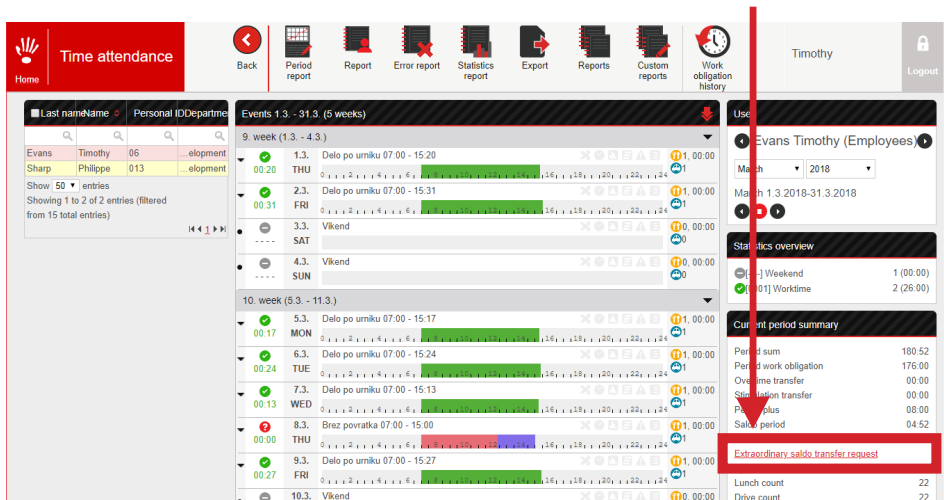
3 In the new pop-up window, you can **set how many hours specifically you would like to transfer to the new month** (the maximum number of hours you can transfer is already entered in the field by default), and add a comment.
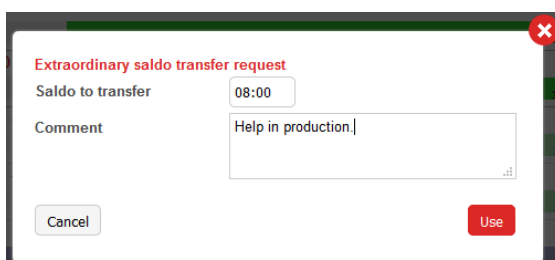
4 Click ***Use***.
Your request will be sent to your head of department.

5 You can monitor the status of your saldo transfer request in the *Current period summary* section:

- Until the head of department processes your request you can still cancel it by clicking the x-icon (❌) next to it.
- If the head of department confirms your request the **Extraordinary transfer request approved** message will be displayed and the requested number of hours will be transferred to the next month.
- If the head of department denies your request the **Extraordinary transfer request denied** message will be displayed and the requested number of hours will **not** be transferred to the next month.

PROCESSING EXTRAORDINARY SALDO TRANSFER REQUESTS

1 In the user access menu select *Extraordinary saldo transfer requests*.

2 The *Process extraordinary saldo transfer requests* menu will display all the requests made by users, who want to transfer more saldo hours to the next month.

- To confirm a request click the confirm icon (✅).
- To deny a request click the deny icon (➖).

3 When confirming, you can **reset how many hours specifically you will transfer for the employee** (the maximum number of hours you can transfer is already entered in the field by default), and add a comment in the new pop-up window.

4 After confirming or rejecting a request the entry will immediately be removed from the pending requests list.
If the user who has requested the saldo transfer has a valid e-mail address, he will receive a notification about the change of the status of his request.
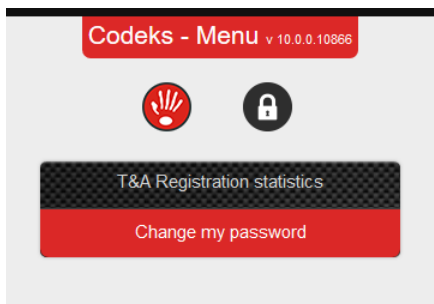
5 The menu also allows you to filter the display of saldo requests according to their status. This enables you to review the history of confirmed, canceled or denied saldo transfer requests.

4 CHANGE MY PASSWORD

1 Select *Change my password* in the user access menu.

2 In the editor, first, enter your current password, then, enter and confirm a new password.

3 Click *Confirm password*.
Next time you log in use, your new password.

5 REGISTER T&A USING YOUR WEB BROWSER

Users who are assigned a virtual (additional) card can register their time and attendance through a web browser by using the simulated T&A controller located at the bottom of the user access menu.

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 virtual card must be assigned to each user by a Codeks system administrator in the Users editor.

REGISTERING ENTRY/EXIT EVENTS

1 To register an event without an assigned button (e.g. an entry or exit) **press the *Register* button**.

2 Similarly as on an actual controller, the name of the employee and type of event will be displayed on the simulated controller screen.

REGISTERING EVENTS WITH BUTTONS

1 To register an event, for which you must press a button when registering at a controller, **just press the appropriate button**.

2 Similarly as on an actual controller, the name of the employee and type of event will be displayed on the simulated controller screen.

NOTE
*If the **Location** selection field is displayed above the simulator, you will have to select the appropriate location before registering your work hours. The selected location will activate the correct timetable to be used for recording your work hours.*