

Codeks ePermits Add-on

Instructions for users

for Codeks software
version 10.2103.2.15093 and newer



Codeks ePermits Add-on user manual

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2023 in Naklo

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1 Codeks ePermits


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

The Codeks ePermits add-on enables users to send requests for electronic permits to their department managers (or supervisors). Users can request electronic permits for different purposes, such as electronic permits for a business or personal exit during working hours or electronic permits for overtime work. Department managers can then confirm or deny a request for a permit. The number and types of electronic permits that users can announce are not limited and can be adapted to the specific needs and requirements of your company.

NOTE

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

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1.2 Disclaimer and Warranty

Disclaimer

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

1.3 Contact Information

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

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SLOVENIA

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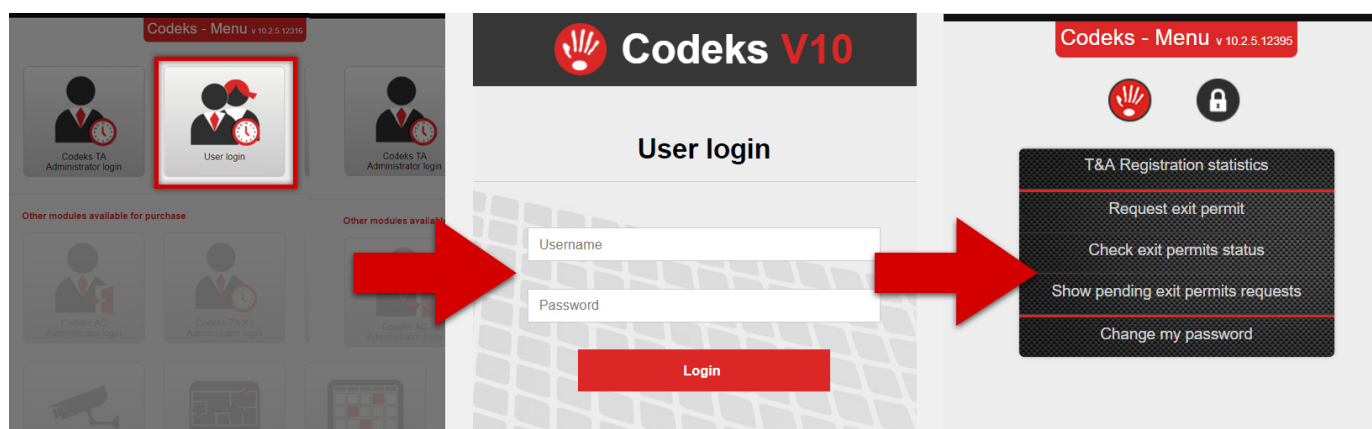
Support

The support form can be found at the link: <https://jantar.si/en/support/>

2 How the Codeks ePermits work

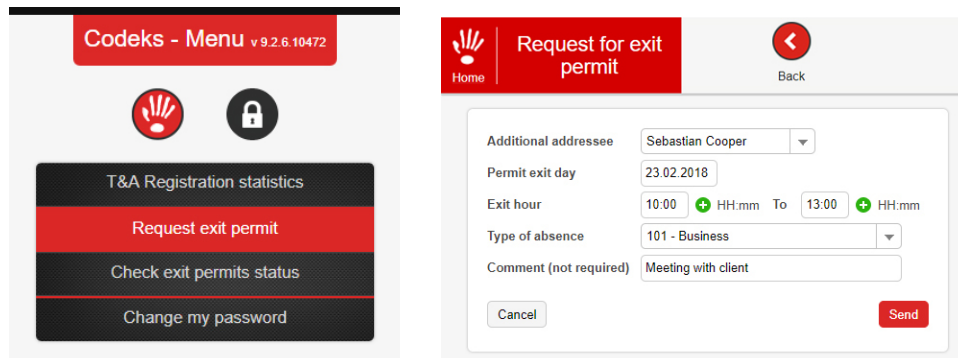
The Codeks ePermits add-on enables the use of electronic permits within an existing Codeks system. The following chapter describes how the Codeks ePermits add-on operates from the moment a user sends a permit request up to the point when he can use it on a controller.

1. The user (employee) logs in to the Codeks application using his user access.



In order for the users to be able to access the Codeks application, they need a username and password.

2. The user can then request an electronic permit in the *Request exit permit* menu.



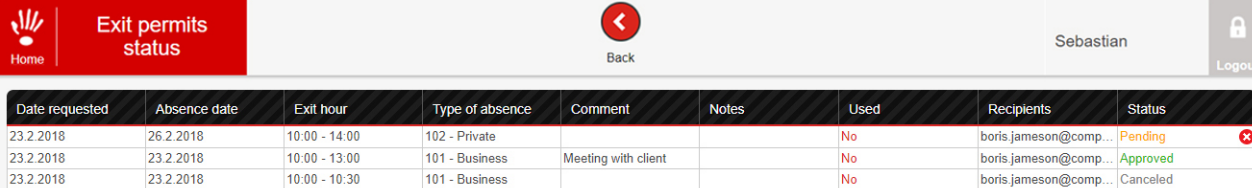
The users will be able to request electronic permits only if they are assigned the appropriate group and timetable that enable the functionality of the Codeks ePermits.

The user's timetable for time registration must contain time intervals (with the enabled setting *Only for permits*), which define the different types of electronic permits. Because the users announce the desired type of permit by selecting the appropriate button, each type of electronic permit must be assigned a different button.

3. When a user requests an electronic permit, the system sends his announcement to his defined department manager (or deputy department manager).

The department heads can also be informed of new permit requests by e-mail if they have a valid e-mail address and are granted the rights to be notified about users' announcements through their *user settings*.

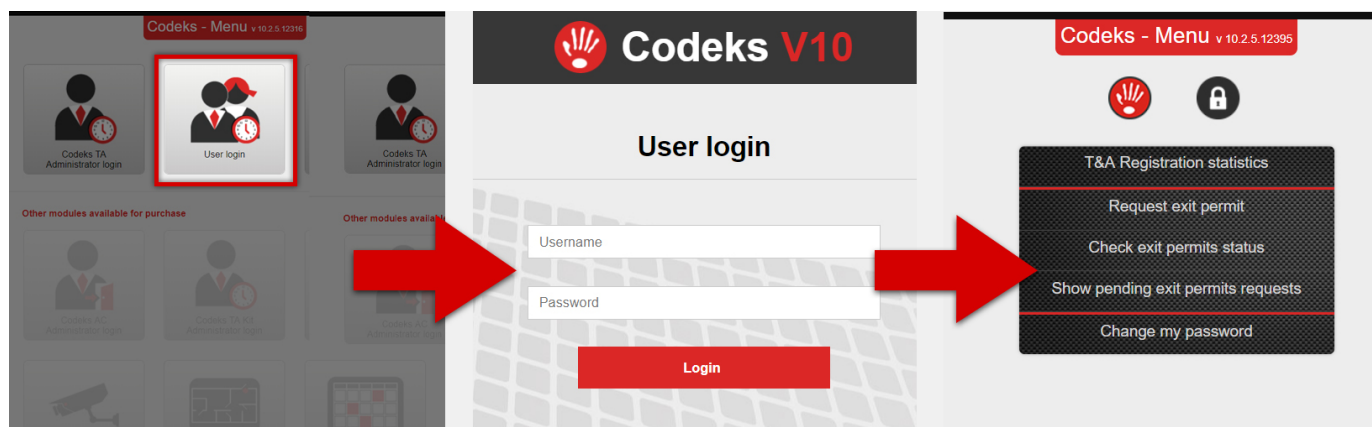
4. The user can view and check the status of his permit request in the *Check exit permits status* menu.



Date requested	Absence date	Exit hour	Type of absence	Comment	Notes	Used	Recipients	Status
23.2.2018	26.2.2018	10:00 - 14:00	102 - Private			No	boris.jameson@comp...	Pending
23.2.2018	23.2.2018	10:00 - 13:00	101 - Business	Meeting with client		No	boris.jameson@comp...	Approved
23.2.2018	23.2.2018	10:00 - 10:30	101 - Business			No	boris.jameson@comp...	Canceled

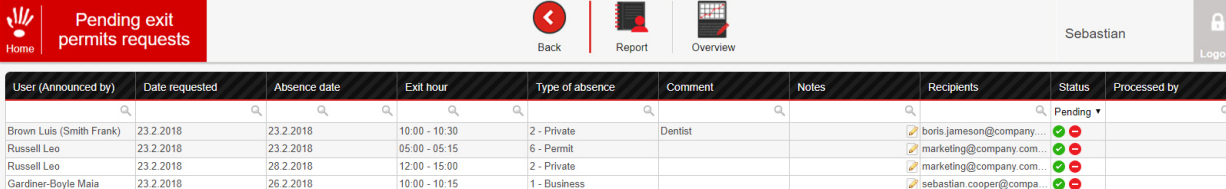
5. In this same menu, the user also has the option to cancel the permit request afterward. However, the cancellation is only possible until the head of the department confirms or rejects it.

6. The department managers can view the (new) permit requests of the users in their departments in the *Pending exit permits requests* menu, which they can access using their username and password.



In order for the department managers to be able to access the Codeks application, they need a username and password.

7. The department manager can confirm or reject the pending users' permit requests in the *Pending exit permits requests* menu.



User (Announced by)	Date requested	Absence date	Exit hour	Type of absence	Comment	Notes	Recipients	Status	Processed by
Brown Luis (Smith Frank)	23.2.2018	23.2.2018	10:00 - 10:30	2 - Private	Dentist		boris.jameson@company...	Pending	
Russell Leo	23.2.2018	23.2.2018	05:00 - 05:15	6 - Permit			marketing@company.com...		
Russell Leo	23.2.2018	28.2.2018	12:00 - 15:00	2 - Private			marketing@company.com...		
Gardiner-Boyle Maia	23.2.2018	26.2.2018	10:00 - 10:15	1 - Business			sebastian.cooper@compa...		

In order for the department managers to be able to process permit requests, they must be granted appropriate rights through their *user settings*.

8. As soon as the manager confirms the request, the confirmed electronic permit is stored in the database. This enables the user to use the functionality of the announced permit on a controller at the announced time.


9. The user can be notified about the status change of his permit request by e-mail.

The users can be informed of the status change of their permit requests by e-mail if they have a valid e-mail address.

10. The user can now use the functionality of the electronic permit.

The user, first, selects the appropriate button for the electronic permit, and then, registers at the controller.

11. The system first checks whether the user has an assigned *Permit interval* in his timetable for time attendance. This interval tells the system that the user may have a confirmed electronic permit to be used.




1 - Business

INTERVAL	INTERVAL TYPE	BUTTON
Overtime PERMIT	Permit interval	6
Overtime ALLOWED	General purpose + <input checked="" type="checkbox"/> Only for permits	6
Overtime UNAUTHORISED	General purpose	6
Business PERMIT	Permit interval	1
Business ALLOWED	General purpose + <input checked="" type="checkbox"/> Only for permits	1
Business UNAUTHORISED	General purpose	1
Private PERMIT	Permit interval	2
Private ALLOWED	General purpose + <input checked="" type="checkbox"/> Only for permits	2

12. The system, then, checks if the user has a confirmed electronic permit stored in the database.

In the event that the user has a confirmed permit for the currently registered event, the appropriate interval (with the enabled *Only for permits* setting) is activated.

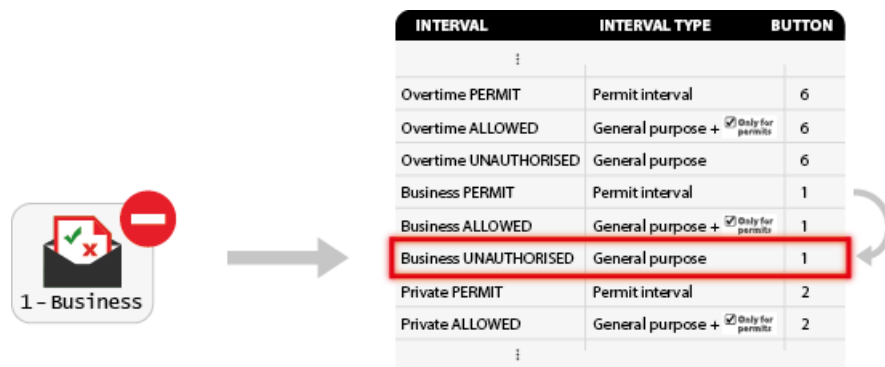


1 - Business

INTERVAL	INTERVAL TYPE	BUTTON
Overtime PERMIT	Permit interval	6
Overtime ALLOWED	General purpose + <input checked="" type="checkbox"/> Only for permits	6
Overtime UNAUTHORISED	General purpose	6
Business PERMIT	Permit interval	1
Business ALLOWED	General purpose + <input checked="" type="checkbox"/> Only for permits	1
Business UNAUTHORISED	General purpose	1
Private PERMIT	Permit interval	2
Private ALLOWED	General purpose + <input checked="" type="checkbox"/> Only for permits	2

13. If the user does not have confirmed permit, the system searches lower in the interval hierarchy for the next interval, which can be activated with the same button.

If the user's timetable contains intervals for recording "unauthorized" events, the system records the event according to this intervals.



If the user's timetable does not contain intervals for recording "unauthorized" events, the system will record an error in the time registration.

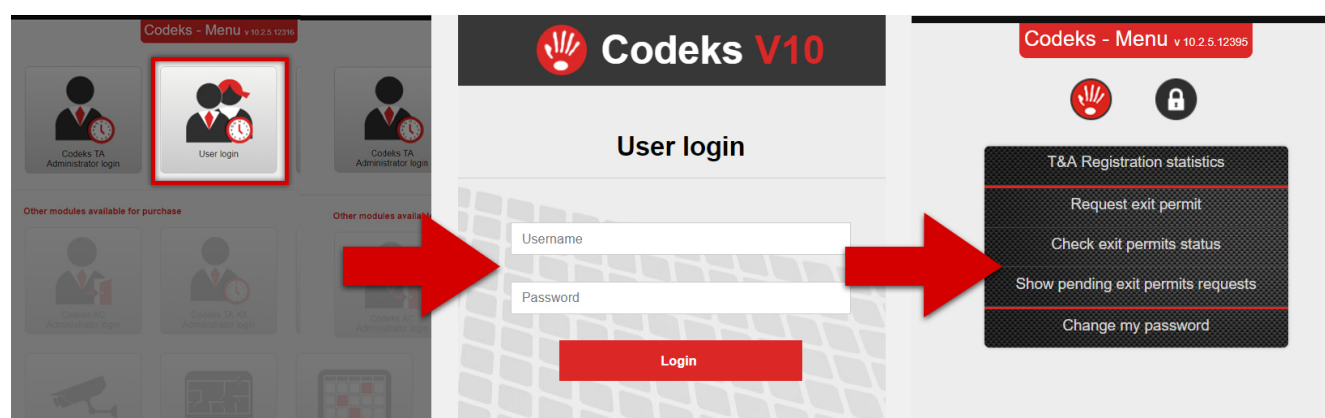
3 Using the Codeks ePermits

The Codeks ePermits makes it possible for users to send permit requests to their department managers. The department managers can then confirm or reject the user's request.

The following chapters describe how users request an electronic permit and how department managers process the users' requests.

3.1 User's request

Users who request electronic permits can access the menus for *requesting permits* and *checking the status of requests* using their username and password.

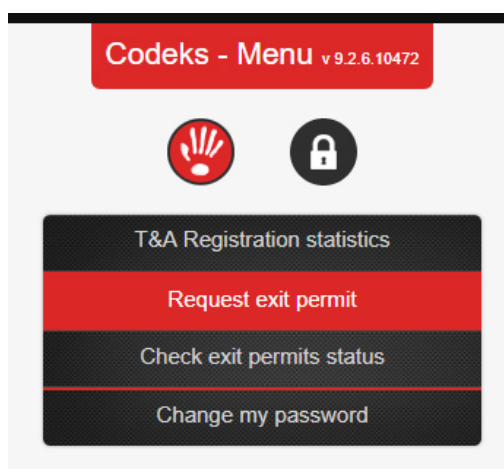


The following chapters describe the use of *user access* menus.

3.1.1 ePermit announcements

1. To request a permit, select the *Request exit permit* in the menu.

This will open the *menu for requesting permits*.



2. In the announcement form, first, set the date for which you are requesting the permit.

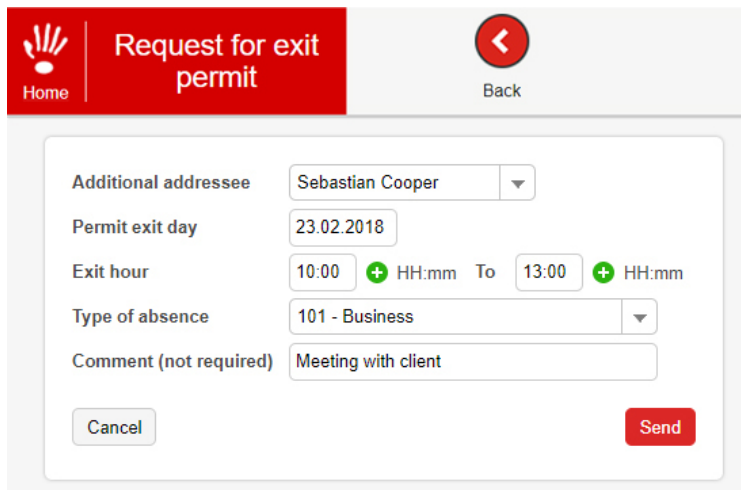
3. Next, specify the time frame when you will register at a controller using the electronic permit. The *Exit hour* setting does not specify when you will be absent but determines when you will be able to use the functionality of the permit on the controller.

4. Then, select the type of permit you wish to request.

5.* Optionally, you can enter a comment or a short message, which will be displayed to your department manager.

6.* If more than one department manager can process permit 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 are finished entering the information about the permit, click Send.



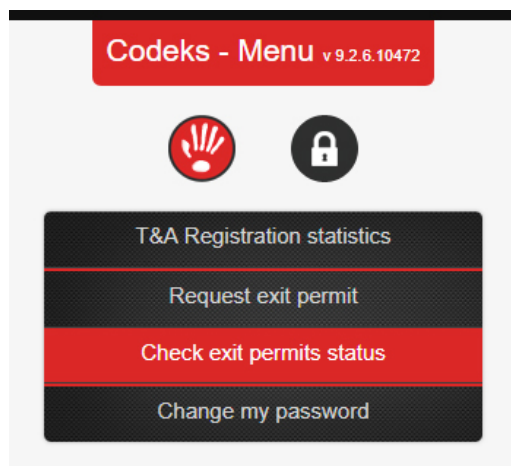
The screenshot shows a mobile application interface for requesting an exit permit. At the top, there is a red header bar with a 'Home' button (hand icon) on the left and a 'Back' button (red circle with a white arrow) on the right. The title 'Request for exit permit' is centered in the header. Below the header, the form contains the following fields:

- Additional addressee:** A dropdown menu with 'Sebastian Cooper' selected.
- Permit exit day:** A date input field showing '23.02.2018'.
- Exit hour:** Two time input fields. The first shows '10:00' with a green '+' icon and 'HH:mm' text. The second shows '13:00' with a green '+' icon and 'HH:mm' text, preceded by 'To'.
- Type of absence:** A dropdown menu with '101 - Business' selected.
- Comment (not required):** A text input field containing 'Meeting with client'.

At the bottom of the form, there are two buttons: a grey 'Cancel' button on the left and a red 'Send' button on the right.

3.1.2 Show pending ePermits requests

Users can monitor the status of their permit requests in the *Exit permits status* menu.



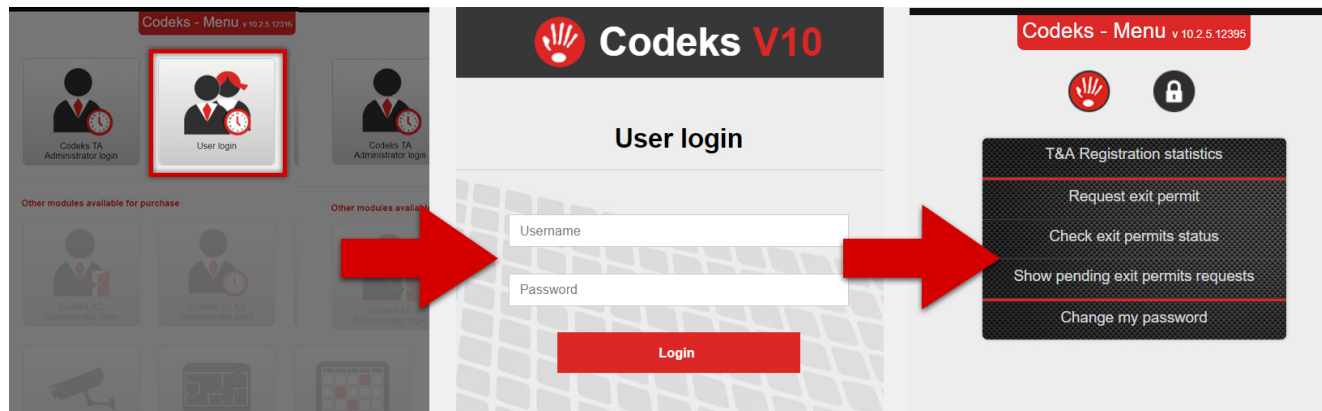
In the *Exit permits status* menu, you can also cancel a permit request. User can cancel his permit even when it has already been confirmed by the head of the department. If it is required for the head of the department to approve cancellation of permit, this must be set in the settings by administrator.

1. To cancel your pending permit request, click on the cancel icon (✖).
2. The status of the request will be immediately changed to *Canceled*, and your announcement will also be removed from the *Pending exit permits requests* menu of your department manager.

Exit permits status								
Home		Back		Sebastian		Logout		
Date requested	Absence date	Exit hour	Type of absence	Comment	Notes	Used	Recipients	Status
23.2.2018	26.2.2018	10:00 - 14:00	102 - Private			No	boris.jameson@comp...	Pending ✖
23.2.2018	23.2.2018	10:00 - 13:00	101 - Business	Meeting with client		No	boris.jameson@comp...	Approved
23.2.2018	23.2.2018	10:00 - 10:30	101 - Business			No	boris.jameson@comp...	Canceled

3.2 Department manager's reply

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

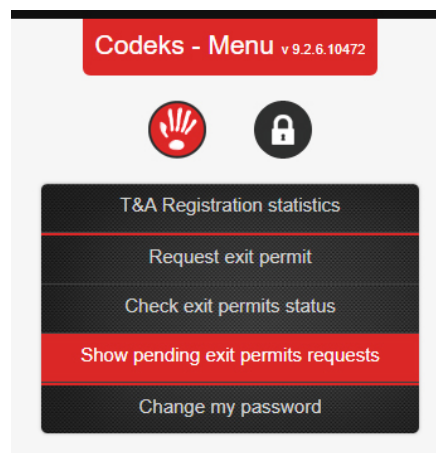


The following chapters describe the use of *user access* menus.

3.2.1 Processing announcements

1. To process permit requests, select the *Pending exit permits requests* in the main menu.

This will open the *menu for processing permit requests*.




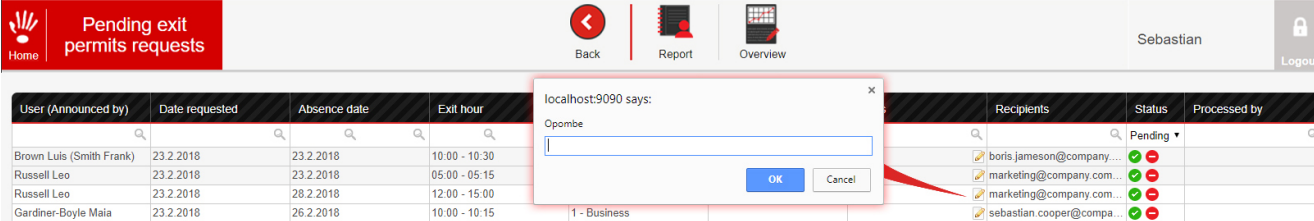
2. The list in the menu will display all permit requests still waiting for processing

Pending exit permits requests									
User (Announced by)	Date requested	Absence date	Exit hour	Type of absence	Comment	Notes	Recipients	Status	Processed by
Brown Luis (Smith Frank)	23.2.2018	23.2.2018	10:00 - 10:30	2 - Private	Dentist		boris.jameson@company...	Pending	
Russell Leo	23.2.2018	23.2.2018	05:00 - 05:15	6 - Permit			marketing@company.com...		
Russell Leo	23.2.2018	28.2.2018	12:00 - 15:00	2 - Private			marketing@company.com...		
Gardiner-Boyle Maia	23.2.2018	26.2.2018	10:00 - 10:15	1 - Business			sebastian.cooper@compa...		

To confirm a permit request click the confirm icon (✓).

To reject a permit request click the reject icon (✗).

3. * Optionally, you can add a note or comment before processing a permit request. To add a note to a request click the  icon. A new pop-up window will open where you can enter your comment.



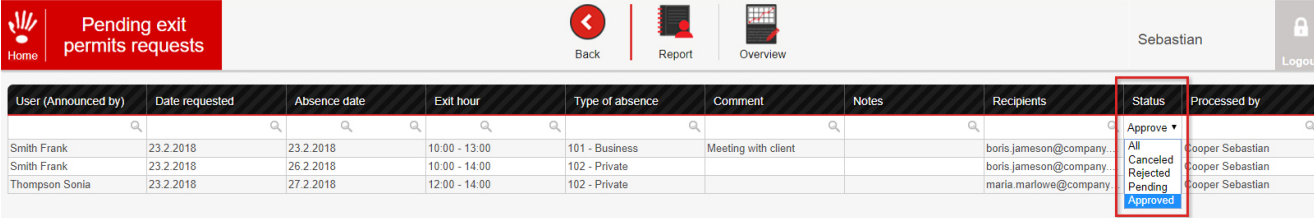
User (Announced by)	Date requested	Absence date	Exit hour
Brown Luis (Smith Frank)	23.2.2018	23.2.2018	10:00 - 10:30
Russell Leo	23.2.2018	23.2.2018	05:00 - 05:15
Russell Leo	23.2.2018	28.2.2018	12:00 - 15:00
Gardiner-Boyle Maia	23.2.2018	26.2.2018	10:00 - 10:15

Recipients	Status	Processed by
boris.jameson@company...	Pending	
marketing@company.com...		
marketing@company.com...		
sebastian.cooper@compa...		

4. After confirming or rejecting a permit request the announcement will immediately be removed from the *pending permits* list.

If the user who has requested the permit has a valid e-mail address, he will receive a notification about the change of the status of his permit request.

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



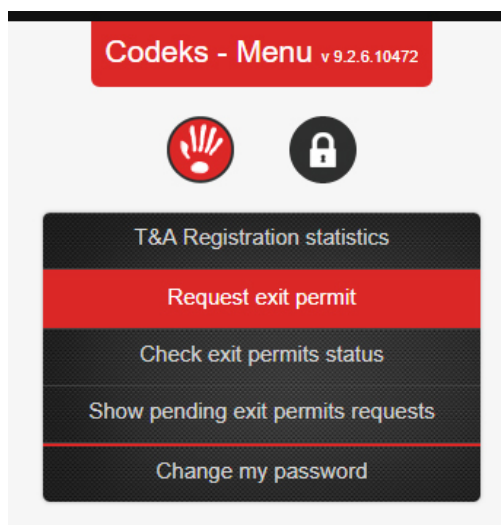
User (Announced by)	Date requested	Absence date	Exit hour	Type of absence	Comment	Notes	Recipients	Status	Processed by
Smith Frank	23.2.2018	23.2.2018	10:00 - 13:00	101 - Business	Meeting with client		boris.jameson@company...	Approve	Cooper Sebastian
Smith Frank	23.2.2018	26.2.2018	10:00 - 14:00	102 - Private			boris.jameson@company...	All	Cooper Sebastian
Thompson Sonia	23.2.2018	27.2.2018	12:00 - 14:00	102 - Private			maria.marlowe@company...	Canceled	Cooper Sebastian
								Rejected	Cooper Sebastian
								Pending	Cooper Sebastian
								Approved	

3.2.2 ePermit announcement for another user

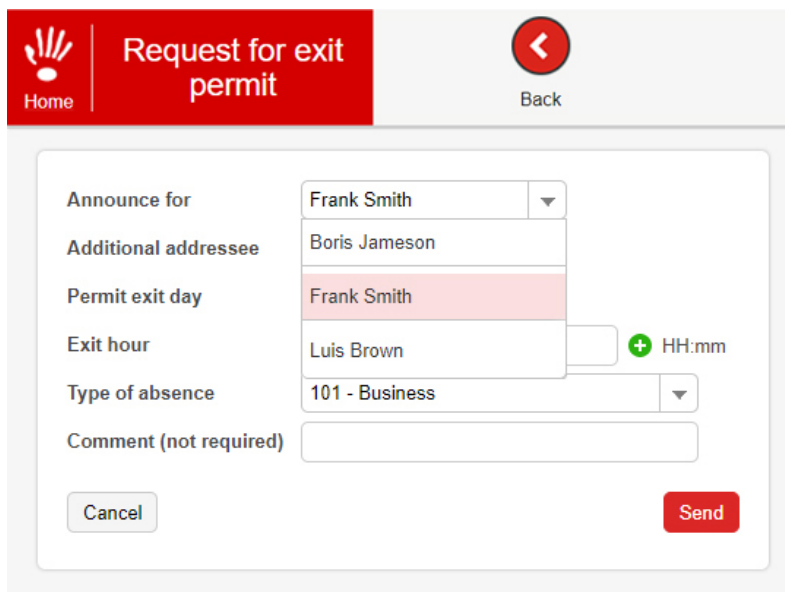
Department managers can also be allowed to request permits for other users. The department managers can only request permits for departments for which they have the right to *request announcements for others*.

1. To request a permit for another user select the *Request exit permit* in the main menu.

This will open the *menu for requesting a permit*.

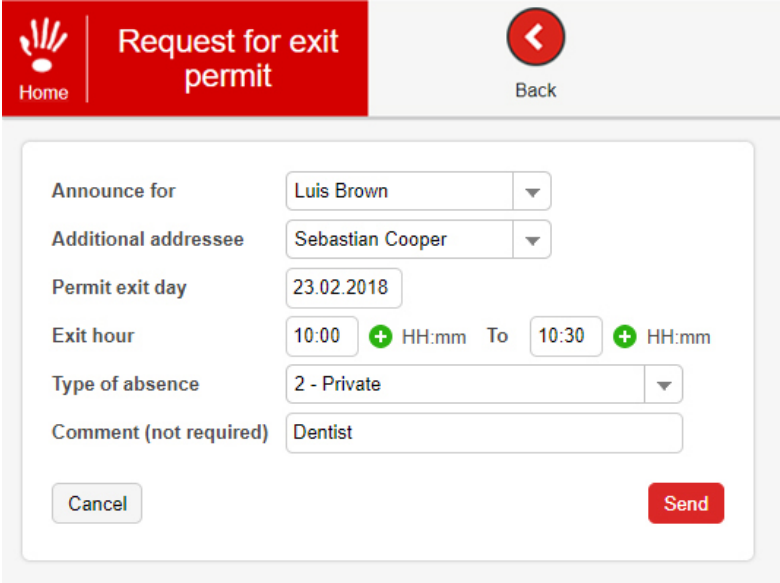


2. In the permit request form, first, select the user for whom you wish to request a permit (setting *Announce for*).



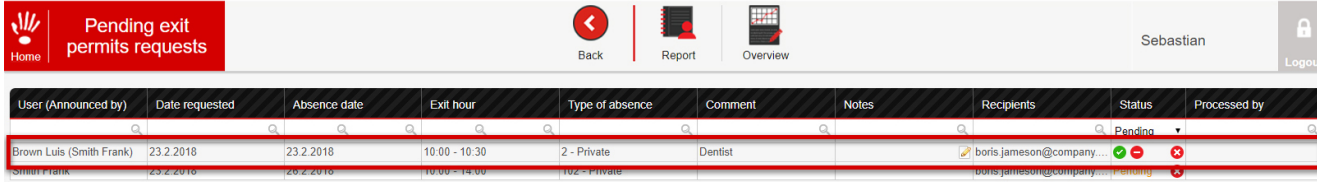
3. Then, select the date, time frame and the type of permit.

4. * Optionally, you can change the addressee of the announcement or enter a comment. If more than one department manager can process permit requests for your department, the *Additional addressee* field will be displayed where you can select the addressee to whom your request will be sent.



5. When you finish entering information for the permit request, click Send. If the user for whom the permit was requested has a valid e-mail address, he will receive a notification about the permit request.

6. The permit request for another user will be displayed in the *Pending exit permits requests* menu, where you can also cancel any requests you have announced for other users.



User (Announced by)	Date requested	Absence date	Exit hour	Type of absence	Comment	Notes	Recipients	Status	Processed by
Brown Luis (Smith Frank)	23.2.2018	23.2.2018	10:00 - 10:30	2 - Private	Dentist		boris.jameson@company...	Pending	
Smith Frank	23.2.2018	20.2.2018	10:00 - 14:00	102 - Private			boris.jameson@company...	Pending	

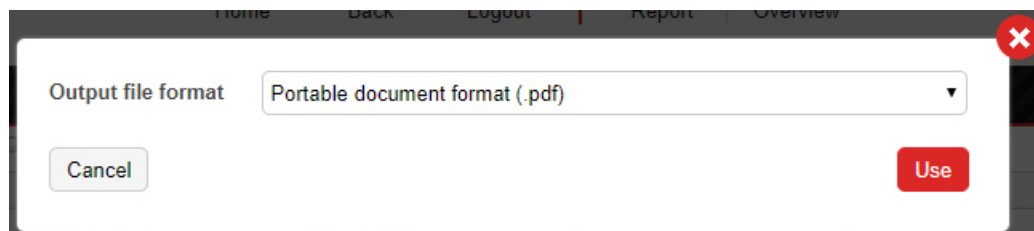
3.2.3 Report

In the *Pending exit permits request* 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.

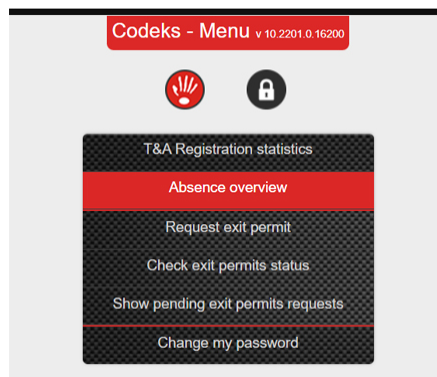
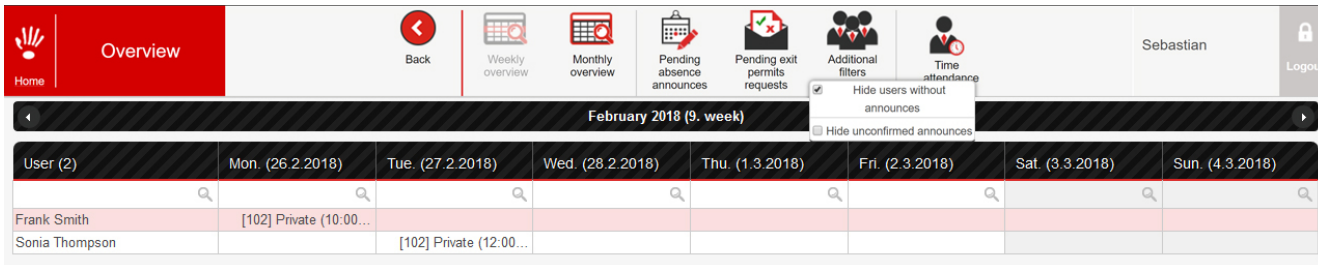


You can choose between file formats: *Portable document format (.pdf)*, *Excel Worksheet (.xls)*, *Excel Worksheet (.xlsx)*, *Open document spreadsheet (.ods)* and *Comma separated values (.csv)*.

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 *Pending exit permits request*, opens a viewer where you can display weekly overviews of all confirmed permits, for all departments for which you have granted View announcement rights.

User (2)	Mon. (26.2.2018)	Tue. (27.2.2018)	Wed. (28.2.2018)	Thu. (1.3.2018)	Fri. (2.3.2018)	Sat. (3.3.2018)	Sun. (4.3.2018)
Frank Smith	[102] Private (10:00...						
Sonia Thompson		[102] Private (12:00...					

If you enable the additional filtering option *Hide users without announces* only users who have a confirmed electronic permit in the selected period will be displayed.

3.4 Editing e-permits in Time attendance

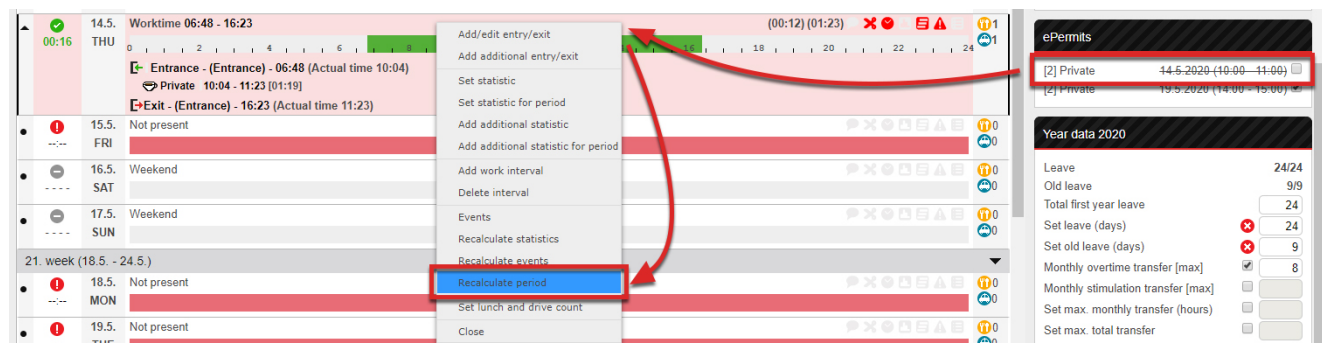
Heads of departments and administrators, who are granted rights to edit the time and attendance of users, can manage the user's confirmed electronic permits by enabling or revoking the electronic permits and thus influence whether they are taken into account when recalculating the time registration or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



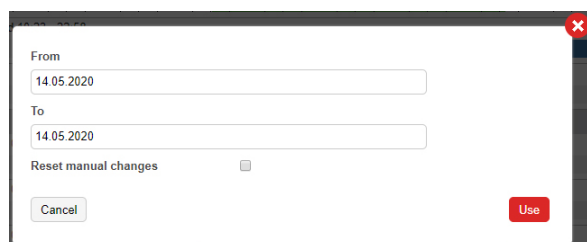
1. In the *Time attendance* editor, the electronic permits that have been recorded for the user in the selected period are displayed in the *ePermits* section on the right.

To revoke the registered electronic permit in the time registration, uncheck the box next to the appropriate electronic permit record.

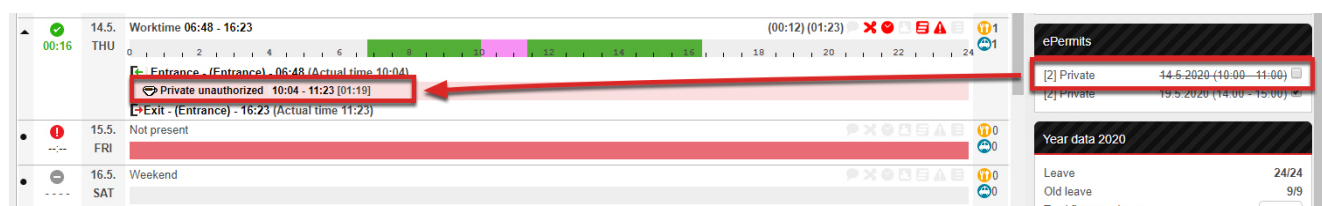
2. Then select the *Recalculate period* function from the right-click menu on the day (if you do not have manual corrections entered on the day, you can also use the *Recalculate events* function, which overrides all manual corrections).



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



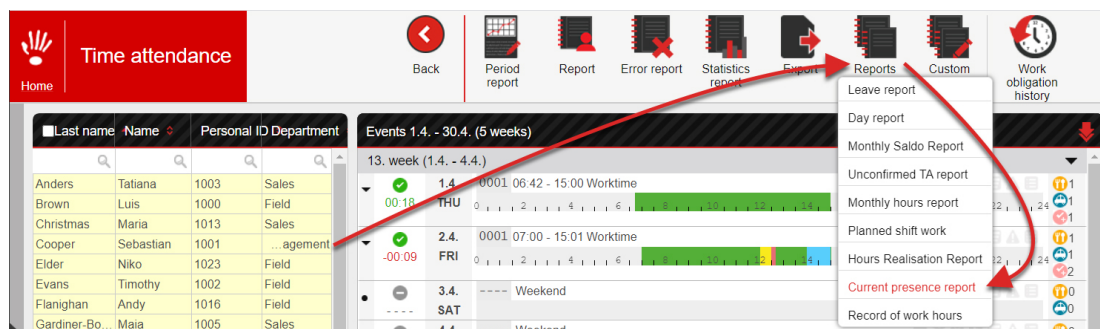
4. In the time registration, the events will now be changed so that the electronic permit is no longer taken into account.



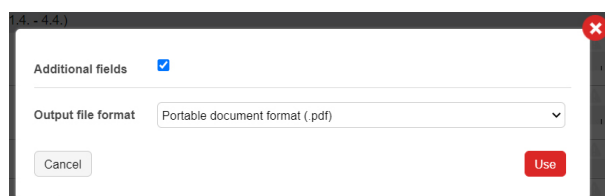
3.5 Current presence report

In the *Time attendance* editor, you can also print a list for checking the current presence of users.

1. To print the list for checking the current presence of users, first select the users for whom you want to generate a report for from the list on the left in the *Time attendance* editor. You can select multiple users by holding down the *Ctrl* or *Shift* key.
2. Then click the *Reports* icon in the editor toolbar and select *Current presence report* from the drop-down list. A new pop-up window will open.



3. In the new window, you can enable the display of *Additional fields* and select the report data format. You can choose between Portable document format (.pdf), Excel Worksheet (.xls), Excel Worksheet (.xlsx), Open document spreadsheet (.ods) and Comma separated values (.csv).



4. Click the *Use* button to print the report.

Current presence report					
Last name	Name	Last event	Request for exit permit	Room	Presence
Department: Company\Accounting					
Anders	Tatiana	15:14	Private - (14:00 - 15:00)	201	
McEntyre	Bruce	11:20		201	
Lin	Cleo	14:58		201	
Department: Company\Support					
Ryerson	Ernest	08:35		193	
Turner	Michael	09:16		194	
Evans	Timothy	11:24	Private - (18:00 - 20:00)	193	
Elder	Niko	11:25		194	
Knowles	Jerry	10:49		193	
Flanighan	Andy	15:07		193	
Department: Company\Sales					
Hermann	Joe	12:13		158	
Jameson	Boris	14:14	Private - (15:00 - 00:00)	158	

For each selected user the report shows the time of the last event they registered, any permits they have already or will use in the current day, the values entered for them in the *Additional fields* and a blank field where you can manually enter the status of their presence. The Current presence report always shows only the data for the current day.