

Codeks ePermits Add-on

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.

1.1 License Information

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

This manual comes "as is" - no warranty of any kind, expressed or implied. Jantar d.o.o. does not give any assurances or guarantee in connection with information in this document.

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

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

1.3 Contact Information

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

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SLOVENIA

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E-mail: info@jantar.si

Web page: www.jantar.si

Support

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

2 Description and installation instructions

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.



The process of announcing and processing an ePermits request.

The Codeks ePermits software package contains:

- the license code for the Codeks ePermits add-on, which activates the components of the Codeks ePermits add-on within the main Codeks application;
- the user manual for the Codeks ePermits add-on.



2.1 System requirements

Before installing the *Codeks ePermits* add-on, make sure these system requirements are met:

- a server 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 4.5,
- a minimum of 4 GB of RAM and a dual-core processor (6 GB of RAM and a quad-core processor, if the database is running on the same server),
- at least 50 GB of available free space on the hard drive,
- PDF Reader software for viewing generated reports,
- internet access,
- Internet 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

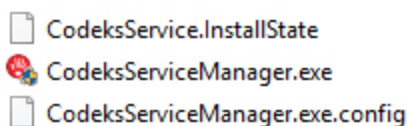
To enable the Codeks ePermits add-on you must enter a valid license code for the software in the Codeks Service Manager program. The validity of the Codeks ePermits license is equal to the validity of the license of the main Codeks.

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

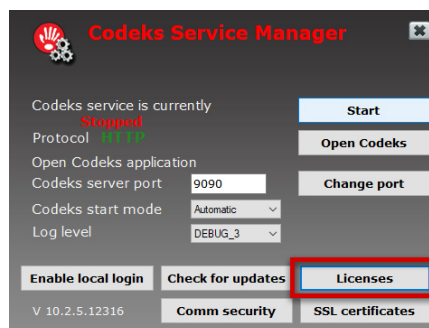
Codeks Service Manager icon:



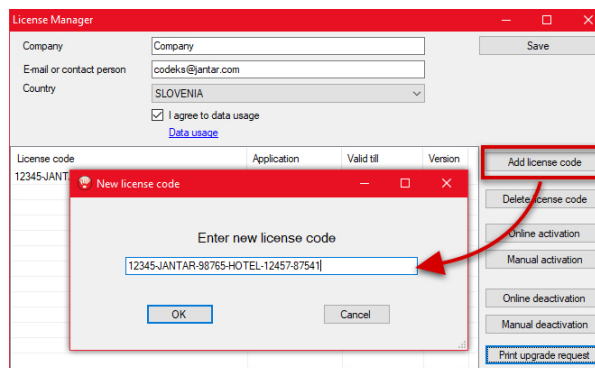
The following picture shows the CodeksServiceManager.exe file in the *C:\Program Files\Codeks* folder:



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.

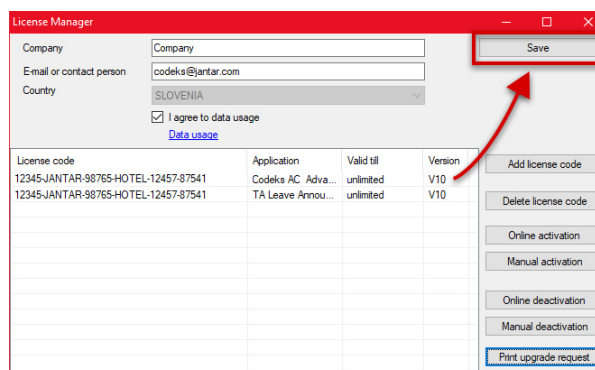
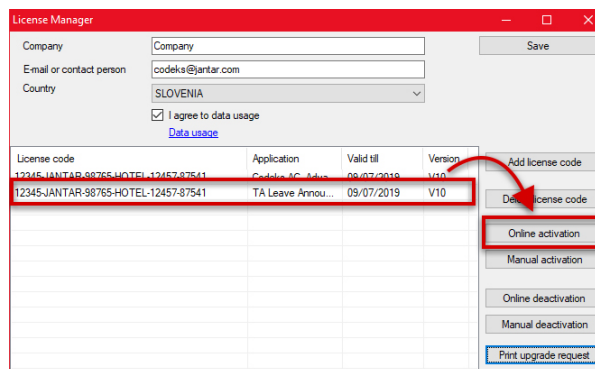


4. The *Codeks TA Leave announces* license code will be displayed in the window. Next the entered license code must be activated. To activate it, click the Online activation or [Manual activation](#) button.

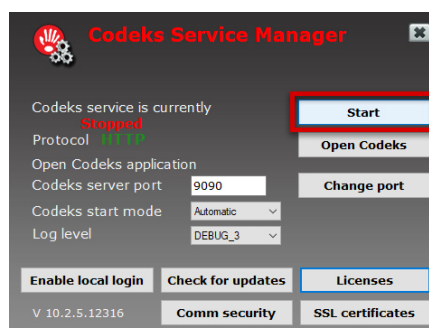
NOTE

If your Codeks server does not have an internet connection, the program will display an error. In this case, you will have to [activate the license code manually](#) using another device with internet access.

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

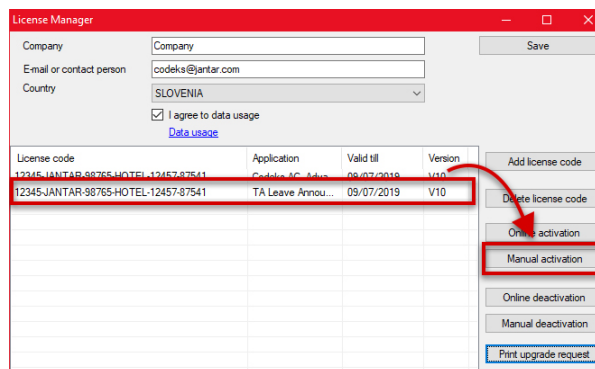


6. In the main window of the *Codeks Service Manager* program restart the Codeks Service by clicking the Start button.



MANUAL LICENSE ACTIVATION

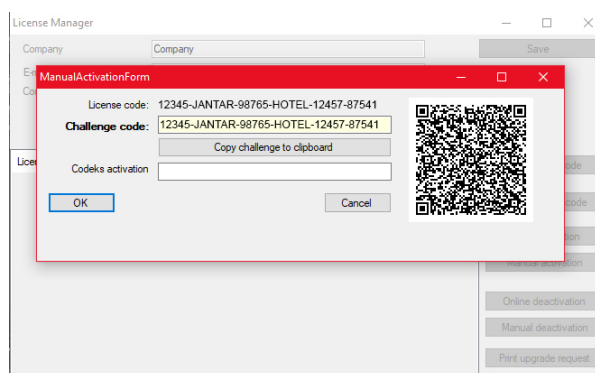
1. Select the license code you wish to activate and click on the *Manual activation* button.



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

IMPORTANT

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

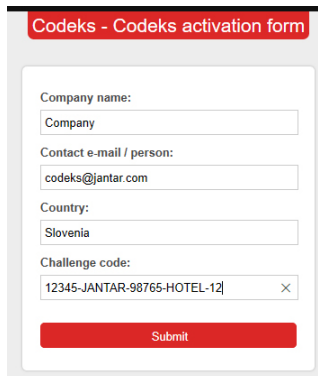


NOTE

If you scan the displayed QR 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 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.

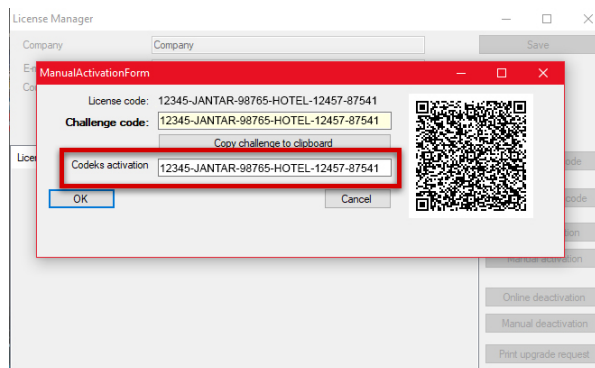
Codeks - Codeks activation form

12345-JANTAR-98765-HOTEL-12457-87541

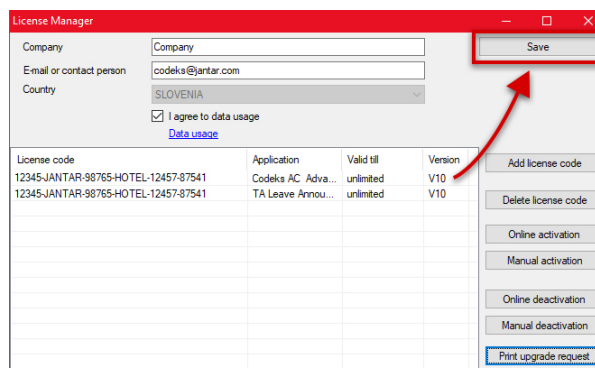
Permission to use your submitted information

The information of Codeks software license owners is stored in our Jantar database. The data will be stored throughout the production and lifetime of the Codeks software.

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*.

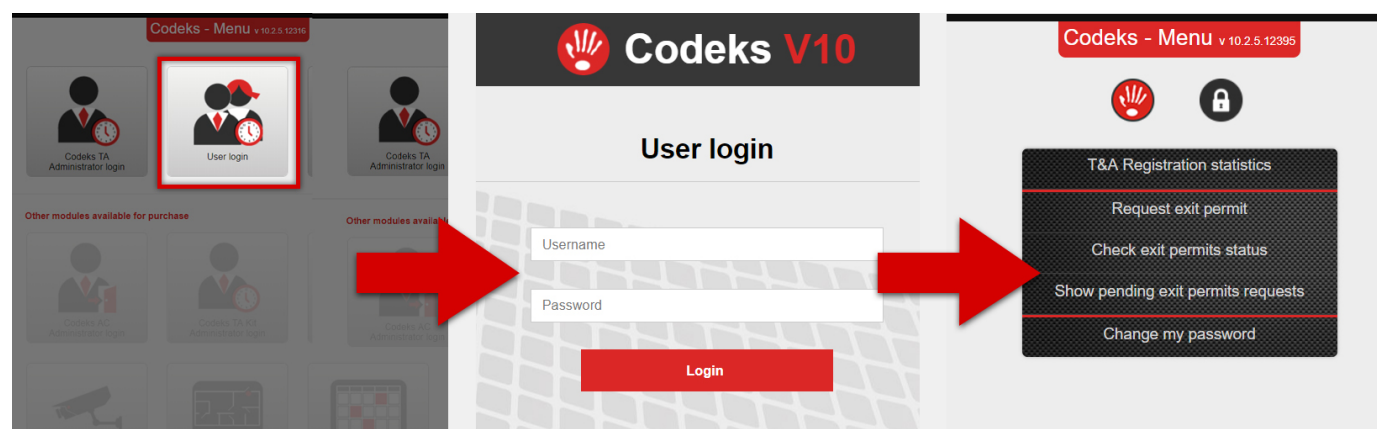


License code	Application	Valid till	Version
12345-JANTAR-98765-HOTEL-12457-87541	Codeks AC Adv...	unlimited	V10
12345-JANTAR-98765-HOTEL-12457-87541	TA Leave Annou...	unlimited	V10

3 How the Codeks ePermits work

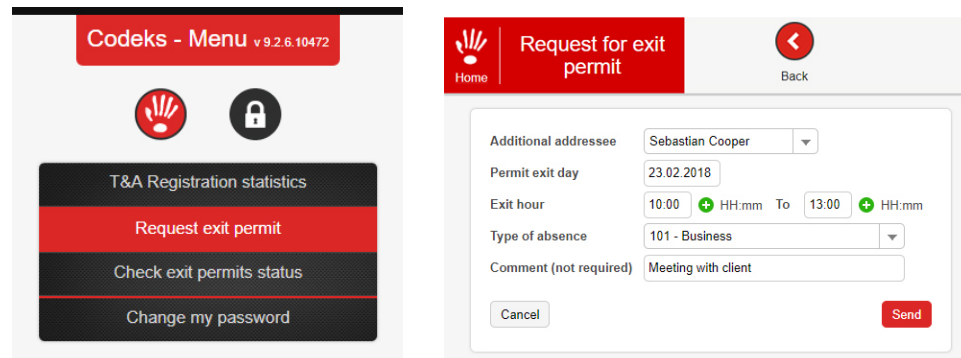
The Codeks ePermits add-on enables the use of electronic permits within an existing Codeks system. The following chapter describes how the Codeks ePermits add-on operates from the moment a user sends a permit request up to the point when he can use it on a controller.

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](#) ³⁶.

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



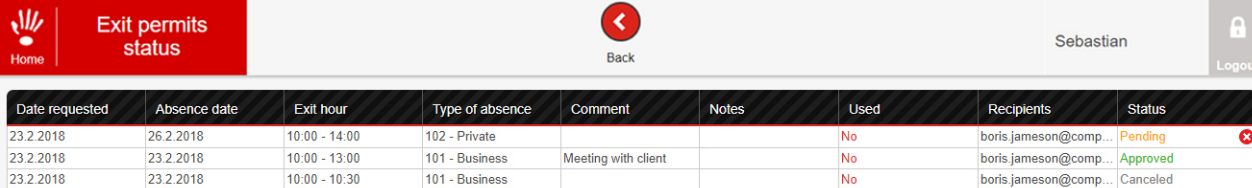
The users will be able to request electronic permits only if [they are assigned the appropriate group and timetable](#) ³⁶ that enable the functionality of the Codeks ePermits.

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](#)^[34] 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

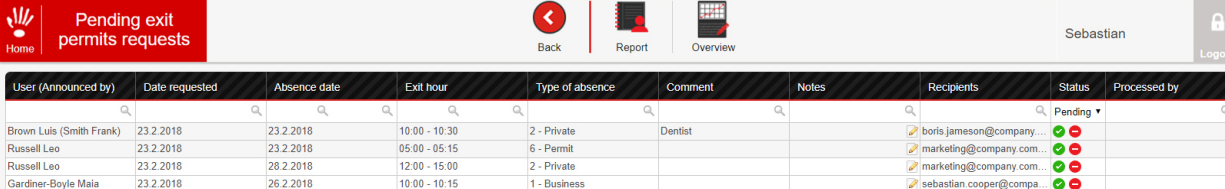
5. In this same menu, the user also has the option to cancel the permit request afterward. However, the cancellation is only possible until the head of the department confirms or rejects it.

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](#)^[33].



In order for the department managers to be able to access the Codeks application, they need [a username and password](#)^[33].

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...	Pending	
Russell Leo	23.2.2018	28.2.2018	12:00 - 15:00	2 - Private			marketing@company.com...	Pending	
Gardiner-Boyle Maia	23.2.2018	26.2.2018	10:00 - 10:15	1 - Business			sebastian.cooper@compa...	Pending	

In order for the department managers to be able to process permit requests, they must be [granted appropriate rights](#)^[35] 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](#)^[34].

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.

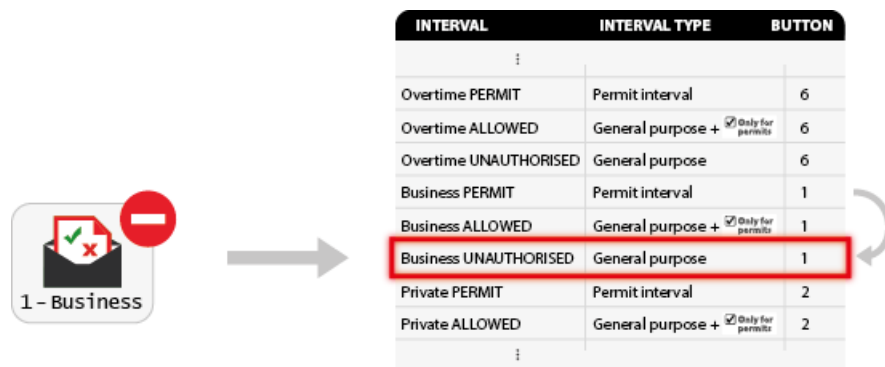


1 - Business

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.

4 Notification systems for ePermits

The Codeks application enables different configurations of notifications and the validation of electronic permits. This way you can customize the system of permit announcements to meet your company's needs. The following chapter describes three examples of system configuration for the notification and validation of electronic permits:

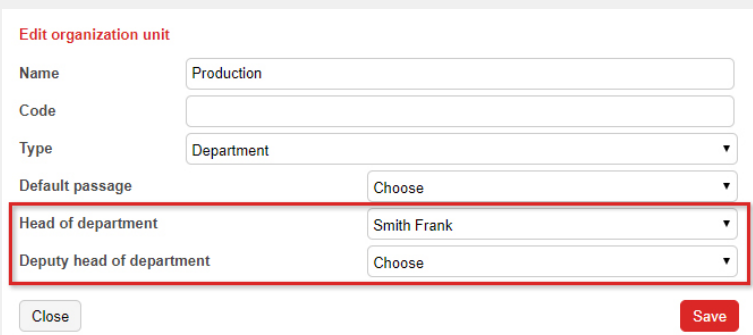
A) NOTIFICATION DEPENDING ON THE COMPANY ORGANIZATION AND DEPARTMENT MANAGER PRESENCE

When users in the company send requests for electronic permits, the system automatically queues their permit request to be processed by 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](#)³¹⁴ 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.



Edit organization unit

Name	Production
Code	
Type	Department
Default passage	Choose
Head of department	Smith Frank
Deputy head of department	Choose




Close Save

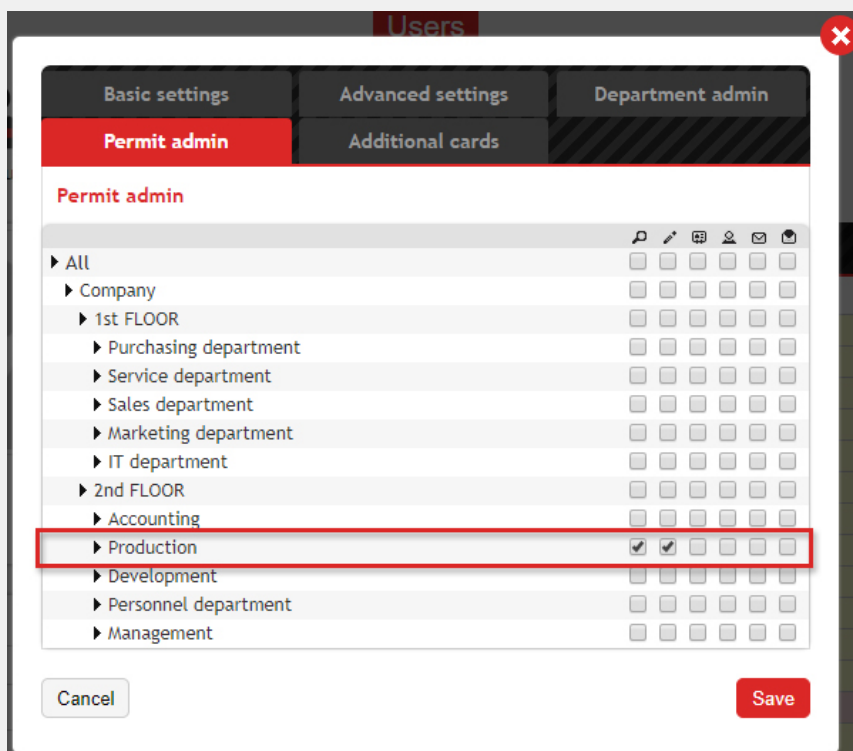
3. Click Save.

The defined users will receive notifications about permit requests sent by 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 permit requests. 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 permit requests](#)^[35] 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 permit requests* 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 *Permit admin* tab, grant the *View announcement* , *Process announcement* , and *Request announcement notification*  rights for appropriate departments to the user.



Basic settings	Advanced settings	Department admin
Permit admin	Additional cards	
Permit admin		
<div> <div> ▶ All </div> <div> ▶ Company </div> <div> ▶ 1st FLOOR </div> <div> ▶ Purchasing department </div> <div> ▶ Service department </div> <div> ▶ Sales department </div> <div> ▶ Marketing department </div> <div> ▶ IT department </div> <div> ▶ 2nd FLOOR </div> <div> ▶ Accounting </div> <div> ▶ Production </div> <div> ▶ Development </div> <div> ▶ Personnel department </div> <div> ▶ Management </div> </div> <div> <div> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> </div> <div> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> </div> <div> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> </div> <div> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> </div> <div> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> </div> <div> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> </div> <div> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> </div> <div> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> </div> <div> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> </div> <div> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> </div> </div>		
Cancel	Save	

3. Click Save.

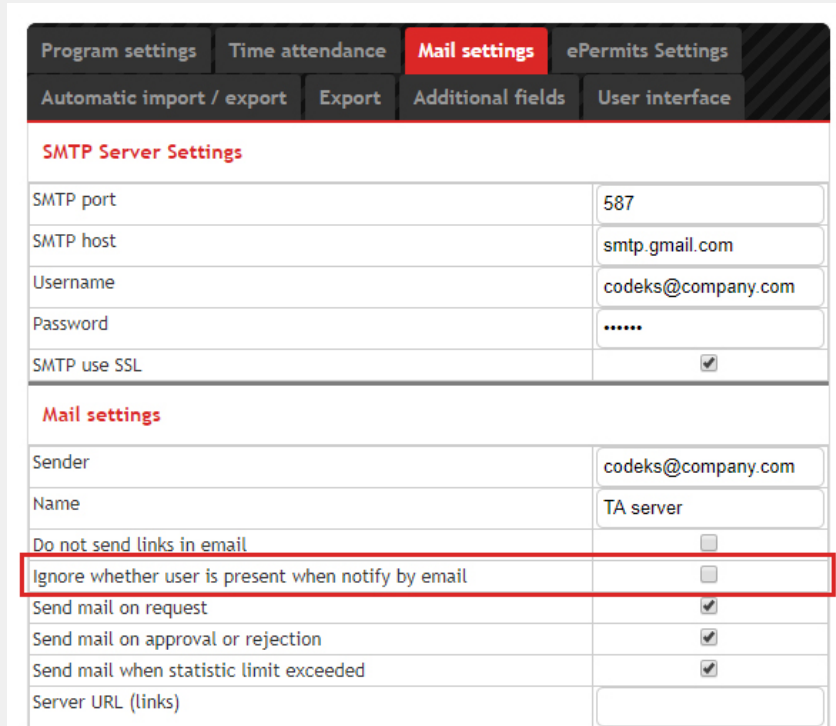
NOTE

The selected user must also have a valid email address for receiving notifications as well as a username and password to enable him user access to the Codeks application. (The user can also be assigned user access other ways, e.g. using Active Directory credentials.)

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 automatically send notifications of permit requests.

1. In the *Settings -> Preferences* editor in the *Mail settings* tab, disable the *Ignore whether user is present when notify by email* setting (the setting must not have a check mark).



Program settings	Time attendance	Mail settings	ePermits Settings
Automatic import / export	Export	Additional fields	User interface
SMTP Server Settings			
SMTP port	587		
SMTP host	smtp.gmail.com		
Username	codeks@company.com		
Password	*****		
SMTP use SSL	<input checked="" type="checkbox"/>		
Mail settings			
Sender	codeks@company.com		
Name	TA server		
Do not send links in email	<input type="checkbox"/>		
Ignore whether user is present when notify by email	<input type="checkbox"/>		
Send mail on request	<input checked="" type="checkbox"/>		
Send mail on approval or rejection	<input checked="" type="checkbox"/>		
Send mail when statistic limit exceeded	<input checked="" type="checkbox"/>		
Server URL (links)			

2. Click Save.

B) NOTIFICATION DEPENDING DEFINED USERS' RIGHTS






When users in the company send requests for electronic permits, the system automatically sends a notification of their permit request 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 permit requests 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 request electronic permits for users in a certain department, and open the window for editing the selected user's settings.

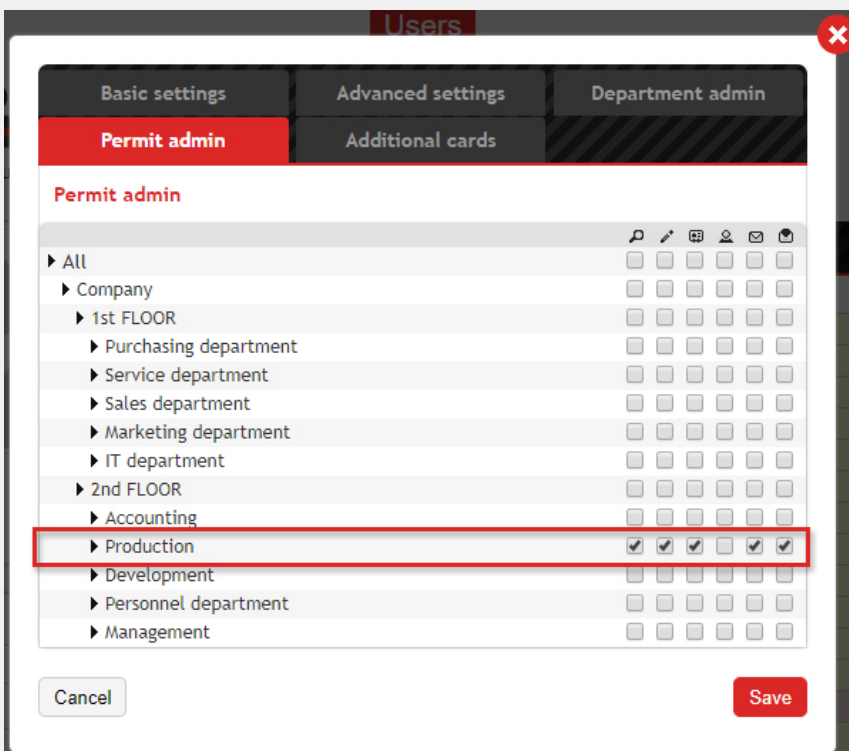
2. In the *Permit admin* tab, grant the user the appropriate rights:

- *View announcement*  - the user can view the permit requests of other users in this department.
- *Process announcement*  - the user can confirm permit requests of other users in this department.
- *Request announcement for others*  - the user can request permits on behalf of other users in this department.
- *Request announcement notification*  - the user is an additional addressee and will receive a notification every time an employee in this department requests a permit.
- *Process announcement notification*  - the user will receive an electronic notification every time a status of a permit request for any user in this department is changed.

3. Click Save.

NOTE

The selected user must also have a valid email address for receiving notifications as well as a username and password to enable him user access to the Codeks application. (The user can also be assigned user access other ways, e.g. using Active Directory credentials.)



Department	View announcement	Process announcement	Request announcement for others	Request announcement notification	Process announcement notification
All	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Company	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
1st FLOOR	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Purchasing department	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Service department	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Sales department	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Marketing department	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
IT department	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2nd FLOOR	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Accounting	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Production	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Development	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Personnel department	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Management	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>


C) NOTIFICATION DEPENDING ON THE SELECTED ADDRESSEE

When users in the company request a permit, they will choose an addressee who will be notified about their announcement and will also be able to process the permit request.

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 permit requests as well as the right to process the requests from users in a certain department.

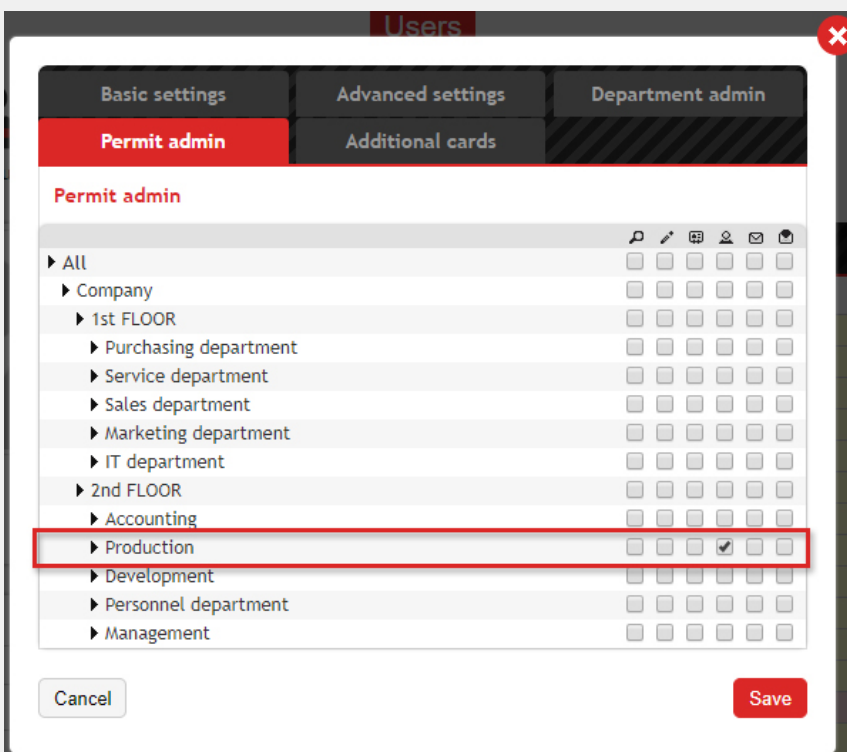
Usually, multiple users are defined as potential addressees for the same department. This enables users, who send requests for electronic permits, to choose the appropriate addressee for their announcement.

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 *Permit admin* tab, grant the user the *Addressee*  right. This will allow him to view, process and be notified about permit requests by users in this department
3. Click Save.

NOTE

The selected user must also have a valid email address for receiving notifications as well as a username and password to enable him user access to the Codeks application. (The user can also be assigned user access other ways, e.g. using Active Directory credentials.)



Permit admin						
▶ All		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
▶ Company		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
▶ 1st FLOOR		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
▶ Purchasing department		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
▶ Service department		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
▶ Sales department		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
▶ Marketing department		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
▶ IT department		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
▶ 2nd FLOOR		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
▶ Accounting		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
▶ Production		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
▶ Development		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
▶ Personnel department		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
▶ Management		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

5 Settings in the Codeks application

The Codeks ePermits 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 electronic permits in the *Preferences* menu of the main Codeks application.
2. Timetables and intervals that enable the request and use of electronic permits (in the [Timetables](#) editor).
3. Settings of each individual user, which enable regular users to request permits and department managers to process the permit requests.

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

5.1 Mail settings and ePermits settings

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

5.1.1 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).

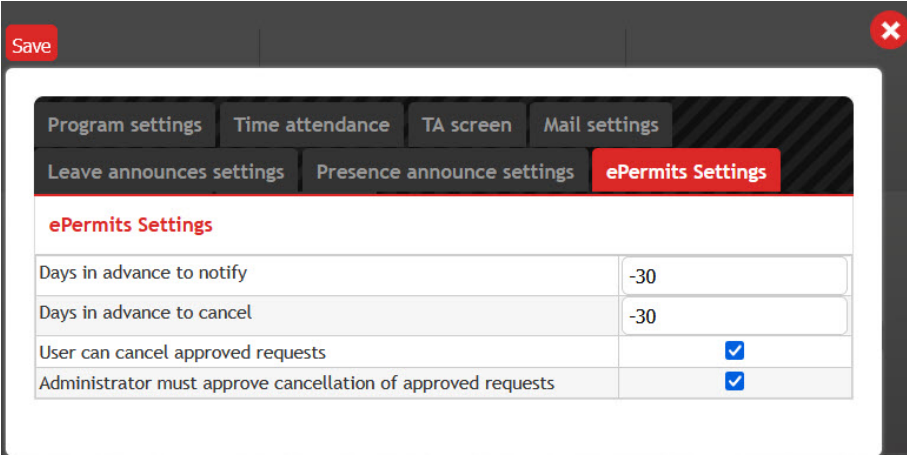
Program settings	Time attendance	Mail settings	ePermits Settings
Automatic import / export	Export	Additional fields	User interface
SMTP Server Settings			
SMTP port		587	
SMTP host		smtp.gmail.com	
Username		codeks@company.com	
Password		*****	
SMTP use SSL		<input checked="" type="checkbox"/>	
Mail settings			
Sender		codeks@company.com	
Name		TA server	
Do not send links in email		<input type="checkbox"/>	
Ignore whether user is present when notify by email		<input type="checkbox"/>	
Send mail on request		<input checked="" type="checkbox"/>	
Send mail on approval or rejection		<input checked="" type="checkbox"/>	
Send mail when statistic limit exceeded		<input checked="" type="checkbox"/>	
Server URL (links)			

SMTP Server Settings	
SMTP port	SMTP port
SMTP host	SMTP host
Username	Username
Password	Password
SMTP use SSL	SMTP uses SSL
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	<p>If the setting is enabled, the sent e-mails will not contain any hyperlinks (e.g. link to editing leave announces).</p> <p>If the setting is not enabled, the e-mails will contain hyperlinks.</p>
Ignore whether user is present when notify by email	<p>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.</p> <p>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.</p>
Send mail on request	<p>If the setting is enabled an e-mail notification will be sent to the department manager when a user sends a request for leave.</p> <p>If the setting is not enabled, no e-mail notification shall be sent.</p>
Send mail on approval or rejection	<p>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.</p> <p>If the setting is not enabled, no e-mail notification shall be sent.</p>
Send mail when statistic limit exceeded	<p>If the setting is enabled the department manager will be sent an e-mail notification when a user exceeds a set statistic limit.</p> <p>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.</p>
Server URL (links)	<p>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).</p> <p>* 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).</p> <p>Example of a server URL: <i>https://www.example.com/</i></p>

5.1.2 ePermits settings

In the *ePermits settings* you can set how many days in advance users have to request an electronic permit.



ePermits settings	
Days in advance to notify	Sets at least how many days in advance the users must request a permit. Using this setting, you can also enable permit requests for the past, e.g. to enable permit requests 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 permit. Using this setting, you can also enable permit announcements for the past, e.g. to enable permit 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 permit.
Administrator must approve cancellation of approved requests	If this setting is enabled, user's canceled permit must also be approved by the administrator.

5.2 Timetables for ePermits


Through their group rights at specific passages users, who will be able to request electronic permits, must be assigned timetables which enable the functionality of the Codeks ePermits add-on.

Users can request different types of electronic permissions (through the *Request for exit permit* menu accessed by using their user access credentials), and then use the confirmed electronic permits on controllers. The timetables used by users must, therefore, contain specially designed intervals that enable the request and use of electronic permits.

The timetables, that are assigned to users at passages where they can use the functionality of the electronic permits, must contain:

1. At least one *Permit interval* with an assigned button, that will enable the functionality of the electronic permits to be activated when users register at a controller. These intervals must be sent to the necessary controllers using the *Send tables* function.

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
⋮		

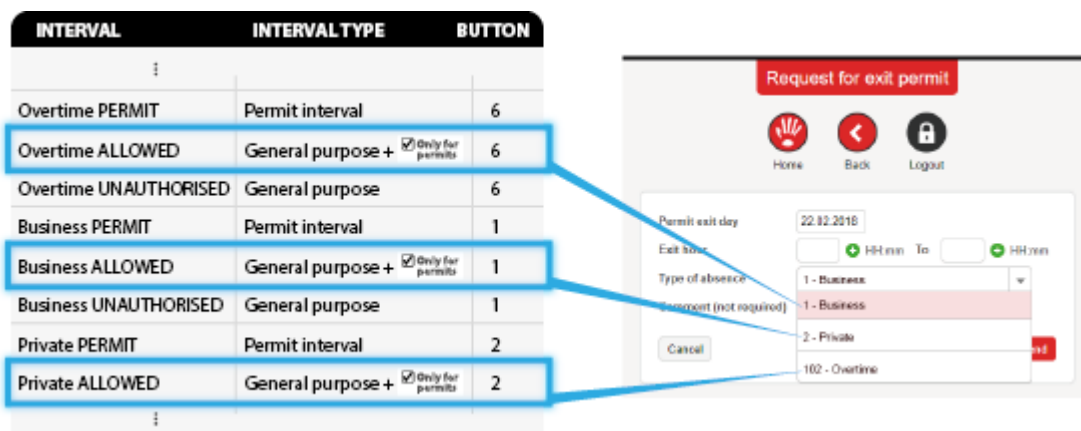


A *Permit interval* adds the button, that the users will use to activate the functionality of an electronic permit, to the controller.

2. Any number of intervals (of either the *General purpose*, *Entry*, *Exit* or *Entry/Exit* type) that have the *Only for permits* setting enabled. These intervals define the different types of electronic permits that the users will be able to request. Each type of permit must be assigned a different button. However, several intervals, which usually do not overlap, can be defined for the same type of permit, which enables the users' registered hours to be recorded into different statistics. These intervals must be added to the users' timetables so that users can choose the appropriate type of permit in the request form.

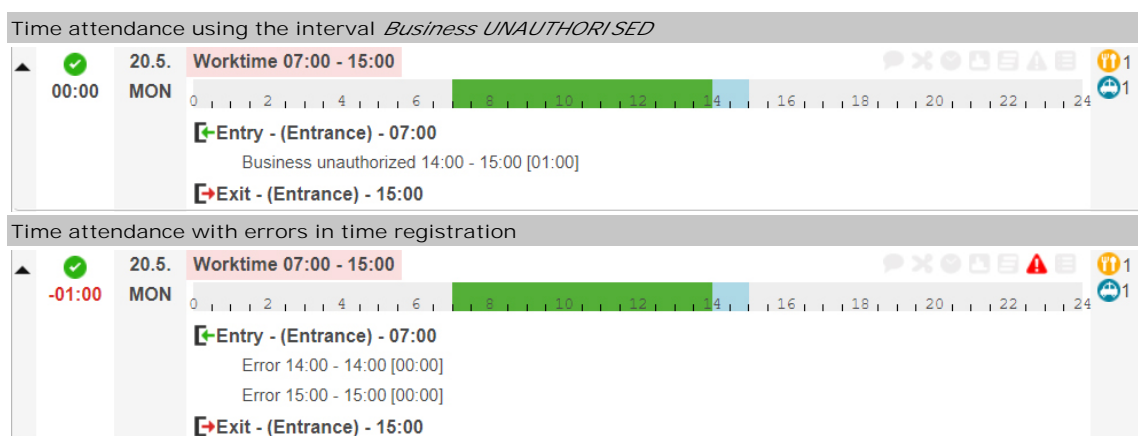
NOTE

Intervals that have the *Only for permits* setting enabled cannot be used for usual time registration at the same time. Intervals used to define the types of permits that users can request must be designed specifically for use with the Codeks ePermits add-on.



The intervals with the enabled *Only for permits* setting enable users to request different types of permits.

3.* Optionally, you can add any number of intervals (of either the General purpose, Entry, Exit or Entry/Exit type) that will record the so-called "unauthorized" events which occur when a user registers at a controller without a confirmed permit (the user may have forgotten to announce the permit or the manager has not yet confirmed the permit). If these intervals are not included in the timetable, the system will register an error in the time registration



Examples of the configuration and use usage of timetables for electronic permits can be found in chapters [Example 1: Using ePermits with one button](#)^[50] and [Example 2: Using ePermits with multiple buttons](#)^[53].

5.2.1 Permit interval

Permit interval type intervals add buttons to controllers, which enable the users to use the electronic permit functionality when registering an event. Time intervals of the type Interval for the license to the controllers add keys through which users can use the functionality of the announced electronic permit.

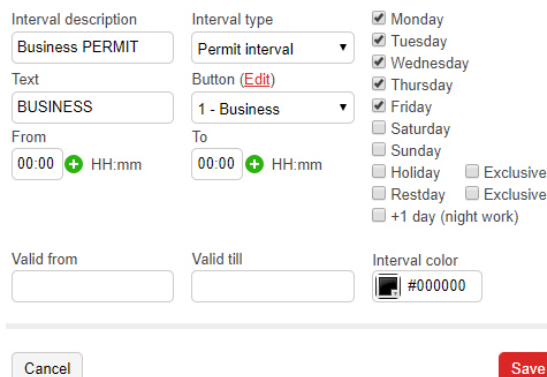
1. To create a new *Permit interval*, click the Add interval icon in the *Timetables* editor.

This will enable the edit field for the time interval on the right side of the editor.

2. Enter the name of the interval and select *Permit interval* interval type.

3. Next, assign a button to the *Permit interval*, which will enable users to activate this permit functionality on a controller.

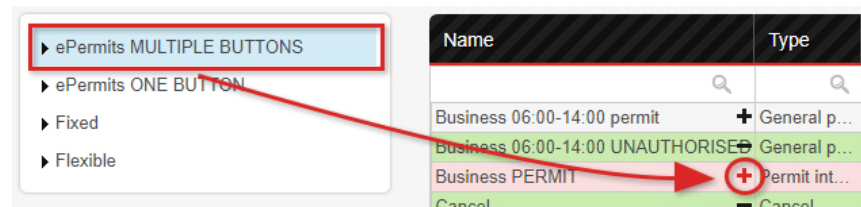
4. Confirm the entered data by clicking the Save button.



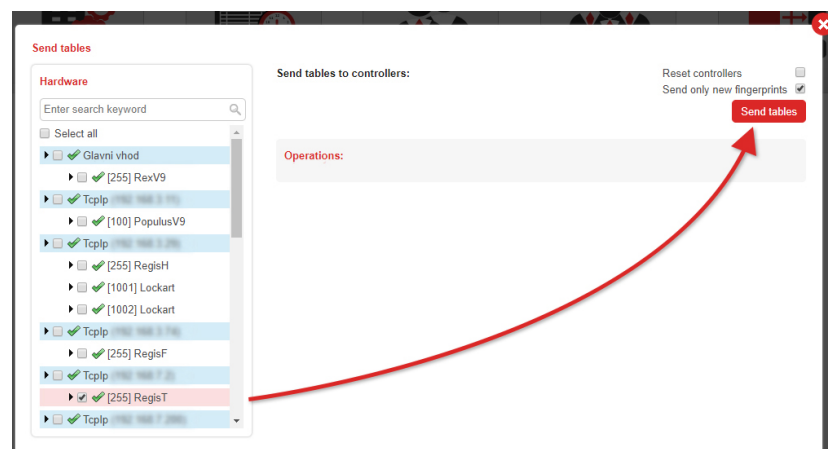
The form contains the following fields and options:

- Interval description:** Business PERMIT
- Interval type:** Permit interval
- Text:** BUSINESS
- Button:** 1 - Business
- From:** 00:00 HH:mm
- To:** 00:00 HH:mm
- Valid from:** (empty)
- Valid till:** (empty)
- Interval color:** #000000
- Days:** Monday, Tuesday, Wednesday, Thursday, Friday (checked); Saturday, Sunday (unchecked)
- Options:** Holiday, Restday, +1 day (night work) (unchecked); Exclusive (checked)
- Buttons:** Cancel, Save

5. The newly created *Permit interval* must also be assigned to the timetable used by users who can request electronic permits.



6. Finally, send tables to all controllers, where users will be able to use electronic permits.



5.2.2 Only for permits interval

Intervals (of either the *General purpose*, *Entry*, *Exit* or *Entry/Exit* type) that have the *Only for permits* setting enabled are used to define the various types of electronic permits that the users will be able to request. These intervals will not be sent to the controllers in the system, but are instead stored in the database and enable users to select the appropriate type of permit when placing their request. Intervals with the *Only for permits* setting enabled must also be assigned a button which users can choose in the permit request form when requesting a permit.

1. To create a new *interval that defines the type of permit that users can request*, click on the Add interval icon in the *Timetables* editor.

This will enable the edit field for the time interval on the right side of the editor.

2. Enter the name of the interval and select the appropriate interval type (of either the *General purpose*, *Entry*, *Exit* or *Entry/Exit* type).

3. Assign the new interval an appropriate button that matches the permit type.

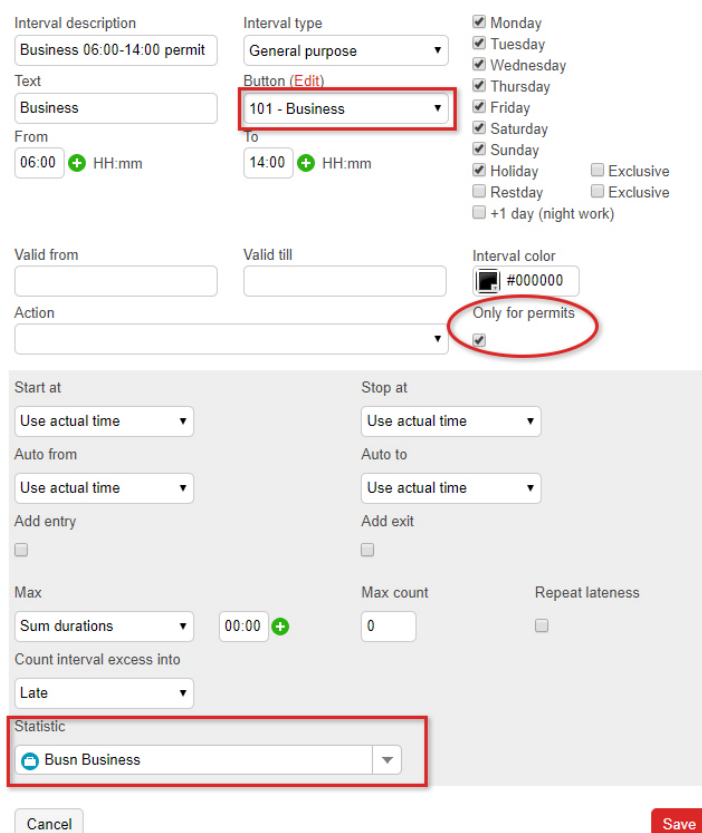
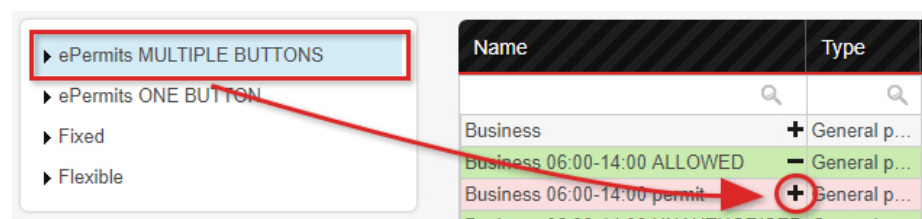
4. Then specify the interval validity time (the *From* and *To* settings). By doing so, you limit the time in which users can announce and use an electronic permit using this interval during the day.

5. Enable the *Only for permits* setting.

6. Select the statistics in which the hours recorded by this interval will be stored.

7. Confirm the entered data by clicking the Save button.

8. The newly created interval must also be assigned to the timetable used by users who can request electronic permits.

5.3 Users' settings for ePermits

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 ePermits add-on.

The necessary settings differ depending on the type of user:

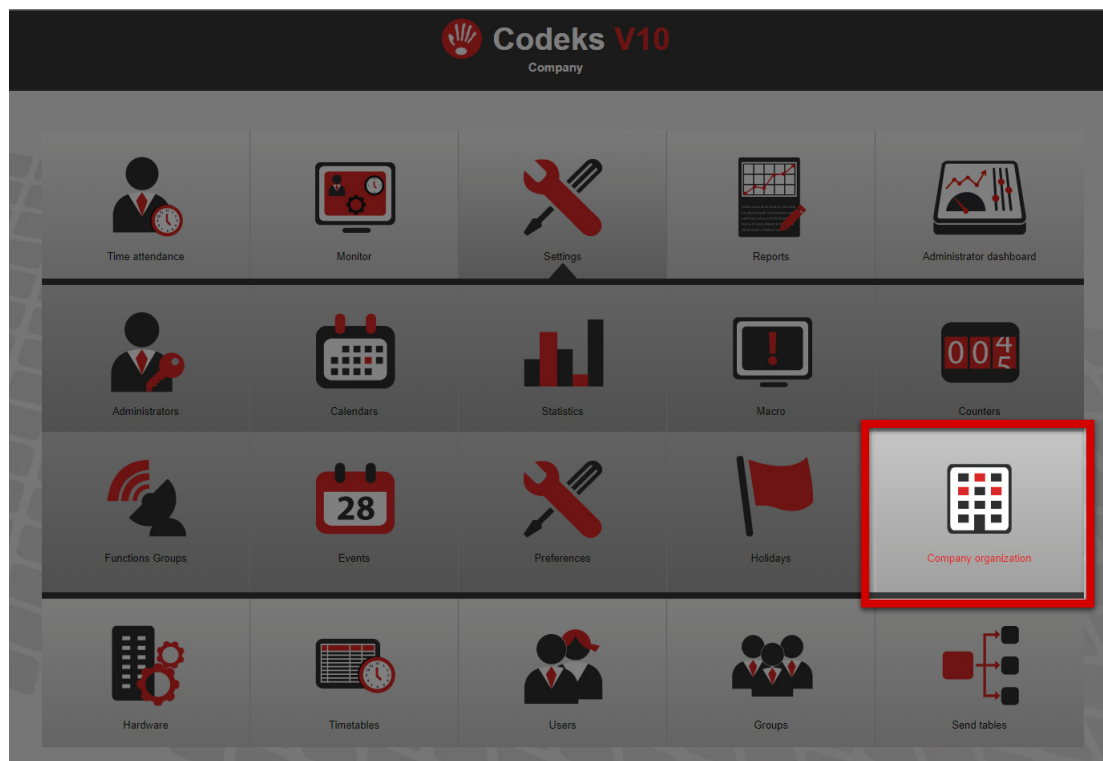
- Department managers, who process (confirm or reject) permit requests of other users, and may also be allowed to request a permit for other users (for example, the users in their department),
- Regular users, who can request a permit.

5.3.1 Company organization settings

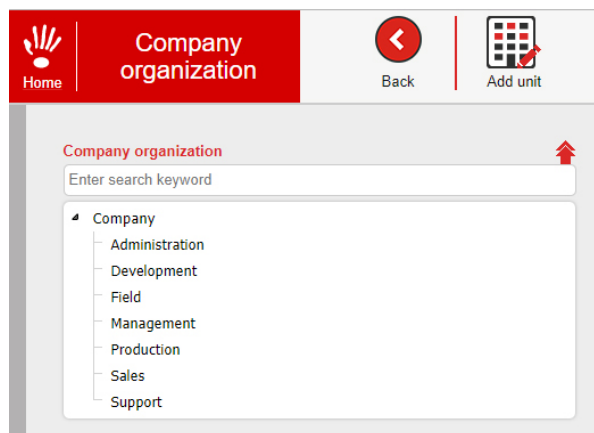
NOTE

The *Company organization* structure must be defined in order to enable the *heads* and *deputy heads of the departments* to be notified about permit requests [according to their presence at the workplace](#)^[18].

Heads of departments and deputy heads of departments can be set for each department in your company in the *Company organization* menu (accessible via the *Settings* submenu).



1. To assign a head or deputy head of department, first, double-click the desired organizational unit to open the pop-up window for editing the organizational unit.



2. In the pop-up window select the users to act as department managers in the *Head of department* and *Deputy head of department* fields. You can choose any existing user within the Codeks system

Edit organization unit

Name	<input type="text" value="Production"/>
Code	<input type="text"/>
Type	<input type="text" value="Department"/>
Default passage	<input type="text" value="Choose"/>
Head of department	<input type="text" value="Smith Frank"/>
Deputy head of department	<input type="text" value="Choose"/>

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

You can read more about the *Company organization* settings in the documentation of the main Codeks application.

You can read more about configuring the notification system in chapter [Notification systems for ePermits](#)^[18].

5.3.2 Settings for department managers

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

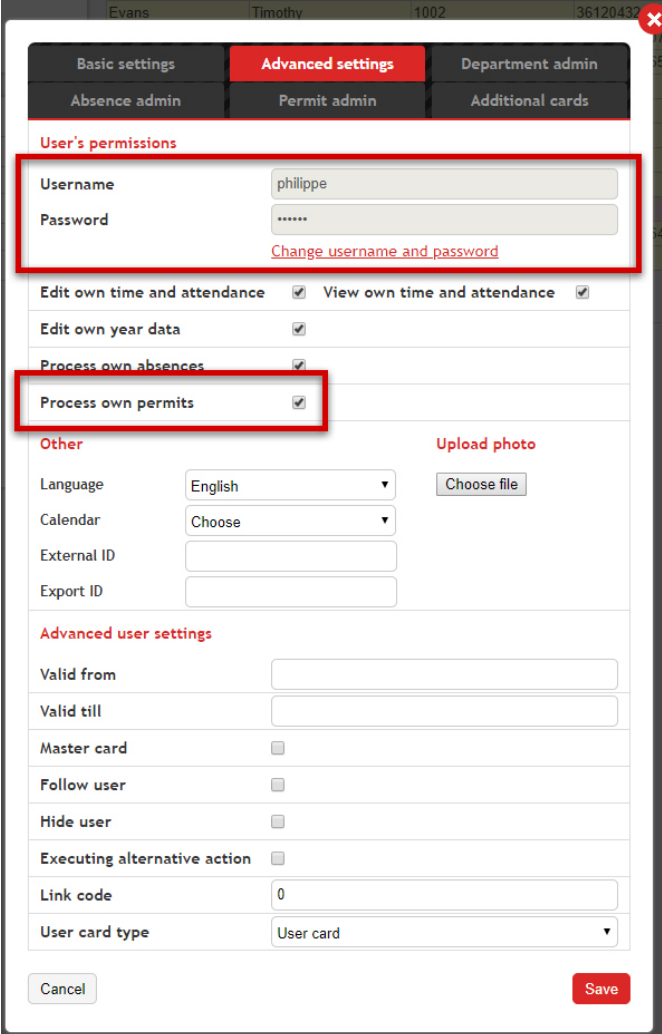
A) Username and password for user access

The department manager can either confirm or reject a permit request in the *Pending exit permits requests* 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 permits by adding a checkmark next to the setting *Process own permits*.
3. When you are finished with editing the user's settings save the entered data by clicking the Save button.

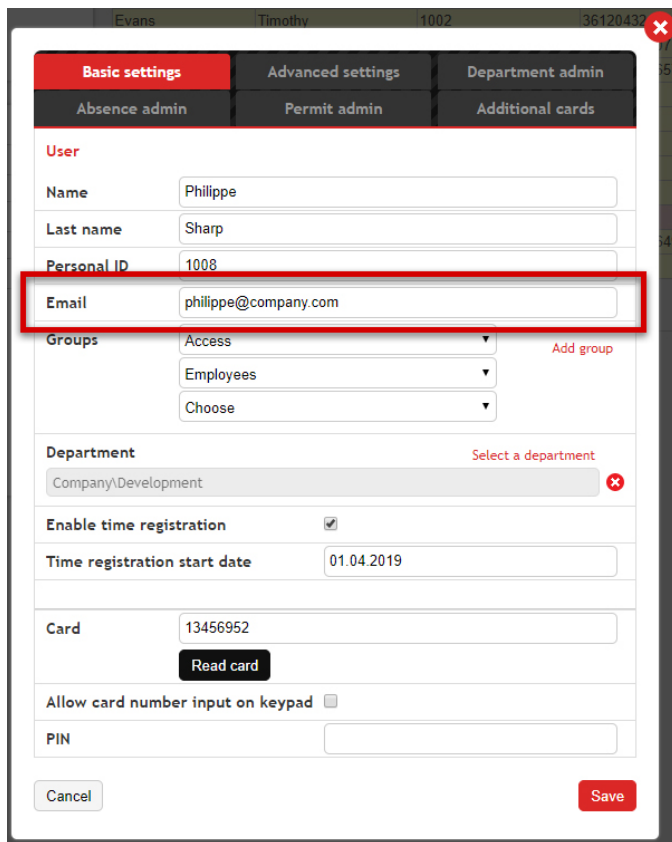
NOTE

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 permit requests 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.



The screenshot shows the Jantar user settings interface. The top navigation bar includes tabs for 'Basic settings' (selected), 'Advanced settings', and 'Department admin'. Below these are sub-tabs: 'Absence admin', 'Permit admin', and 'Additional cards'. The 'User' section contains the following fields:

- Name: Philippe
- Last name: Sharp
- Personal ID: 1008
- Email: philippe@company.com (highlighted with a red box)

Below the email field are three dropdown menus for 'Groups': 'Access', 'Employees', and 'Choose'. To the right of these is a red 'Add group' button. The 'Department' section shows a dropdown menu with 'Company\Development' selected and a red 'Select a department' button. Below this are checkboxes for 'Enable time registration' (checked) and a date field for 'Time registration start date' (01.04.2019). The 'Card' section includes a card number field (13456952), a 'Read card' button, and a checkbox for 'Allow card number input on keypad' (unchecked). A 'PIN' field is also present. At the bottom are 'Cancel' and 'Save' buttons.

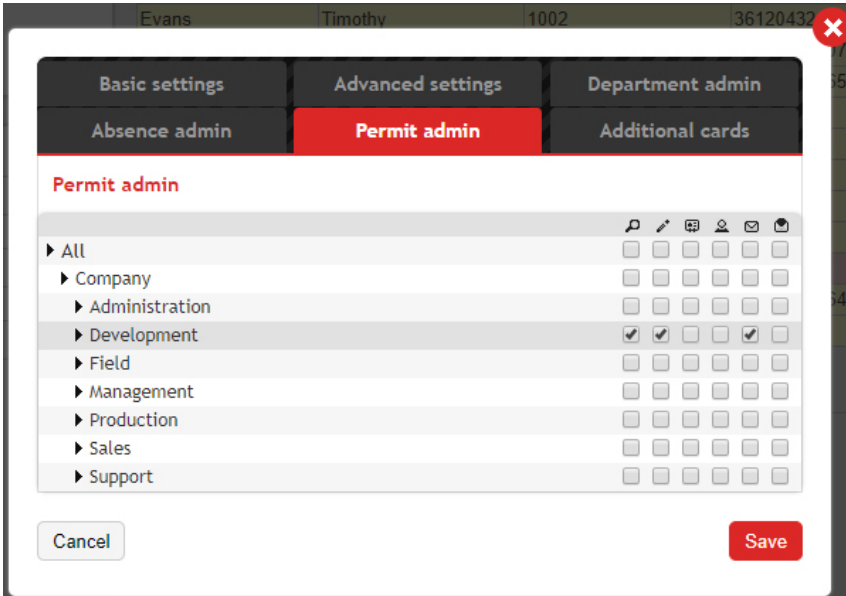
C) Permit processing and notification rights







The rights of the department managers for processing permit requests 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 permit requests of other users.

You can limit the rights of department managers for viewing, processing, and notification about permit requests 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 permit requests of other users in this department.
 Process announcement	The user can confirm permit requests of other users in this department.
 Request announcement for others	The user can request permits 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 requesting a permit, 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.
 Request announcement notification	The user is an additional addressee and will receive a notification every time an employee in this department request a permit.
 Process announcement notification	The user will receive an electronic notification every time a status of a permit request of any user in this department is changed.

2. Save the settings by clicking the Save button.

5.3.3 Settings for regular users

Necessary settings for regular users who will be able to request electronic permits:

A) Set the group and timetable

The user will be able to request and use the electronic permits only if he is assigned the appropriate timetable, which enables the functionality of the ePermits add-on, through his *Time and attendance group* rights.

You can assign a group to the user in the *Users* or *Groups* editor. For more information on assigning groups and timetables, see the documentation of the main Codeks application.

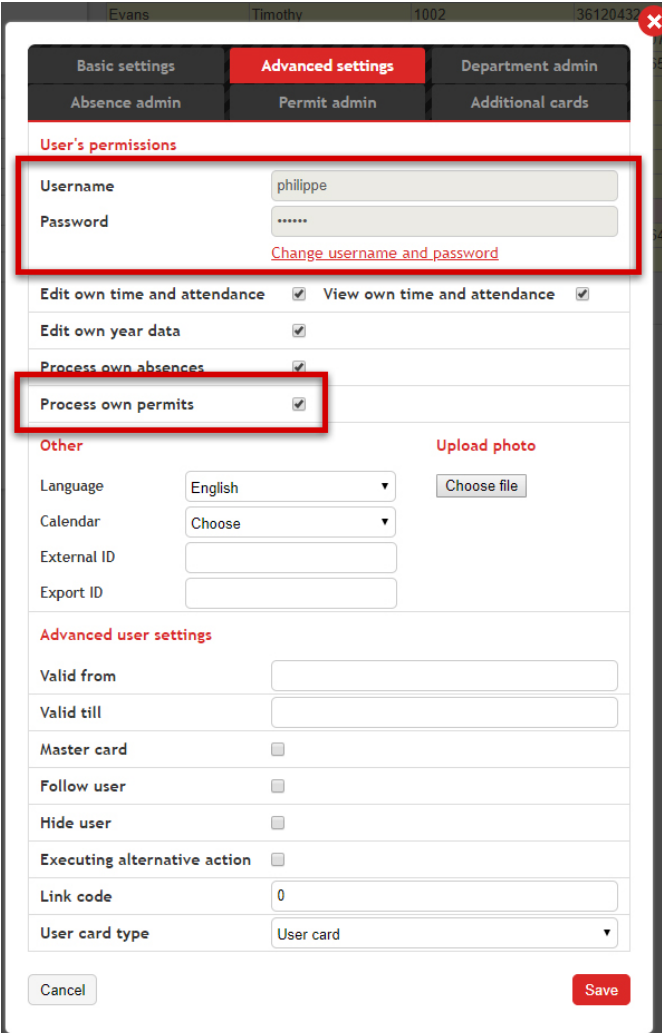
B) Username and password for user access

Users can request a permit only through the *Request for exit permit* 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 permits by adding a checkmark next to the setting *Process own permits*.

3. When you are finished with editing the user's settings save the entered data by clicking the Save button.

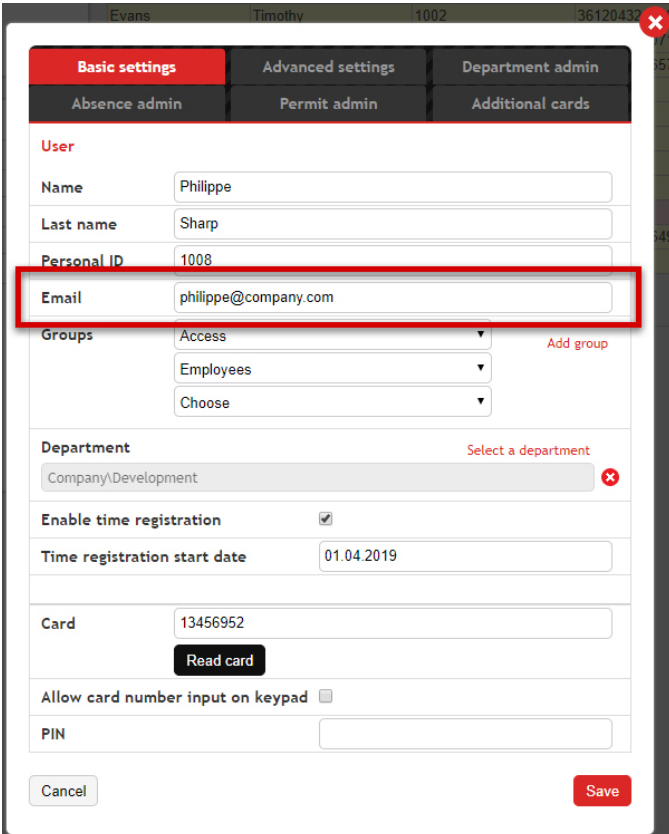


NOTE

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).

C*) E-mail address settings for notifications

The Codeks system can notify users about their confirmed permit request 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.



The screenshot shows the 'Basic settings' tab for a user named Philippe Sharp. The 'Email' field, containing 'philippe@company.com', is highlighted with a red rectangular box. Other visible fields include 'Name', 'Last name', 'Personal ID', 'Groups', 'Department', 'Enable time registration', 'Time registration start date', 'Card', 'Allow card number input on keypad', and 'PIN'. The interface includes 'Cancel' and 'Save' buttons at the bottom.

6 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.

6.1 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.

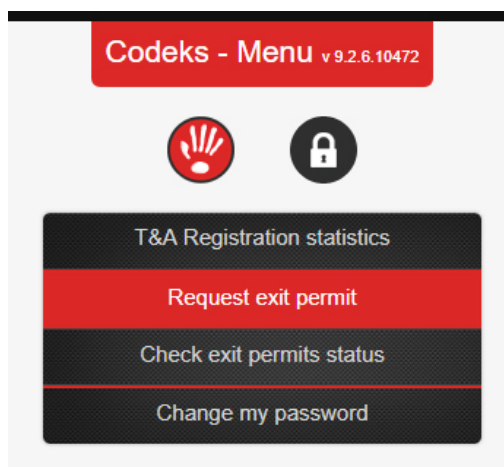


The following chapters describe the use of *user access* menus.

6.1.1 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.

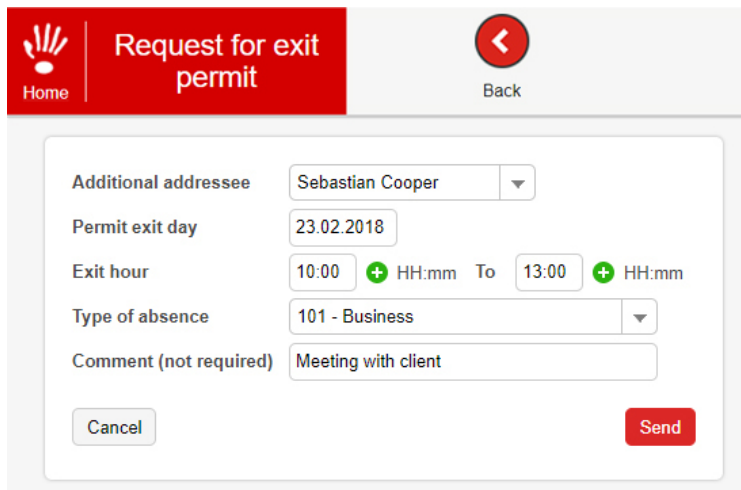
3. Next, specify the time frame when you will register at a controller using the electronic permit. The *Exit hour* setting does not specify when you will be absent but determines when you will be able to use the functionality of the permit on the controller.

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.



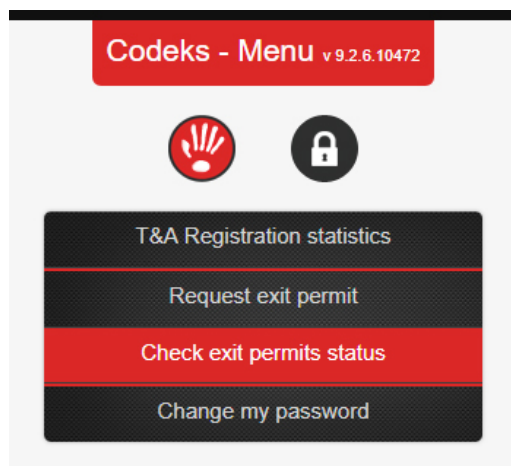
The screenshot shows a mobile application interface for requesting an exit permit. At the top, there is a red header bar with a 'Home' button (hand icon) on the left and a 'Back' button (red circle with a white arrow) on the right. The title 'Request for exit permit' is centered in the header. Below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


6.1.2 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](#)^[26].

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.




Home

Exit permits status




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

6.2 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.

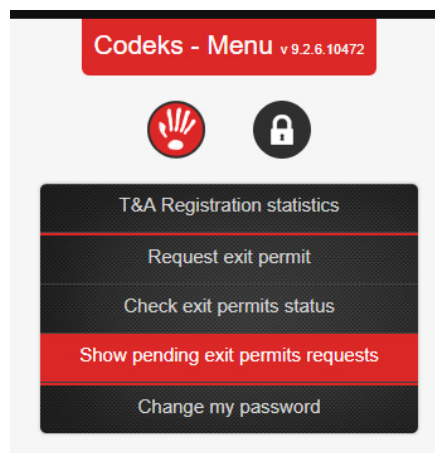


The following chapters describe the use of *user access* menus.

6.2.1 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*.




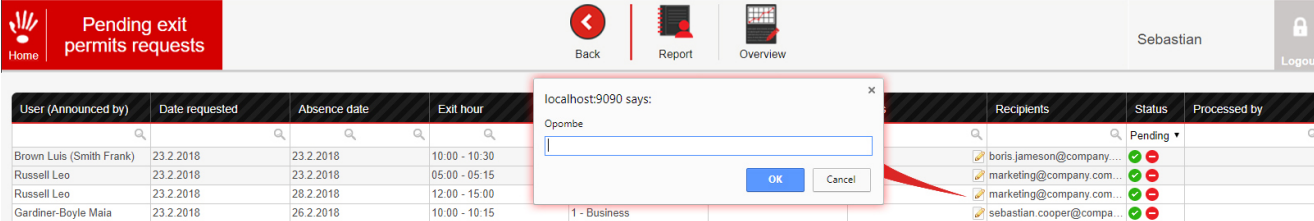
2. The list in the menu will display all permit requests still waiting for processing

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.



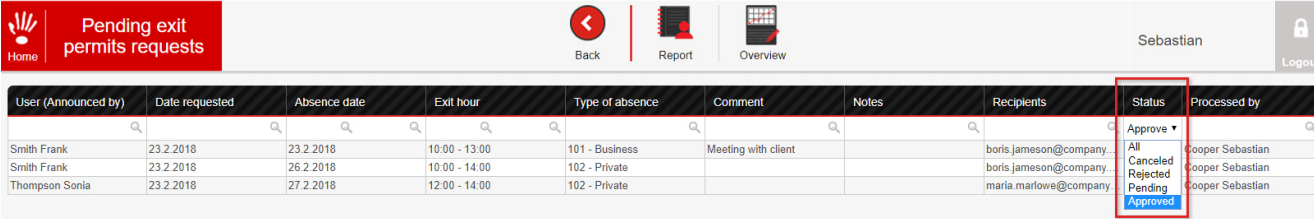
User (Announced by)	Date requested	Absence date	Exit hour
Brown Luis (Smith Frank)	23.2.2018	23.2.2018	10:00 - 10:30
Russell Leo	23.2.2018	23.2.2018	05:00 - 05:15
Russell Leo	23.2.2018	28.2.2018	12:00 - 15:00
Gardiner-Boyle Maia	23.2.2018	26.2.2018	10:00 - 10:15

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.



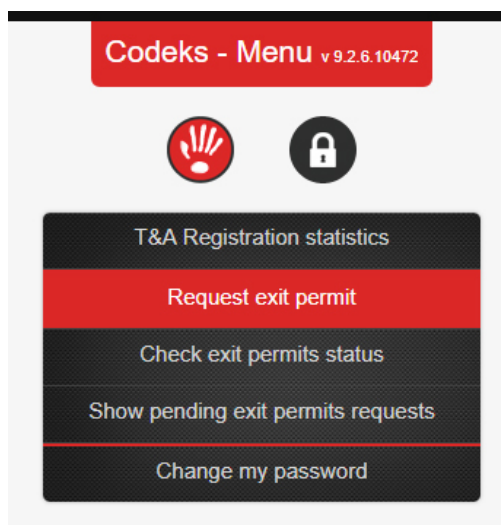
User (Announced by)	Date requested	Absence date	Exit hour	Type of absence	Comment	Notes	Recipients	Status	Processed by
Smith Frank	23.2.2018	23.2.2018	10:00 - 13:00	101 - Business	Meeting with client		boris.jameson@company...		Cooper Sebastian
Smith Frank	23.2.2018	26.2.2018	10:00 - 14:00	102 - Private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

6.2.2 ePermit announcement for another user

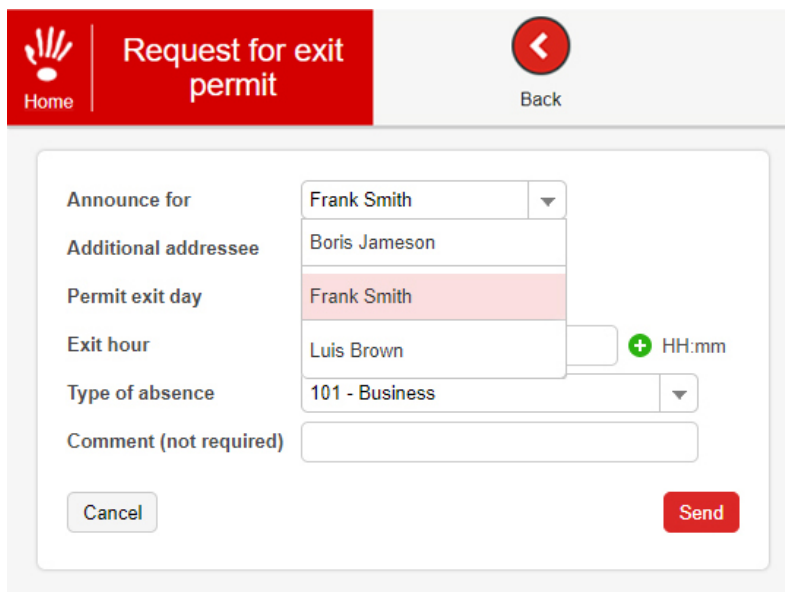
Department managers can also be allowed to request permits for other users. The department managers can only request permits for departments for which they have the right to [request announcements for others](#)^[35].

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*.

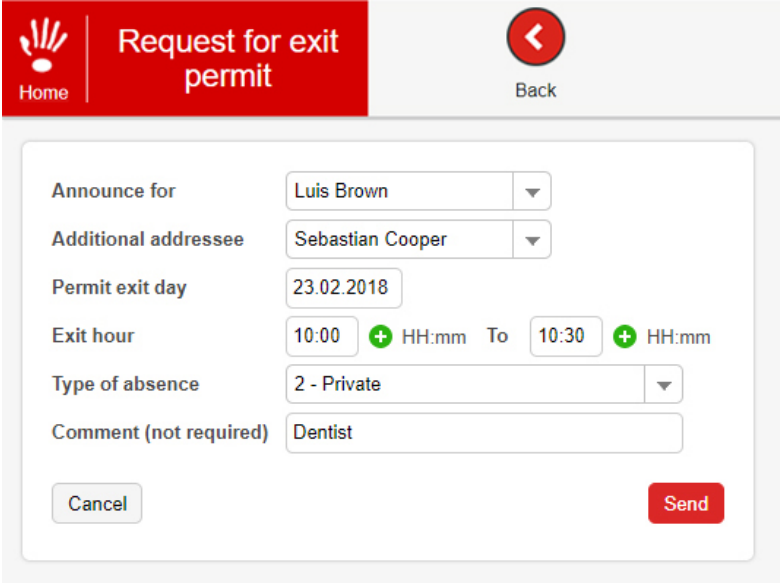


2. In the permit request form, first, select the user for whom you wish to request a permit (setting *Announce for*).



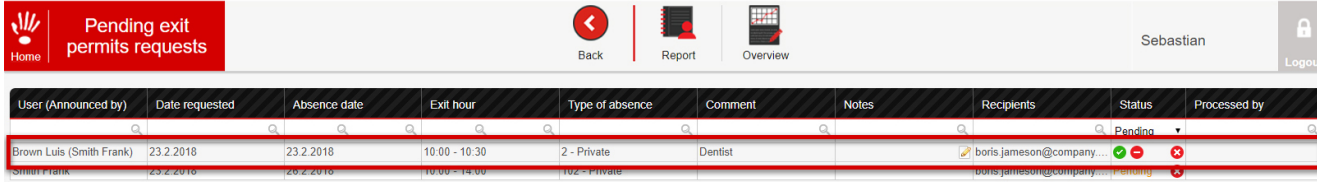
3. Then, select the date, time frame and the type of permit.

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	

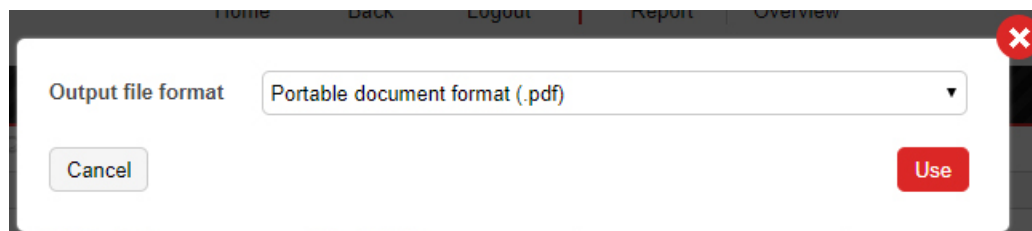
6.2.3 Report

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.

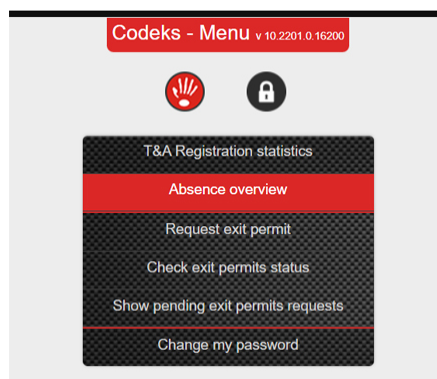


You can choose between file formats: *Portable document format (.pdf)*, *Excel Worksheet (.xls)*, *Excel Worksheet (.xlsx)*, *Open document spreadsheet (.ods)* and *Comma separated values (.csv)*.

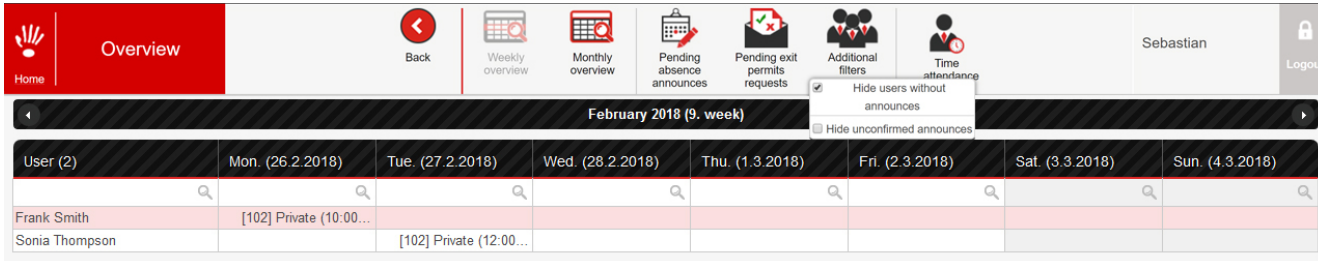
4. Click Use to display the report.

6.3 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](#)³⁵⁾ rights.



or

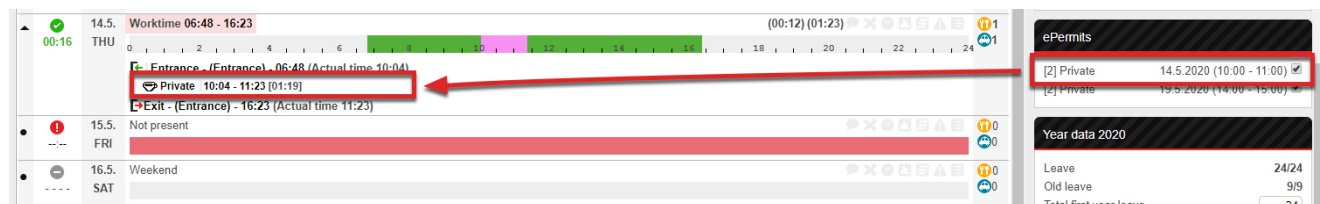



User (2)	Mon. (26.2.2018)	Tue. (27.2.2018)	Wed. (28.2.2018)	Thu. (1.3.2018)	Fri. (2.3.2018)	Sat. (3.3.2018)	Sun. (4.3.2018)
Frank Smith	[102] Private (10:00...						
Sonia Thompson		[102] Private (12:00...					

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.

6.4 Editing e-permits in Time attendance

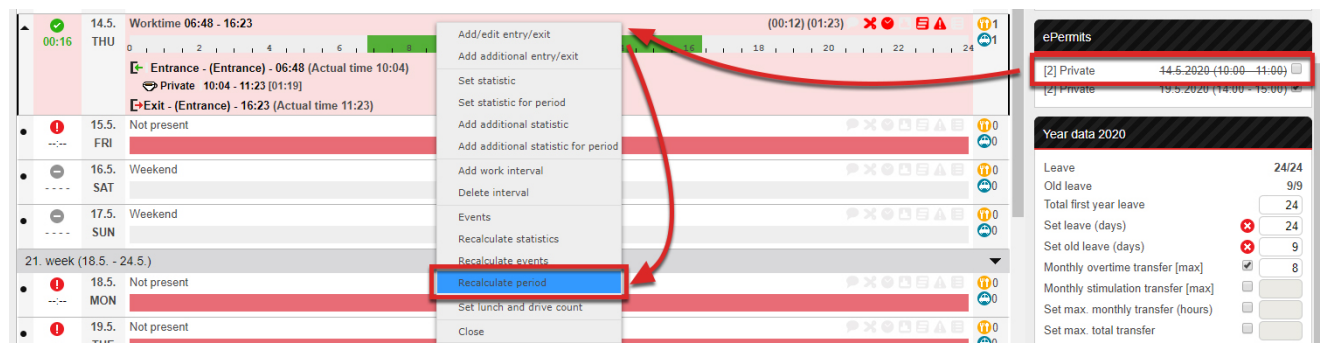
Heads of departments and administrators, who are granted rights to edit the time and attendance of users, can manage the user's confirmed electronic permits by enabling or revoking the electronic permits and thus influence whether they are taken into account when recalculating the time registration or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



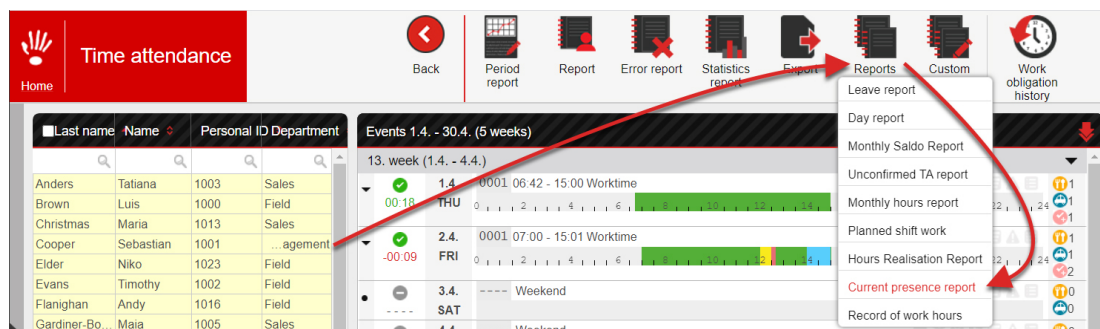
4. In the time registration, the events will now be changed so that the electronic permit is no longer taken into account.



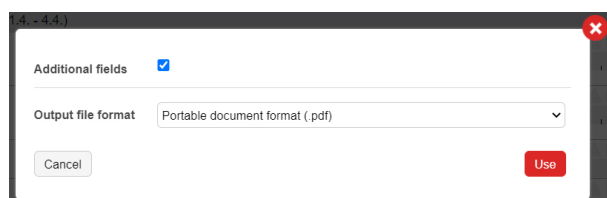
6.5 Current presence report

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.

7 Example 1: Using ePermits with one button

Users can use their confirmed electronic permits by selecting the defined *button for the electronic permit* before registering on the controller. The defined *button for the electronic permit* can activate any type of electronic permit.

SETTINGS OF THE USERS' TIMETABLE

The user is assigned the default timetable *ePermit ONE BUTTON* through his time and attendance group *Employees ePermit*. The user can request three types of electronic permits: business, private and overtime.

The timetable contains the following intervals (with the *Only for permits* setting enabled), which define the types of electronic permits:

- the *General purpose* interval *Business 06:00-14:00 permit* assigned with the button 101-Business*, that enables the user to register a business exit during work hours;
- the *General purpose* interval *Private 06:00-14:00 permit* assigned with the button 102-Private*, that enables the user to register a private exit during work hours;
- the *Entry type* interval *Overtime 00:00-06:00 permit* assigned with the button 103-Overtime*, that enables the user to register overtime hours before 6 o'clock on the morning;
- the *Exit type* interval *Overtime 16:00-00:00 permit* assigned with the button 103-Overtime*, that enables the user to register overtime hours after 4 o'clock in the afternoon.

* Intervals used to define the types of permits must be assigned a button, so that users can select the appropriate button when requesting the electronic permit. If the ePermits system is configured so that all types of electronic permits can be activated using the same button at the controller, the intervals that define the types of electronic permits are usually assigned button numbers above one hundred. These buttons will not be displayed on the controllers and will only be used only "virtual" buttons when requesting electronic permits.

In addition to these intervals, the timetable also contains a *Permit interval* named *Permit* with the assigned button 6-*Permit*, which enables the user to activate the electronic permit functionality on the controller.

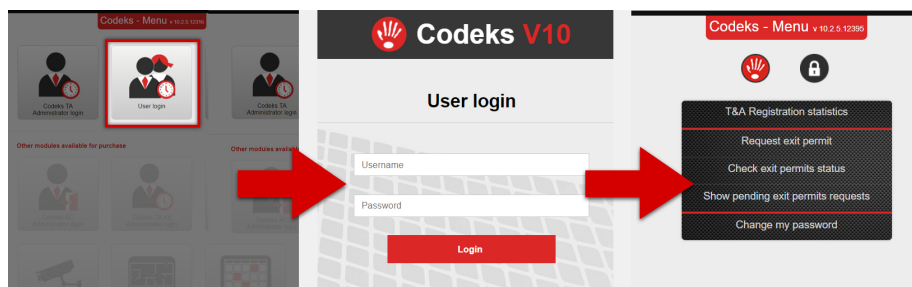
The user has no defined additional intervals for recording "unauthorized" events, so the system registers an error in the time registration when the user registers on the controller without a confirmed electronic permit.

List of intervals on selected timetable

Name	Type	From	To	Start	Stop	Button	
Permit	Permit interval	00:00	00:00			6	for all permit types
Exceptional	Entry / Exit	00:00	23:59			3	
Fixed entry	Entry	00:00	06:00	06:00	06:00		
Fixed exit	Exit	16:00	23:59		16:00		
Flexible entry	Entry	06:00	08:00				
Flexible exit	Exit	14:00	16:00				
Info	Info	00:00	23:59			4	
Overtime 00:00-06:00 permit	Entry	00:00	06:00			103	permit type OVERTIME
Overtime 16:00-00:00 permit	Exit	00:00	06:00			103	
Cancel	Cancel	00:00	23:59			9	
Business 06:00-14:00 permit	General purpose	06:00	14:00			101	permit type BUSINESS
Lunch flexible	General purpose	09:00	13:05			5	
Private 06:00-14:00 permit	General purpose	06:00	14:00			102	permit type PRIVATE

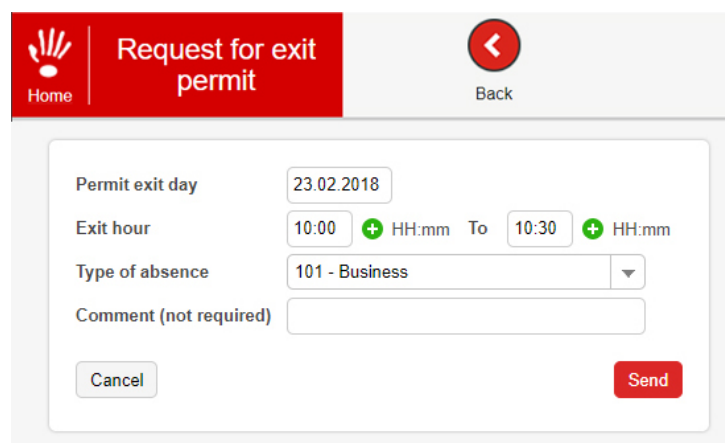
A. THE USER'S REQUEST FOR A BUSINESS EXIT

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



2. Then, he requests an electronic permit for a business exit in the *Request for exit permit* menu.

In the permit request form, he selects the desired day and indicates that he will make a business exit (that is, he will use the electronic permit at the controller) sometime between 10.00 and 10.30. The announced time does not specify when the user will return, it only defines when the user will be able to activate the requested permit on the controller.



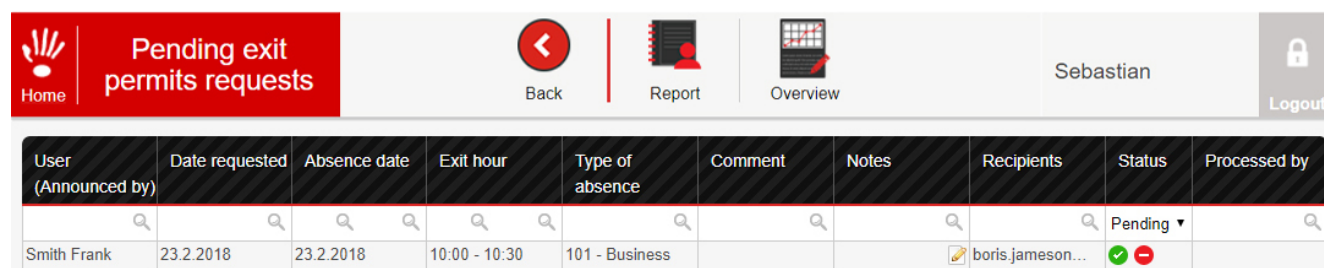
In the *Type of absence* field, he then selects the *101-Business* type permit.

3. The user sends a request for a business permit.

B. THE DEPARTMENT MANAGER'S REPLY

1. The department manager receives an e-mail about the requested permit for a business exit.

2. The department manager logs in to the Codeks application using his user access and can view the new permit request 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
Smith Frank	23.2.2018	23.2.2018	10:00 - 10:30	101 - Business			boris.jameson...	Pending	


3. The manager confirms the requested permit.

C. USING THE CONFIRMED ELECTRONIC PERMIT

1. After the department manager confirms the user's permit request, the user receives an e-mail notification about the status change of his request.


2. The user can now use the confirmed permit to register a business exit on a controller.

Before registering on the controller, the user presses the 6-Permit button that activates the Permit interval (*Permit interval/type*).



INTERVAL	INTERVAL TYPE	BUTTON
Permit	Permit interval	6
Overtime 00:00-06:00 PERMIT	General purpose + <input checked="" type="checkbox"/> Only for permits	103
Overtime 16:00-00:00 PERMIT	General purpose + <input checked="" type="checkbox"/> Only for permits	103
Business 06:00-14:00 ALLOWED	General purpose + <input checked="" type="checkbox"/> Only for permits	101
Private 06:00-14:00 ALLOWED	General purpose + <input checked="" type="checkbox"/> Only for permits	102

3. The system then checks whether the user has a confirmed permit stored in the database.



INTERVAL	INTERVAL TYPE	BUTTON
Permit	Permit interval	6
Overtime 00:00-06:00 PERMIT	General purpose + <input checked="" type="checkbox"/> Only for permits	103
Overtime 16:00-00:00 PERMIT	General purpose + <input checked="" type="checkbox"/> Only for permits	103
Business 06:00-14:00 ALLOWED	General purpose + <input checked="" type="checkbox"/> Only for permits	101
Private 06:00-14:00 ALLOWED	General purpose + <input checked="" type="checkbox"/> Only for permits	102

4. When the system finds the user's confirmed permit for a business exit in the database, it activates the *Business 06:00-14:00 permit* interval.

The event registered by the user on the controller will be recorded according to the activated interval.

8 Example 2: Using ePermits with multiple buttons

Users can use their confirmed electronic permits by selecting the button of the appropriate type of permit. The button the user presses at the controller can only activate one type of electronic permits.

SETTINGS OF THE USERS' TIMETABLE

The user is assigned the default timetable *ePermit MULTIPLE BUTTONS* through his time and attendance group *Employees ePermit*. The user can request three types of electronic permits: business, private and overtime.

The timetable contains the following intervals (with the *Only for permits* setting enabled), which define the types of electronic permits:

- the *General purpose* interval *Business 06:00-14:00 ALLOWED* assigned with the button 1-Business, that enables the user to register a business exit during work hours;
- the *General purpose* interval *Private 06:00-14:00 ALLOWED* assigned with the button 2-Private, that enables the user to register a private exit during work hours;
- the *Entrytype* interval *Overtime 00:00-06:00 permit* assigned with the button 6-Overtime, that enables the user to register overtime hours before 6 o'clock on the morning;
- the *Exittype* interval *Overtime 16:00-00:00 permit* assigned with the button 6-Overtime, that enables the user to register overtime hours after 4 o'clock in the afternoon.

In addition to these intervals, the timetable also contains three *Permit interval/type* intervals with assigned buttons, which enable the user to activate the functionality of an appropriate electronic permit on the controller:

- the *Business PERMIT* interval with the assigned button 1-Business;
- the *Private PERMIT* interval with the assigned button 2-Private;
- the *Overtime PERMIT* interval with the assigned button 6-Overtime.

The user also has additional defined intervals for recording "unauthorized" events in instances when the user registers on the controller without a confirmed electronic permit:

- the *General purpose* interval *Business 06:00-14:00 UNAUTHORISED* assigned with the button 1-Business;
- the *General purpose* interval *Private 06:00-14:00 UNAUTHORISED* assigned with the button 2-Private.

List of intervals on selected timetable

Name	Type	From	To	Start	Stop	Button
Exceptional	Entry / Exit	00:00	23:59			3
Fixed entry	Entry	00:00	06:00	06:00	06:00	
Fixed exit	Exit	16:00	23:59		16:00	
Flexible entry	Entry	06:00	08:00			
Flexible exit	Exit	14:00	16:00			
Lunch flexible	General purpose	09:00	13:05			5
Overtime 00:00-06:00 permit	Entry	00:00	06:00			6
Overtime 16:00-00:00 permit	Exit	16:00	00:00			6
Overtime PERMIT	Permit interval	00:00	00:00			6
Cancel	Cancel	00:00	23:59			9
Business 06:00-14:00 ALLOWED	General purpose	06:00	14:00			1
Business 06:00-14:00 UNAUTHORISED	General purpose	06:00	14:00			1
Business PERMIT	Permit interval	00:00	00:00			1
Info	Info	00:00	23:59			4
Private 06:00-14:00 ALLOWED	General purpose	06:00	14:00			2
Private 06:00-14:00 UNAUTHORISED	General purpose	06:00	14:00			2
Private PERMIT	Permit interval	00:00	00:00			2

permit type
OVERTIME

permit type
BUSINESS

permit type
PRIVATE

Within the interval hierarchy of the timetable *Permit intervals* are ranked higher than the intervals for recording "unauthorized" events. This is because both types of intervals are activated by the same button on the controller, and the system first processes the hierarchically higher ranking interval.

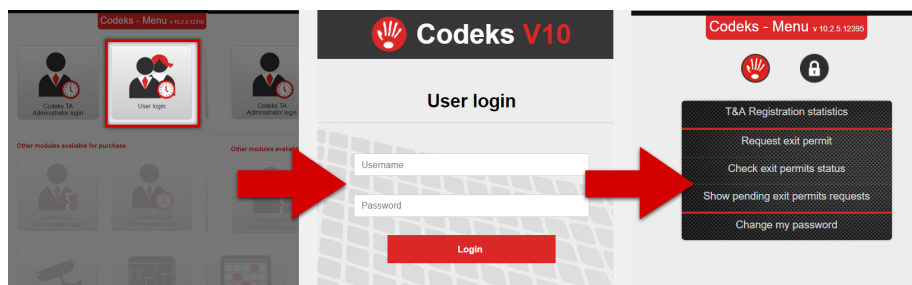
Intervals in timetable ePermits MULTIPLE BUTTONS

- Fixed exit [16:00 - 23:59]
- Flexible entry [06:00 - 08:00]
- Flexible exit [14:00 - 16:00]
- Fixed entry [00:00 - 06:00]
- Cancel [00:00 - 23:59]
- Info [00:00 - 23:59]
- Exceptional [00:00 - 23:59]
- Lunch flexible [09:00 - 13:05]
- Business PERMIT [00:00 - 00:00]
- Private PERMIT [00:00 - 00:00]
- Overtime PERMIT [00:00 - 00:00]
- Business 06:00-14:00 ALLOWED [06:00 - 14:00]
- Business 06:00-14:00 UNAUTHORISED [06:00 - 14:00]
- Private 06:00-14:00 ALLOWED [06:00 - 14:00]
- Private 06:00-14:00 UNAUTHORISED [06:00 - 14:00]
- Overtime 00:00-06:00 permit [00:00 - 06:00]
- Overtime 16:00-00:00 permit [16:00 - 00:00]

This kind of interval order ensures that the system first checks for any confirmed permits the user might have. If the system does not find any confirmed electronic permits, it moves on in search of the next interval, which is activated with the same button. The registered event is then recorded according to this interval.

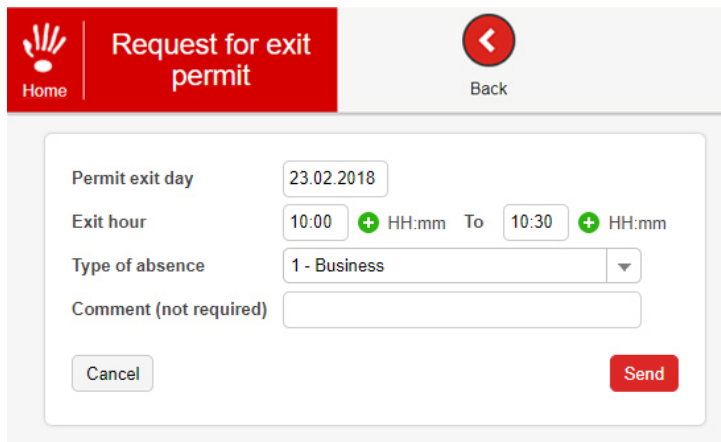
A. THE USER'S REQUEST FOR A BUSINESS EXIT

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



2. Then, he requests an electronic permit for a business exit in the *Request for exit permit* menu.

In the permit request form, he selects the desired day and indicates that he will make a business exit (that is, he will use the electronic permit at the controller) sometime between 10.00 and 10.30. The announced time does not specify when the user will return, it only defines when the user will be able to activate the requested permit on the controller.



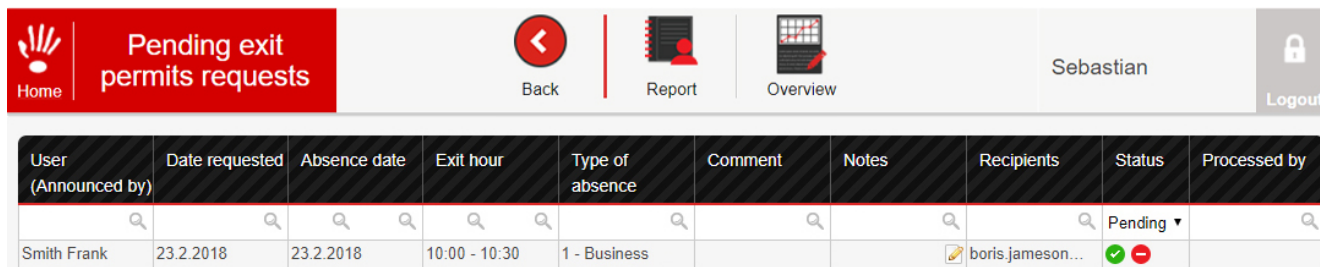
In the *Type of absence* field, he then selects the *1-Business* type permit.

3. The user sends a request for a business permit.

B. THE DEPARTMENT MANAGER'S REPLY

1. The department manager receives an e-mail about the requested permit for a business exit.

2. The department manager logs in to the Codeks application using his user access and can view the new permit request 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
Smith Frank	23.2.2018	23.2.2018	10:00 - 10:30	1 - Business			boris.jameson...	Pending	

3. The manager confirms the requested permit.

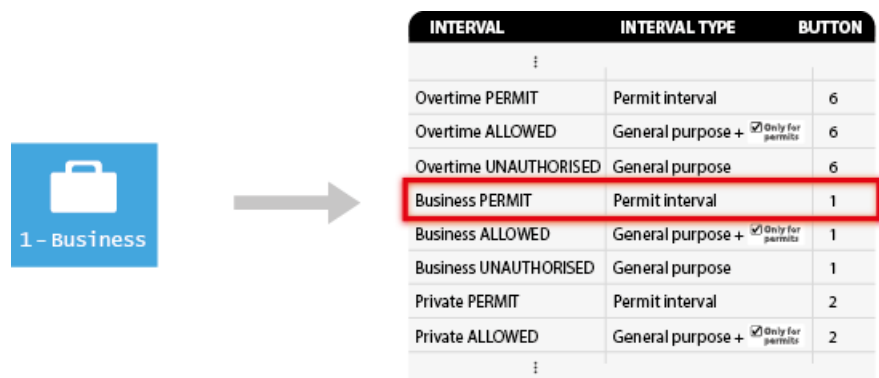
C. USING THE CONFIRMED ELECTRONIC PERMIT

1. After the department manager confirms the user's permit request, the user receives an e-mail notification about the status change of his request.

2. The user can now use the granted permit to register a business exit on a controller.

Before registering on the controller, the user presses the 1-Business button that activates the Business PERMIT interval (*Permit interval* type).

3. The system then checks whether the user has a confirmed permit stored in the database.



4. When the system finds the user's confirmed permit for a business exit in the database, it activates the *Business 06:00-14:00 ALLOWED* interval.

The event registered by the user on the controller will be recorded according to the activated interval.

