

# Codeks FrontDesk Add-on

# Instructions for users

for Codeks software version 10.2.8.13221 and newer



# Codeks FrontDesk Add-on user manual

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#### 1 Codeks FrontDesk Add-on

Codeks FrontDesk is an Add-on for the Codeks software for access control and time attendance registration.

The Codeks FrontDesk is designed for announcing and confirming planned visitors as well as to be used at corporate frontdesks or reception desks, for issuing cards to visitors and for issuing replacement cards for lost user cards to users.

This add-on enables you to set up a system for announcing guests who are invited to visit the company. Employees can announce the visit of guests and send a request via the Codeks FrontDesk add-on to their department head, who confirms the visit. This guarantees the traceability of the visitors as well as ascertains persons responsible for the guests.

Additionally, it is designed to be used at corporate frontdesks or reception desks, **for issuing cards to visitors and for issuing replacement cards for lost user cards to users**. The application simplifies and automates the process of issuing visitor cards, provides control over issued cards and enables visitor supervision. Advanced options for assigning access rights provide complete flexibility, yet the use of the application remains simple.

The Front Desk add-on is suitable for large companies, such as banks, airports and hospitals, as well as for smaller businesses that want to regulate and limit visitors' access.

#### NOTE

This manual contains only the description and installation instruction for the Codeks FrontDesk add-on. The installation instructions and general settings of the main Codeks software are described in the documentation of the main Codeks AC or Codeks TA application. Screenshots of the Codeks application contained in this manual were made in a web browser.



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- By installing and using the Codeks FrontDesk add-on you are accepting the terms and conditions of this license.
- If you do not agree with the terms of this license you must remove all Codeks FrontDesk files from your storage devices and cease using the product.



# 1.2 Disclaimer and Warranty

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#### 1.3 Contact Information

Jantar d.o.o. has more than 30 years of experience in the development and production of access control, time attendance and visitor control systems. What sets us apart from our competitors is that we develop and manufacture all of our software and most of our hardware ourselves. Our systems are installed and utilised at airports, office buildings, financial institutions, factories, shopping centers, hospitals, etc. Our products are present virtually anywhere our clients need basic or advanced access control and time and attendance systems.

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#### Support

E-mail: <a href="mailto:support@jantar.si">support@jantar.si</a>



# 2 Using the Codeks FrontDesk Add-on

Dodatek Codeks FrontDesk omogoča najavljanje v naprej dogovorjenih obiskov ter potrjevanje teh obiskov s strani vodij oddelkov. Šele ko je posamezen obisk potrjen, lahko receptorji na vstopnih točkah podjetja prijavilo najavljene goste in jim dodelijo kartice (ali druga identifikacijska sredstva) za dostop.

#### SENDING AND PROCESSING GUEST ANNOUNCEMENTS

Zaposleni in vodje oddelkov do orodij za najavo gostov in obravnavo najavljenih gostov dostopajo prek svojega uporabniškega dostopa do aplikacije Codeks.

The employees and department managers can log into the *Codeks* application using their **username and password** through the *User login* form.

Codeks - Menu visua 1954

Codeks - Menu visua 1954

Codeks - Menu visua 1954



Link to the user login form:

~IP address of your server~:9090/addons/userslogin.html

#### Step 1 - USER'S ABSENCE REQUEST



The user first announces a guest in the *Visitor announce* menu. Users can announce guests only if they are granted the *Can announce guests right* in their user settings.

In the guest visit announcement form, users are required to fill out several mandatory fields to provide all the necessary information about the visit. Users can enter multiple individuals within the same guest announcement.

When a user announces guests, the system sends the announcement to the head of department, who can process visitor announcements for their department, and to all co-workers the user has selected to be additional hosts of the visit.

Users can monitor the status of their guest announcements in the **Show visitor** announces menu, where they can also subsequently correct or cancel the announcement. Cancellation of the announcement is only possible until the head of the department confirms or rejects it.



#### **Step 2 - DEPARTMENT MANAGER'S REPLY**



The head of the department is notified about new guest announcements by email. In order to be designated as a head of department a user must have the **Process visitor announces** setting enabled in their user settings. This setting enables them to confirm or reject visitor announcements made by employees of a selected department.

All guest announcements announced by employees in his department can be viewed and processed in the **Show visitor announces** menu. In this same menu, the head of department may also subsequently correct the data of the guest announcement.

When the manager confirms the guest announcement, the employee (and any additional hosts of the visit) is notified about the status change of their visitor announcement by email.

#### Step 3 - CONFIRMED GUESTS ARE ADDED TO THE FRONTDESK VIEWER



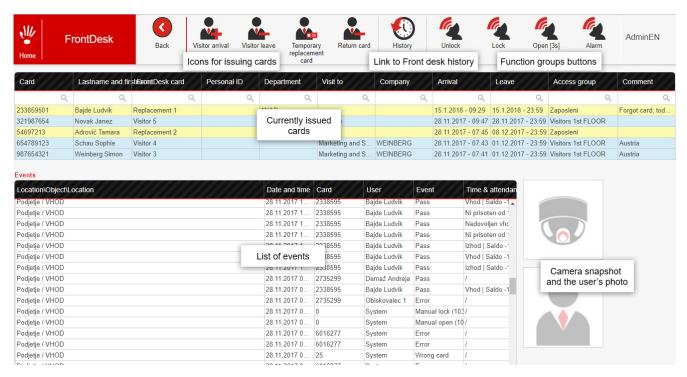
When a head of department confirms a visitor announcement, that announcement can be displayed in the FrontDesk viewer designed for receptionists at the company's entry points.

Receptionists can then look for the announced visit when a visitor arrives, checkin the guests and issue them an appropriate means of identification which allows them limited access to the company premises.

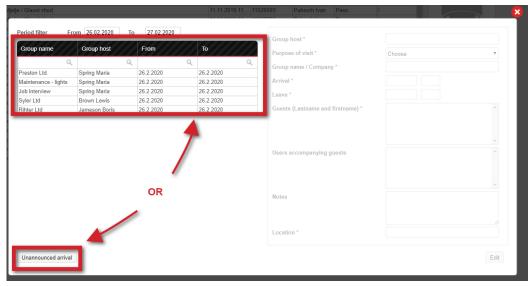


#### THE FRONTDESK VIEWER

The Codeks FrontDesk Add-on is designed to be used by a receptionist at the entrance of the company. The FrontDesk editor consists of a toolbar with command icons, a list of currently issued cards, and a list of events.



At the reception the receptionist must, first, ascertain whether an arriving guest has been announced beforehand or if they have arrived unannounced.



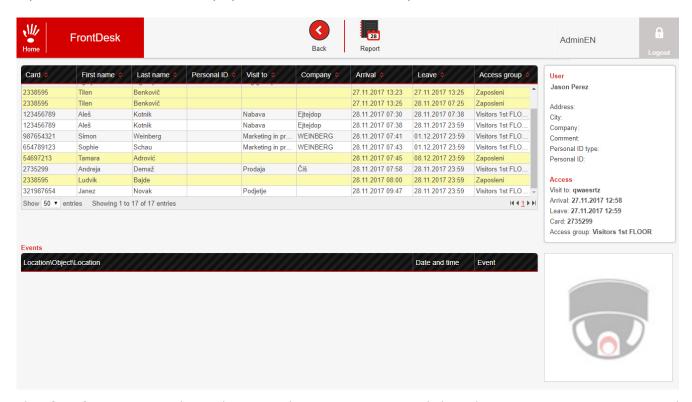
Then the **receptionist can assign a card to each individual visitor**, and the guest's access rights are sent to the system controllers immediately.



I addition to visitor cards the receptionists can also issue *replacement cards* to employees who have forgotten or lost their own user card. In the *List of currently issued cards* visitor cards, are shown in blue ( ), and the **replacement cards** that are temporarily issued to employees are shown in yellow ( ).

In addition to the basic icons, the toolbar also contains **function groups buttons**, with which the receptionist can manually trigger actions at certain passage within the company. The *function group buttons* are created by the administrator in the Functions groups editor in the main Codeks application. The receptionist can trigger *function group buttons* only if he has the necessary administrator's rights (set in the Administrators editor).

The **History** icon opens a new viewer, where you can view the list of all visitors and users that have been entered in the Codeks FrontDesk Add-on. The viewer enables you to browse the history of visitor and replacement cards as well as display the data in the form of a report.



The **List of events** is similar to the one in the *Monitor* viewer, and show the most recent events registered within the system.



In the fields next to the *list of events*, a picture of the user is displayed, as well as a snapshot from the control camera when a user (employee) registers at a controller. The camera snapshot can only be viewed if you are also using the Codeks IP Camera Add-on.



# 2.1 User's guest announcement

Users who announce visitors can access the menus for *announcing visitors* and *checking the status of their announcements* using their users' access username and password.



The following chapters describe the use of *user access* menus.

#### 2.1.1 Visitor announce

**1.** To announce a visitor, first, **select the** *Visitor announce* **menu** option in the main menu of your user access.

The editor for making visitor announcements will open.



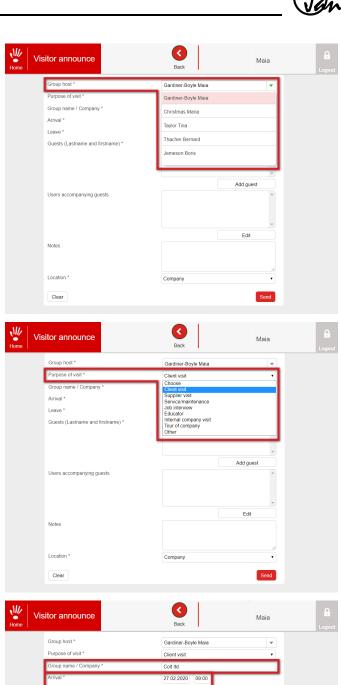


**2.** If you are allowed to make visitor announcements for your coworkers, first, in the *Group host* drop-down select the appropriate person to be the host of the visit.

If you do not have the right to announce guests for co-workers, you will not be able to select a different host in the first drop-down list

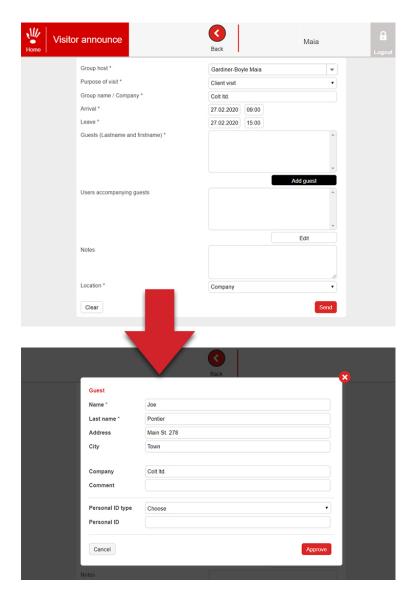
3. Then, select the *Purpose of visit*.

4. Next, fill in the *Group Name / Company* in the announcement form and specify the date and time of arrival and the day and time of departure.





- **5.** In the *Guests (Last name and First Name)* section, enter the information of at least one guest you know will visit the company.
  - **5.1.** To add a new guest, click the **Add Guest** button.
  - **5.2.** A new window will open where you can enter the guest's information (entering the guest's name and last name is mandatory).
  - **5.3.** Click **Approve** when you're done.





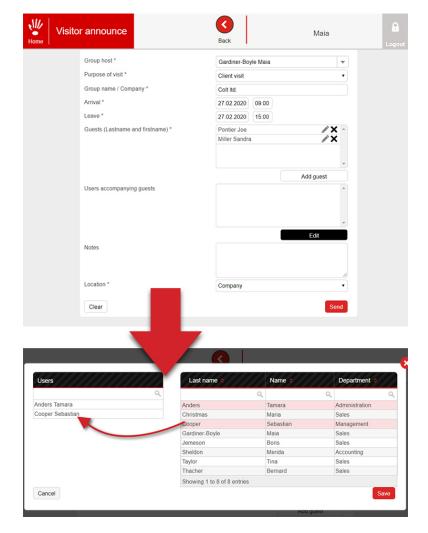
- **6.** In the *Users accompanying guests* section, you can select co-workers from your department or from another department who will also be invited to attend as additional hosts of the visit.
  - **6.1.** Click the *Edit* button to add an additional host.
  - **6.2.** A new window will open where you can select co-workers who will accompany the visit.

To assign a coworker as an additional host, click on their name in the user list on the right.

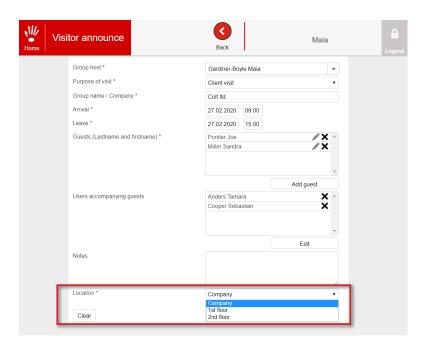
Selected colleagues will appear in the list on the left.

The selected coworkers will also be notified about the new visitor announcements by email.

6.3. Click Save when you're done.



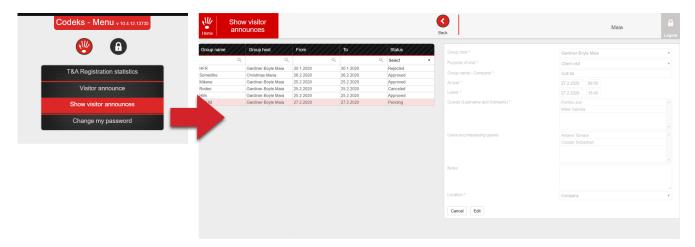
- **7.** You can write additional instructions or comments in the **Notes** section.
- **8.** In the *Location* section, select the company location where the visitor is invited. (This information is important for issuing access cards later.)
- **9.** When you have finished entering the information, click *Send*.





#### 2.1.2 Show visitor announces

Employees can track the status if their visitor announcements in the **Show visitor announces** menu.



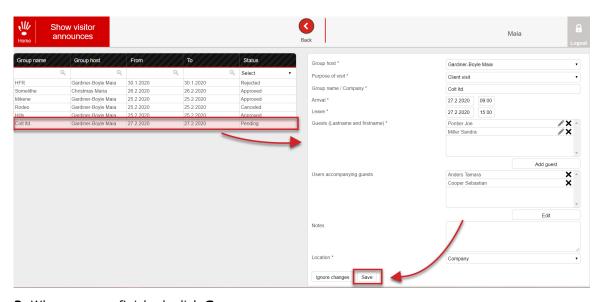
In the same editor, they can also subsequently correct or cancel the announcement.

Editing and cancellation of an announcement is only possible until the head of the department confirms or rejects it.

#### **Editing the visitor announcement**

**1.** To edit the guest announcement, first select and double-click the announcement you want to edit in the list of announcements on the left.

This will enable the right side of the editor, where you can edit the data about the visitor announcement.



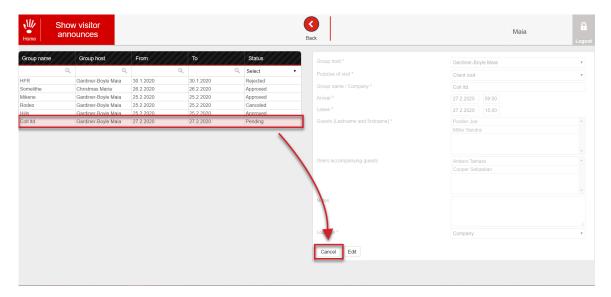
2. When you are finished, click Save.



#### **Canceling the visitor announcement**

- **1.** To cancel a guest announcement, first select the announcement you want to cancel from the list of announcements on the left. Za preklic najave gostov najprej izberite najavo, ki jo želite preklicati, v seznamu najav na levi.
- **2.** Then, in the right part of the editor, click the *Cancel* button.

The status of the visitor announcement will be immediately changed to Canceled.





# 2.2 Department manager's reply

The following chapters describe the use of *user access* menus.

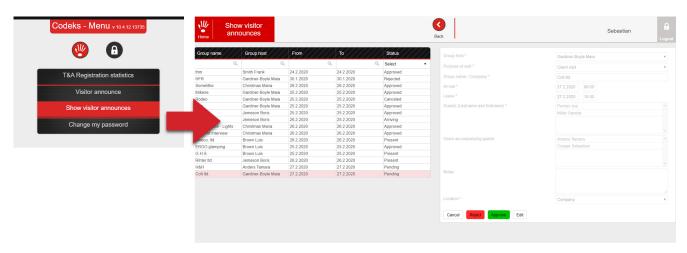
Heads of departments who can confirm or reject visitor announcements can access the menus for *processing* their employees visitor announcements using their users' access username and password.



The following chapters describe the use of user access menus.

#### 2.2.1 Processing announcements

The heads of departments can access tools for processing visitor announcements in the **Show visitor** announces menu.



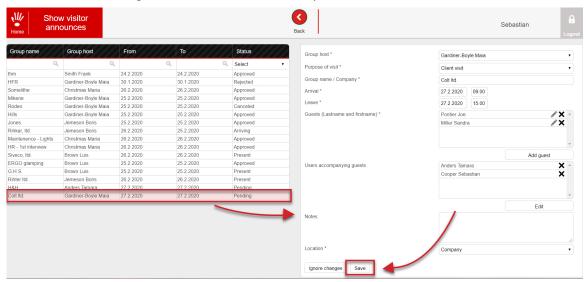
In this same editor, the heads of departments can subsequently edit the visitor announcement before confirming it or they can deny it.



#### **Editing the visitor announcement**

**1.** To edit a visitor announcement, firs, locate and double-click the desired announcement on the list of announcements on the left.

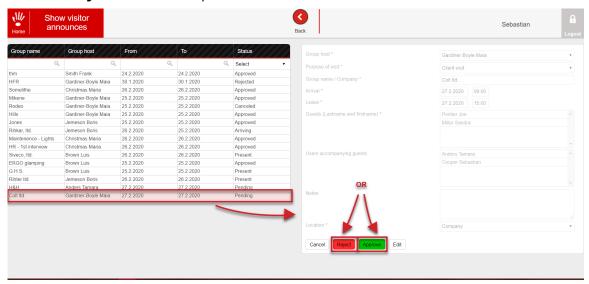
This will enable the right side of the editor, where you can edit the data about the visitor announcement.



2. When you are finished, click Save.

#### Processing the visitor announcement

- **1.** To process the visitor announcement:
- click the **Approve** button to confirm the announcement,
- click the **Reject** button to deny the announcement.



2. The status of the announcement will immediately be set to Approved or Rejected.



### 2.3 Receptor's work

Receptionists who issue cards to visitor at the company entry points can access the main *FrontDesk* viewer by logging into through the FrontDesk login using their administrators username and password.



The following chapters show work in the Codeks FrontDesk viewer.

#### 2.3.1 Issuing a card to an announced visitor

The cards that the receptionist will issue to visitors or users using Codeks FrontDesk must be entered in the Codeks system beforehand. When a visitor arrives, the receptionist will only change the rights of an existing card by assigning it a new group, and, thus, granting it access rights at certain passages. When assigning a group and issuing a card, the system automatically issues a command to update the rights of this card at appropriate controllers.

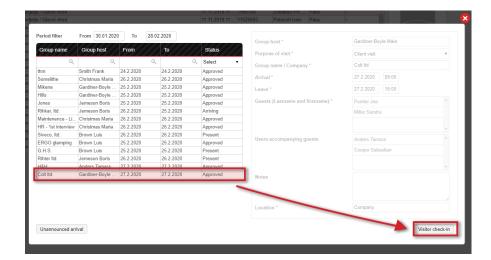
**1.** To **issue a visitor card to an announced visitor select the** *Visitor arrival* **icon in the toolbar of the FrontDesk editor.** 



**2.** A new window will open, showing the visitor announcements for the selected date range on the left. By clicking on an announcement entry, the details of the selected visitor announcement will be displayed on the right side of the pop-up window.



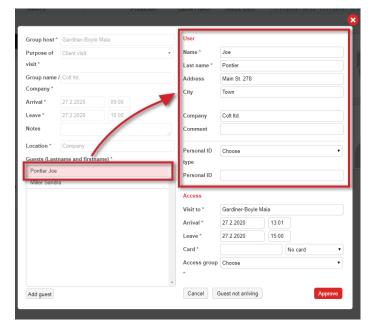
3. To check-in a guest, who was previously announced by a visitor announcement, double click the announcement or mark the announcement on the list and, then, click the Visitor check-in button.



**4.** A new pop-up window will open where you can manage individual guests within the visitor announcement:

#### 4.1. To check-in a guest:

- a) select the guest in the Guests (Lastname and first name) \* section,
- **b)** review the guest information in the right part of the window and edit it if needed,





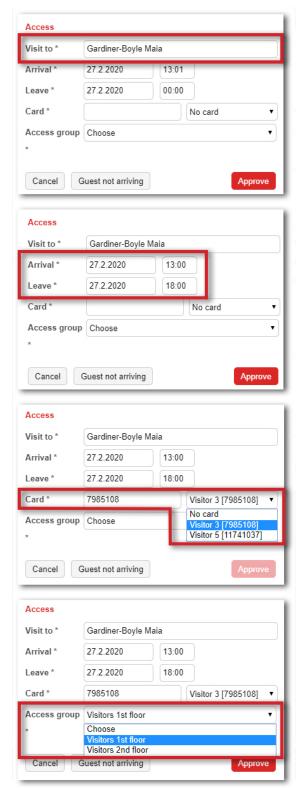
- c) then, in the Access section:
  - check (or change) the host of the visit in the Visit to field,

- set the *Arrival* and *Leave* date and time, which limit when the visitor will be able to access your company premises,

- select the *Card* to be assigned to the visitor,

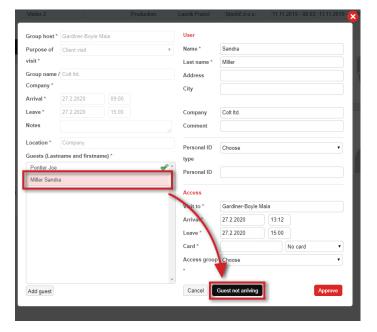
- assign the Access group.

d) click *Approve*. This will check-in the guest into the system (a command will be sent to the controllers that will assign appropriate access rights to the assigned card).

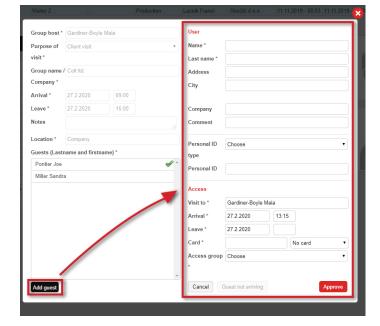




4.2. If the guest does not (will not) arrive, mark the guest in the *Guests (Lastname and first name)* section and click the *Guest not arriving* button.



- 5.\* To add and simultaneously check-in a new unannounced guest inside the same announcement, click the *Add guest* button and fill in all the fields on the right side of the window. Then click *Confirm*.
- **6.** When you are done checking-in guests close the pop-up window.





#### 2.3.2 Issuing a card to an unannounced visitor

Postopek prijave **nenapovedanega gosta** je za receptorja nekoliko drugačen. Ker za prispelega gosta še ni nobenih podatkov, je potrebno pred dodelitvijo kartice novemu gostu v sistem vnesti še podatke, ki se navadno vpisujejo ob najavi gostov.

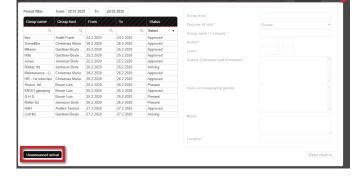
1. To issue a visitor card to an unannounced visitor select the *Visitor arrival* icon in the toolbar of the

FrontDesk editor.

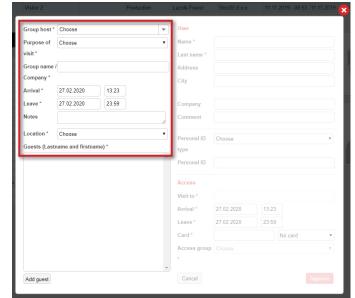


**2.** A new window will open, showing the visitor announcements for the selected date range on the left.

Then click the *Unannounced arrival* button in the lower-left corner.



**3.** To **check-in an unannounced guest**, first, fill in all the basic information about the arrival on the left side of the new pop-up window:



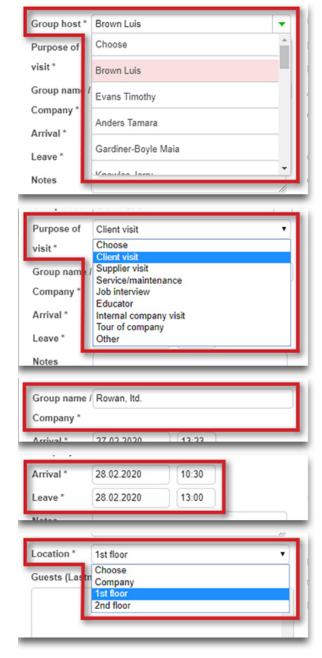


**a)** first, select the appropriate employee for the *Group host*,

b) then select the Purpose of visit,

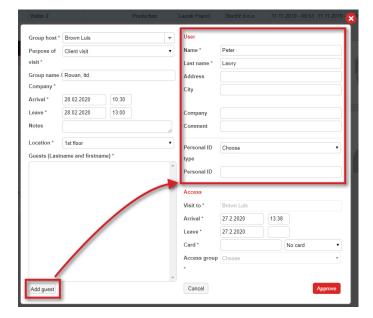
c) fill in the Group Name / Company in the announcement form and specify the date and time of arrival and the day and time of departure,

d) in the *Location* section, select the company location where the visitor is invited.
 (This information is important for issuing access cards later.)





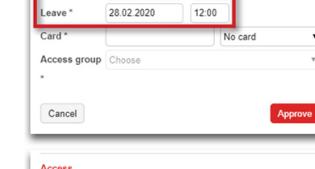
- **4. Then click the** *Add guest* **button.** This will enable the entry fields on the right side of the window:
  - a) first, enter the visitor's *Name* and*Lastname* (this information is mandatory).
  - **b)** then also fill out the lower entry fields as necessary,





•

- c) then, in the Access section:
  - set the Arrival and Leave date and time, which limit when the visitor will be able to access your company premises,



10:00

Brown Luis

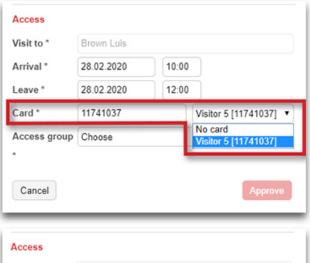
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Access

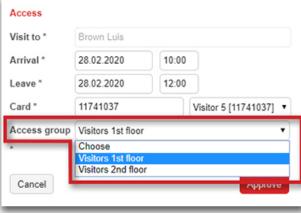
Visit to \*

Arrival 3

- select the *Card* to be assigned to the visitor,



- assign the Access group.



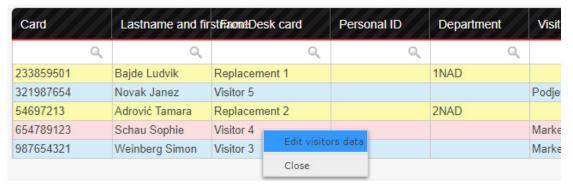
- d) click *Approve*. This will check-in the guest into the system (a command will be sent to the controllers that will assign appropriate access rights to the assigned card).
- **6.** When you are done checking-in guests close the pop-up window.



#### 2.3.3 Editing a visitor

It is also possible to subsequently edit an active visitor within the Codeks FrontDesk system.

1. To edit a visitor select the desired visitor from the *List of currently issued cards*. Double-click the selected visitor or right-click and select *Edit visitors data* to enable the edit visitor window.

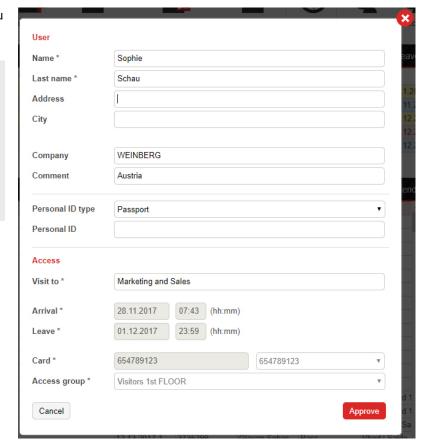


**2.** A pop-up window will open, where you can edit and enter new visitor's data.

#### **NOTE**

You cannot subsequently change settings that define the visitor's access rights. In order to change the visitor's access rights, you must remove the visitor from the system and re-issue his visitor card.

**3.** Save the entered information by clicking **Approve**.





#### 2.3.4 Issuing a replacement card

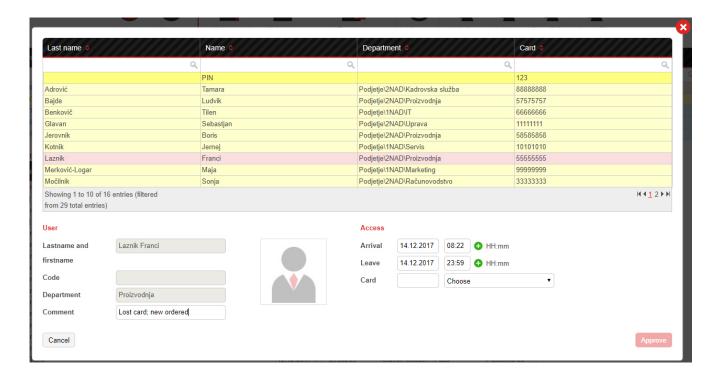
The cards that the receptionist will issue to visitors or users using Codeks FrontDesk must be entered in the Codeks system beforehand. When the receptionist issues a replacement card, he will only change the rights of an existing card by assigning it a new group, and, thus, granting it access rights at certain passages. When assigning a group and issuing a card, the system automatically issues a command to update the rights of this card at appropriate controllers.

**1.** To **issue a replacement card to a user** select the **Temporary replacement card** icon in the toolbar of the FrontDesk editor.



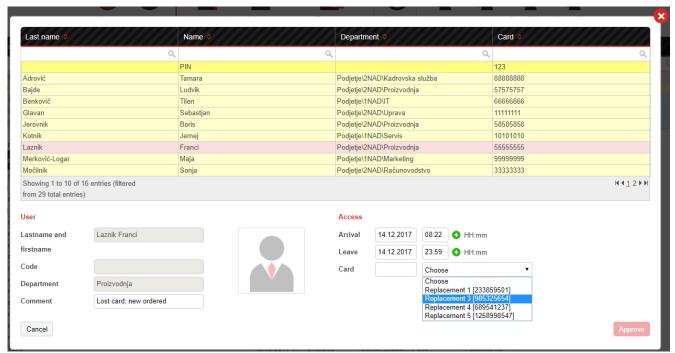
2. A pop-up window will open, where you can select the appropriate user.

Find and select the user whom you wish to issue a replacement card in the List of users.





- **3.** On the right side of the window **define the date and time of arrival and departure** to define when the replacement card will be valid.
- 4. Next, select one of the prepared Replacement cards.



4. Confirm the issued replacement card for the selected user by clicking Approve.



#### 2.3.5 Visitor's departure / Removing a replacement card

When a visitor departs or when a replacement card is removed, the receptor removes the access rights of the issued cards. The system in the background automatically updates card rights on the appropriate controllers.

#### **ATTENTION**

In the event that the employee has lost his card, or if the card was stolen, it is **necessary to cancel the user's old card and assign him a new user card before canceling the replacement card**. A new user card is assigned to the employee by an administrator in the main Codeks application. The administrator enters a new number code in the *Card* section of the user's settings, thus simultaneously assigning a new user card to the employee and canceling the old user card.

**1.** In the *List of currently issued cards*, select the visitor who is departing, or the replacement card you wish to remove. Then, click the**Visitor leave** icon.



**2.** The browser will request confirmation of the visitor's departure. When you confirm the departure, the visitor or replacement card will be removed from the list.



#### 2.3.6 Return card

The **Return card** function enables **faster and easier removal of issued visitor's or replacement cards** from the FrontDesk system. The receptionist can read and remove a card from the system with the help of a desktop USB card reader.

#### NOTE

To use the *Remove card* function you will need a desktop USB card reader set to the appropriate reading mode. You can read more about the use and specific settings of the USB table reader in the documentation of the Table Reader Service program (Jantar TableReaderManual-en.pdf).

**1.** To **remove visitor's cards using the USB card reader** select the **Remove card** icon in the toolbar of the *FrontDesk* editor.



2. A pop-up window will open where you can read and remove cards.

Now, read the *visitor or replacement card* you wish to remove with the USB reader. The card's number will be displayed in the *Card* field of the pop-up window.



- 3. To remove the card click Remove.
- **4.** The card will be immediately removed from the system.



You can continue this process to read and remove several cards successively.

**5.** When you are done removing cards, close the pop-up window.