# Codeks TA Leave Announces Add-on

for Codeks software version 9.0.1.64 and newer

# Codeks TA Leave Announces Add-on user manual

# Table of Contents

# 1 Codeks TA Leave Announces

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

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

> **NOTE**
>
> This manual contains only the description and installation instruction for the Codeks TA Leave Announces add-on. The installation instructions and general settings of the main Codeks software are described in the documentation of the main Codeks AC or Codeks TA application. Screenshots of the Codeks application contained in this manual were made in a web browser.

## 1.1 Licence information

- Logo "Hand" is registered at EUIPO (The European Union Intellectual Property Office) and is exclusively owned by Jantar d.o.o. You may not copy, imitate, rent, lease, sell, modify or otherwise use the "hand" logo, except as provided in this or any other agreement with Jantar d.o.o. Any such unauthorized use will result in immediate and direct termination of this license and may result in criminal and/or civil prosecution.

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

- All copyrights of Codeks TA Leave Announces are exclusively owned by the author, Jantar d.o.o..
- You may not use, copy, emulate, clone, rent, lease, sell, modify, decompile, disassemble, otherwise reverse engineer, or transfer the licensed program, or any subset of the licensed program, except as stated in this agreement. Any such unauthorized use shall result in immediate and automatic termination of this license and may result in criminal and/or civil prosecution.
- Codeks TA Leave Announces 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 şoftware at your own risk. Neither the author nor his authorized distributors will be liable for any data loss, damages, loss of profits or any other kind of loss while using, misusing or being unable to use this software.
- All rights not expressly granted here are reserved by Jantar d.o.o.
- By installing and using the Codeks TA Leave Announces add-on you are accepting the terms and conditions of this license.
- If you do not agree with the terms of this license you must remove all  Codeks TA Leave Announces files from your storage devices and cease using the product.

## 1.2 Disclaimer and Warranty

**Disclaimer**

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

**Warranty**

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

Jantar, elektronski sistemi, d.o.o.
Kranjska cesta 24, SI-4202 Naklo
SLOVENIA
VAT ID: SI34737332
E-mail: info@jantar.si
Web page: www.jantar.si

**Support**
E-mail: support@jantar.si

# 2 Description and installation instructions

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

---

**The Codeks TA Leave Announces software package:**

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

---

## 2.1 System requirements

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

- a personal computer with an installed Windows 7 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 quad-core processor, if the database is running on the same server),
- at least 50 GB of space on the hard drive,
- PDF Reader software for viewing generated reports,
- internet access,
- a web browser, at least versions Internet Explorer 11, Firefox 46, Chrome 50

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

- installed Codeks software,

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

## 2.2 Activating the License Code

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

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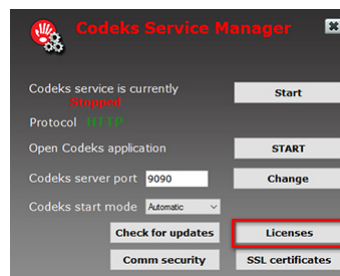
Codeks Service Manager icon:

The following picture shows the **CodeksServiceManager.exe** file in the ***C:\Program Files\Codeks*** folder***:***
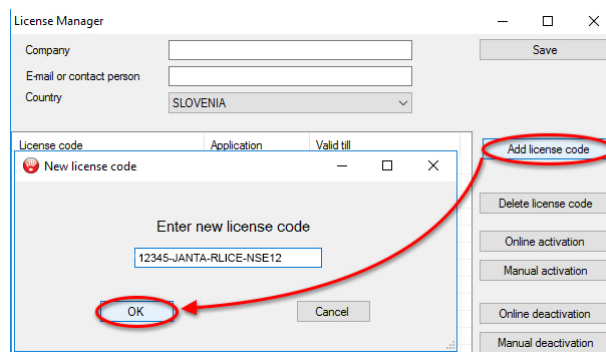
**1.** Before entering a new license code, **stop** the Codeks Service by clicking on the **Stop** button. Before continuing make sure the status of the service is **Stopped**.

**2.** Then click the **Licenses** button.

**3.** Click the **Add license code** button and the *License Manager* window will appear. Enter the Codeks TA Leave Announces license code and click **OK** to confirm the entry.
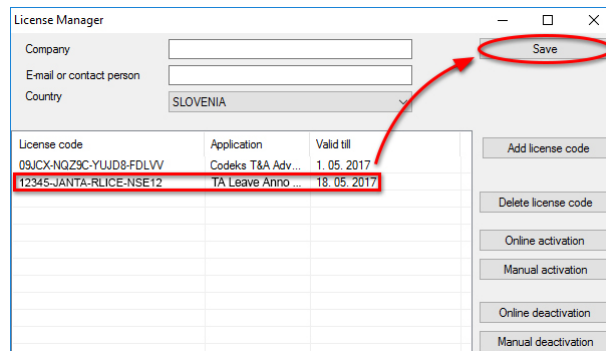
**4.** The Codeks TA Leave Announces license code will be displayed in the window. The entered license code must also be activated. Click the **Online activation** button to activate the license.

**NOTE**

The Codeks TA Leave Announces is an add-on for the main Codeks software and cannot work separately. The Codeks TA Leave Announces add-on will only work in combination with a valid license code of the main Codeks application.
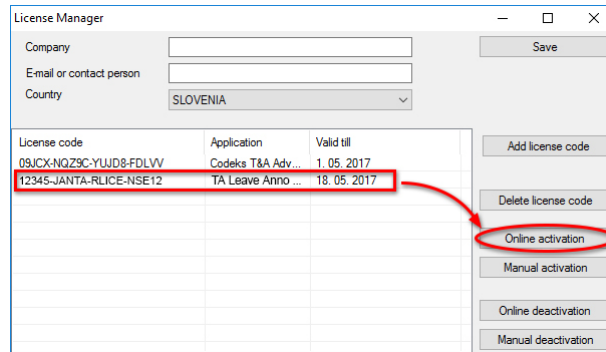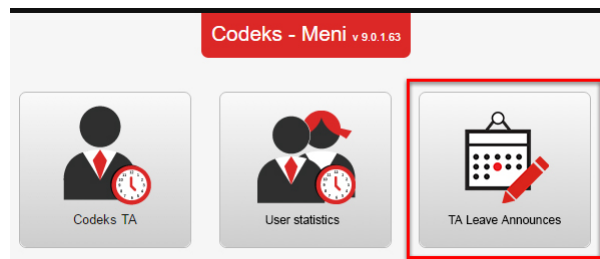


**5.** Finally, save the changes by clicking the **Save** button.



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



**7.** The login menu of the Codeks application will now also display access to the Codeks TA Leave Announces add-on.

# 3 Settings in the Codeks application

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

1. **E-mail settings and general settings for absence announcements** in the *Preferences* menu of the main Codeks application.
2. **Statistics for absence** (in the *Statistics* 14 editor).
3. **Settings of each individual user,** which enable regular users to announce their absence and department managers to process absence requests.

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

## 3.1 How the Codeks TA Leave Announces work

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

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** 28.
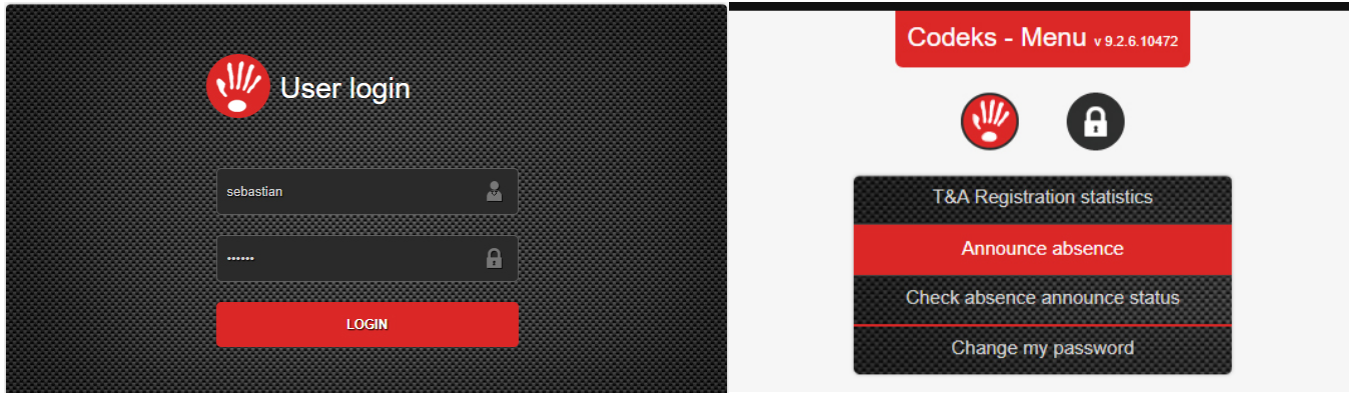


The user can then announce his absence in the *Announce absence* menu. Users will be able to announce **leave** and **old leave days** only if they are assigned the appropriate number of leave days 27 in the *Time attendance* editor.
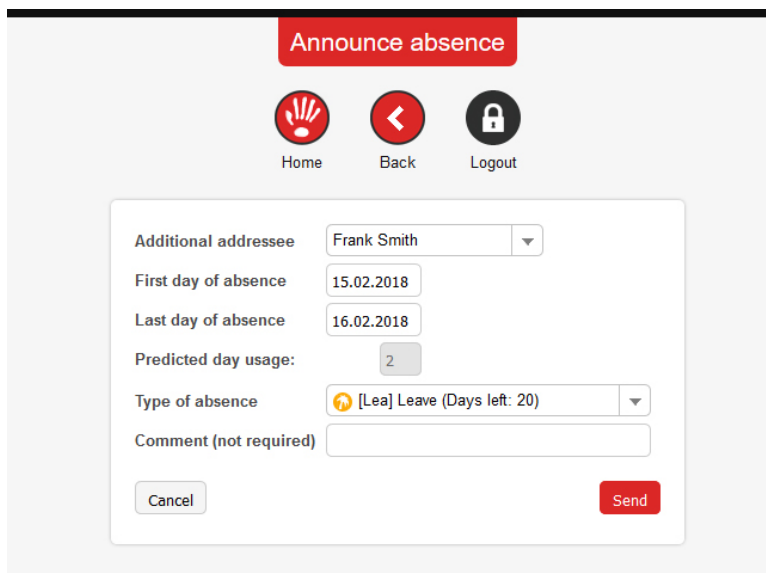


Users can also announce **other types of absences** that may be defined in the Codeks application as user statistics that indicate absences 15. These type of statistics do not have a day limit (like the leave or old leave statistics), so no additional settings are required for their use.

When a user announces his absence, the system sends his announcement to his defined department manager. The user can check the absence announcement and its status in the *Absence announce status* menu.



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

The department managers can view the absence announcements of the users in their departments in the *Pending absence announces* menu, which they can access using their username and password [24].



The system can also inform the department managers of new absence announcements by e-mail if the users acting as department managers have a valid e-mail address [25] and are granted the rights [26] to be notified about absence announcements.

The department manager can confirm or reject the pending users' absence announcements in the *Pending absence announces* menu. In order for the department managers to be able to process absence announcements, they must be granted appropriate rights [26] through their user settings.

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

The user can also be notified about the change of the status of his absence announcement by email if he has a valid e-mail address [29] in the user's settings. Users can monitor the status of their absence announcement in the *Absence announce status* menu.

## 3.2 Mail settings and Leave announces settings

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

### 3.2.1 Mail settings

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

**NOTE**

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

| SMTP Server Settings | |
|---|---|
| SMTP port | SMTP port |
| SMTP host | SMTP host |
| Username | Username |
| Password | Password |
| 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 | If the setting is enabled, the sent e-mails will not contain any hyperlinks (e.g. link to editing leave  announces). If the setting is not enabled, the e-mails will contain hyperlinks. |

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

## 3.2.2 Leave announces settings

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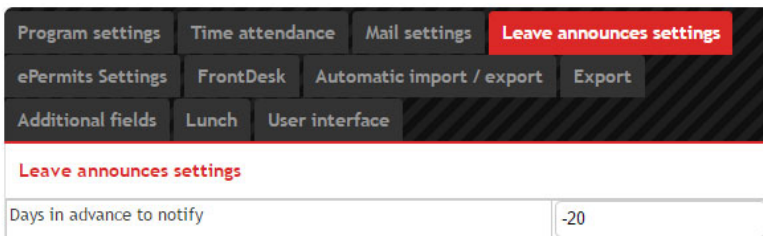


| Leave announces settings | |
|---|---|
| Days in advance to notify | Sets at least how many days in advance the users must announce their leave.<br>Using this setting, you can also enable absence announcements for the past, e.g. to enable absence announcements for up to 30 days in the past enter the value -30 in the field. |

## 3.3 Statistics for leave announces

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

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

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

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

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

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

## 3.3.1 Add statistic

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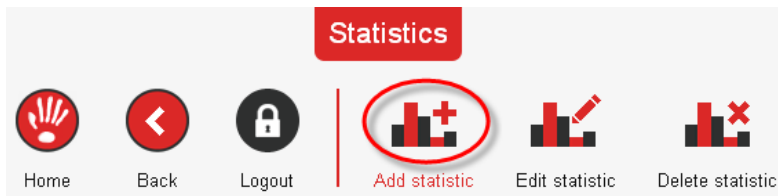


**2.** This will enable the edit field on the right.
Enter a (unique) name for the statistic and set the desired settings for the new statistic.
You must also enable the *additional setting for counting hours* **This statistic indicates absence**, which will enable users to select this statistic when announcing their absence.
You can read more about individual settings for statistics in chapter [Statistics' settings](#) 16.

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

## 3.3.2 Statistics' settings

This chapter describes all the settings for statistics.



| Code | A custom set, unique code for each statistic. The statistic's code is used to display the recorded data in exports and reports. |
|---|---|
| Name | The full name of the statistic used to describe the statistic in more detail. |
| Print position | The order in which the statistics will be displayed in the exports and reports. |
| Hours | The setting defines how the work hours will be recorded. Read more about this setting in the Hours 17 table. <br><br> The additional field is used to set the fixed number of hours when using the values FixedHours and FixedAndRealHours. |

| | |
|---|---|
| Statistic infotype | The setting enables you to set an additional code (or infotype). This setting is not necessary and is only used when an additional code is needed in reports to identify each statistic. |
| Statistic's color | The color of the statistic that will be used to color the status bar of the day in the Time attendance editor. |
| Statistic validity | This setting enables you to set a date limit on the validity of the statistic. |
| ~ *additional settings for hour count* ~ | you can find a detailed description of the additional settings in chapter Additional settings for hour count 18. |
| Statistic limits | The settings enable a limit to be set to a statistic. You can find a detailed description of the settings in chapter Statistic limits 20. |
| Statistic's icon | The icon of the statistic that will be displayed in the Time attendance editor and in certain reports. |
| Select existing icon | Enables you to chose one of the pre-installed statistic icons. |
| Upload new icon | Enables you to chose and upload a new statistic icon from your computer. |

The Hours setting defines how the statistic will record the work hours (e.g. it sets whether the statistic will record only the actually registered work hours or if it will record a fixed number of hours. The following table contains the descriptions of the different values of the setting. You can see examples of practical use of these settings in the following chapters.

| Hours | Description |
|---|---|
| None | The statistic does not record anything (does not record the duration nor repetitions). This setting is used when you wish to mark the time of a certain statistic during the work hours but you do not want to record or store the duration. The setting is used e.g. for the Private exit statistic when you want to mark the user's exit as private time, but do not need to record exactly how long the private exit lasted. |
| Real | The statistic will only record the actual registered amount of work hours (the amount of clocked in work hours according to the registered time attendance events). |
| WorkObligation | The statistic will always record a number of hours equal to the set work obligation. |
| LeaveDayHours | This setting is only used for special cases of recording leave days when the users have varying amounts of work obligation hours depending on the day of the week. Using this setting you can set a fixed number of leave hours to be recorded for each leave day. |
| RealPlusWorkObligation | This statistic setting is only used for holidays. The statistic will record the number of hours equal to the set daily  work obligation plus the actual amount of clocked in work hours. |
| FixedHours | The statistic will always record the fixed number of hours, set in the additional field next to the setting. |
| AskHours | If this setting is enabled the system will always ask you to enter the desired number of hours whenever setting this statistic. |
| RealAtMostWorkObligation | The statistic will record the actual registered amount of work hours, but it will only record up to the maximum value equal to the daily work obligation. |
| FixedAndRealHours | The statistic will always record the fixed number of work hours set in the additional filed next to the setting. If a user exceeds the entered fixed number of work hours the statistic will also record any excess work hours that have been actually registered. |
| WorkObligationPlusSaldo | This setting is used for recording work hours of regular work days. The statistic will always record the number of hours equal to the set daily work obligation and also record any additional hours that have been actually registered (overtime hours). |
| WorkObligationOrReal | If the user has not registered his arrival at work (Entry event) the statistic will record the number of hours equal to the set daily work obligation. If the user has registered his arrival at work (Entry event) the system will only record the actual registered amount of work hours. |

## ADDITIONAL SETTINGS FOR HOUR COUNT

| Setting | Description |
|---------|-------------|
| Count statistic as | This setting defines what the clocked hours of the current statistic will be recorded as. It is possible to set the hours to be recorded in the value of the saldo (default), directly as overtime or in a special hours fund, which the users can later use as private hours. |

| | **VALUES:** | |
|---|---|---|
| | Regular Saldo | The clocked hours are recorded in the value of the saldo (as by default). |
| | Overtime | The clocked hours are recorded as overtime. |
| | HoursFund | The clocked hours are recorded in a separate hours fund. |

<table>
<tr><td></td><td></td><td><strong>NOTE</strong><br>Statistics set with this setting, which record hours into a special hours fund, can only be used in combination with statistics, which enable the accumulated hours in the fund to be used.</td></tr>
<tr><td></td><td></td><td>Additionally, you can set how many months the hours will be stored in the fund and how long they will be available to be used. After this period the recorded hours will be removed from the fund and erased.<br><br>Count statistic as<br>[ HoursFund ▼ ]<br>☑ Limit fund hours transfer<br>Validity of fund hours (months)<br>[ 1 ]</td></tr>
<tr><td></td><td>UseHoursFund</td><td>The recorded hours in a separate hours fund will be used. Select the hours fund to be used by this statistic in the field underneath this setting.<br><br>Count statistic as<br>[ UseHoursFund ▼ ]<br>Use fund<br>[ Fond ▼ ]<br>[ Fond ]</td></tr>
<tr><td></td><td></td><td><strong>NOTE</strong><br>Statistics set with this setting, which enable the accumulated hours in the fund to be used, can only be used in combination with statistics, which record hours into the same hours fund.</td></tr>
</table>

| Setting | Description |
|---------|-------------|
| Add to statistic | The work hours in this statistic will also be recorded to another statistic, defined in the additional field next to this setting. |
| Count work hours | The work hours recorded by this statistic are taken into account when assigning lunches and drives.<br>Usually, employees must register their arrival at work and clock a certain number of work hours, to be assigned a lunch or drive to work. However, this setting, in combination with settings *Count drive* and *Count lunch*, enables a drive or lunch to be assigned only based on a sufficient number of work hours, without the users having to register their arrival at work. This setting is used mostly for special cases and exceptions, e.g. for statistic *Working from home*, which is usually manually added to a day at some later date. |
| Count in work obligation | The work hours recorded by this statistic are used to cover the defined work obligation. |
| Count in time cut | The work hours recorded by this statistic are taken into account when using time cuts. |
| Count in standby | The work hours recorded in this statistic are counted as standby hours. |

| Setting | Description |
|---|---|
| Count drive | The work hours recorded by this statistic are taken into account when assigning drives. |
| Count statistics | The setting enables the repetitions of the statistic to be counted (in addition to the duration of the statistic, as additional data within the statistic). If the setting is disabled the statistic repetition is not recorded. |
| Count only once daily | The setting enables only one repetition of the statistic to be recorded per day, regardless of the actual number of repetitions. This setting must be used in combination with the *Count statistic* setting. |
| Export | The setting enables the statistic to be displayed in the statistic exports in the Time attendance editor. |
| Overwrite | The setting enables the statistic to be overwritten by another statistic. )this setting is usually used for leave day statistics, where the Leave statistic can be overwritten if the user comes to work during his vacation). |
| Count lunch | The work hours recorded by this statistic are taken into account when assigning lunches. |
| Count leave | The work hours recorded in this statistic are counted as used leave days. |
| Count old leave | The work hours recorded in this statistic are counted as used old leave days. |
| Show statistic in reports | This setting enables the statistic to be displayed in reports in the Time attendance editor. |
| Show statistic in statistic overview | This setting enables the statistic to be displayed in the Statistic overview section in the Time attendance editor. |
| Show statistic in statistics menus | This setting enables the statistic to be displayed and selected in the menu lists for setting statistics. |
| [1] This statistic indicates absence | This setting enables the statistic to be selected when announcing absences. [1] The setting can only be set when using the Codeks Leave Announces Add-on. |
| This statistic indicates sickness | The work hours recorded in this statistic are counted as sick leave. |
| [2] This statistic indicates absence in MFERAC | The work hours recorded in this statistic are counted as absences in the MFERAC payroll system. [2] The setting is available only when using the MFERAC export Add-on. |
| [2] This statistic indicates overtime in MFERAC | The work hours recorded in this statistic are counted as overtime hours in the MFERAC payroll system. [2] The setting is available only when using the MFERAC export Add-on. |
| [2] This statistic can be continued in MFERAC | The work hours recorded in this statistic are recorded in the same daily hour's sum even when they stretch into the next day past midnight. [2] The setting is available only when using the MFERAC export Add-on. |
| [2] This statistic is in minutes in MFERAC | The work hours recorded in this statistic are counted and displayed in minutes in the MFERAC payroll system. [2] The setting is available only when using the MFERAC export Add-on. |
| Decrease presence bonus | This setting enables the recording of hours which decrease the value of the employees' presence bonus (a salary bonus). This setting is usually enabled for recording absences such as leave or sick. You can read more about the presence bonus in chapter Preferences -> Time Attendance (Presence bonus calculation). |
| Statistic needs confirmation | The statistic must be confirmed by an administrator or a department manager. Unconfirmed statistics are not recorded anywhere. |

## STATISTIC LIMITS

You can set a limit to the hour cont of each statistic. The set limits can be daily, weekly, monthly or yearly.



To set a desired limit, first, select how the work hours will be recorded:



| Hours | Description |
|---|---|
| None | The statistic limit is not set. |
| WorkObligation | The maximum amount of hours the statistic can record is equal to the set work obligation for the selected time period. |
| WorkObligationPlusFixedHours | The maximum amount of hours the statistic can record is equal to the set work obligation for the selected time period plus a fixed number of hours. The additional fixed number of hours is entered in the field next to the setting. |
| WorkObligationPlusMaxTransfer | The maximum amount of hours the statistic can record is equal to the set work obligation plus the maximum value of the monthly hour transfer. The setting can only be used when setting a monthly limit. |
| FixedHours | The maximum amount of hours the statistic can record is equal to the fixed number of hours entered in the field next to the setting. |
| MaxOvertime | The maximum amount of hours the statistic can record is equal to the maximum value of the monthly overtime  hours. The setting can only be used when setting a monthly limit. |

By choosing one of the options for recording work hours, the next drop-down list is activated. Here you can specify how the system will record any excess of hours. You can choose one of four options: **None, Discard, AddToStat** or **AddToOvertime**.

| Action | Description |
|---|---|
| None | Nothing is done with the excess hours. |
| Discard | The excess hours are erased. |
| AddToStat | The excess hours are added to the statistic selected in the third column. |
| AddToOvertime | The excess hours are recorded as overtime hours. |

The third drop-down list is only activated when the **AddToStat** option is selected. The last column enables you to set the statistic that will record the excess of hours.

The **Notify** option enables e-mail notifications to be sent when a set statistic limit is exceeded.

**Example: Exceeding the maximum overtime hours**

The department manager wants to be notified every time a worker exceeds the maximum number of daily overtime hours.

The daily limit for the statistic is set to WorkObligationPlusFixedHours and the value in the additional field is set to 2. This means workers can clock up to 2 overtime hours each day. The excess hours are discarded (the second column is set to Discard). Finally, the Notify option is checked to enable e-mail notification to be sent to the department manager.

### 3.3.3 Example of statistics for leave announces

**LEAVE DAYS STATISTIC**

| | |
|---|---|
| **Code** | **Count statistic as** |
| Lea | RegularSaldo ▼ |
| **Name** | ☐ Add to statistic |
| Leave | ☐ Count work hours |
| **Print position** | ☑ Count in work obligation |
| 0 | ☑ Count in time cut |
| **Hours** | ☐ Count in standby |
| RealPlusWorkObligation ▼ | ☑ Count drive |
| 00:00 ⊕ HH:mm | ☑ Count statistics |
| **Statistic infotype** | ☐ Count only once daily |
| | ☐ Export |
| | ☐ Overwrite |
| **Statistic's color** | ☑ Count lunch |
| #D4FFAA | ☑ Count leave |
| **Statistic validity** | ☐ Count old leave |
| From _____ To _____ | ☑ Show statistic in reports |
| | ☑ Show statistic in statistics overview |
| | ☑ Show statistic in statistics menus |
| | ☑ This statistic indicates absence |
| | ☐ This statistic indicates absence in MFERAC |
| | ☐ This statistic indicates overtime in MFERAC |
| | ☐ This statistic can be continued in MFERAC |
| | ☐ This statistic is in minutes in MFERAC |
| | ☐ Decrease presence bonus |
| | ☐ Statistic needs confirmation |

**Daily**

None ▼ | 00:00 | None ▼ | Choose ▼ | ☐ Notify

**Weekly**

None ▼ | 00:00 | None ▼ | Choose ▼ | ☐ Notify

**Monthly**

None ▼ | 00:00 | None ▼ | Choose ▼ | ☐ Notify

**Yearly**

None ▼ | 00:00 | None ▼ | Choose ▼ | ☐ Notify

🔶 Statistic's icon

Select existing icon

Choose File | No file chosen | Upload new icon

Cancel | Save

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

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

The statistic also has the following additional settings enabled:

- **Count in work obligation** defines that the work hours recorded by this statistic are used to cover the user's defined daily work obligation.

- **Count in time cut** enables the work hours recorded by this statistic to be recorded in time cuts.

- **Count drive** defines that the work hours recorded by this statistic are taken into account when assigning drives.

- **Count statistics** enables the repetitions of the statistics to be counted.

- **Count lunch** defines that the work hours recorded by this statistic are taken into account when assigning

lunches.

- **Count leave** defines that the work hours recorded by this statistic are counted as used leave days.
- **Show statistic in reports** enables the statistic to be displayed in reports in the Time attendance editor.
- **Show statistic in statistic overview** enables the statistic to be displayed in the Statistic overview section in the Time attendance editor.
- **Show statistic in statistics menus** enables the statistic to be displayed and selected in the menu lists for setting statistics.
- **This statistic indicates absence** enables the statistic to be selected when announcing absences.

***The use of the statistic in the Time attendance editor:***

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



# 3.4 Users' settings

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

The necessary settings differ depending on the type of user:

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

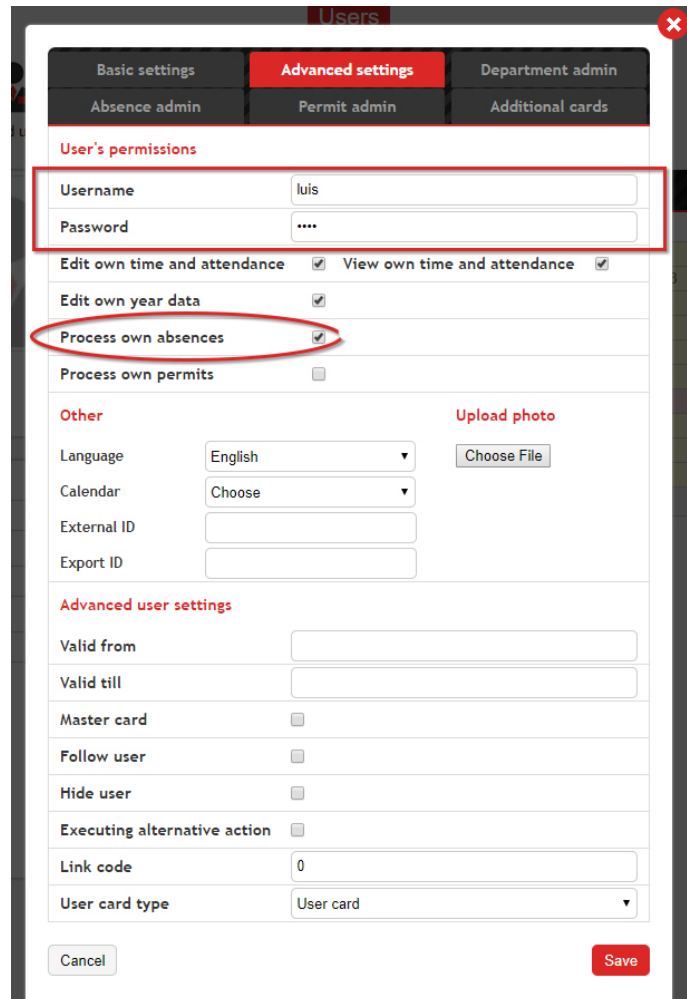- **Regular users**, who can announce their absences.

## 3.4.1 Settings for department managers

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

**A) Username and password for user access**

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

**1.** In the *Advanced settings* tab, enter a **username** and **password** for the current user which will allow him user access to the Codeks application.

**2.*** Additionally, you can enable the user to **confirm his own absences** adding a checkmark next to the setting *Process own absences*.

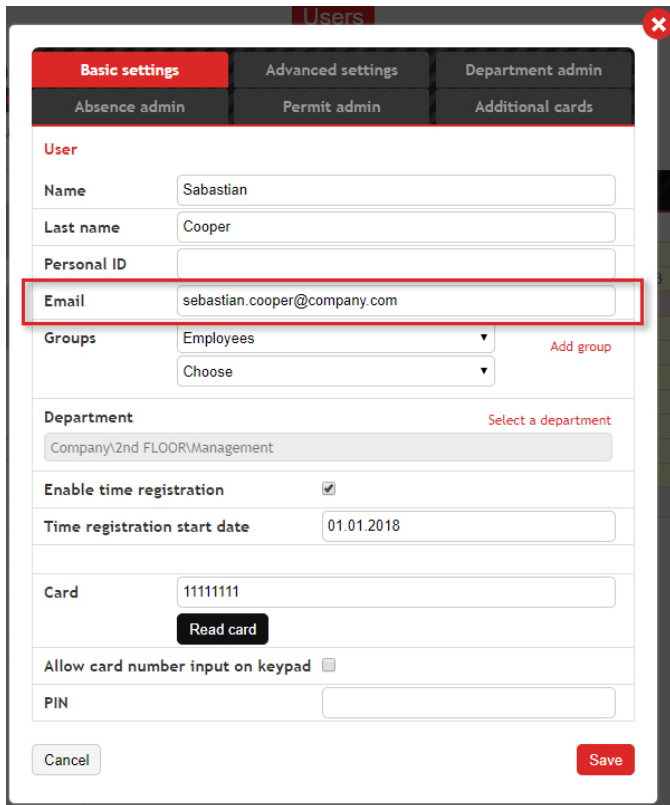**3.** Save the entered data by clicking the **Save** button.

**NOTE**

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

## B) E-mail address settings for notifications

The Codeks system can notify department managers about new absence announcement and status changes by e-mail. In order to receive notifications, the department managers must have a valid e-mail address entered in the *Basic settings* tab of the user settings.
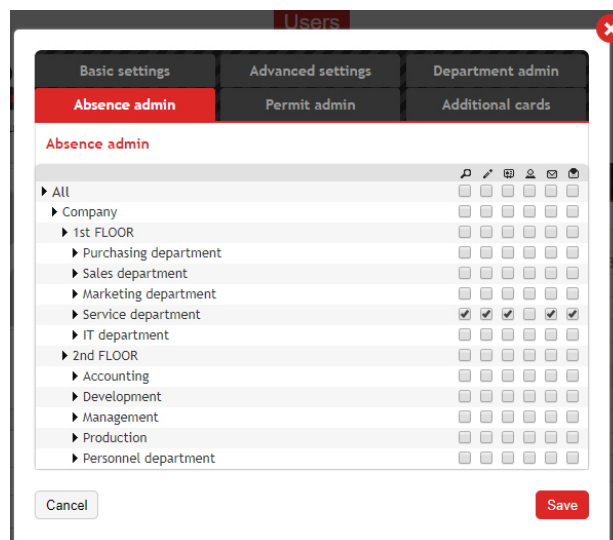
## C) Absence processing and notification rights

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

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

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

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



| Rights for absence processing | Description |
| --- | --- |
| 🔍 **View announcement** | The user can view the absence announcements of other users in this department. |
| ✏ **Process announcement** | The user can confirm absence announcements of other users in this department. |
| 🖳 **Request announcement for others** | The user can announce absences for other users in this department. |
| 👤 **Additional addressee** | The user receives a notification and can confirm the request if a user from this department, who is announcing his absence, chooses him as the addressee of the announcement. If there is more than one addressee defined for a specific department, the employee requesting a permit can choose who will receive the notification. |
| ✉ **Request announcement notification** | The user is an additional addressee and will receive a notification every time an employee in this department announces his absence. |
| 🖱 **Process announcement notification** | The user will receive an electronic notification every time a status of an absence announcement of any user in this department is changed. |

**2.** Save the settings by clicking the **Save** button.
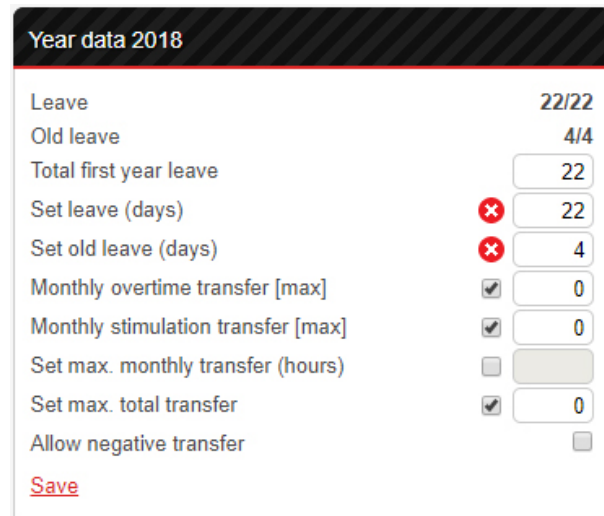
## 3.4.2 Settings for regular users

Necessary settings for regular users who will announce their absences:

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

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

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

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

| Year data 2018 | |
| --- | --- |
| Leave | 22/22 |
| Old leave | 4/4 |
| Total first year leave | 22 |
| Set leave (days) | ❌ 22 |
| Set old leave (days) | ❌ 4 |
| Monthly overtime transfer [max] | ☑ 0 |
| Monthly stimulation transfer [max] | ☑ 0 |
| Set max. monthly transfer (hours) | ☐ |
| Set max. total transfer | ☑ 0 |
| Allow negative transfer | ☐ |
| Save | |

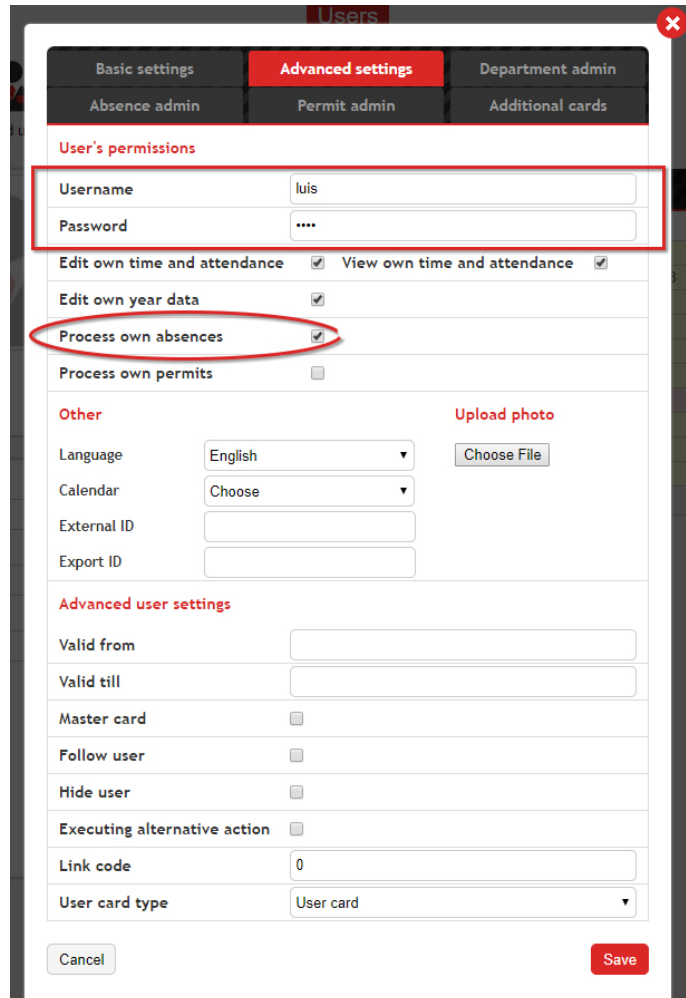| Setting | Description |
| --- | --- |
| **Leave** | Displays how many days of leave the user still has available from his total yearly number of leave days. |
| **Old leave** | Displays how many days of old leave the user still has available from his total yearly number of old leave days. |
| **Total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

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

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

## B) Username and password for user access

Users can announce their absences only through the *Announce absence* menu which they can access using their user access. The username and password for the Codeks user access can be set in the *Advanced settings* tab of each user in the *Users* editor.

**1.** In the *Advanced settings* tab, enter a **username** and **password** for the current user which will allow him user access to the Codeks application.

**2.\*** Additionally, you can enable the user to **confirm his own absences** adding a checkmark next to the setting *Process own absences*.

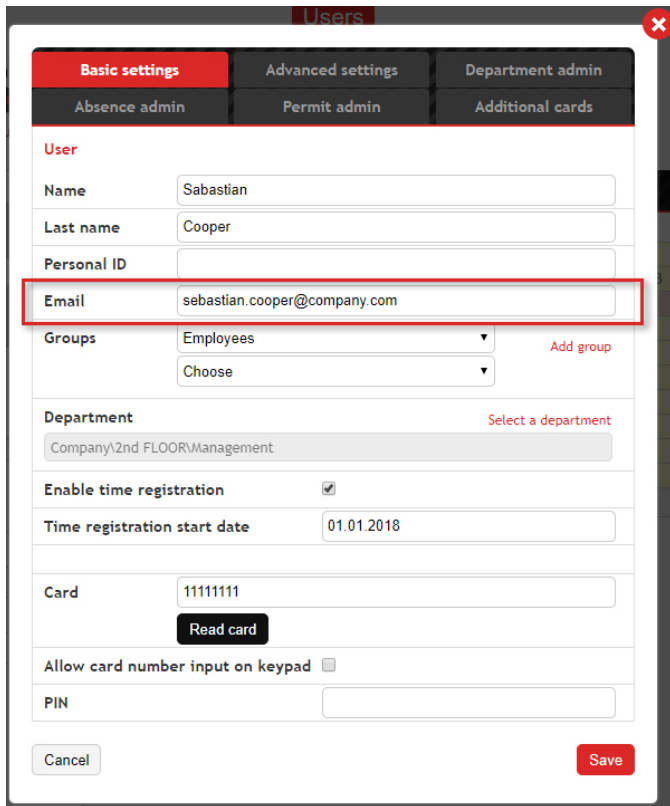**3.** Save the changes to the user's data by clicking the **Save** button.



---

**NOTE**

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

## C*) E-mail address settings for notifications

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

# 4 Using the Codeks TA Leave Announces

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

The following chapters describe how users announce their absence and how department managers process the users' requests.

## 4.1 User's request

Users who announce their absence can access the menus for *absence announcements* and *request-status overview* using their username and password.
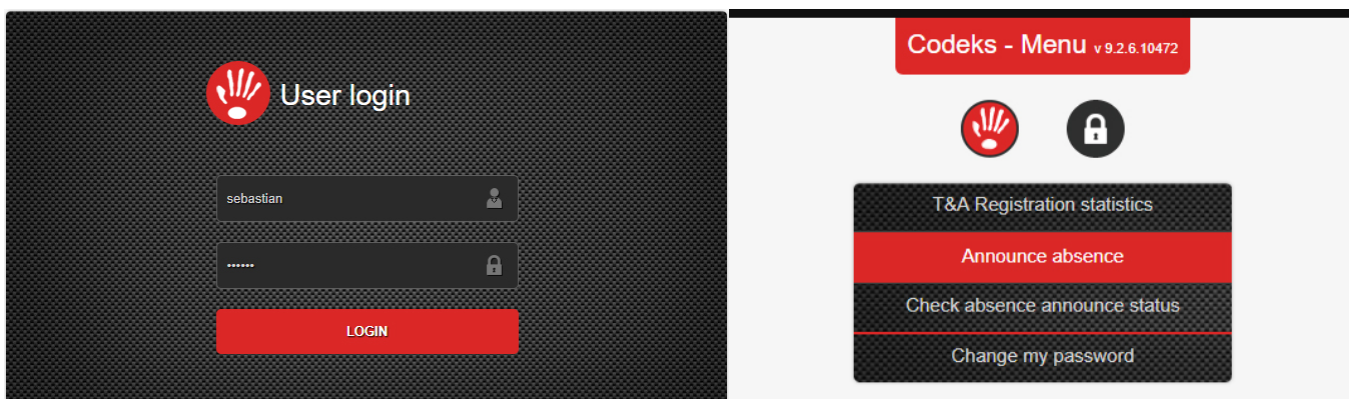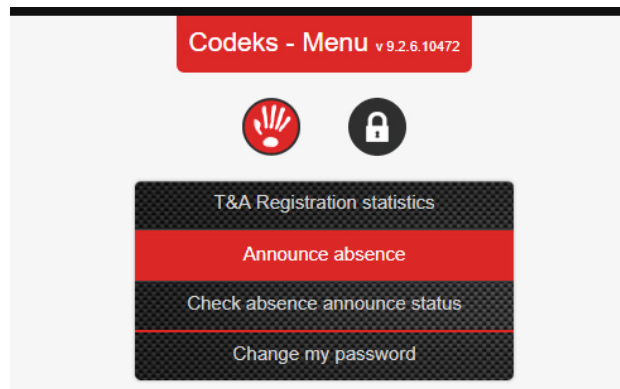


The following chapters describe the use of *user access* menus.

### 4.1.1 Absence announcements

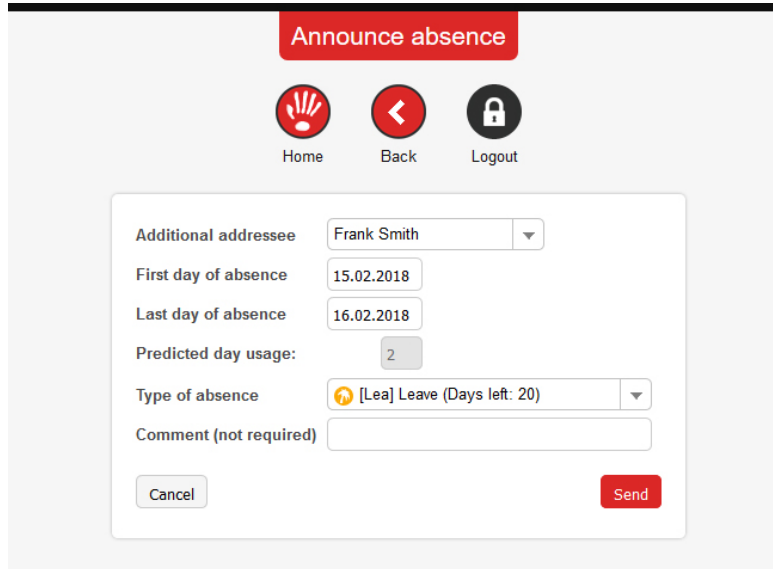**1.** To announce your absence, **select the *Announce absence*** in the menu.

This will open the *menu for absence announcing*.

**2.** In the announcement form, first, **set the first and last day of absence**. To announce a single day of absence, enter the same date in both fields.

**3.** Then, **select the type of absence you wish to announce**.

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



**5.\*** If more than one department manager can process absence requests for your department, the *Additional addressee* field will be displayed where you can select the addressee to whom your request will be sent.

**6.** When you finish entering information for the absence announcement, click **Send**.

## 4.1.2 Overview of pending absence announcements
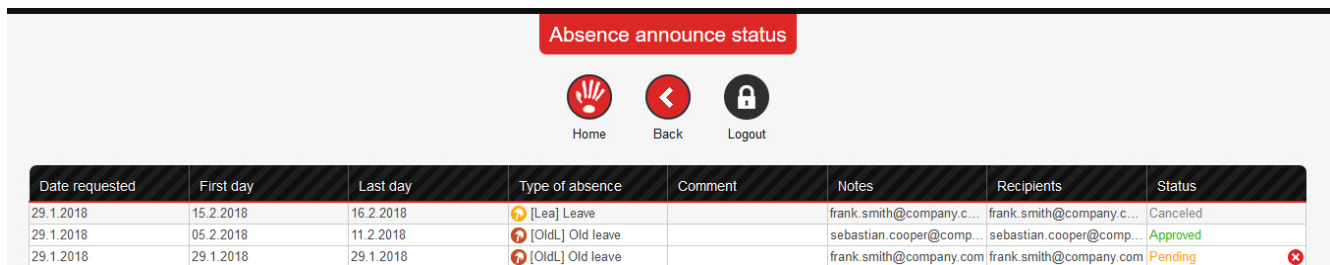
Users can monitor the status of their absence announcements in the ***Absence announce status*** menu.
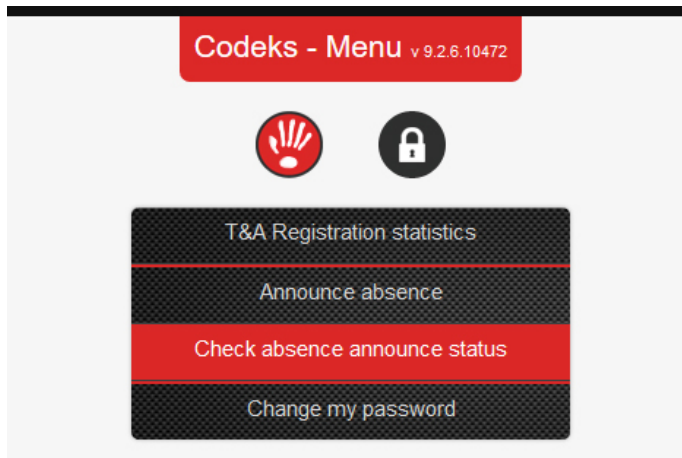


In the *Absence announce status* menu you can also cancel a request for absence.

However, the cancellation is only possible until the head of the department confirms or rejects it.

**1.** To cancel your pending absence announcement, click on the cancel icon (❌).

**2.** The status of the announcement will be immediately changed to *Canceled*, and your announcement will also be removed from the *Pending absence announces* menu of your department manager.



| Date requested | First day | Last day | Type of absence | Comment | Notes | Recipients | Status | |
|---|---|---|---|---|---|---|---|---|
| 29.1.2018 | 15.2.2018 | 16.2.2018 | [Lea] Leave | | frank.smith@company.c... | frank.smith@company.c... | Canceled | |
| 29.1.2018 | 05.2.2018 | 11.2.2018 | [OldL] Old leave | | sebastian.cooper@comp... | sebastian.cooper@comp... | Approved | |
| 29.1.2018 | 29.1.2018 | 29.1.2018 | [OldL] Old leave | | frank.smith@company.com | frank.smith@company.com | Pending | ❌ |

## 4.2 Department manager's reply

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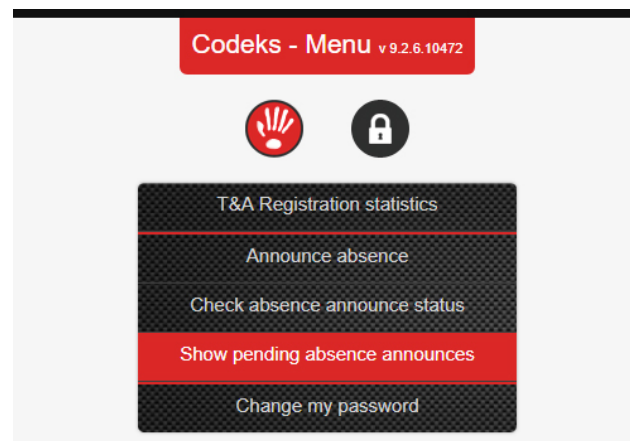


The following chapters describe the use of *user access* menus.

### 4.2.1 Processing announcements

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

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



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



| User (Announced by) | Date requested | First day | Last day | Type of absence | Comment | Notes | Recipients | Status | Processed by |
|---|---|---|---|---|---|---|---|---|---|
| | | | | | | | | Pending | |
| Adkins Tamara | 29.1.2018 | 02.7.2018 | 15.7.2018 | [Lea] Leave | | | sebastian.cooper@compa... | | |
| Barrow Tyler | 29.1.2018 | 12.2.2018 | 16.2.2018 | [Lea] Leave | | | sebastian.cooper@compa... | | |
| Michael Maria | 29.1.2018 | 25.6.2018 | 07.7.2018 | [Lea] Leave | | | sebastian.cooper@compa... | | |
| Smith Frank | 29.1.2018 | 01.8.2018 | 15.8.2018 | [OldL] Old leave | | | sebastian.cooper@compa... | | |
| Sullivan Luis | 29.1.2018 | 01.2.2018 | 02.2.2018 | [OldL] Old leave | | | sebastian.cooper@compa... | | |
| Sullivan Luis | 29.1.2018 | 26.3.2018 | 01.4.2018 | [OldL] Old leave | | | sebastian.cooper@compa... | | |
| Valdez Elly | 29.1.2018 | 29.1.2018 | 29.1.2018 | [OldL] Old leave | | | sebastian.cooper@compa... | | |
| Wallengate Daniel | 29.1.2018 | 19.2.2018 | 20.2.2018 | [OldL] Old leave | | | sebastian.cooper@compa... | | |

To **confirm** an absence announcement **click the confirm icon** ( ✓ ).

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

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



**4.** After confirming or rejecting an absence announcement the announcement will immediately be removed from the *pending announcements* list.

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

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

## 4.2.2 Absence announcement for another user
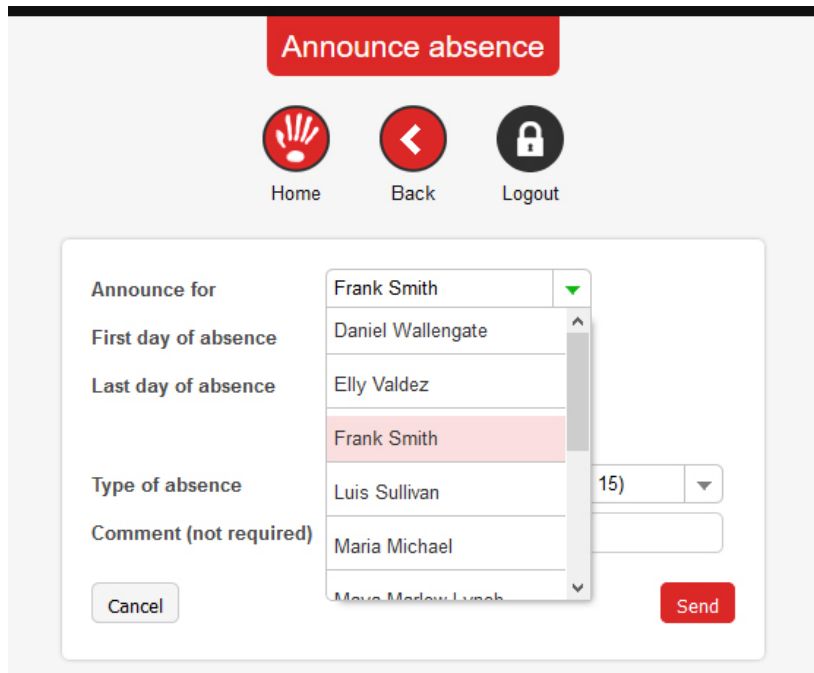
Department managers can also be allowed to announce absences for other users. The department managers can only announce absences for departments for which they have the right to *request announcements for others* 26.

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

This will open the *menu for absence announcing*.
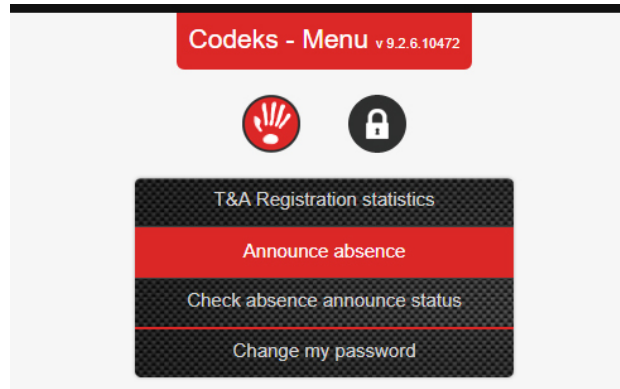
**2.** In the announcement form, first, select the user for whom you wish to announce absence (setting ***Announce for***).

**3.** Then, **set the first and last day of absence**, and **select the type of absence**.

**4.\*** Optionally, you can change the addressee of the announcement or enter a comment.

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



**6.** The announced absence for another user will be displayed in the *Pending absence announces* menu, where you can also cancel any absence announcements you have announced for other users.



| User (Announced by) | Date requested | First day | Last day | Type of absence | Comment | Notes | Recipients | Status | Processed by |
|---|---|---|---|---|---|---|---|---|---|
| Adkins Tamara | 29.1.2018 | 02.7.2018 | 15.7.2018 | [Lea] Leave | | | sebastian.cooper@compa... | | |
| Barrow Tyler | 29.1.2018 | 12.2.2018 | 16.2.2018 | [Lea] Leave | | | sebastian.cooper@compa... | | |
| Smith Frank (Cooper Sab... | 29.1.2018 | 29.1.2018 | 29.1.2018 | [OldL] Old leave | | | frank.smith@company.com | | |
| Michael Maria | 29.1.2018 | 25.6.2018 | 07.7.2018 | [Lea] Leave | | | sebastian.cooper@compa... | | |
| Smith Frank | 29.1.2018 | 01.8.2018 | 15.8.2018 | [OldL] Old leave | | | sebastian.cooper@compa... | | |
| Sullivan Luis | 29.1.2018 | 01.2.2018 | 02.2.2018 | [OldL] Old leave | | | sebastian.cooper@compa... | | |
| Sullivan Luis | 29.1.2018 | 26.3.2018 | 01.4.2018 | [OldL] Old leave | | | sebastian.cooper@compa... | | |
| Valdez Elly | 29.1.2018 | 29.1.2018 | 29.1.2018 | [OldL] Old leave | | | sebastian.cooper@compa... | | |
| Wallengate Daniel | 29.1.2018 | 19.2.2018 | 20.2.2018 | [OldL] Old leave | | | sebastian.cooper@compa... | | |

## 4.2.3 Report

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

**1.** First, display the data you wish to export in the menu.

**2.** Then, **click the *Report* icon.**
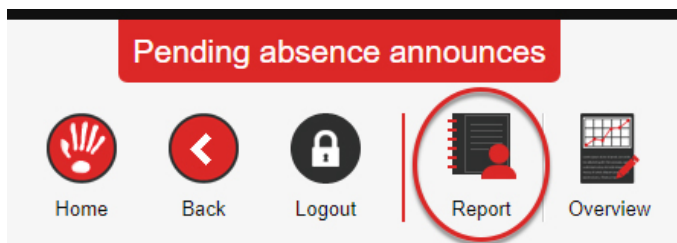


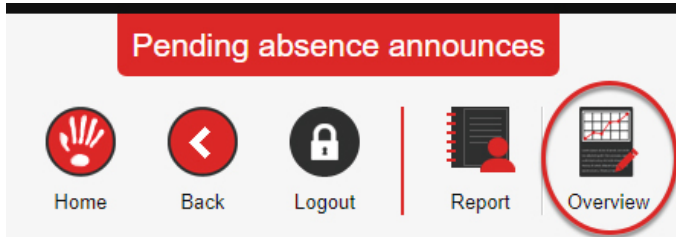**3.** A new pop-up window will appear, where you can select the report file format.
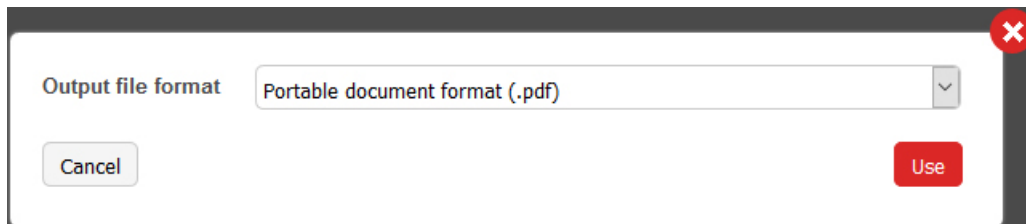


You can choose between file formats: *Portable document format (.pdf), Excel Worksheet (.xls), Excel Worksheet (.xlsx), Open document spreadsheet (.ods)* and *Comma separated values (.csv)*.

**4.** Click **Use** to display the report.

## 4.2.4 Overview

The **Overview** icon, located in the *Show pending absence announces* menu, opens a viewer where you can display weekly overviews of all confirmed absence announcements, for all departments for which you have granted View announcement 26 rights.

# 5 Examples of notification systems for absence announcements

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

The following chapter describes three examples of system configuration for notifications and absence announcements validation:

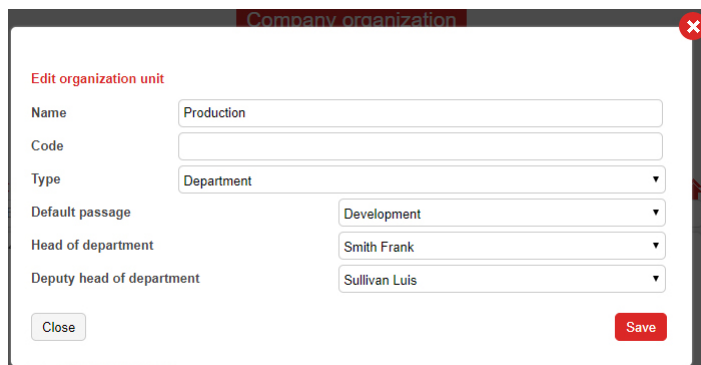## NOTIFICATION DEPENDING ON THE COMPANY ORGANIZATION AND DEPARTMENT MANAGER PRESENCE

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

Required settings for this function:

**A. Define the company organization and assign heads and deputies of departments.**

In the *Company organization* editor, define the (hierarchical) structure of the company, and set the appropriate users to act as **heads** and **deputy heads of departments** for each defined department.

**1.** To assign the head and deputy head of a department, first, **double-click the selected department in the tree-view list** of the *Company organization* editor.

**2. Now, select the appropriate users in the *Head of department* and *Deputy head of department* fields.**
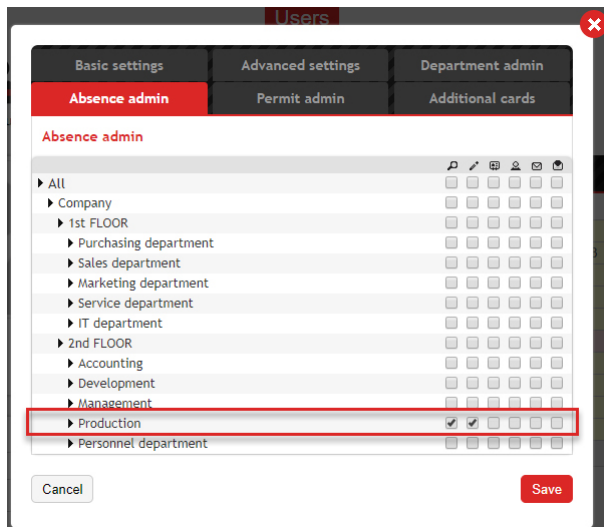


**3.** Click **Save.**

The defined users will receive notifications about absence announcements of the users in selected departments **depending on the  company hierarchy and their presence at the workplace**. In the

event that both, the head and deputy head of the department, are present, only the head of the department will receive notifications of absence announcements. In the case of his absence, only the deputy head of the department will be notified, and if both are absent, notifications will be sent to both.

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

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

**1.** From the *list of users*, select the user defined as the head or deputy head of a department, and **open the window for editing the selected user's settings**.

**2. In the *Absence admin* tab, grant the *View announcement* 🔍 and *Process announcement* ✏ rights for appropriate departments to the user.**



**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 absence announces.

**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).



**2.** Click **Save.**

## NOTIFICATION DEPENDING DEFINED USERS' RIGHTS

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

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

Required settings for this function:

**1.** From the *list of users*, select the user who will be able to view, process or announce absence for users in a certain department, and **open the window for editing the selected user's settings**.

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

**- View announcement** 🔎  -

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

**- Process announcement** ✏️ -

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

**- Request announcement for others** 🖥️  -

the user can announce absences of other users in this department.
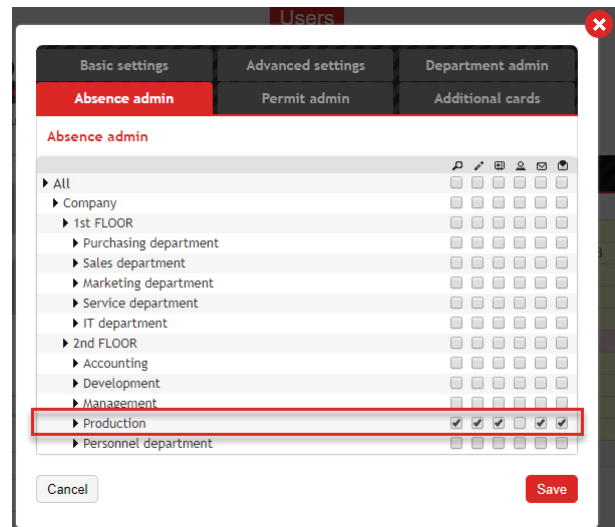
**- Request announcement notification** ✉️ -

the user is an additional addressee and will receive a notification every time an employee in this department announces his leave.

**- Process announcement notification** 📧  -

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

**3.** Click **Save.**

> **NOTE**
> 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.)
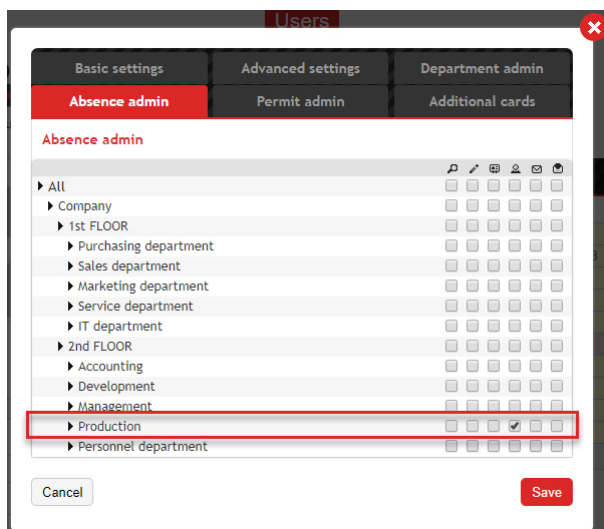
# NOTIFICATION DEPENDING ON THE SELECTED ADDRESSEE

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

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

Required settings for this function:

**1.** From the *list of users*, select the user who will be one of the possible **Addressees** for a certain department, and **open the window for editing the selected user's settings**.

**2. In the *Absence admin* tab, grant the user the *Addressee* ⚇ right.** This will allow him to view, process and be notified about absence announcements 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.)