

Codeks TA Leave Announces Add-on

Instructions for users

for Codeks software version 10.2110.0.15840 and newer



Codeks TA Leave Announces Add-on user manual

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February 2023 in Naklo



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1 Codeks TA Leave Announces

Codeks TA Leave Announces is an add-on for the Codeks TA or Codeks TA Kit software for time and attendance.

Codeks TA Leave Announces enables users to send absence announcements to their department managers, and enables the department managers to confirm or reject the request for absence.

NOTE

This manual contains only the description and installation instruction for the Codeks TA Leave Announces 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 TA Leave Announces 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 TA Leave Announces 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 utilized 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

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2 How the Codeks TA Leave Announces work

The Codeks TA Leave Announces enables users to send absence or presence announcements to their department managers and enables the department managers to confirm or reject the request.

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

2.1 Absence announcement

1. step - USER'S ABSENCE REQUEST



The user can announce his absence in the <u>Announce absence</u> 10 menu. Users will be able to announce leave and old leave days only if they are assigned the appropriate number of leave days in the *Time attendance* editor.

Users can also announce other types of absences that may be defined in the Codeks application as user statistics that indicate absences. These type of statistics do not have a day limit (like the leave or old leave statistics), so no additional settings are required for their use.

The system then sends the user's absence request either to:

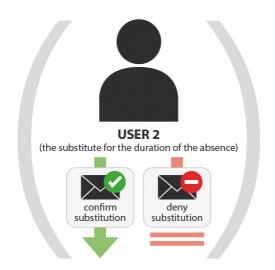
- a) the corresponding department manager or,
- b) first, to the coworker, which the user has marked to substitute them during their absence.

The user can check the absence announcement and its status in the *Absence announce status* 11th menu.

In this same menu, the user also has the option to cancel the announcement afterward. However, the cancellation is only possible until the head of the department confirms or rejects it.



* 2. step - REPLACEMENT CONFIRMATION



This step is only necessary if a replacement is required for the employee announcing their absence. In this case, the employee's announcement will first be sent to the coworker who has been designated (by the employee) to replace the employee during their absence. The designated coworker will be able to view the absence announcement with a replacement request in the <u>Pending absence</u> announces 12 menu.

If the coworker confirms the replacement, the request for absence will be forwarded to the head of the department, who has the final say.

If the coworker does not confirm the request, the absence request will be denied and canceled, and the user who announced it will be notified about this.

3. step - DEPARTMENT MANAGER'S REPLY



The department managers can view the absence announcements of the users in their departments in the *Pending absence announces* menu, which they can access using their username and password.

NOTE

The department manager can confirm or reject the pending users' absence announcements in the *Pending absence announces* menu. In order for the department managers to be able to process absence announcements, they must be granted appropriate rights through their user settings.

When the department manager confirms a user's absence announcement, the user is automatically assigned the announced daily statistic in his time attendance.

NOTE

Employees, and substitutions, as well as department managers, can be notified about the status and any changes concerning the absence announcement via e-mail, but only if they have a valid e-mail address entered in their users' settings.



2.2 Presence announcement

1. step - USER'S PRESENCE REQUEST



USER 1 (the employee requesting presence)



The user can announce e.g. work from home in the Announce presence 4 menu.

The system then sends the user's presence request to the corresponding department manager.

The user can check the presence announcement and its status in the *Presence announce status* ²⁵ menu.

In this same menu, the user also has the option to cancel the announcement afterward. However, the cancellation is only possible until the head of the department confirms or rejects it.

2. step - DEPARTMENT MANAGER'S REPLY



The department managers can view the presence announcements of the users in their departments in the *Pending presence announces* menu, which they can access using their username and password.

NOTE

The department manager can confirm or reject the pending users' presence announcements in the *Pending presence announces* menu. In order for the department managers to be able to process presence announcements, they must be granted appropriate rights through their user settings.

When the department manager confirms a user's presence announcement, the user is automatically assigned the announced daily statistic in his time attendance.

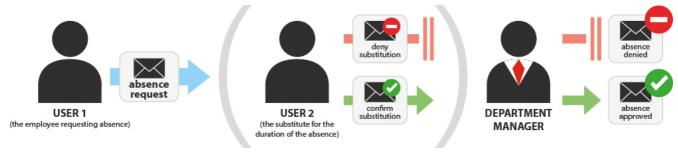
NOTE

Employees and department managers can be notified about the status and any changes concerning the presence announcement via e-mail, but only if they have a valid email address entered in their users' settings.



3 Using Leave Announces

The user sends an absence announcement request. The user's announcement can then be sent directly to the head of the user's department or, if the replacement function is enabled, first to the co-worker the user has designated to act as a replacement for them. In this case, the absence announcement is forwarded to the head of the department only after the co-worker has confirmed the replacement. Finally, the head of department confirms or denies the absence request.



3.1 User's request

The employees 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

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

9

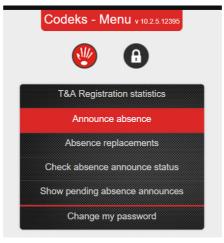


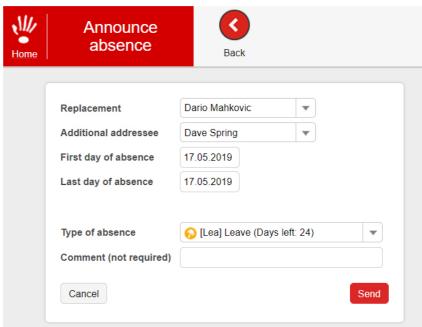
3.1.1 Absence announcements

 To announce your absence, select the *Announce absence* in the menu.

This will open the *menu for absence* announcing.

- 2. In the announcement form, first, set the first and last day of absence. To announce a single day of absence, enter the same date in both fields.
- 3. Then, select the type of absence you wish to announce.
- 4.* Optionally, you can enter a comment or a short message, which will be displayed to your department manager.



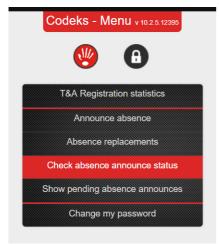


- 5.* If the replacement setting is enabled for your department, an additional field *Replacement* will be displayed, where you can select a co-worker who will substitute you in your absence.
- 6.* If more than one department manager can process absence requests for your department, the *Additional addressee* field will be displayed where you can select the addressee to whom your request will be sent.
- 7. When you finish entering information for the absence announcement, click Send.



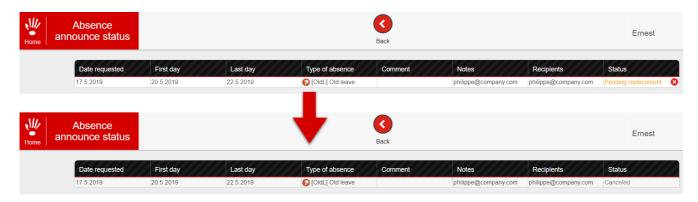
3.1.2 Overview of pending absence announcements and canceling announcements

Users can monitor the status of their absence announcements in the Absence announce status menu.



In the *Check absence announce status* menu you can also cancel a request for absence. User can cancel his announcement even when it has already been confirmed by the head of the department. If it is required for the head of the department to approve cancellation of announcement, this must be set in the settings.

- 1. To cancel your pending absence announcement, click on the cancel icon ().
- 2. The status of the announcement will be immediately changed to *Canceled*, and your announcement will also be removed from the *Pending absence announces* menu of your department manager (or co-worker designated for replacement).



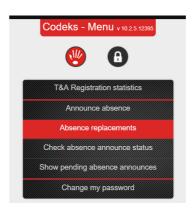


3.1.3 * Confirming replacement requests

After an employee announces their absence with a replacement, their request is first sent to the co-worker who they appointed to replace them. The appointed co-worker must first confirm, that they agree with the replacement, in the *Absence replacements* menu, only then is the absence request (of the original employee) forwarded to the head of the department.

1. To process the replacement requests of a coworker, select the *Absence replacements* in the main menu.

This will open the *menu for processing absence announcements*.



2. The list in the menu will display all absence requests of your co-workers where you are listed as the replacement in their absence, and which are still pending to be processed.

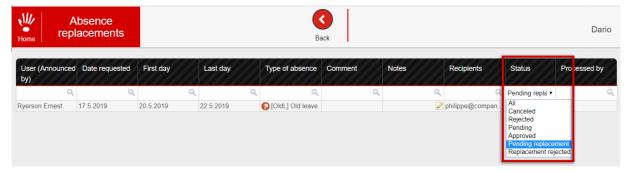


To confirm a replacement request click the confirm icon (🍑). To reject a replacement request click the reject icon (😑).

- 3.* Optionally, you can add a note or comment before processing an replacement request. To add a note to an absence announcement click the icon. A new pop-up window will open where you can enter your comment.
- 4. After confirming or rejecting a replacement request the announcement will immediately be removed from the list.

If the user who has announced the absence has a valid e-mail address, he will receive a notification about the change of the status of his absence announcement.

5. The menu also allows you to filter the display of replacement requests according to their status. This enables you to review the history of confirmed, canceled or denied replacement requests.





3.2 Department manager's reply

The 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

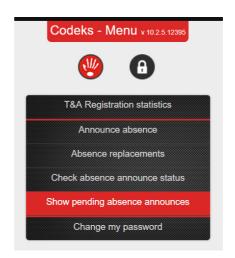
The following chapters describe the use of *user access* menus for department managers.



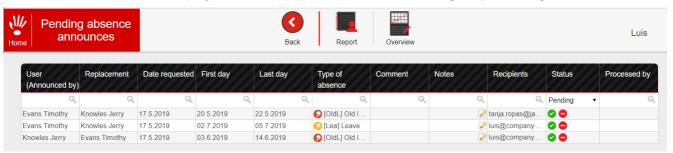
3.2.1 Processing announcements

1. To process the absence requests, select the *Pending absence announces* in the main menu.

This will open the *menu for processing absence announcements*.



2. The list in the menu will display all absence announcements still waiting for processing.



To confirm an absence announcement click the confirm icon (\checkmark) .

To reject an absence announcement click the reject icon ().

NOTE

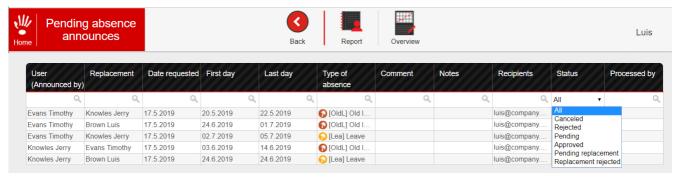
If manual corrections have already been made on the days affected by the absence announcement of absence and the *Confirmation action* setting is set to *None*, a pop-up window will appear when confirming the announcement, where you can choose how it should affect the employee's time registration. You can choose between actions:

- Skip manual changes (default like the absence announcement system worked before) if you select this option, the system will skip the days with manual corrections (and thus keep them in their original state) and set the daily absence only to days without manual corrections.
- Overwrite manual changes if you select this option, the system will keep manual corrections and change only daily statistics on the days affected by the absence announcement.
- Reset manual changes if you select this option, manual corrections on the days covered by the absence announcement will be deleted and the period will be recalculated without manual corrections.
- 3.* Optionally, you can add a note or comment before processing an absence announcement. To add a note to an absence announcement click the icon. A new pop-up window will open where you can enter your comment.
- 4. After confirming or rejecting an absence announcement the announcement will immediately be removed from the *pending announcements* list.

If the user who has announced the absence has a valid e-mail address, he will receive a notification about the change of the status of his absence announcement.



5. The menu also allows you to filter the display of absence announcements according to their status. This enables you to review the history of confirmed, canceled or denied absence announcements.





3.2.2 Absence announcement for another user

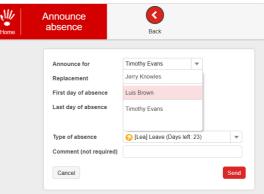
Department managers can also be allowed to announce absences for other users. The department managers can only announce absences for departments for which they have the right to *request announcements for others*.

1. To announce absence for another user select the *Announce absence* in the main menu.

This will open the menu for absence announcing.

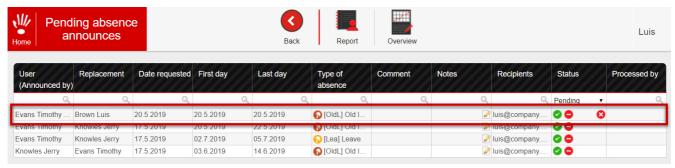


- 2. In the announcement form, first, select the user for whom you wish to announce absence (setting *Announce for*).
- 3. Then, set the first and last day of absence, and select the type of absence.
- 4.* Optionally, you can change the addressee, appoint a replacement or enter a comment.



- 5. When you finish entering information for the absence announcement, click Send.

 If the user for whom the absence was announced has a valid e-mail address, he will receive a notification about the announced absence.
- 6. The announced absence for another user will be displayed in the *Pending absence announces* menu, where you can also cancel any absence announcements you have announced for other users.





3.2.3 Report

In the *Pending absence announces* menu you can export the currently displayed data in the form of a report.

- 1. First, display the data you wish to export in the menu.
- 2. Then, click the *Report* icon.



3. A new pop-up window will appear, where you can select the report file format.



You can choose between file formats: *Portable document format (.pdf), Excel Worksheet (.xls), Excel Worksheet (.xlsx), Open document spreadsheet (.ods)* and *Comma separated values (.csv)*.

4. Click Use to display the report.



3.3 Overview

You can access the *Absence overview* by clicking on the *Absence overview* menu in the main menu of the user access or by clicking the Overview icon, located in the *Show pending absence announces* menu, opens a viewer where you can display weekly overviews of all confirmed absence announcements, for all departments for which you have granted View announcement rights.

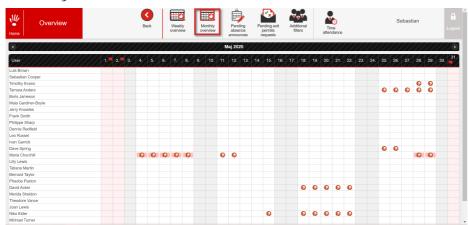


In the *Overview* viewer you can choose between the weekly or monthly overview by clicking on the corresponding icon.

- Weekly overview



- Monthly overview





Additional filtering options enable you to hide users without absence announcements and also hide unconfirmed absence announcements.

- Hide users without announcements



Unconfirmed announcements are colored red in the Overview.

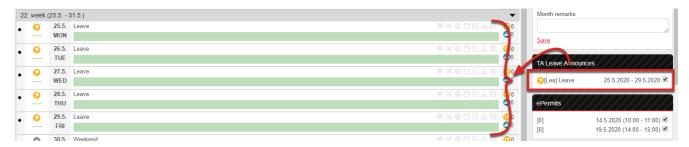
- Hide unconfirmed announcements





3.4 Editing leave announcements in Time attendance

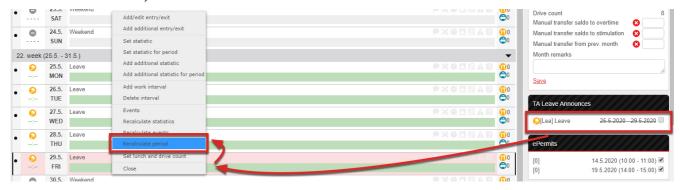
Heads of departments and administrators, who are granted rights to edit the time and attendance of users, can manage the confirmed user absence announcements by enabling or revoking the absence announcements and thus influence whether they are taken into account when recalculating the time registration or not.



1. In the *Time attendance* editor, the absence announcements that have been recorded for the user in the selected period are displayed in the *TA Leave Announcements* section on the right.

To revoke the registered absence announcements in the time registration, uncheck the box next to the appropriate absence announcement record.

2. Then select the *Recalculate period* function from the right-click menu on the day (if you do not have manual corrections entered on the day, you can also use the *Recalculate events* function, which overrides all manual corrections).



3. In the new window, select the period you want to recalculate.





4. In the time registration, the events will now be changed so that the absence announcement is no longer taken into account.

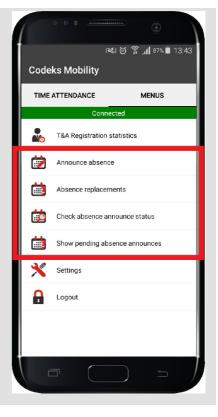




3.5 Leave announcements in the Codeks Mobility mobile app

Users can also place and manage absence announcements in the *Codeks Mobility* mobile application.

You can read more about the Codeks Mobility mobile application in the application documentation, which is available on our download pages (https://jantar.si/pdf/Codeks Mobility EN Instructions for USERS.pdf).



4 Using Presence Announces

The user sends a presence announcement request. The head of department confirms or denies the presence request.



4.1 User's request

The employees 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

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



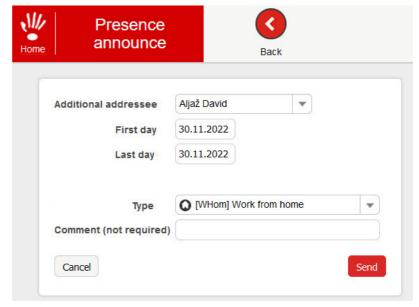
4.1.1 Presence announcements

1. To announce your presence, select the *Presence* a *nnounce* in the menu.

This will open the *menu for presence* announcing.

- In the announcement form, first, set the first and last day of presence.
 To announce a single day of presence, enter the same date in both fields.
- 3. Then, select the type of presence you wish to announce.
- 4.* Optionally, you can enter a comment or a short message, which will be displayed to your department manager.





- 5.* If more than one department manager can process presence requests for your department, the *Additional addressee* field will be displayed where you can select the addressee to whom your request will be sent.
- 6. When you finish entering information for the presence announcement, click Send.



4.1.2 Overview of pending presence announcements and canceling announcements

Users can monitor the status of their presence announcements in the Presence announce status menu.



In the *Check absence announce status* menu you can also cancel a request for absence. User can cancel his announcement even when it has already been confirmed by the head of the department. If it is required for the head of the department to approve cancellation of announcement, this must be set in the settings.

- 1. To cancel your pending presence announcement, click on the cancel icon ().
- 2. The status of the announcement will be immediately changed to *Canceled*, and your announcement will also be removed from the *Pending presence announces* menu of your department manager.





4.2 Department manager's reply

The 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

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



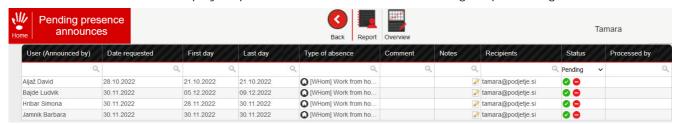
4.2.1 Processing presence announcements

1. To process the presence requests, select the *Pending presence announces* in the main menu.

This will open the *menu for processing presence* announcements.



2. The list in the menu will display all presence announcements still waiting for processing.



To confirm a presence announcement click the confirm icon ().



NOTE

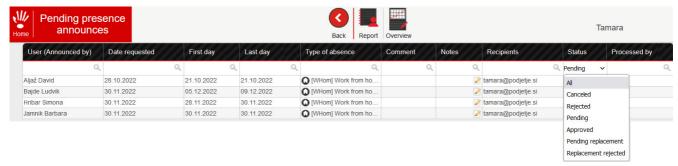
If manual corrections have already been made on the days affected by the presence announcement and the *Confirmation action* setting is set to *None*, a pop-up window will appear when confirming the announcement, where you can choose how it should affect the employee's time registration. You can choose between actions:

- Skip manual changes (default like the presence announcement system worked before) if you select this option, the system will skip the days with manual corrections (and thus keep them in their original state) and set the daily presence only to days without manual corrections.
- Overwrite manual changes if you select this option, the system will keep manual corrections and change only daily statistics on the days affected by the presence announcement.
- Reset manual changes if you select this option, manual corrections on the days covered by the presence announcement will be deleted and the period will be recalculated without manual corrections.
- 3.* Optionally, you can add a note or comment before processing a presence announcement. To add a note to a presence announcement click the icon. A new pop-up window will open where you can enter your comment.
- 4. After confirming or rejecting a presence announcement the announcement will immediately be removed from the *pending announcements* list.

If the user who has announced the presence has a valid e-mail address, he will receive a notification about the change of the status of his presence announcement.



5. The menu also allows you to filter the display of presence announcements according to their status. This enables you to review the history of confirmed, canceled or denied presence announcements.



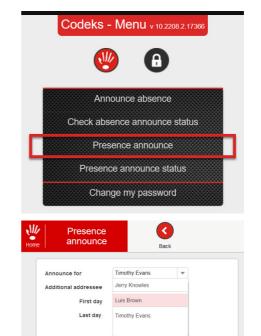


4.2.2 Presence announcement for another user

Department managers can also be allowed to announce presences for other users. The department managers can only announce presences for departments for which they have the right to *request* announcements for others.

1. To announce presence for another user select the *Presence announce* in the main menu.

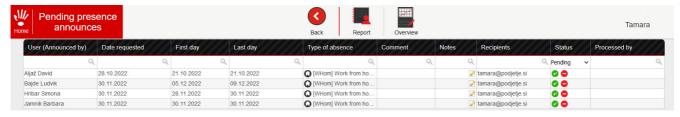
This will open the menu for presence announcing.



Type (WHom) Work from home

- 2. In the announcement form, first, select the user for whom you wish to announce presence (setting *Announce for*).
- 3. Then, set the first and last day of presence, and select the type of presence.
- 4.* Optionally, you can change the addressee, appoint a replacement or enter a comment.
- 5. When you finish entering information for the presence announcement, click Send. If the user for whom the presence was announced has a valid e-mail address, he will receive a notification about the announced presence.
- 6. The announced presence for another user will be displayed in the *Pending presence announces* menu, where you can also cancel any presence announcements you have announced for other users.

Cancel





4.2.3 Report

In the *Pending presence announces* menu you can export the currently displayed data in the form of a report.

- 1. First, display the data you wish to export in the menu.
- 2. Then, click the *Report* icon.



3. A new pop-up window will appear, where you can select the report file format.



You can choose between file formats: *Portable document format (.pdf), Excel Worksheet (.xls), Excel Worksheet (.xlsx), Open document spreadsheet (.ods)* and *Comma separated values (.csv)*.

4. Click Use to display the report.



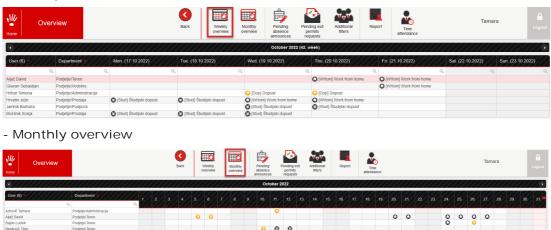
4.3 Overview

You can access the *Presence overview* by clicking the Overview icon located in the *Pending presence* announces menu. This opens a viewer where you can display weekly overviews of all confirmed presence announcements, for all departments for which you have granted View announcement rights.



In the *Overview* viewer you can choose between the weekly or monthly overview by clicking on the corresponding icon.

- Weekly overview



Additional filtering options enable you to hide users without presence announcements and also hide unconfirmed presence announcements.





4.4 Editing presence announcements in Time attendance

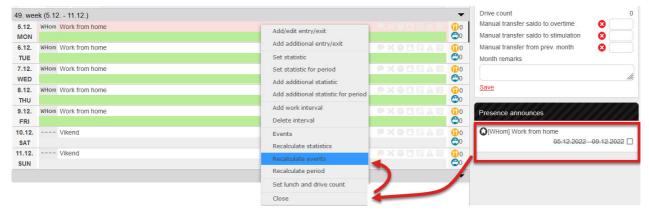
Heads of departments and administrators, who are granted rights to edit the time and attendance of users, can manage the confirmed user presence announcements by enabling or revoking the presence announcements and thus influence whether they are taken into account when recalculating the time registration or not.



1. In the *Time attendance* editor, the presence announcements that have been recorded for the user in the selected period are displayed in the *TA Leave Announcements* section on the right.

To revoke the registered presence announcements in the time registration, uncheck the box next to the appropriate presence announcement record.

2. Then select the *Recalculate period* function from the right-click menu on the day (if you do not have manual corrections entered on the day, you can also use the *Recalculate events* function, which overrides all manual corrections).



3. In the new window, select the period you want to recalculate.





4. In the time registration, the events will now be changed so that the presence announcement is no longer taken into account.



