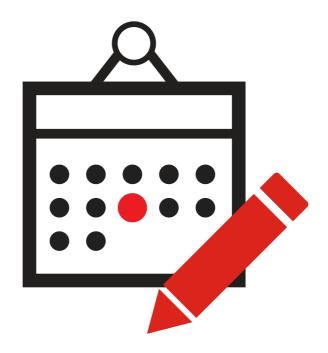


Codeks TA Leave Announces Add-on

for Codeks software version 10.2110.0.15840 and newer



Codeks TA Leave Announces Add-on user manual

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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.

1.1 Licence information

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Codeks TA Leave Announces 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 TA Leave Announces are exclusively owned by the author, Jantar d.o.o..
- You may not use, copy, emulate, clone, rent, lease, sell, modify, decompile, disassemble, otherwise reverse engineer, or transfer the licensed program, or any subset of the licensed program, except as stated in this agreement. Any such unauthorized use shall result in immediate and automatic termination of this license and may result in criminal and/or civil prosecution.
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- Codeks is distributed "as is". No warranty of any kind is expressed or implied. You use the Codeks
 oftware at your own risk. Neither the author nor his authorized 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
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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

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.

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

For support contact our regional partner: https://jantar.si/en/contact/our-partners/



2 Description and installation instructions

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 Codeks TA Leave announces software package:

- the add-on license code, which enables and activates components of the Codeks TA Leave announces within the main Codeks application.
- the user manual for the Codeks TA Leave announces.



2.1 System requirements

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

- a computer installed with the 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 4.8,
- a minimum of 4 GB of RAM and 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,
- · internet access,
- Edge, Firefox or Chrome web browser updated to the latest official version,

 (We do not guarantee the proper functioning of the Codeks application if you are using a different browser or older browser versions.)
- installed Codeks 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 the License Code

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

You can enter the license code for the Codeks TA Leave Announces 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: IProgram Files | Codeks* (or *C: IProgram Files | (x86) | Codeks*).

Codeks Service Manager icon:



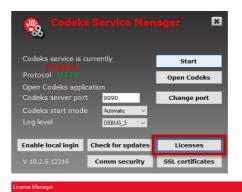
The following picture shows the CodeksServiceManager.exe file in the *C:\Program Files\Codeks* folder:

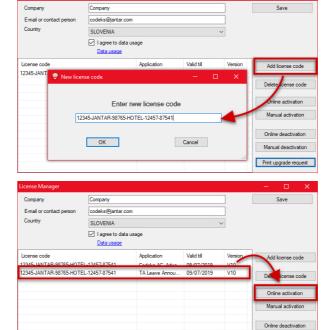
- CodeksService.InstallState
 CodeksServiceManager.exe
 CodeksServiceManager.exe.config
- 1. Before entering a new license code, stop the *Codeks Service* by clicking on the Stop button. Before continuing make sure the status of the service is Stopped.
- 2. Then click the Licenses button.
- 3. Click 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 TA Leave announces* 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 10¹ button.



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 10 using another device with internet access.

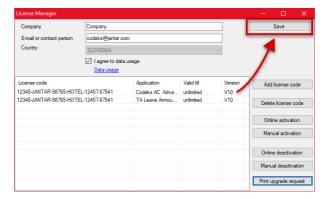




Manual deactivation



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.

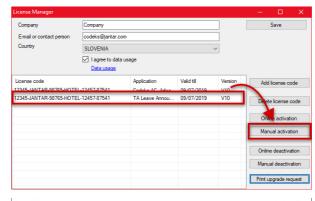
IMPORTANT

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.

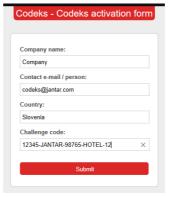
NOTE

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.







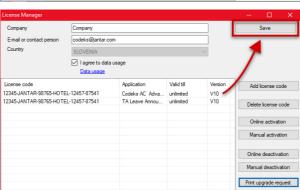




6. Enter the *Codeks activation code* into the ManualActivationForm and click OK.



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





3 How 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.

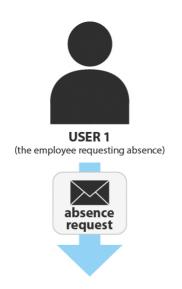


Link to the user login form:

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

3.1 Absence announcement

1. step - USER'S ABSENCE REQUEST



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

Users can also announce other types of absences that may be defined in the Codeks application as <u>user statistics that indicate</u> <u>absences</u> ²¹. 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:

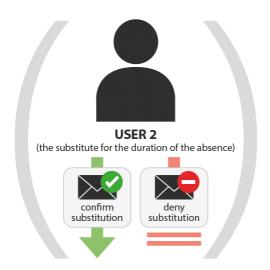
- a) the corresponding department manager or,
- b) first, to the coworker, which the user has marked to substitute them during their absence.

The user can check the absence announcement and its status in the Absence announce status 44 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 46 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 29h.

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 1314 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.



3.2 Presence announcement

1. step - USER'S PRESENCE REQUEST



(the employee requesting presence)



The user can announce e.g. work from home in the <u>Announce</u> presence 584 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** 59 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 <u>access using their username and password as their username and password</u> sentences.

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 <u>granted appropriate rights</u>

40 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.



4 Settings in the Codeks application

The Codeks TA Leave Announces is an add-on for the main Codeks application, so it is necessary to make sure that the settings within the basic Codeks application are properly set before use. The necessary settings in the main Codeks application must be prepared by a Codeks administrator. It is necessary to prepare:

- 1. E-mail settings and general settings for absence or presence announcements in the *Preferences* menu of the main Codeks application.
- 2. Statistics for absence or presence (in the <u>Statistics</u> 20 editor).
- 3. Settings of each individual user, which enable regular users to announce their absence or presence and department managers to process absence or presence requests.

The necessary settings for enabling the Codeks TA Leave Announces 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 Mail settings and Leave announces settings

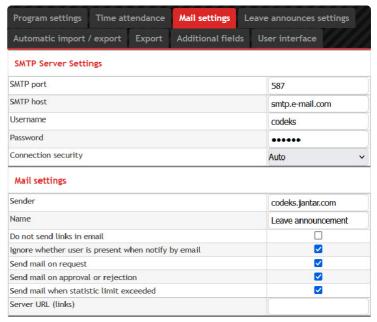
In order to enable the functionality of the add-on, you must set the Mail settings, Leave announces settings and Presence announces settings tabs of the *Preferences* editor in the main Codeks application. The following chapters contain descriptions of all settings in the tabs mentioned above.

4.1.1 Mail settings

In the *Email settings* tab, you can set up a connection with your email provider. These settings will allow the Codeks application to send e-mails with the users' requests to their department manager.

NOTE

The SMTP server settings allow you to connect to your email provider. You can get data for establishing a connection from your IT administrator or e-mail provider (internet provider).



SMTP Server Settings	
SMTP port	SMTP port
SMTP host	SMTP host
Username	Username
Password	Password
Connection security	 This setting provides a way of specifying the SSL and/or TLS encryption that should be used for the connection to the SMTP server for sending electronic notifications via the Codeks system. You can choose between several options for secure connection: None - No SSL or TLS encryption should be used. Auto (default) - Allow the service to decide which SSL or TLS options to use. If the server does not support SSL or TLS, then the connection will continue without any encryption. SsIOnConnect - The connection should use SSL or TLS encryption immediately. StartTls - Elevates the connection to use TLS encryption immediately after reading the greeting and capabilities of the server. If the server does not support the STARTTLS extension, then the connection will fail. StartTlsWhenAvailable - Elevates the connection to use TLS encryption immediately after reading the greeting and capabilities of the server, but only if the server supports the STARTTLS extension.
Mail settings	
Sender	The e-mail address all emails will be sent from. The e-mail address must really exist and must be prepared for use.
Name	The name of the sender.
Do not send links in email	If the setting is enabled, the sent e-mails will not contain any hyperlinks (e.g. link to editing leave announces). If the setting is not enabled, the e-mails will contain hyperlinks.

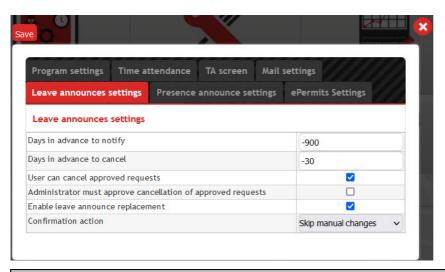


Ignore whether user is present when notify by email	If the setting is enabled, the application will not take into account the presence of the department managers when sending e-mail notifications. The e-mail notification will be sent to all e-mail recipients. If the setting is not enabled, the application will take the absence of department managers into account when sending e-mail notifications. If the department manager is not present the system looks for the next deputy in command following the organization hierarchy. If none of the department managers and deputies are present, the system sends e-mail notifications to all the e-mail recipients.
Send mail on request	If the setting is enabled an e-mail notification will be sent to the department manager when a user sends a request for leave. If the setting is not enabled, no e-mail notification shall be sent.
Send mail on approval or rejection	If the setting is enabled the user, who announced a leave request, will be sent an e-mail notification about the confirmation or rejection of this request. If the setting is not enabled, no e-mail notification shall be sent.
Send mail when statistic limit exceeded	If the setting is enabled the department manager will be sent an e-mail notification when a user exceeds a set statistic limit. If the setting is not enabled the department manager will not be sent an e-mail notification, when a user exceeds a set statistic limit.
Server URL (links)	The URL address of the server where the Codeks software is installed and where the Codeks service is currently running. The default value is localhost (the local computer). * This setting only needs to be set, if you are using a safe communication connection with encrypted data transfer between the clients (users) and server (HTTPS and SSL certificates). Example of a server URL: https://www.example.com/



4.1.2 Leave announces settings

In the *Leave announces settings* you can set how many days in advance users have to announce their absence.

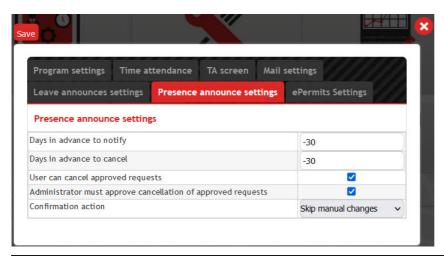


Leave announces settings	
Days in advance to notify	Sets at least how many days in advance the users must announce their leave. Using this setting, you can also enable absence announcements for the past, e.g. to enable absence announcements for up to 30 days in the past enter the value -30 in the field.
Days in advance to cancel	Sets at least how many days in advance the users can cancel their leave. Using this setting, you can also enable absence announcements for the past, e.g. to enable absence announcements for up to 30 days in the past enter the value -30 in the field.
User can cancel approved requests	If this setting is enabled, the user can cancel an already approved announcement.
Administrator must approve cancellation of approved requests	If this setting is enabled, user's canceled announcement must also be approved by the administrator.
Enable leave announce replacement	If this setting is enabled, users will have to name a replacement (coworker) when announcing their absence. Their absence announcement will then first be sent to their replacement who can confirm or reject the replacement. Only if and when the coworker agrees to be the replacement, the user's absence announcement is also sent to the head of the department who has the final say to confirm or deny the absence as well as the replacement.
Confirmation action	 This setting determines what action should be performed when department heads confirm an absence announcement for days on which manual corrections have already been made. You can choose between actions: None - if you select this option, department heads will see a pop-up window in which they will be able to choose what action should be performed when confirming absence announcements for days that already have manual corrections. 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.



4.1.3 Presence announces settings

In the *Presence announces settings* you can set how many days in advance users have to announce their presence.



Leave announces settings	
Days in advance to notify	Sets at least how many days in advance the users must announce their leave. Using this setting, you can also enable presence announcements for the past, e.g. to enable presence announcements for up to 30 days in the past enter the value -30 in the field.
Days in advance to cancel	Sets at least how many days in advance the users can cancel their announcement. Using this setting, you can also enable absence announcements for the past, e.g. to enable absence announcements for up to 30 days in the past enter the value -30 in the field.
User can cancel approved requests	If this setting is enabled, the user can cancel an already approved announcement.
Administrator must approve cancellation of approved requests	If this setting is enabled, user's canceled announcement must also be approved by the administrator.
Confirmation action	 This setting determines what action should be performed when department heads confirm a presence announcement for days on which manual corrections have already been made. You can choose between actions: None - if you select this option, department heads will see a pop-up window in which they will be able to choose what action should be performed when confirming presence announcements for days that already have manual corrections. 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.



4.2 Statistics for leave announces

In the Codeks application, statistics are used to describe the type of work hours the employees of the company are clocking in, and differentiate between different types of absences from work. Statistics are used to categorize the recorded work hours of employees in order to prepare them for further data processing in different payroll programs.

We recommend thorough and careful consideration of the specific needs of your company before setting the statistics. When planning the statistics needed it is essential to consider the company policy on work hours, the timetable settings in the Codeks application and the use of different types of absences (or payroll programs) in the company.

You can read more about setting and using statistics in the documentation of the main Codeks application.

The Codeks TA Leave Announces add-on uses statistics for period that categorize the type of the day and mark (usually) all-day absences. By default the add-on uses *system statistics Leave* and *Old leave* to mark days when users use their *leave* or *old leave days*. These statistics enable the correct count of *leave* and *old leave days* still available to the user. In order for the users to be able to use the *Leave* and *Old leave* statistics, they must be assigned the number of leave and old leave days in the *Time attendance* editor. The Codeks system administrators can add new *user's statistics*, which record different absences from work, depending on the company's needs.

NOTE

New user's statistics that record absences must have the *This statistic indicates absence* setting enabled in order to enable users to select it when announcing their absence using the Codeks TA Leave Announces add-on.

NOTE

New user's statistics that record presence must have the *This statistic indicates presence* setting enabled in order to enable users to select it when announcing their presence using the Codeks TA Leave Announces add-on.

You can read more about adding and editing statistics in the following chapters.



4.2.1 Add statistic

1. To add a new statistic, click the *Add statistic* icon.



This will enable the edit field on the right.Enter a (unique) name for the statistic and set the desired settings for the new statistic.

You must also enable the *additional setting for counting hours* This statistic indicates <u>absence</u>, which will enable users to select this statistic when announcing their absence.

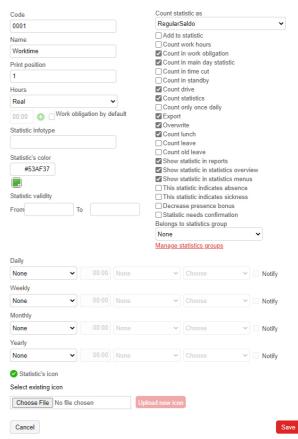
NOTE

For the statistics that subtract the user's leave and old leave days the settings *Count leave* and *Count old leave*, respectively, must be enabled.

You must also enable the *additional setting for counting hours* This statistic indicates <u>presence</u>, which will enable users to select this statistic when announcing their presence.

You can read more about individual settings for statistics in the documentation of the main Codeks application (https://jantar.si/pdf/CodeksManual-en_V10.pdf).

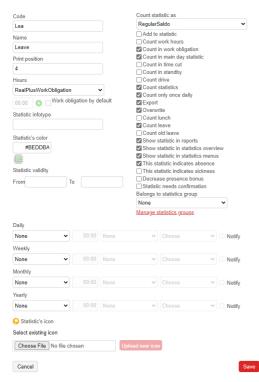
3. When you are done editing settings, click the Save button.





4.2.2 Examples of statistics for leave announces

LEAVE DAYS STATISTIC



The Leave days statistic is used to record days when users are on vacation.

This statistic has the *Hours* setting set to RealPlusWorkObligation which means that it will record the number of hours equal to the set daily work obligation but any actual clocked in work hours will also be added to the day (e.g. if the user came to work during his vacation).

The statistic also has the following additional settings enabled:

- Count in work obligation defines that the work hours recorded by this statistic are used to cover the user's defined daily work obligation.
- Count in main day statistic defines that the work hours recorded by this statistic will also be recorded in the statistic of the main daily interval.
- Count statistics enables the repetitions of the statistics to be counted.
- Count only once daily enables only one repetition of the statistic to be recorded per day, regardless of the actual number of repetitions. This setting must be used in combination with the *Count statistic setting*.
- Export enables the statistic to be displayed in the statistic exports in the *Time attendance* editor.
- Overwrite enables this statistic to be overwritten by another statistic.
- Count leave defines that the work hours recorded by this statistic are counted as used leave days.
- Show statistic in reports enables the statistic to be displayed in reports in the Time attendance editor.
- Show statistic in statistic overview enables the statistic to be displayed in the Statistic overview section in the Time attendance editor.
- Show statistic in statistics menus enables the statistic to be displayed and selected in the menu lists for setting statistics.
- This statistic indicates absence enables the statistic to be selected when announcing absences (*Codeks TA Leave Announces*).

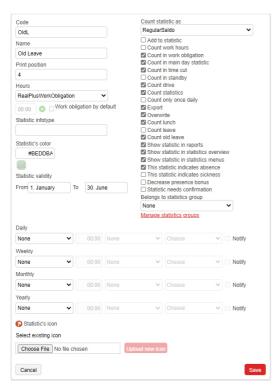
The use of the statistic in the Time attendance editor:

This statistic is usually manually added in the Time attendance editor using the *Set statistic* or *Set statistic for period* functions. It is marked with a yellow icon and records a number of hours equal to the defined daily work obligation.





OLD LEAVE DAYS STATISTIC



The Old leave days statistic is used to record days when users are using their old leave days.

This statistic has the *Hours* setting set to RealPlusWorkObligation which means that it will record the number of hours equal to the set daily work obligation but any actual clocked in work hours will also be added to the day (e.g. if the user came to work during their vacation).

The statistic also has the following additional settings enabled:

- Count in work obligation defines that the work hours recorded by this statistic are used to cover the user's defined daily work obligation.
- Count in main day statistic defines that the work hours recorded by this statistic will also be recorded in the statistic of the main daily interval.
- Count statistics enables the repetitions of the statistics to be counted.
- Count only once daily enables only one repetition of the statistic to be recorded per day, regardless of the actual number of repetitions. This setting must be used in combination with the *Count statistic setting*.
- Export enables the statistic to be displayed in the statistic exports in the *Time attendance* editor.
- Overwrite enables this statistic to be overwritten by another statistic.
- Count old leave defines that the work hours recorded by this statistic are counted as used old leave days.
- Show statistic in reports enables the statistic to be displayed in reports in the Time attendance editor.
- Show statistic in statistic overview enables the statistic to be displayed in the Statistic overview section in the Time attendance editor.
- Show statistic in statistics menus enables the statistic to be displayed and selected in the menu lists for setting statistics.
- This statistic indicates absence enables the statistic to be selected when announcing absences (*Codeks TA Leave Announces*).

Statistic validity



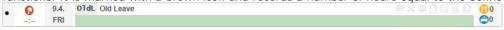
The validity of the *Old leave days* statistic is usually limited to a certain part of the year (e.g. the statistic is limited to the period from 1 January to 30 June each year. In accordance with the current Slovenian legislation in this area, employees have the right to spend last year's leave in the first half of the current year.) The validity setting for the statistic, however, is completely customizable.



To enable the extended use of last year's leave, you must first enable the *Enable old leave use after validity expires* setting in the program *Preferences* in the *Time attendance* tab, and then, in the *Time attendance* editor, enable the *Allow old leave use after validity expires* setting in the *Year data* section for the user in question.

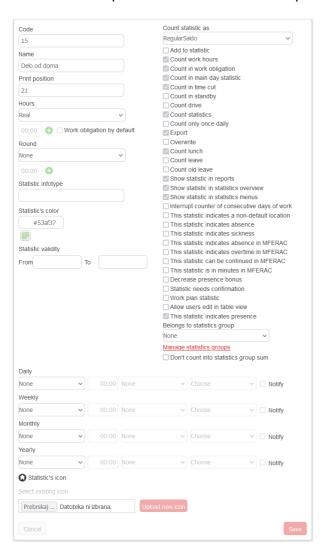
The use of the statistic in the Time attendance editor:

This statistic is usually manually added in the *Time attendance* editor using the *Set statistic* or *Set statistic for period* functions. It is marked with a brown icon and records a number of hours equal to the defined daily work obligation.





4.2.3 Examples of statistics for presence / work from home



The Work from home statistic is used to record days when the user performs his work obligation from home.

This statistic has the *Hours* setting set to Real which means that it will only record the actual registered work hours - from the time user registered his start of work (Entry) on the virtual time and attendance controller up to his end of work (Exit) e.g. when working from home.

The statistic also has the following additional settings enabled:

- Count work hours defines that the work hours recorded by this statistic are taken into account when assigning lunches and drives.
- Count in work obligation defines that the work hours recorded by this statistic are used to cover the user's defined daily work obligation.
- Count in main day statistic defines that the work hours recorded by this statistic will also be recorded in the statistic of the main daily interval.
- Count in time cut enables the statistic to be seen in a time cut.
- Count statistics enables the repetitions of the statistics to be counted.
- Export enables the statistic to be displayed in the statistic exports in the *Time attendance* editor.
- Count lunch defines the work hours recorded by this statistic are taken into account when assigning lunches.
- Show statistic in reports enables the statistic to be displayed in reports in the Time attendance editor.
- Show statistic in statistic overview enables the statistic to be displayed in the Statistic overview section in the Time attendance editor.
- Show statistic in statistics menus enables the statistic to be displayed and selected in the menu lists for setting statistics.
- This statistic indicates presence enables the statistic to be selected when announcing presence (*Codeks TA Leave Announces*).



The use of the statistic in the Time attendance editor:

This statistic is usually manually added in the *Time attendance* editor using the *Set statistic* or *Set statistic for period* functions. It is marked with a black icon and records a number of hours which the employee registers on the virtual time and attendance controller.



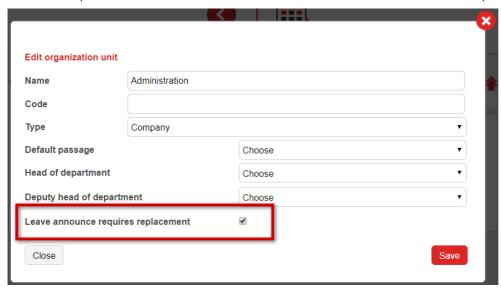
4.3 Company organization

In order to use the absence announcements with replacement requests, you will also need to edit the *Company organization*. This is because the replacement settings for each user are enabled for an entire department at a time. This is why the company departments structure must be organized and all users must be assigned to appropriate departments.

You can read more about adding and editing departments in the *Company organization* editor in the documentation of the main *Codeks* application (<u>CodeksManual-en.pdf</u>).

ENABLING REPLACEMENTS FOR DEPARTMENTS

- 1. To enable absence announcements with replacements requests, first open the edit window of a department.
- 2. In the department edit window find and enable the Leave announce requires replacement setting.



^{*} Leave announce requires replacement - If this setting is enabled, users in this department will have to name a replacement (coworker) when announcing their absence.

3. To save the changes, click Save.



4.4 Users' settings when announcing absence

It is necessary to correctly set each individual user's settings in the main Codeks application in order to enable the functionality of the Codeks TA Leave Announces add-on.

The necessary settings differ depending on the type of user:

- Department managers, who process (confirm or reject) absence requests of other users, and may also be allowed to announce absence for other users (for example, the users in their department),
- Regular users, who can announce their absences.



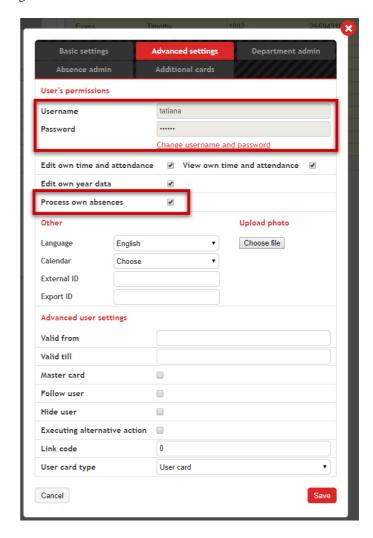
4.4.1 Settings for department managers

Necessary settings for department managers, who may process the absence announces of other users:

A) Username and password for user access

The department manager can either confirm or reject an absence announcement in the *Pending absence* announces menu which he can access using his Codeks user access. The username and password for the Codeks user access can be set in the *Advanced settings* tab of each user in the *Users* editor.

- 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.* Additionally, you can enable the user to confirm his own absences adding a checkmark next to the setting *Process own absences*.
- 3. Save the entered data by clicking the Save button.

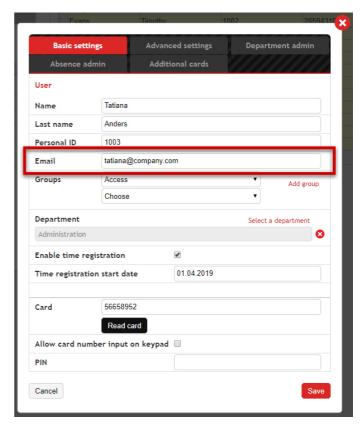


NOTE

Users can also use the username and password for Windows Active Directory to sign in to the Codeks application. The use of Active Directory can be enabled using settings in the main Codeks application. The description of the settings for connecting Active Directory to the Codeks application can be found in the documentation of the main Codeks application (CodeksManual-en.pdf).



B) E-mail address settings for notifications
The Codeks system can notify department
managers about new absence announcement and
status changes by e-mail. In order to receive
notifications, the department managers must have
a valid e-mail address entered in the Basic settings
tab of the user settings.





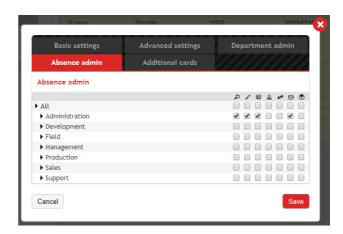
C) Absence processing and notification rights

The rights of the department managers for processing absence announcements are defined in the *Absence admin* tab of each manager in the *Users* editor.

1. In the *Absence admin* tab, you can specify the department manager's rights to view and process absence announcements of other users.

You can limit the rights of department managers for viewing, processing, and notification about absence announcements to specific departments.

To assign a right, add a checkmark in the appropriate box:



Rights for absence processing	Description
View announcement	The user can view the absence announcements of other users in this
	department.
Process announcement	The user can confirm absence announcements of other users in this department.
Request announcement for others	The user can announce absences for other users in this department.
Additional addressee	The user receives a notification and can confirm the request if a user from this department, who is announcing his absence, chooses him as the addressee of the announcement. If there is more than one addressee defined for a specific department, the employee requesting a permit can choose who will receive the notification.
Can replace	The user can replace other users from this department in the event of their absence. (* This setting is usually only enabled for employees and not department managers).
☑ Request announcement notification	The user will receive a notification every time an employee in this department announces his absence.
Process announcement notification	The user will receive an electronic notification every time a status of an absence announcement of any user in this department is changed.

2. Save the settings by clicking the Save button.



4.4.2 Settings for regular users

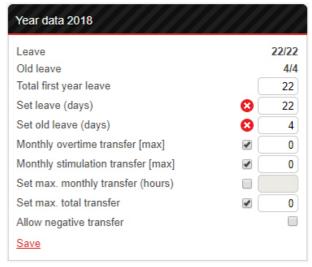
Necessary settings for regular users who will announce their absences:

A) Set the number of leave days and old leave days

Using the Codeks TA Leave Announces add-on users can announce different types of absences (the types of absences are defined as new user's statistics and can be fully tailored to the needs of each company).

Users will be able to announce leave and old leave days only if they are assigned the necessary settings in the *Time attendance* editor.

1. You can enter the number of leave and old leave days for each individual user in the *Time* attendance editor. In the editor, first, select the desired user and then enter the relevant data in the *Year data* section.



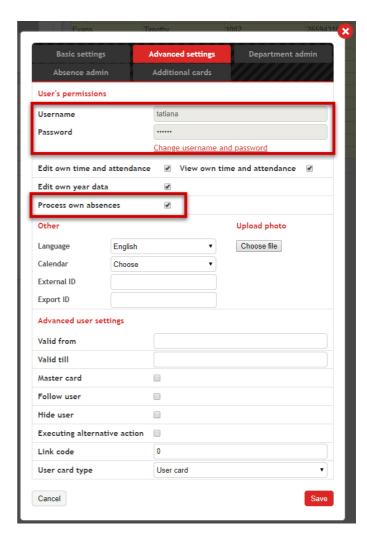
Setting	Description
Leave	Displays how many days of leave the user still has available from his total yearly number of leave days.
Old leave	Displays how many days of old leave the user still has available from his total yearly number of old leave days.
Total first year leave	Enter the total number of leave days assigned to a user in his first year of employment in your company (also enter the total number of leave days for all uses in the first year of using the Codeks application).
Set leave (days)	Enter the number of leave days the user still has available at the start of registration. NOTE For a new employee in your company, enter the number of available leave days in his first year of employment in your company.
	NOTE When entering the leave data for employees in the first year of using the Codeks application, enter the number of still available leave days for each employee. Enter the total number of leave days for each employee in the Set leave (days) filed.
Set old leave (days)	Enter the number of still available old leave days for the first year of using the Codeks application. At the start of a new year, the number of available leave days will be automatically converted to available old leave days.

You can read more about setting the Year data in the documentation of the main Codeks application.

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



- B) Username and password for user access
 Users can announce their absences only through
 the *Announce absence* menu which they can
 access using their user access. The username and
 password for the Codeks user access can be set in
 the *Advanced settings* tab of each user in the *Users* editor.
- 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.* Additionally, you can enable the user to confirm his own absences adding a checkmark next to the setting *Process own absences*.
- 3. Save the changes to the user's data by clicking the Save button.

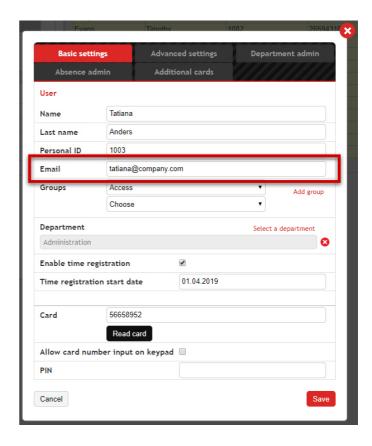


NOTE

Users can also use the username and password for Windows Active Directory to sign in to the Codeks application. The use of Active Directory can be enabled using settings in the main Codeks application. The description of the settings for connecting Active Directory to the Codeks application can be found in the documentation of the main Codeks application (CodeksManual-en.pdf).



C*) E-mail address settings for notifications The Codeks system can notify users about their confirmed absence announcement by e-mail. In order to receive notifications, users must have a valid e-mail address entered in the Basic settings tab of the user settings.





*D) Settings for employee replacements

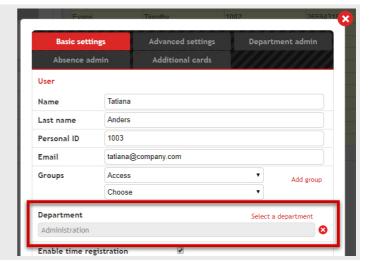
NOTE

The settings for employee replacements must only be set if employees are required to arrange for a replacement in the event of their absence.

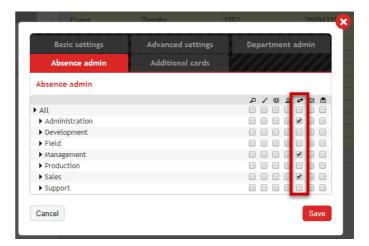
To enable settings for replacements, first enable the *Enable leave announce replacement* setting in the *Leave announces settings* of the *Preferences* editor.

NOTE

The replacement settings can only be enabled for an entire department (or some other organization unit) at a time. This means that all employees involved in the system of replacements must be assigned a department. This can be done in the user's settings in the <code>Department</code> section of the <code>Basic settings</code> tab.



The settings for replacement must be set individually for each employee, that will be able to substitute coworkers in a particular department. To define for which departments a particular user will be able to substitute, navigate to the *Absence admin* tab of each user's settings and enable the *Can replace* option for the appropriate departments.

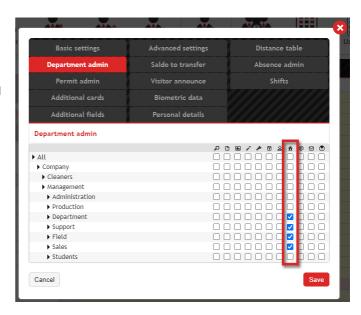




4.4.3 Enabling rights to absence overview

Through their user access, both department heads and regular users can access the *Absence overview*. The *Absence overview* table shows daily as well as short-term permit absences for employees of departments, for which a particular user has the right to view.

- 1. To grant the right to view the *Absence overview* table, enable the *Absence overview* right in the *department admin* tab of the *Users* editor.
- 2. You can enable the right separately for individual departments so that the user can only see the absences of certain co-workers.





4.5 Users' settings when announcing presence

It is necessary to correctly set each individual user's settings in the main Codeks application in order to enable the functionality of the Codeks TA Leave Announces add-on.

The necessary settings differ depending on the type of user:

- Department managers, who process (confirm or reject) presence requests e.g. work from home, and may also be allowed to announce presence for other users (for example, the users in their department),
- Regular users, who can announce their presence.



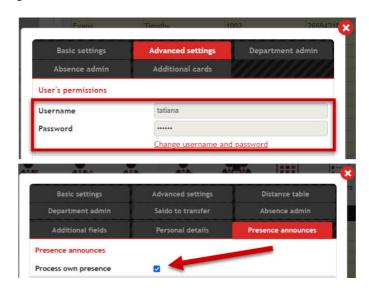
4.5.1 Settings for department managers

Necessary settings for department managers, who may process the presence of other users:

A) Username and password for user access

The department manager can either confirm or reject a presence announcement in the *Pending presence* announces menu which he can access using his Codeks user access. The username and password for the Codeks user access can be set in the *Advanced settings* tab of each user in the *Users* editor.

- 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.* Additionally, you can enable the user to confirm his own presence adding a checkmark next to the setting *Process own presence*.
- 3. Save the entered data by clicking the Save button.

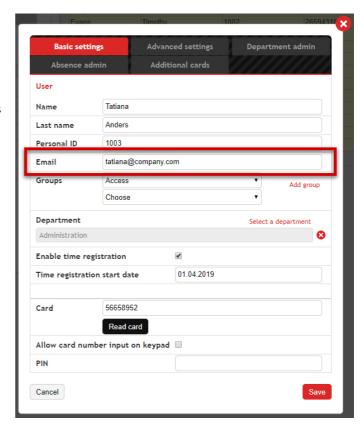


NOTE

Users can also use the username and password for Windows Active Directory to sign in to the Codeks application. The use of Active Directory can be enabled using settings in the main Codeks application. The description of the settings for connecting Active Directory to the Codeks application can be found in the documentation of the main Codeks application (CodeksManual-en.pdf).



B) E-mail address settings for notifications
The Codeks system can notify department
managers about new presence announcement and
status changes by e-mail. In order to receive
notifications, the department managers must have
a valid e-mail address entered in the Basic settings
tab of the user settings.





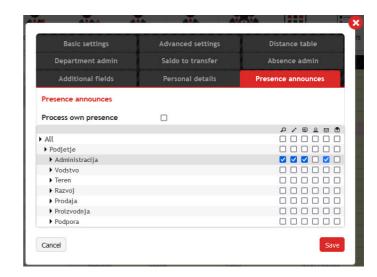
C) Presence processing and notification rights

The rights of the department managers for processing presence announcements are defined in the *Presence announces* tab of each manager in the *Users* editor.

1. In the *Presence announces* tab, you can specify the department manager's rights to view and process presence announcements of other users.

You can limit the rights of department managers for viewing, processing, and notification about presence announcements to specific departments.

To assign a right, add a checkmark in the appropriate box:



Rights for presence processing	Description
View announcement	The user can view the presence announcements of other users in this
	department.
Process announcement	The user can confirm presence announcements of other users in this department.
Request announcement for others	The user can announce presence for other users in this department.
Additional addressee	The user receives a notification and can confirm the request if a user from this department, who is announcing his presence, chooses him as the addressee of the announcement. If there is more than one addressee defined for a specific department, the employee requesting a permit can choose who will receive the notification.
Can replace	The user can replace other users from this department in the event of their presence. (* This setting is usually only enabled for employees and not department managers).
☑ Request announcement notification	The user will receive a notification every time an employee in this department announces his presence.
Process announcement notification	The user will receive an electronic notification every time a status of an presence announcement of any user in this department is changed.

2. Save the settings by clicking the Save button.

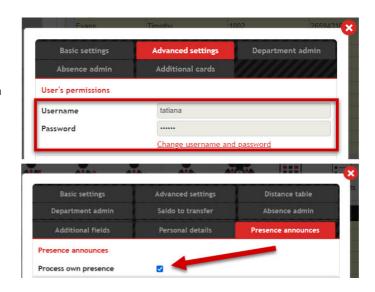


4.5.2 Settings for regular users

Necessary settings for regular users who will announce their presence:

A) Username and password for user access
Users can announce their presence only through
the *Presence announce* menu which they can
access using their user access. The username and
password for the Codeks user access can be set in
the *Advanced settings* tab of each user in the *Users* editor.

- 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.* Additionally, you can enable the user to confirm his own presences adding a checkmark next to the setting *Process own presences*.
- 3. Save the changes to the user's data by clicking the Save button.



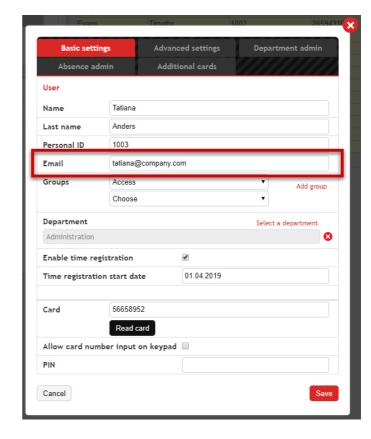
NOTE

Users can also use the username and password for Windows Active Directory to sign in to the Codeks application. The use of Active Directory can be enabled using settings in the main Codeks application. The description of the settings for connecting Active Directory to the Codeks application can be found in the documentation of the main Codeks application (CodeksManual-en.pdf).

C*) E-mail address settings for notifications



The Codeks system can notify users about their confirmed presence announcement by e-mail. In order to receive notifications, users must have a valid e-mail address entered in the Basic settings tab of the user settings.





5 Using the Codeks TA 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.



5.1 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.

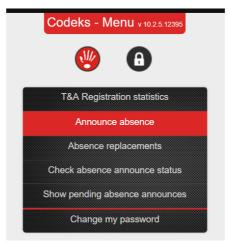


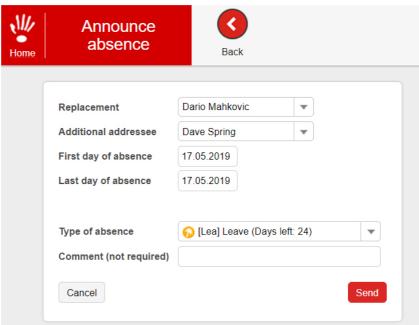
5.1.1 Absence announcements

 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.



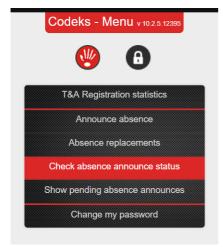


- 5.* If the replacement setting is enabled for your department, an additional field *Replacement* will be displayed, where you can select a co-worker who will substitute you in your absence.
- 6.* If more than one department manager can process absence requests for your department, the *Additional addressee* 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.



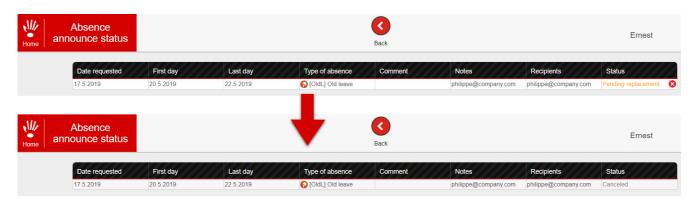
5.1.2 Overview of pending absence announcements and canceling announcements

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 <u>set in the settings</u> 18.

- 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).



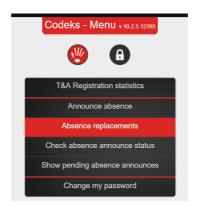


5.1.3 * Confirming replacement requests

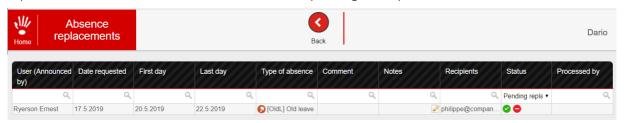
After an employee announces their absence with a replacement, their request is first sent to the co-worker who they appointed to replace them. The appointed co-worker must first confirm, that they agree with the replacement, in the *Absence replacements* menu, only then is the absence request (of the 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 (\checkmark) . To reject a replacement request click the reject icon (\bigcirc) .

- 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.





5.2 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

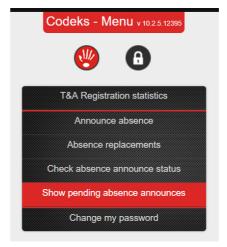
The following chapters describe the use of *user access* menus for department managers.



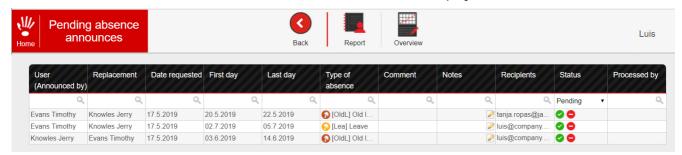
5.2.1 Processing absence announcements

1. To process the absence requests, select the Show 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. In versions newer than 10.2209.3., the current status of the user's leave is also displayed in the third column.



To confirm an absence announcement click the confirm icon (



To reject an absence announcement click the reject icon (

NOTE

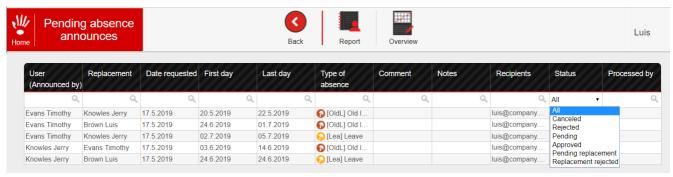
If manual corrections have already been made on the days affected by the absence announcement and the Confirmation action 18 setting is set to None, a pop-up window will appear when confirming the announcement, where you can choose how it should affect the employee's time registration. You can choose 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.





5.2.2 Absence announcement for another user

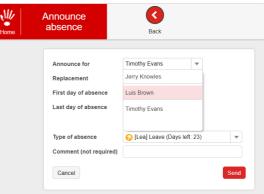
Department managers can also be allowed to announce absences for other users. The department managers can only announce absences for departments for which they have the right to <u>request announcements for others</u> at a state of the state of

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

This will open the menu for absence announcing.

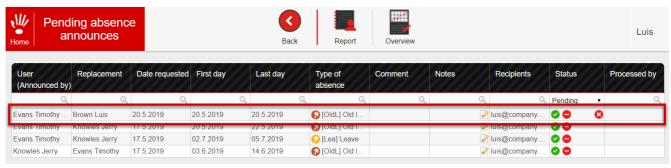


- 2. In the announcement form, first, select the user for whom you wish to announce absence (setting *Announce for*).
- 3. Then, set the first and last day of absence, and select the type of absence.
- 4.* Optionally, you can change the addressee, appoint a replacement or enter a comment.



- 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.





5.2.3 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.



5.3 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 <u>View announcement</u> rights.

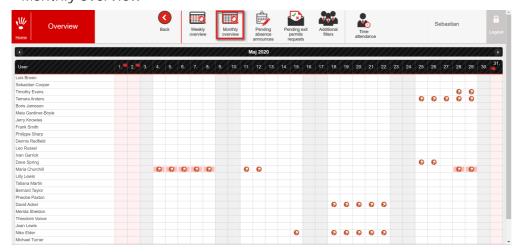


In the *Overview* viewer you can choose between the weekly or monthly overview by clicking on the corresponding icon.

- 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.

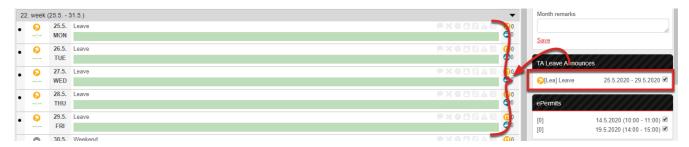
- Hide unconfirmed announcements





5.4 Editing leave announcements in Time attendance

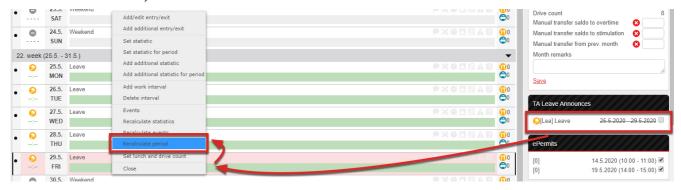
Heads of departments and administrators, who are granted rights to edit the time and attendance of users, can manage the confirmed user absence announcements by enabling or revoking the absence announcements and thus influence whether they are taken into account when recalculating the time registration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



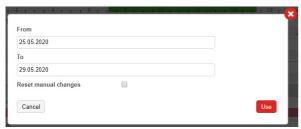
1. In the *Time attendance* editor, the absence announcements that have been recorded for the user in the selected period are displayed in the *TA Leave Announcements* section on the right.

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.

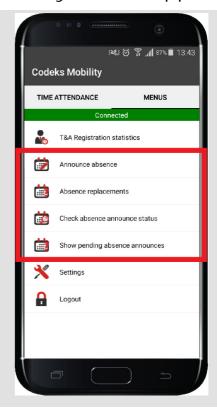




5.5 Leave announcements in the Codeks Mobility mobile app

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).





6 Using the Codeks TA Presence

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



6.1 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.



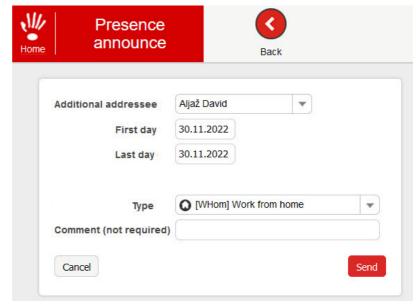
6.1.1 Presence announcements

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

This will open the *menu for presence* announcing.

- 2. 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.



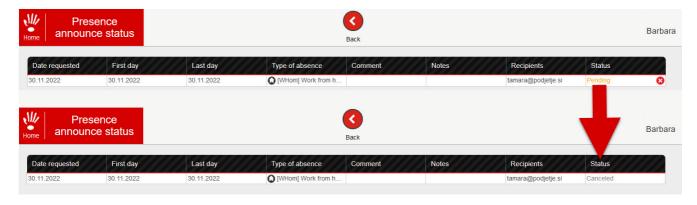
6.1.2 Overview of pending presence announcements and canceling announcements

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



In the *Presence announce status* menu user can also cancel his announcement. 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 <u>set in the settings</u> 19.

- 1. To cancel your pending or confirmed 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.





6.2 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.



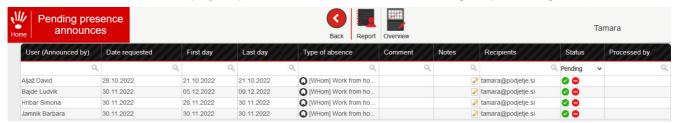
6.2.1 Processing presence announcements

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

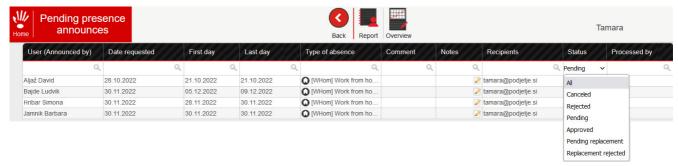
If manual corrections have already been made on the days affected by the presence announcement and the <u>Confirmation action</u> setting is set to *None*, a pop-up window will appear when confirming the announcement, where you can choose how it should affect the employee's time registration. You can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





6.2.2 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 <u>request</u> <u>announcements for others</u> 40.

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

This will open the menu for presence announcing.



- 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 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





6.2.3 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.



6.3 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 <u>View announcement</u> 40 rights.

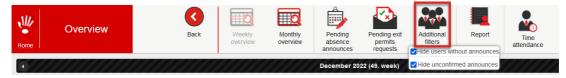


In the *Overview* viewer you can choose between the weekly or monthly overview by clicking on the corresponding icon.

- Weekly overview



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





6.4 Editing presence announcements in Time attendance

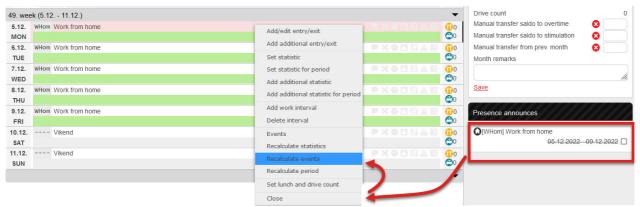
Heads of departments and administrators, who are granted rights to edit the time and attendance of users, can manage the confirmed user presence announcements by enabling or revoking the presence announcements and thus influence whether they are taken into account when recalculating the time registration 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.





7 APPENDIX: Examples of notification systems for absence announcements

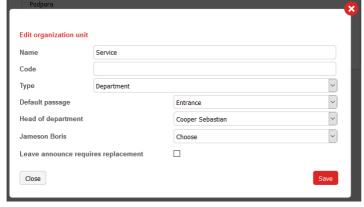
The Codeks application enables different configurations of notifications and the validation of absence announcements. This way you can customize the system of absence announcements to meet your company's needs. The following chapters describe examples of system configuration for notifications and absence announcements validation.

7.1 Notification depending on the company organization and department manager presence

When users in the company announce their absence, the system automatically sends a notification of their absence to the department manager or deputy head of the department, as defined in the *Company organization* settings. At the same time, the system checks the presence of *heads* and *deputies of the departments*, and sends e-mail notifications accordingly: if both the head and deputy of the department are present the system only sends notifications to the head of the department, if the head of the department is not present the system sends a notice of announcement to the deputy head of the department, and if both are absent notifications are sent to both.

Required settings for this function:

- A. Define the company organization and assign heads and deputies of departments. In the *Company organization* editor, define the (hierarchical) structure of the company, and set the appropriate users to act as *heads* and *deputy heads of departments* for each defined department.
- 1. To assign the head and deputy head of a department, first, double-click the selected department in the tree-view list of the *Company organization* editor.
- 2. Now, select the appropriate users in the *Head of department* and *Deputy head of department* fields.



3. Click Save.

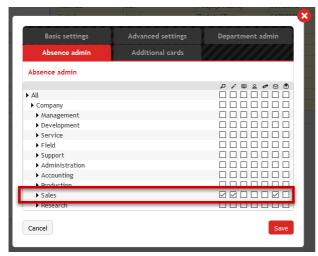
The defined users will receive notifications about absence announcements of the users in selected departments depending on the company hierarchy and their presence at the workplace. In the event that both, the head and deputy head of the department, are present, only the head of the department will receive notifications of absence announcements. In the case of his absence, only the deputy head of the department will be notified, and if both are absent, notifications will be sent to both.



B. Assign rights to view and process absence announcements to heads and deputy heads of departments

In addition, the selected heads and deputy heads of departments must be *granted rights to view and process absence announcements* through their *user rights* in the *Users* editor.

- 1. From the *list of users*, select the user defined as the head or deputy head of a department, and open the window for editing the selected user's settings.
- 2. In the *Absence admin* tab, grant the *View announcement* D , *Process announcement* C , and *Request announcement notification* $^{\square}$ rights for appropriate departments to the user.

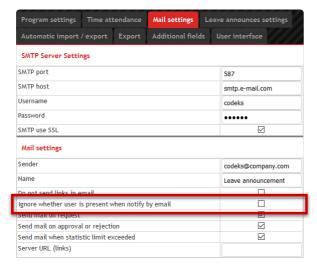


3. Click Save.

NOTE



- C. Enable e-mail notification depending on the user's presence
 In the system settings of the Codeks application (*Settings -> Preferences*), you must enable e-mail notification depending on the user's presence at the workplace, otherwise, the system will not
- 1. In the *Settings -> Preferences* editor in the *Mail settings* tab, disable the *I gnore whether user is present when notify by email* setting (the setting must not have a check mark).



automatically send notifications of absence announces.

2. Click Save.



7.2 Notification depending defined users' rights

When users in the company announce their absence, the system automatically sends a notification of their absence announcement to all users who are granted the rights to be notified about users' announcements through their *user rights* in the *Users* editor.

Users who act as *heads* or *deputy heads* of departments (even though they are not assigned as department heads and deputy heads in the *Company organization* editor) are granted all the rights to view, process, and be notified about absence announcements through their *user rights* in the *Users* editor.

Required settings for this function:

- 1. From the *list of users*, select the user who will be able to view, process or announce absence for users in a certain department, and open the window for editing the selected user's settings.
- 2. In the Absence admin tab, grant the user the appropriate rights:

View announcement - the user can view the absence announcements of other users in this department.

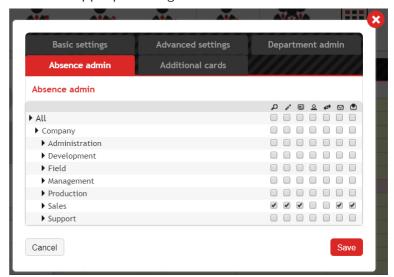
Process announcement - the user can confirm absence announcements of other users in this department.

request announcement for others the user can announce absences of other users in this department.

Request announcement notification

- □ the user will receive a notification every time an employee in this department announces his leave.

 Process announcement notification
- the user will receive an electronic notification every time a status of an announcement request of any user in this department is changed.



3. Click Save.

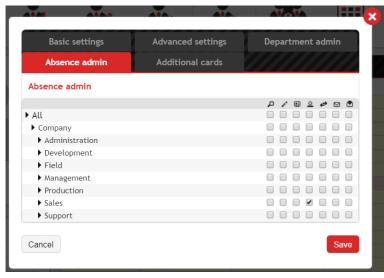
NOTE



7.3 Notification depending on the selected addressee

When users in the company announce their absence, they will choose an addressee who will be notified about their absence announcement and will also be able to process the absence announcement. Users who act as *heads* or *deputy heads* of departments (even though they are not assigned as department heads and deputy heads in the *Company organization* editor) must be granted the *Addressee* right through their *user rights* in the *Users* editor. This setting gives the users both the right to be notified about absence announcements as well as the right to process absence announcements from users in a certain department. Usually, multiple users are defined as potential addressees for the same department. This enables users, who announce their absences, to choose the appropriate addressee for their announcement. Required settings for this function:

- 1. From the *list of users*, select the user who will be one of the possible *Addressees* for a certain department, and open the window for editing the selected user's settings.
- 2. In the *Absence admin* tab, grant the user the *Addressee* aright. This will allow him to view, process and be notified about absence announcements by users in this department.



3. Click Save.

NOTE



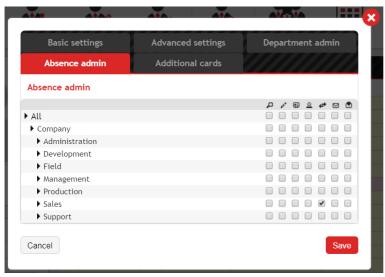
7.4 Leave announcements with replacements

If the *Leave announce requires replacement* setting is enabled for a particular department (<u>Absence announcements with replacements</u>), each user will have to specify a co-worker who will replace them during their absence.

The user's announcement will then first be the co-worker. Only in the event that the appointed co-worker confirms the replacement, will the announcement also be sent to the head of the department for final confirmation.

In order for such a system to work correctly, all users who will be able to replace their co-workers must have the *Can replace* setting enabled in their *Users' settings* in the *Absence admin* tab:

- 1. From the *list of users*, select the user who will be able to replace a co-worker, and open the window for editing the selected user's settings.
- 2. In the *Absence admin* tab, grant the user the *Can replace* right. The user will now be added to the drop-down menu of the absence announcement form for each co-worker in the specified department.



3. Click Save.

NOTE