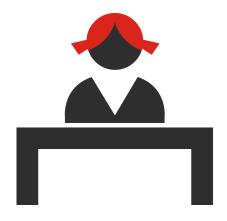


# Codeks Front Desk Add-on

for Codeks software version 10.2.8.13221 and newer



# Codeks FrontDesk Add-on user manual

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2023 in Naklo



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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.



# 1.1 Licence Information

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Codeks FrontDesk software is distributed together with the Jantar hardware or separately as a replacement system for an existing access control system, which means:

- All copyrights of Codeks FrontDesk are exclusively owned by the author, Jantar d.o.o.
- You may not use, copy, emulate, clone, rent, lease, sell, modify, decompile, disassemble, otherwise
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  stated in this agreement. Any such unauthorised use shall result in immediate and automatic termination
  of this license and may result in criminal and/or civil prosecution.
- Codeks FrontDesk binary code may NOT be used or reverse engineered to re-create the Codeks access control, time and attendance or communication algorithms which are proprietary and protected by copyright law.
- Codeks is distributed "as is". No warranty of any kind is expressed or implied. You use the Codeks software at your own risk. Neither the author nor his authorised distributors will be liable for any data loss, damages, loss of profits or any other kind of loss while using, misusing or being unable to use this software.
- All rights not expressly granted here are reserved by Jantar d.o.o.
- 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

#### **Disclaimer**

The information in this document is subject to change without notice. While the information contained herein is assumed to be accurate, Jantar d.o.o., assumes no responsibility for any errors or omissions. We also reserve the right to discontinue or change the specifications of products without prior notice. No claim can be made in the case of profit or loss from use or sale of any products bought or delivered by us. Errors reported will be corrected in new software releases.

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Although we strive to include accurate and up to date information, Jantar d.o.o., without prejudice to the generality of this paragraph does not guarantee that the information in this manual is complete, true, accurate and not misleading.

The information in this manual is designed for user purposes and not as a substitute for information from customer regulations, technical manuals/documents or other official documents. Customers using this manual can report errors or omissions, recommendations for improvement or other comments to Jantar d.o.o..

## 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.

Jantar, elektronski sistemi, d.o.o. Kranjska cesta 24, SI-4202 Naklo SLOVENIA

VAT ID: SI34737332 E-mail: <u>info@jantar.si</u>

Web page: www.jantar.si

## Support

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



# 2 Description and installation instructions

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.

# The Codeks FrontDesk software package contains:

 the Codeks FrontDesk license code, which enables and activates components of the Codeks FrontDesk within the main Codeks application.



# 2.1 System requirements

Before installing the Codeks FrontDesk Add-on, make sure these system requirements are met:

- a personal computer with an installed Windows 10 operating system or newer,
- available free USB ports or ethernet (LAN) ports for hardware connections,
- display resolution at least 1366 x 768 px (recommended resolution 1440 x 900 px),
- installed Microsoft .NET Framework 4.6.2,
- a minimum of 4 GB of RAM and a dual-core processor (6 GB of RAM and quad-core processor, if the database is running on the same server),
- at least 50 GB of free space on the hard drive,
- PDF Reader software for viewing generated reports,
- · internet access,
- a web browser, at least versions Internet Edge, Firefox or Chrome.

#### NOTE

We do not guarantee the proper functioning of the Codeks application if you are using a different browser or older browser versions.

• installed Codeks TA or Codeks AC software,

#### **NOTE**

You can find the installation instructions for the main Codeks software in the main Codeks application documentation (CodeksManual-en.pdf).



# 2.2 Activating License Code

To enable the Codeks FrontDesk add-on you must enter a valid license code for the software in the Codeks Service Manager program. The validity of the Codeks FrontDesk license is equal to the validity of the license of the main Codeks.

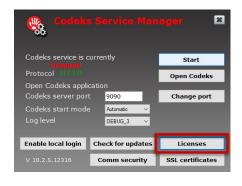
You can enter the license code for the Codeks FrontDesk add-on using the Codeks Service Manager program. Open the Codeks Service Manager by clicking the **CodeksServiceManager.exe** file located on your desktop or the folder *C:\Program Files\Codeks* (or *C:\Program Files(x86)\Codeks*).

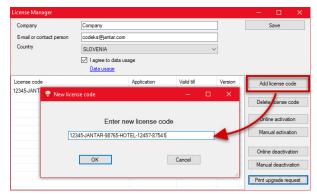
Codeks Service Manager icon:



The following picture shows the **CodeksServiceManager.exe** file in the **C:\Program Files\Codeks** folder:

- CodeksService.InstallState
  CodeksServiceManager.exe
- CodeksServiceManager.exe.config
- **1.** Before entering a new license code, **stop** the *Codeks Service* by clicking on the **Stop** button. Before continuing make sure the status of the service is **Stopped**.
- 2. Then click the **Licenses** button.
- **3.** Click the **Add license code** button and the *License Manager* window will appear. Enter the license code and click **OK** to confirm the entry.







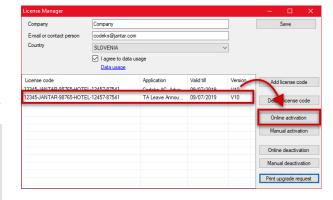
**4.** The *Codeks FrontDesk* license code will be displayed in the window.

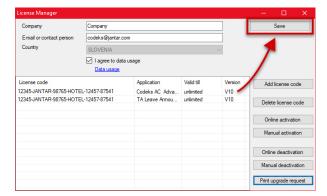
Next the entered license code must be activated. To activate it, click the **Online** activation or Manual activation button.

#### NOTE

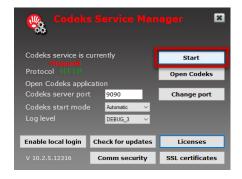
If your Codeks server does not have an internet connection, the program will display an error. In this case, you will have to activate the license code manually 11<sup>th</sup> using another device with internet access.

**5.** Finally, save the changes by clicking the **Save** button.





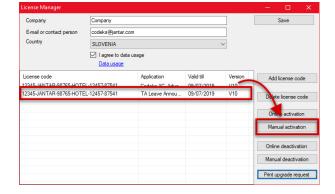
**6.** In the main window of the *Codeks Service Manager* program **restart** the Codeks Service by clicking the **Start** button.





#### MANUAL LICENSE ACTIVATION

1. Select the license code you wish to activate and click on the *Manual activation* button.



**2.** The *ManualActivationForm* window will open which contains a **Challenge code** for activating the selected license code.

#### **IMPORTANT**

Do not close this window until you enter the required Codeks activation code. If you close this window before entering the Codeks activation code you will have to repeat the manual activation process again, because a different Challenge code is generated every time you open the manual activation dialogue.

#### NOTE

If you scan the displayed OR code with your smartphone you will be **automatically redirected to the Codeks Activation Form webpage.** All the necessary information for generating the **Codeks Activation code** for the selected license code will already be entered in the form fields. **To continue just click Submit.** 

- **3.** Use your smartphone phone or any other device with internet access and go to **http://www.jantar.si/caf.html**. Here, fill in the *Codeks Activation Form* with the necessary company data and the generated *Challenge code*.
- 4. Then click Submit.



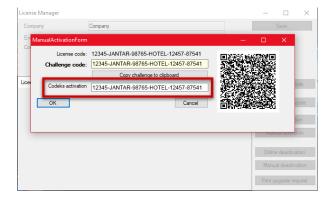




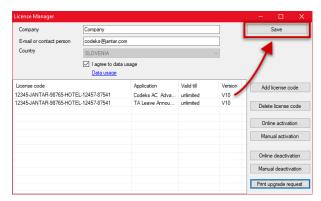
**5.** The form will then display the **Codeks Activation code** for activating the selected license code.



**6.** Enter the *Codeks activation code* into the ManualActivationForm and click **OK.** 



**7.** If activation was successful the validity of the selected license will be changed to **unlimited**.





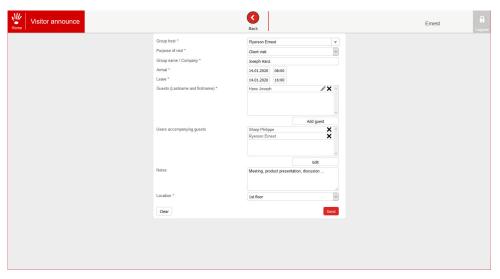
# 3 How it works

The FrontDesk add-on is designed to be used by **employees** who announce visits to guests, **heads of departments** who confirm the visitor announcements, and **receptionists** at the reception or company entry points. The add-on enables control and overview of guest announcements as well as tracking and monitoring the movements of guests throughout the company premises. The FrontDesk add-on also enables quick allocation of cards to visitors as well as issuing replacement cards to employees e.g. who have lost their original cards through the FrontDesk editor for receptionists.

#### ANNOUNCING AND CONFIRMING VISITS

When a company employee is expecting a visit, they can send a visit request announcement to his department manager by logging into Codeks using his username and password – through the new **Visitor announce** menu. The announcement of the visit contains information about the visit, which specifies the purpose and destination department, the person the guests are visiting, etc. The employee who announces a visit is usually the person responsible for accompanying guests during their visit, although, the FrontDesk add-on also allows employees to announce visits for a co-worker or to assign co-workers as additional visitors' hosts.

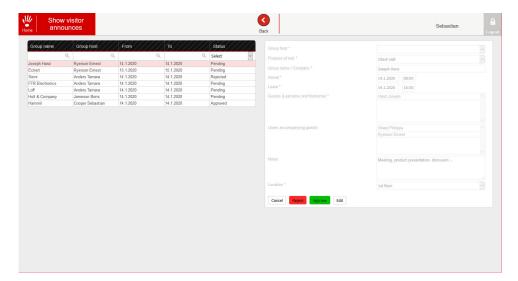
The department heads are notified of new guest announcements by email (if they have a valid email address entered in the Codeks).



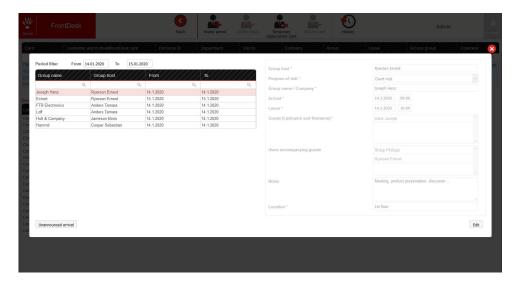
Before the visitor can enter the company, the announcement of the employee must be confirmed by their department manager. Heads of departments can access the menu for processing the visitor announcements by logging into Codeks using their username and password. In the **Show visitor announces** viewer, the department manager can review, edit, and ultimately process the requests made by employees in his department.

Employees who are either the main or additional guest hosts are also notified by email when changes to the guest announcement status are made (if they have a valid email address entered in the Codeks).





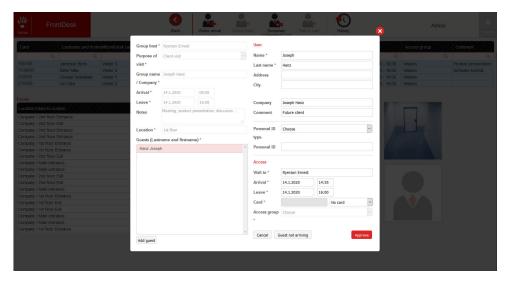
Only after the heads of departments confirm a visit announcement is the announced visit shown to the receptionists at the entry points of the companies. The receptionists can issue each individual guest identification means (cards, tags, pin codes, etc.) that allows them entry to specific parts of the company premises – according to the information given in the visit. The individually assigned identification means can later be used to track the movement of an individual visitor.





#### RECEPTOR'S WORK AT THE FRONT DESK

At the reception, the receptionist first selects whether the guest is announced or if they have come unannounced.

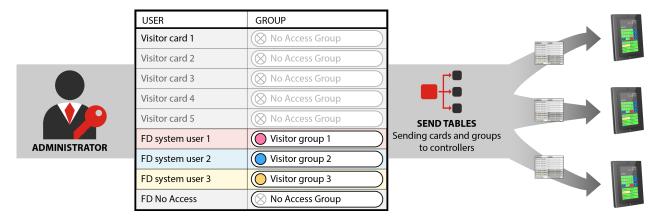


Then the receptionist can assign a card to each individual visitor, and the guest's access rights are sent to the system controllers immediately. The receptionist can assign a card to a visitor without requiring administrator rights to user data or the right to send tables to controllers.

Similarly, when a visitor is removed, a command is issued that removes the access rights of the quest.

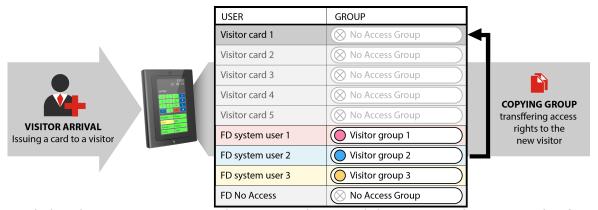
## **BACKGROUND OPERATION OF THE ADD-ON**

Al the visitor and replacement cards, as well as all visitors groups, used in the Codeks Frontdesk Add-on, must be defined in the main Codeks application before it is used by receptionists at the front desk. The necessary settings in the main Codeks application are made by a Codeks administrator, who also sends new tables to the controllers in the system. With this, all the visitor cards and possible access rights are already waiting to be used on the system's controllers. By default, all prepared visitor cards and replacement cards are assigned a group without access rights.

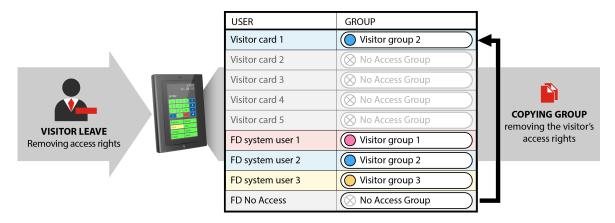




When a receptionist assigns a card to a visitor, the system issues a command to copy the access rights from the selected visitors group to the newly issued visitor card. This is executed on each controller, therefore, sending tables is not necessary.



Similarly, when a visitor is removed, a command is issued that removes the access rights from the card by reassigning the *No access group* to the visitor's card.



## Advantages of this kind of operation:

- · fast and easy issuing of cards at the front desk,
- faster system performance, because there is no need to send tables when assigning cards,
- the prepared cards for visitors cannot be misused because they do not have any access rights in their default state,
- it is possible to limit the rights that can be assigned to visitors (security-sensitive spaces can be protected because the prepared groups for visitors do not have access to them).



# 4 Settings for the FrontDesk application

The Codeks FrontDesk is an Add-on for the Codeks application and requires the appropriate setting to be set within the main application in order to operate correctly. The settings must be set by the Codeks system administrator. To enable the functionality of the Codeks FrontDesk the following setting must be prepared:

- 1. **Set the locations** where visitors can pass. In the <u>Hardware 18</u> editor, it is necessary to enable the *Location for FrontDesk* for the parent locations of *Passage* type locations where visitors will be able to pass. (These parent locations can be *Room*, *Floor*, *Building*, or *Organization* type locations that are hierarchically superior to the *Passage* type locations.)
- 2. **Edit the users' settings** in the <u>Users 20</u> editor. The Codeks FrontDesk add-on allows users to announce agreed-uppon visits and enables the heads of departments to confirm said announced visits beforehand. Therefore, users must have an assigned username and password that allows them to log in to the Codeks application. Users can also be granted different rights to confirm their own visit announcements, to receive notice of announced visits, or to participate in accompanying the guest.
- 3. **Edit the** *FrontDesk settings* in the <u>Preferences</u> 40 editor.
- 4. Ready-to-be-used **FrontDesk visitors and replacement cards** (in the <u>Users editor 24</u>) which will be later assigned to visitors.
  - When the receptionist adds a new visitor a command is issued to all controllers which change the access right group on the card issued to the visitor from the default *No access group* to the selected FrontDesk visitors group. This is done by copying the access rights from the *FD system user* (who is assigned the selected *visitor group*) to the newly issued visitor's card.
- 5. **Timetables for visitors** which define when the users will be able to pass at specific passages within the company (in the <u>Timetables editor</u> 26).
- 6. **FrontDesk visitors groups** through which the visitors are assigned access rights at specific passages (in the <u>Groups Editor</u> 29).
  - When you add a new *FrontDesk visitors group* an *FD system user* who is assigned the visitors group is automatically created. When **sending tables** all the *FD system users* (with assigned *FD visitors groups*) will be sent to controllers. The prepared visitor access rights are thus ready to be assigned to a new visitor.
- 7. **FrontDesk administrators** with appropriate administrator rights for the front desk receptionists (in the Settings -> Preferences editor[31]).
- 8. Additionally, you can also set **Functions groups** which the receptionists can manually trigger with the FrontDesk Add-on (defined in the <u>Functions Groups</u> 4 editor).

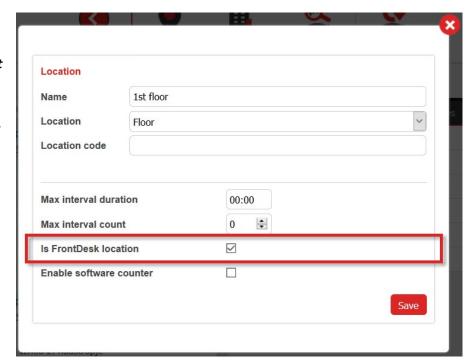
The necessary settings for enabling the Codeks FrontDesk functionality in the main Codeks application are described in more detail in the following chapters. The chapters follow the most optimal order of editing.



# 4.1 Settings for FrontDesk locations

All locations that visitors will be able to access must be marked as **being a FrontDesk location**. With this setting it is possible to limit visitors' access to specific places. It is also possible to restrict viewing rights to announced visits for receptionists at reception desks placed in different departments or locations. This way, only the visits announced for their department or location will be shown to a specific receptionist.

- 1. To define an existing location as a location where visitors are also allowed to enter, first select the desired location (an Organization, Building, Floor or Room type location) from the list of locations and double-click it. A pop-up window will open for editing the selected location
- 2. Next, find and enable the *Is FrontDesk location* setting in the lower part of the pop-up window.
- **3.** When you are done click **Save.**

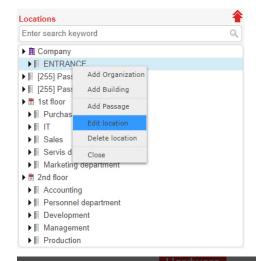




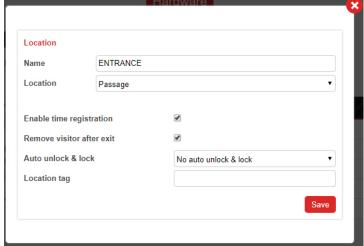
# 4.1.1 Additional settings for locations

When using the FrontDesk Add-on an additional setting is available for the *passage* type locations. The **Remove visitor after exit** setting defines that the visitors will be automatically removed from the system when departing the premises at specific passages. The visitors are stripped of access rights when they register at the controller on location.

1. To set a location where the visitors will be automatically removed from the system, first, select the desired location (passage) in the *List of locations*, right-click it, and select *Edit location*.



2. In the pop-up edit window enable the Remove visitor after exit setting and click Save.



\* In the event that an error occurs on the controller (i.e., the controller reports an error event) when a visitor is exiting the premises, the visitor can remain active even if they have already physically left the company. To avoid such situations, you can activate the *Use strict mode for Remove visitor after exit* feature, which is found in the <a href="FrontDesk preferences">FrontDesk preferences</a> and which allows the removal of a visitor regardless of a failed event on the exit controller.



# 4.2 Settings for users

The *Codeks FrontDesk* add-on enables users to announce agreed-upon visits and send a request to be confirmed by their department manager.

#### **NOTE**

Regular employees and heads of the departments differ only in the user settings they are assigned. The defining setting which usually separates heads of departments from regular users is the <u>Process visitor</u> <u>announces</u> setting which allows the selected user to confirm or deny the visitor announcements made by employees of a particular department.

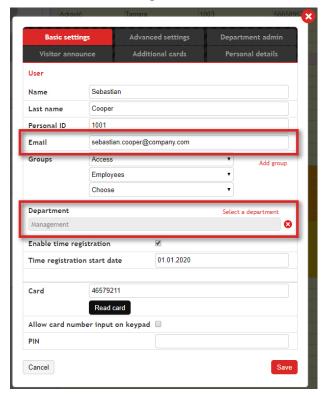
The user's setting for a regular employee or a head of department must be **set for each user individually**. To open the user's settings pop-up window in the *Users editor*, first, find and **double-click the desired user on the** *List of all users:* 

## A) Settings in the Basic settings tab

The rights of the heads of departments and all regular employees are defined based on the company's departmental hierarchy. This is why it is important for each head of department and all regular employees to be **assigned to the proper department** within the company.

Also, the Codeks system can only notify the heads of departments and users about visitor announcements by e-mail, if they have a **valid e-mail address entered** in their user's settings.

- **1.** In the *Basic settings* tab:
  - enter the Email address for the user and
  - select the **proper department** for the user.
- 2. When you are finished click Save.



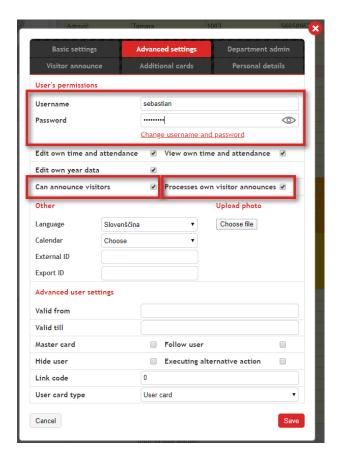


## B) Settings in the Advanced settings tab

In order for users to be able to log in to the Codeks application, they must be **assigned user credentials** (username and password) for logging in to the Codeks application. The username and password can be set in the *Advanced settings*.

In addition to the user login access settings, the **basic rights to announce visits** and **confirm their own visitor announcements** can also be set in this tab.

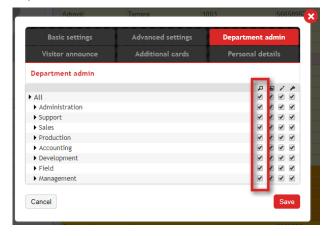
- **1.** In the *Advanced settings* tab, enter a **username** and **password** for the current user which will allow him user access to the Codeks application.
- **2.** In order to allow the user to announce visitors, enable the *Can announce visits* setting.
- **3.** \* In order to allow the user to confirm their own visitor announcements enable the **Processes own visitor announcements** setting.
- **4.** When you are finished click **Save**.





#### C) Settings in the Department admin tab

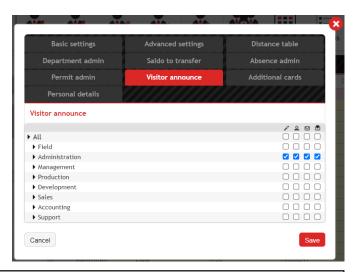
If the user will be able to announce a visit for a co-worker (as if the main host of the visit is one of his coworkers) you must enable the **View time and attendance** right in the *Department admin* tab for all the departments of the co-workers for which he will be allowed to announce visits.



#### D) Settings in the Visitor announce tab

In the *Visitor announce* tab, the rights of the heads of departments for processing visitor announcements are defined.

1. In the Absence admin tab, you grant or limit the rights of users to be notified about visitor announcements, process visitor announcements, and also to be assigned as an additional host of the visit. The rights are defined at the department level, so to assign a right, add a checkmark in the appropriate box:



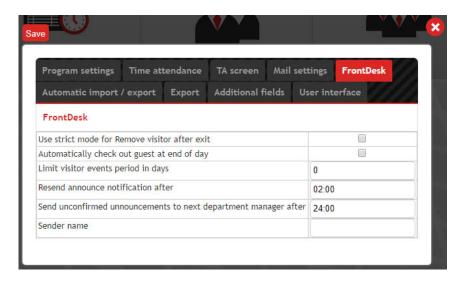
Setting	Description
* * Process visitor announces	If this setting is enabled the user can process (confirm or deny) the visitor announcement for all announces made by users from the selected department. * You would usually enable this settings for heads of departments.
User accompanying guests	If this setting is enabled for any department the user can be picked by a coworkers fro that department to act as an additional host of the visit.
Request announcement notification	If this setting is enabled, the user will be notified by email of new guest announcements announced by users in the selected department.
Process announcement notification	If this setting is enabled, the user will be notified by email about changes in the status of guest announcements announced by users in the selected department.

2. When you are finished click Save.



# 4.3 FrontDesk preferences

Some advanced functions of the FrontDesk add-on can be set in the FrontDesk tab of the Preferences menu.



FrontDesk	
Use strict mode for Remove visitor after exit	If the setting is enabled the application will only remove the Front Desk visitor from the system if his exit event was registered correctly. The visitor will not be removed if the exit event was registered as an error. (The setting only affects locations, which have the <i>Remove visitor after exit</i> setting enabled in the Hardware editor.)
Automatically check out guest at end of day	If this setting is enabled the system will automatically check out all still active visitors (i.e. revoke their access rights) at the end of the day.
Limit visitor events period in days	The setting limits the age of events that can still be displayed in the list of events in the Codeks FrontDesk Add-on.  In the settings field, enter the age of the events (in days) that can be displayed in the list of events and in visitor reports. The default value of the setting is 0, which means that events are not limited.
Resend announce notification after	This setting defines how many hours after the first notification, about a guest notification in need of processing, a second notification is sent to the same head of the department.
Send unconfirmed announcements to next department manager after	This setting defines after how many hours of inactivity of the first department manager a new notification will be sent to the next head of department in the chain of command (i.e. according to the <i>Company organization</i> hierarchy).
Sender name	The name of the sender as it will be displayed when sending guest announcement notifications (e.g. FrontDesk GUEST ANNOUNCEMENT).



# 4.4 Adding visitor and replacement cards

Cards that the receptionist will issue to visitors or users with the *Codeks FrontDesk* Add-on must be entered in the Codeks system beforehand. **Visitor cards** and **replacement cards** are added as a special type of user in the *User* editor.

1. To add a **visitor card** or a **replacement card**, first, select the **Add user** icon in the toolbar of the *Users* editor.



**2.** A pop-up window will open where you can *enter* the necessary data and set the appropriate setting for a new user.

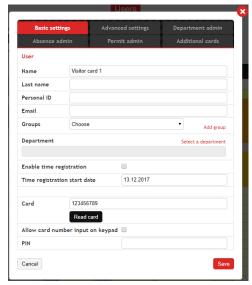
Enter a name for the **card** and **enter a number code** in the *Card* section of the window. You can read more about different ways of entering the card's number in the documentation of the main Codeks application (CodeksManual-en.pdf).

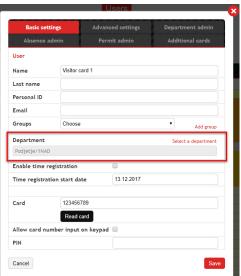
3.\* Additionally, you can set a department for the card. This setting allows you to limit which cards can be assigned to a specific location or which cards can be assigned by a particular receptionist. Receptionist, who are defined as administrators in the Codeks system, may have limited rights to issue visitors or replacement cards depending on locations

#### **ATTENTION**

and departments.

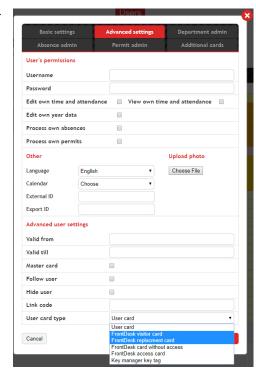
If the company's receptionists have limited rights to assign visitor's cards depending on the department, it is also necessary to assign departments to the prepared cards in order for the Codeks FrontDesk Add-on to work correctly.







- **4.** Next, in the *Advanced settings* tab, set the *User card type* to **FrontDesk visitors card** or **FrontDesk replacement card**.
- 5. Click Save.





# 4.5 Timetables for visitors

Visitor timetables in the Codeks program defines the time when visitors will be able to pass at specific locations. To define *visitor* the timetables type *Only access timetables* is usually used.

# 4.5.1 Adding a timetable

1. To add a new timetable click the **Add timetable** icon in the *Timetables* editor.



2. In the new pop-up window enter the name of the new timetable.

It is advised that a suitably descriptive and distinguishing name be assigned to the new timetable.



- **3.** Select the **Only access timetable** type.
- **4.** Save the newly added timetable by clicking the **Save** button. The new timetable will be added to the *List* of timetables.

You can read more about timetables and time intervals in the user manual of the main Codeks application (CodeksManual-en.pdf).

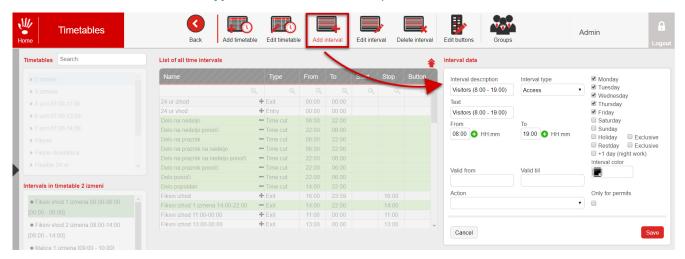
In the next step, you must add time intervals to the newly added timetable.



## 4.5.2 Adding new time intervals

**1.** To add a new interval, click the **Add interval** icon in the upper menu of the *Timetables* editor. This will enable the interval editor window on the left side of the editor.

2. Select the Access interval type and enter the necessary data in the interval editor window.

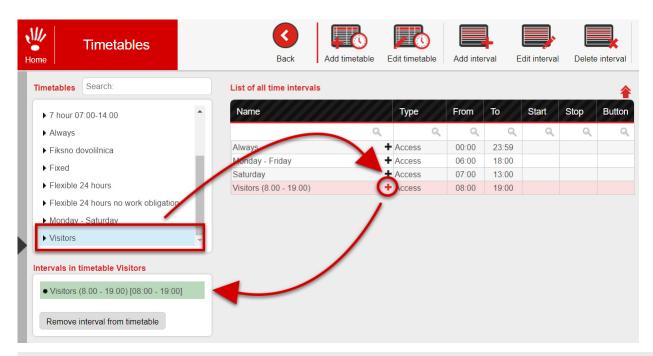


3. Save the entered data by clicking the Save button.

The newly added time interval will be added to the *List of all intervals*, however, the interval is not yet assigned to any timetable.

- **4.** To add a time interval to a selected timetable, first, mark the timetable you wish to assign the time interval to in the *List of timetables*. The selected timetable will color *blue*.
- **5.** Then locate the interval you wish to assign in the *List of all intervals* and click on the + (plus) icon next to the interval's name. When the time interval is successfully added to the timetable it will color *green*.





#### **ATTENTION!**

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.

You can read more about specific time intervals in the user manual of the main Codeks application (CodeksManual-en.pdf).



# 4.6 Access groups for visitors

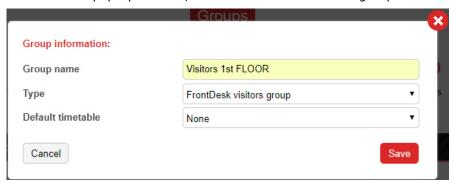
Visitors are assigned access rights at specific locations through specially defined *Visitors groups*. *FrontDesk visitors groups* are used to define access groups for visitors.

## 4.6.1 Adding a group

1. To add a new visitor group select the **Add group** icon in the upper menu of the *Groups* editor.



2. In the new pop-up window, enter the name of the new group.



**3.** Select the **FrontDesk visitors group** type and select the default *timetable for visitors*.

## 4. Click Save.

The new group will be displayed in the *List of groups*, and, simultaneously, a *FrontDesk system user* for the group will be automatically created and displayed in the *Users* editor. When **sending tables** the *FD system user (with the assigned FD visitors group)* will be sent to controllers. When the receptionist adds a new visitor a command is issued to all controllers which changes the access right group on the card issued to the visitor from the default *No access group* to the selected FrontDesk visitors group.



# 4.6.2 Adding access rights

To enable a visitors group to be able pass at specific passages, enable the appropriate passages in the *Groups* editor and assign a timetable that defines when the visitors will be able to use the passages.

- **1.** To add access rights to a specific visitors group mark the selected **FrontDesk visitors group** in the *List of groups* in the *Groups* editor. The selected group will color *blue*
- **2.** Enable access to a specific passage for the group by **adding a checkmark** next to the name of the passage in the *List of passages*.



- 3. Next, select a timetable, which defines when the visitors will be able to pass at the selected passages.
- 4. When you are done editing, save the changes by clicking Save.



# 4.7 Adding FrontDesk administrators

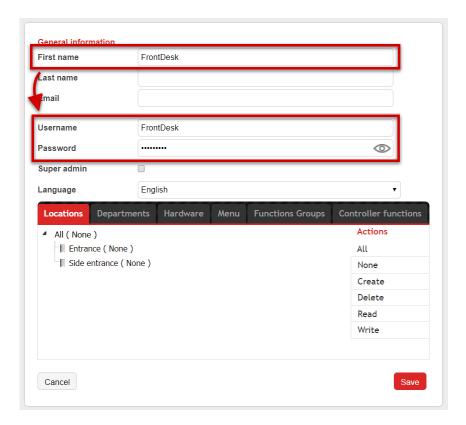
In the *Administrators* editor, you can add and edit Codeks system administrators and manage the rights of administrators. For a receptionist, it is necessary to **create a FrontDesk administrator** who has the right to use the Codeks FrontDesk Add-on.

1. To add a new administrator click the Add administrator icon in the toolbar.



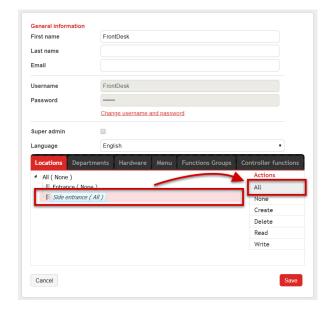
2. The window for editing the administrator rights will be enabled.

Enter the name of the new FrontDesk administrator and assign a unique username and password.





- **3.** In the lower part of the window, you can assign specific rights to the administrator according to the location, departments, hardware, and menus. For a FrontDesk administrator:
- in the *Locations tab, assign all action rights* for all locations, for which the receptionist will be able to assign access rights. Adding rights to locations also enables the receptionist to see events that visitors and users register on enabled locations in the Table of events in the FrontDesk editor.

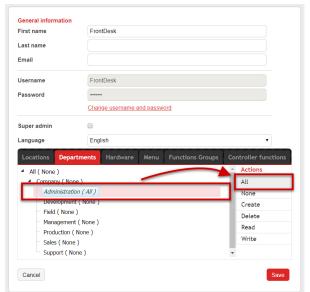


rights to the receptionist for all departments, for which the receptionist will be able to assign access rights. This setting allows you to limit which cards can be assigned at a specific location or which cards can be assigned by a particular receptionist. Receptionists can have different rights to assign visitors cards and replacement cards depending on the location or department. By assigning rights to specific departments, you also allow the administrator to see the employees in these departments, who can be issued replacement cards.

#### **ATTENTION**

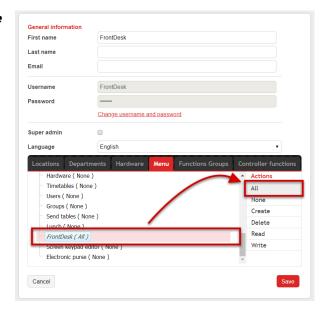
If the company's receptionists have limited rights to assign visitor's cards depending on the department, it is also necessary to assign departments to the prepared cards in order for the Codeks FrontDesk Add-on to work correctly.

Otherwise, a receptionist with limited administrator rights will not be able to assign cards to visitors and users.





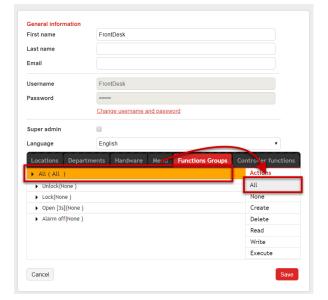
- in the *Menu tab, assign all action rights for the FrontDesk Add-on.* This will allow the receptionist to log in to FrontDesk as a FrontDesk administrator.



- in the Functions Groups tab, assign all action rights to enable the receptionist to use the function group buttons.

**4.** Click **Save** when you are done editing to save the new administrator.

The new administrator will be added to the *List of administrators* on the left.

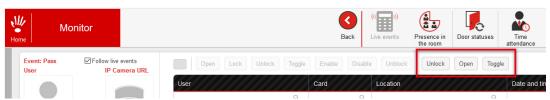




# 4.8 \* Settings for functions groups

**Function groups** are preset **actions** which can be manually triggered by an administrator or receptionist. They they can be accessed through additional buttons displayed in the *Monitor* and the *FrontDesk* editor.

## Function groups buttons in the Monitor



## Function groups buttons in the FrontDesk editor



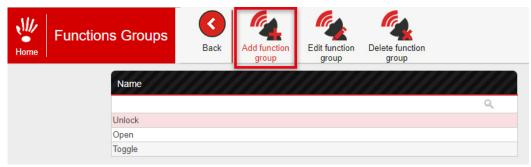
**Function groups** can be created in the *Functions groups* editor which can be accessed through the *Settings* submenu.



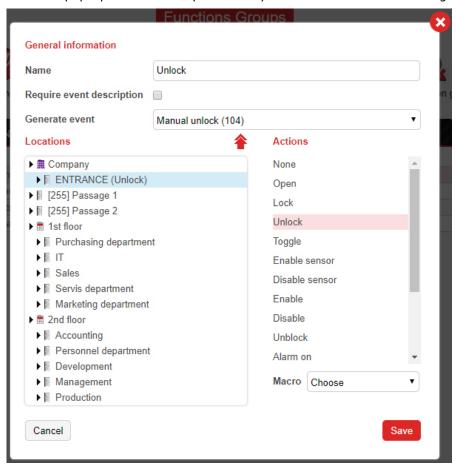


# 4.8.1 Add function group

1. To add a new function group select the **Add function group** icon in the *Functions Groups* editor.



2. A new pop-up window will open where you can set the desired settings for the new function group.



Name	The name of the function group, which will also serve as the name of the button for manually triggering the function group in the <i>Monitor</i> and <i>FrontDesk</i> editor. The name should be as short as possible, jet still sufficiently descriptive.
Require event description	If the field is enabled, the administrator or receptionist, who triggers the function group must enter a comment, before the triggered actions can be executed.
Generate event	The event that will be recorded and displayed in the <i>table of events</i> (in the <i>Monitor</i> and <i>FrontDesk</i> editor) when the function group is triggered.
Locations	List of locations.  ATTENTION! the actions can only be executed at passages with connected controllers.



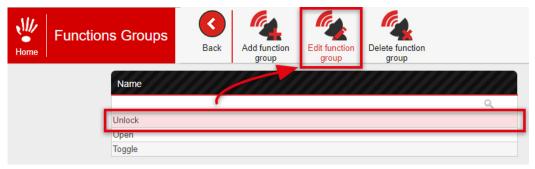
Name	The name of the function group, which will also serve as the name of the button for manually triggering the function group in the <i>Monitor</i> and <i>FrontDesk</i> editor. The name should be as short as possible, jet still sufficiently descriptive.
Actions	List of actions which can be performed at passages with connected controllers.
Macro	List of macros which can be performed a passages instead of a single action.

- **3.** The set name of the function group will be displayed on the function group button in the *Monitor* or *FrontDesk* editor.
- 4. Select the locations where the new function group will be triggered, and select the action to be performed from the list of actions on the right.
- 5. Also, select what kind of event will be recorded when the function group will be triggered.
- **6.** When you are done editing, save the changes by clicking **Save.**

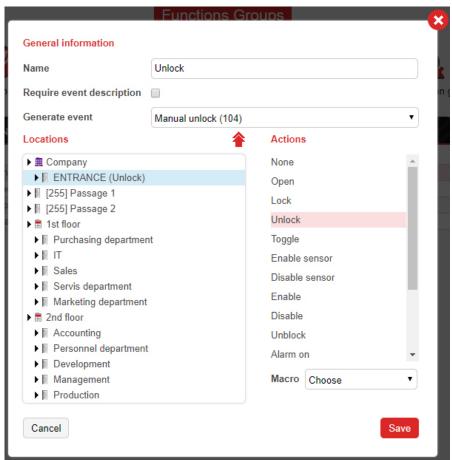


## 4.8.2 Edit function group

**1.** To edit a function group mark the selected function group and click on the **Edit function group** icon in the *Functions groups* editor or **double-click the selected function group**.



2. A new pop-up window will open where you can edit the settings of the function group.

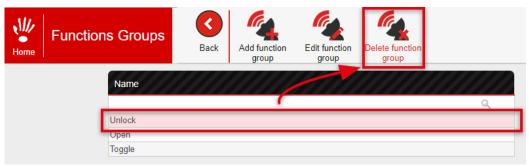


3. When you are done editing, save the changes by clicking Save.



## 4.8.3 Delete function group

**1.** To delete a function group mark the selected function group and select the **Delete function group** icon in the *Functions Groups* editor.



**2.** The browser will **request confirmation of the deletion of the function group**. After you confirm the deletion of the function group, the function group will be removed from the list.



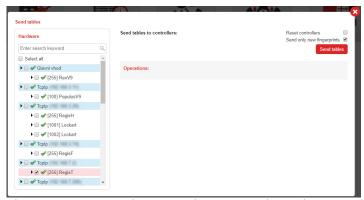
### 4.9 Send tables

Za implementacijo vnesenih urnikov, skupin, uporabnikov in administratorjev za Front Desk je potrebno s funkcijo **Pošlji tabele** ustreznim kontrolerjem posredovati shranjene podatke.

**1.** To send tables to controllers click the **Send tables** button in the *Main menu*. A new window will open where you can select the appropriate controllers.

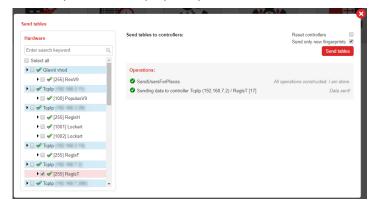


- 2. Select all the controllers to which you want to send tables from the List of controllers on the left.
- 3. Then click the **Send tables** button.



The process can take several minutes depending on the number of controllers and the speed of the connection.

**4.** The system will display a report in the window when the process is finished.





# 5 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.



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 <u>Visitor announce</u> 44 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



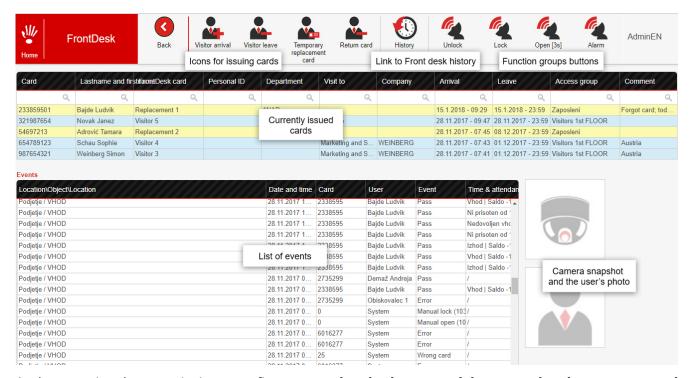
When a head of department confirms a visitor announcement, that announcement can be displayed in the FrontDesk viewer designed for receptionists at the company's entry points.

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.

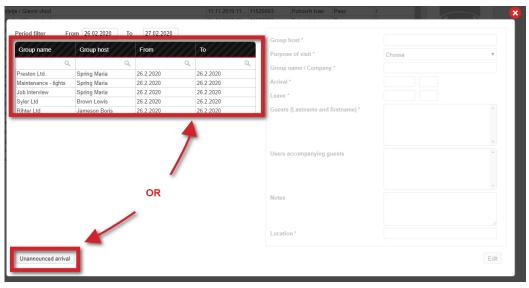


#### THE FRONTDESK VIEWER

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.



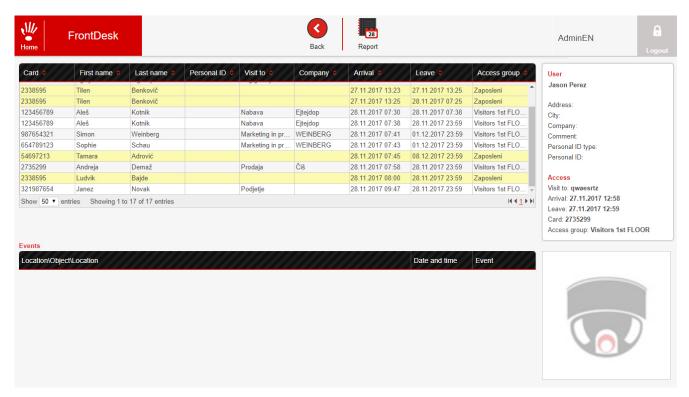
Then the **receptionist can assign a card to each individual visitor**, and the guest's access rights are sent to the system controllers immediately.



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 <u>Functions groups</u> (34) 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 <u>Administrators</u> (31) 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.



# 5.1 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.

## 5.1.1 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.



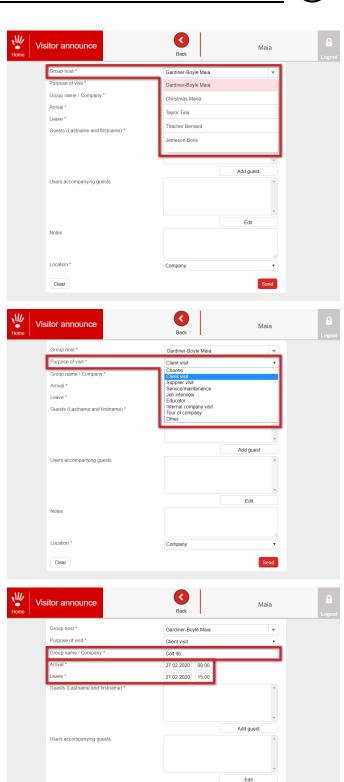


2. If you are allowed to make visitor announcements for your coworkers, first, in the *Group host* drop-down select the appropriate person to be the host of the visit.

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*.

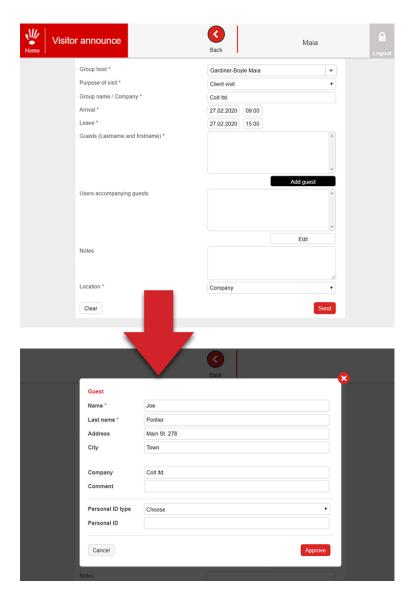
4. Next, fill in the *Group Name / Company* in the announcement form and specify the date and time of arrival and the day and time of departure.



Location \*



- **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.





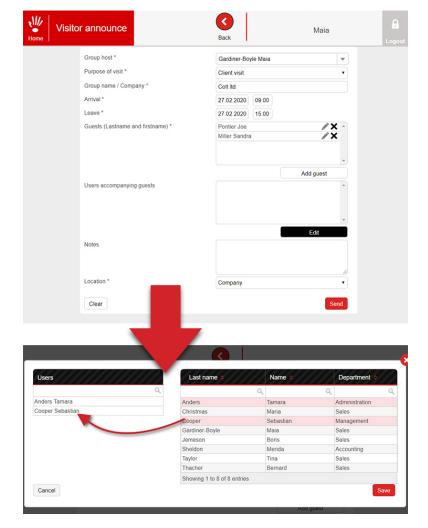
- **6.** In the *Users accompanying guests* section, you can select co-workers from your department or from another department who will also be invited to attend as additional hosts of the visit.
  - **6.1.** Click the *Edit* button to add an additional host.
  - **6.2.** A new window will open where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

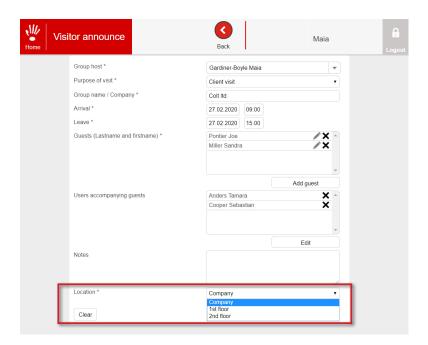
Selected colleagues will appear in the list on the left.

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

6.3. Click Save when you're done.



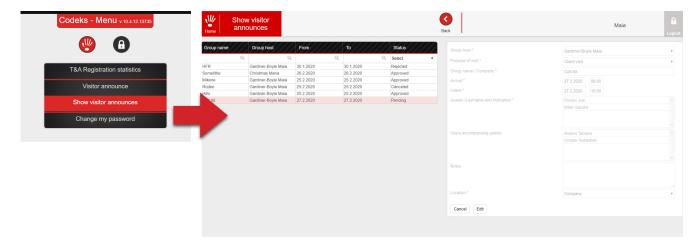
- **7.** You can write additional instructions or comments in the **Notes** section.
- **8.** In the *Location* section, select the company location where the visitor is invited. (This information is important for issuing access cards later.)
- **9.** When you have finished entering the information,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





### 5.1.2 Show visitor announces

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



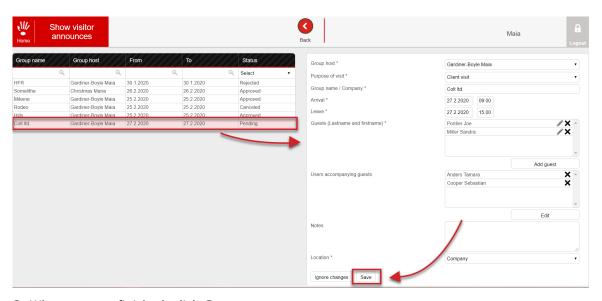
In the same editor, they can also subsequently correct or cancel the announcement.

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.



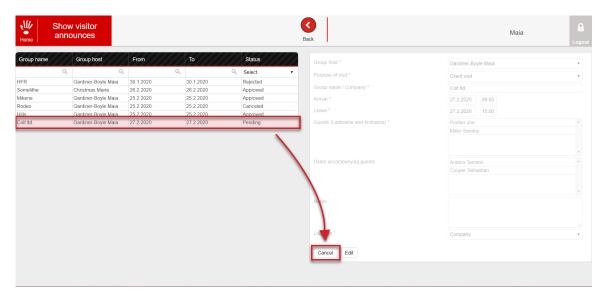
2. When you are finished, click Save.



### **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.





# 5.2 Department manager's reply

The following chapters describe the use of user access menus.

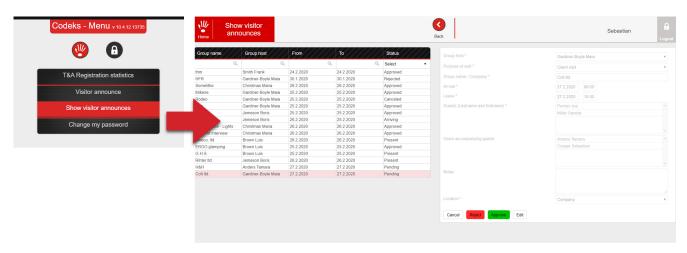
Heads of departments who can confirm or reject visitor announcements can access the menus for *processing* their employees visitor announcements using their users' access username and password.



The following chapters describe the use of user access menus.

## **5.2.1 Processing announcements**

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



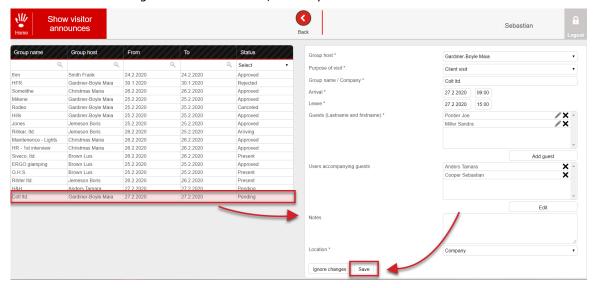
In this same editor, the heads of departments can subsequently edit the visitor announcement before confirming it or they can deny it.



#### **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.

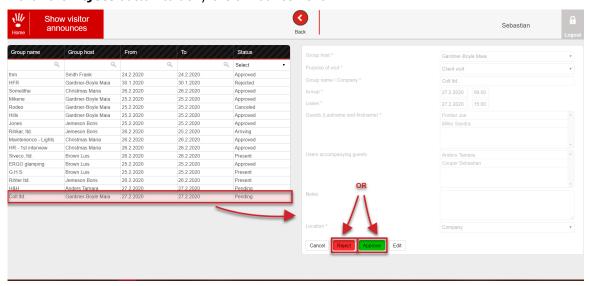
This will enable the right side of the editor, where you can edit the data about the visitor announcement.



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.



## 5.3 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.

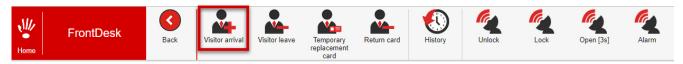


The following chapters show work in the Codeks FrontDesk viewer.

## 5.3.1 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.

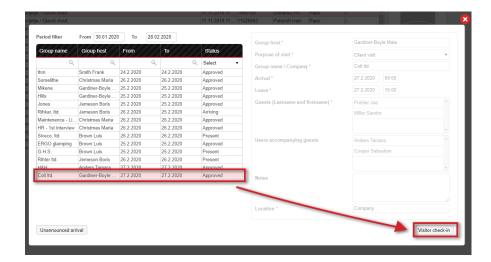
**1.** To **issue a visitor card to an announced visitor select the** *Visitor arrival* **icon in the toolbar of the FrontDesk editor.** 



**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.



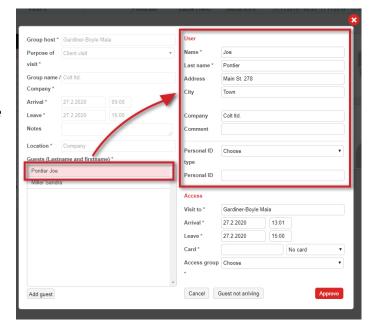
3. To check-in a guest, who was previously announced by a visitor announcement, double click the announcement or mark the announcement on the list and, then, click the Visitor check-in button.



**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,





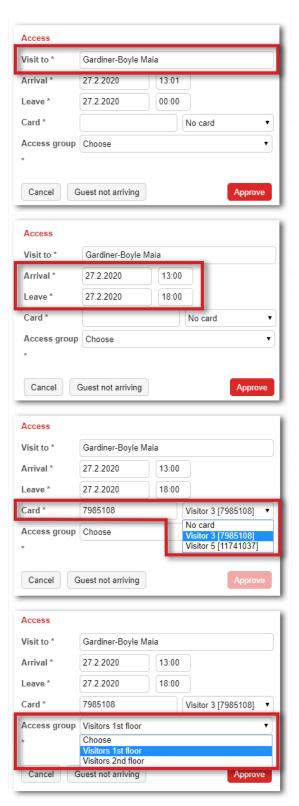
- c) then, in the Access section:
  - check (or change) the host of the visit in the *Visit to* field,

- 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,

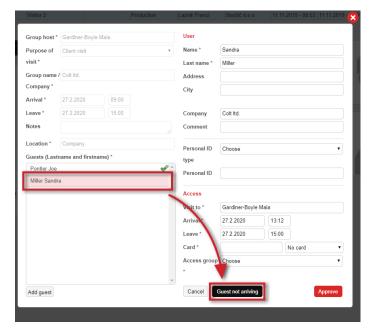
- assign the Access group.

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).

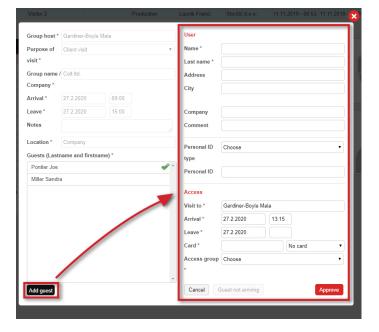




4.2. If the guest does not (will not) arrive, mark the guest in the *Guests (Lastname and first name)* section and click the *Guest not arriving* button.



- 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.





## 5.3.2 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.

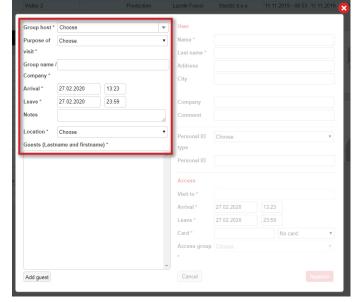


**2.** A new window will open, showing the visitor announcements for the selected date range on the left.

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:



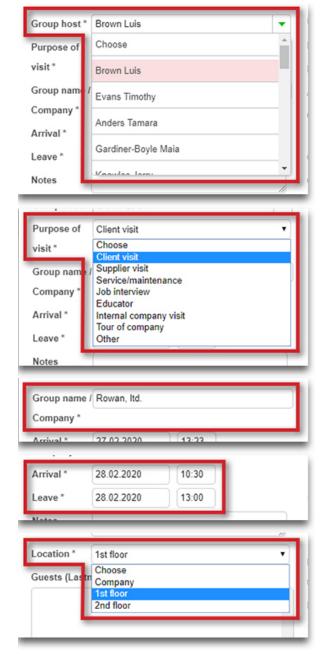


**a)** first, select the appropriate employee for the *Group host*,

b) then select the Purpose of visit,

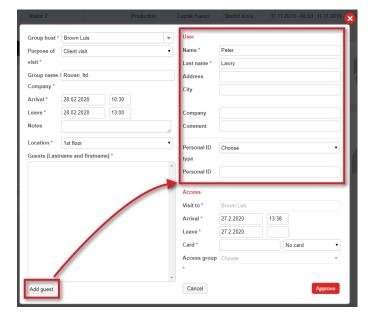
c) fill in the Group Name / Company in the announcement form and specify the date and time of arrival and the day and time of departure,

**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,

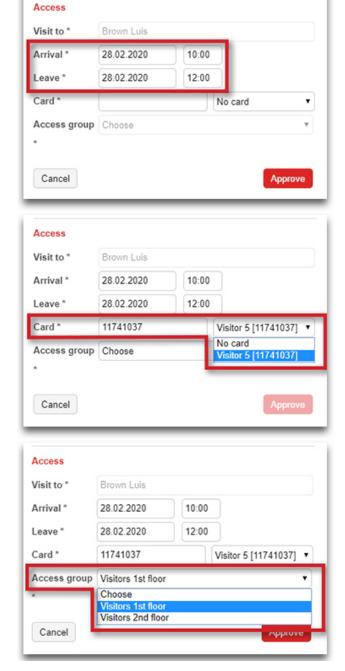




- c) then, in the Access section:
  - set the Arrival and Leave date and time, which limit when the visitor will be able to access your company premises,

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

- assign the Access group.



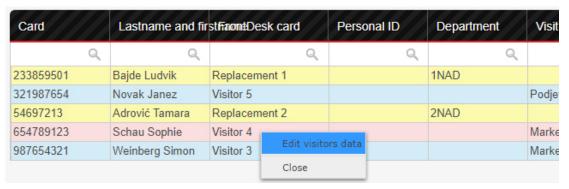
- d) click *Approve*. This will check-in the guest into the system (a command will be sent to the controllers that will assign appropriate access rights to the assigned card).
- **6.** When you are done checking-in guests close the pop-up window.



## 5.3.3 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.

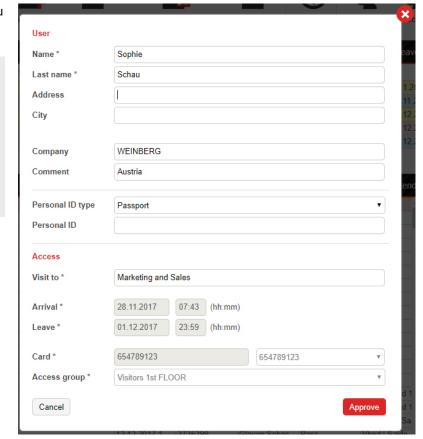


**2.** A pop-up window will open, where you can edit and enter new visitor's data.

#### **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**.





## 5.3.4 Issuing a replacement card

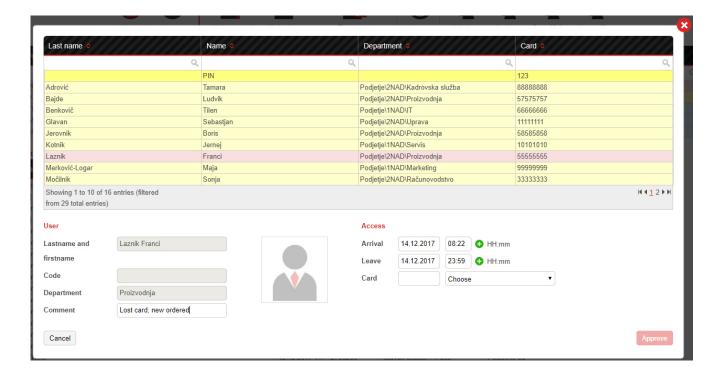
The cards that the receptionist will issue to visitors or users using Codeks FrontDesk must be entered in the Codeks system beforehand. When the receptionist issues a replacement card, he will only change the rights of an existing card by assigning it a new group, and, thus, granting it access rights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



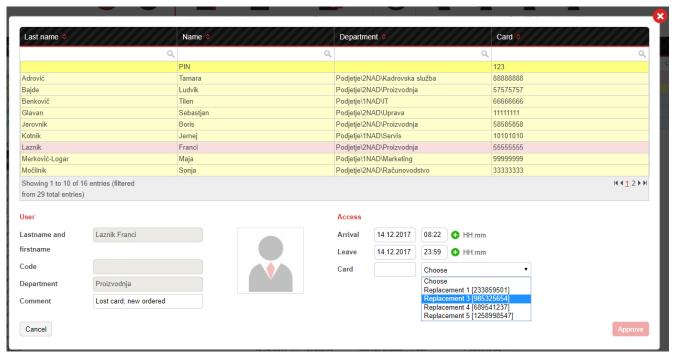
2. A pop-up window will open, where you can select the appropriate user.

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.



## 5.3.5 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.



### 5.3.6 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.