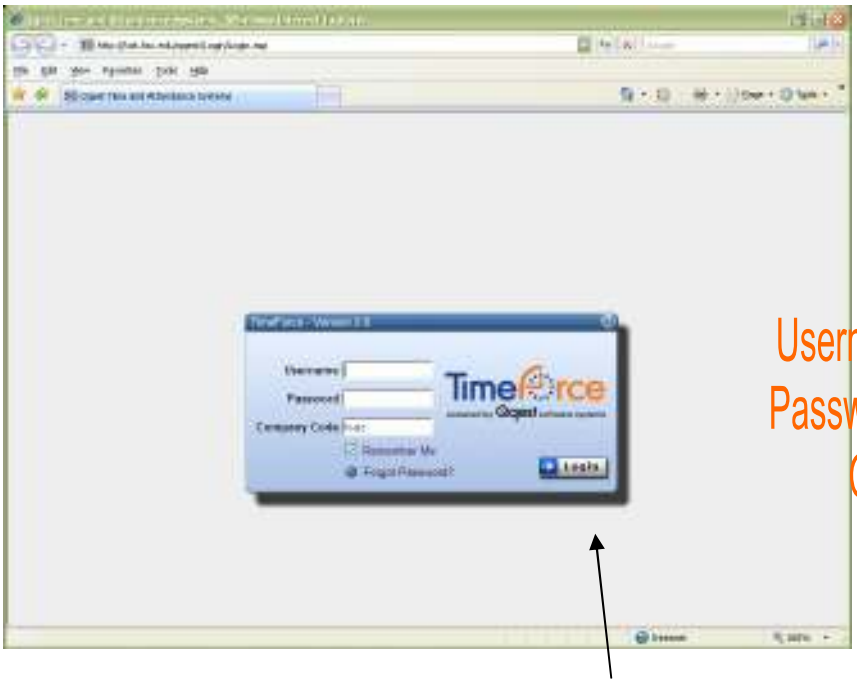
On your desktop double-click the Qgest Time and Attendance Systems icon:

You will be prompted for your Username, Password, and Company Code:




Username = First Initial Last Name
Password = Last Four Digits of SS#
Company Code = h-sc

Enter your information, then click the Login button.

## Passwords

If you forget your password you can use the Forgot Password link, then follow the directions in the pop-up window as shown to the right.

If you would like, you can change your password after you've logged in by using Preferences link in the upper right-hand corner of the screen. Go to the Password field. After changing the password, re-type the new password into the Confirm Password field. Click UPDATE.

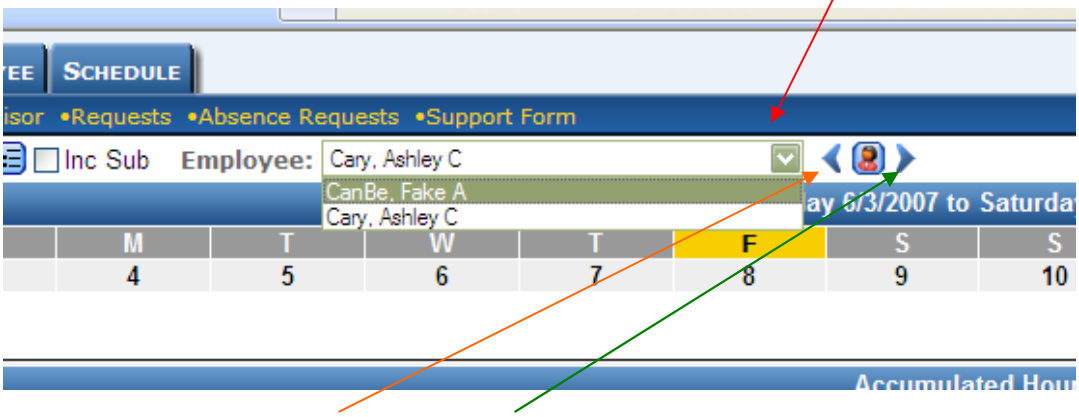
Or, you may contact Human Resources and we can change your password, but we cannot tell what the current password is once you've changed it.

# TIME CARDS

The first thing you see when you Login is <u>your</u> timecard.

**Note:** As a supervisor you will have access to your own time and attendance, as well as that of your employees. You may manipulate the data of your employees but there are limits to what you may do to your own data.

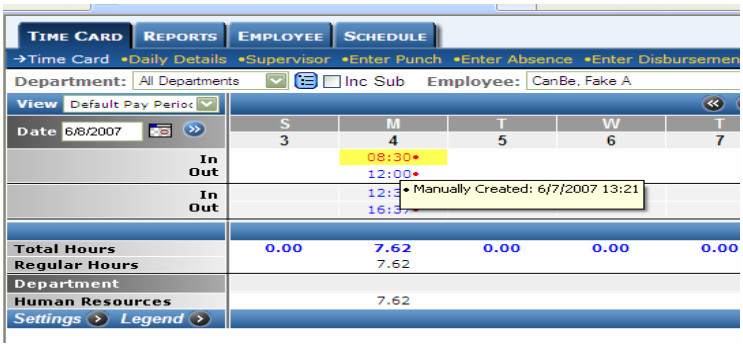
To view a different employee's timecard use the Employee drop down list. Highlight and click on the employee you wish to see.



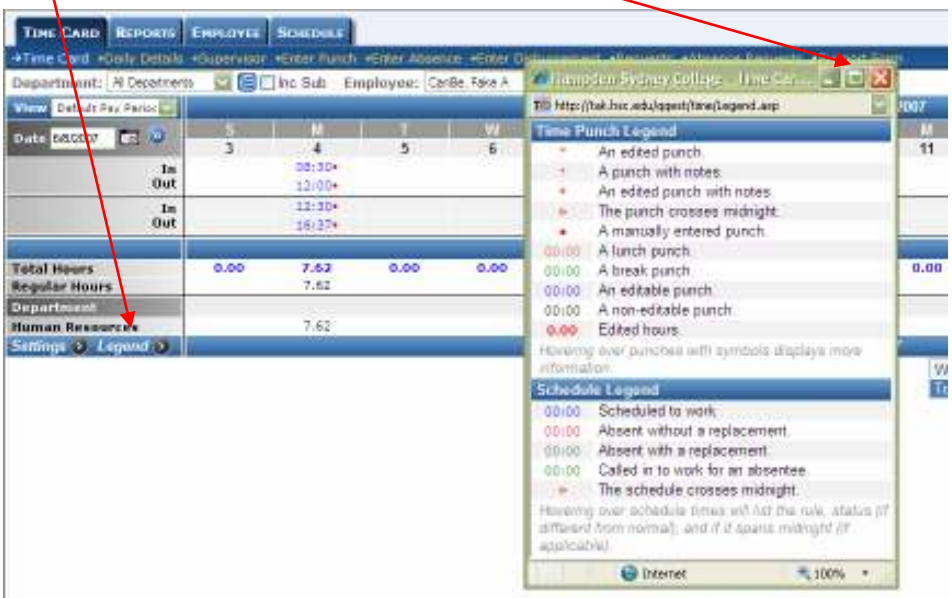

You can also use the Previous and Next buttons to scroll through your employees one at a time.

On the timecard you may see punches with symbols or in different colors or you may see a number in the Punch Errors row. To see the meaning or details of the symbols you can do four things:

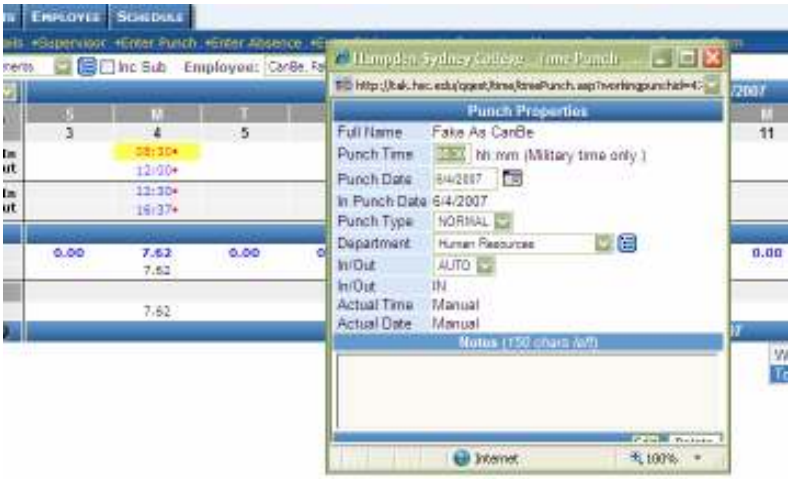
1) You can use your mouse to 'hover' over the punch and a small information box will appear



2) Click on the Legend menu and the Time Punch Legend will appear on your screen. The Legend gives the symbol definitions. To close the Legend use the small red in the top right corner of the Time Punch Legend box.




3) Click on the punch itself and the Punch Properties dialog box will open.



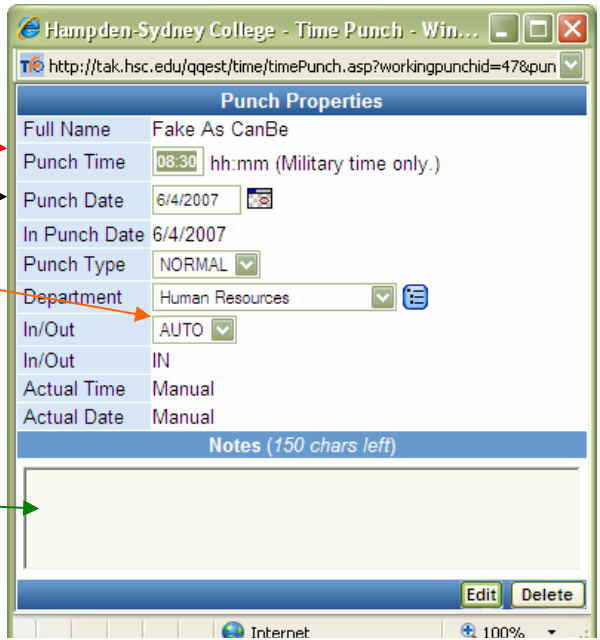

From the Punch Properties box you can:

**1-** Change the Punch Time, changes must be made in Military Time

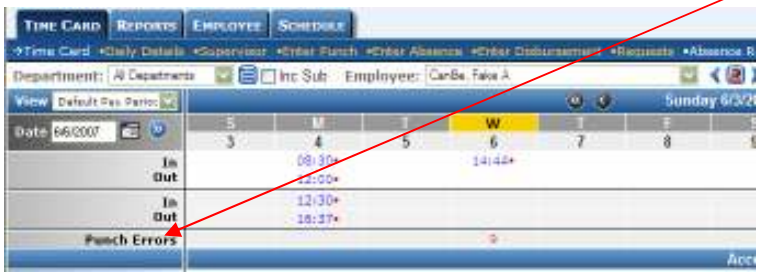
**2-** Change the Punch Date

**3-** Change whether the punch was an In or Out punch, if you do not make a selection it will AUTO fill the In or Out for you.

**4-** If you make a change, you MUST enter a Note giving a reason for the change(s).

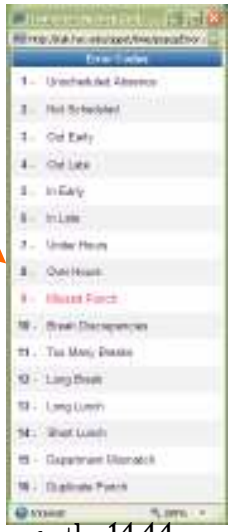


4) If the punch contains an error, a code will be displayed in the Punch Errors row of the table. This is the row under the last Out punch row.




Click on the code to view the details of the error.

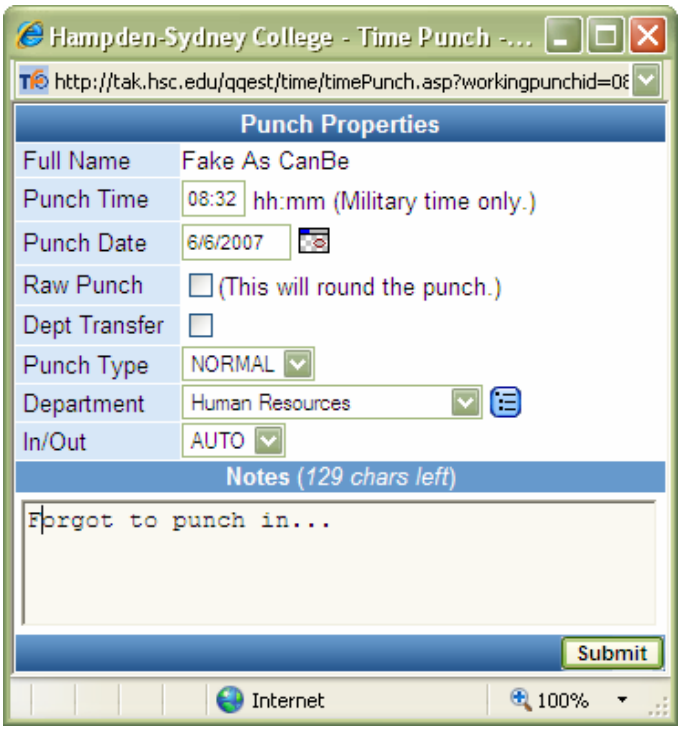
The Error Code dialog box will open. The Error Code in question will be highlighted in RED.
To close this box, click on the RED X in the Right Corner of the box.



An Error Code of 9 means there is a missing punch. To correct this you will need to enter the missing punch.

If you click on the punch with the ● beside it, you can alter the time of the existing punch. If you do indeed change the 14:44 punch to 08:32, it does just that, changes it to 08:32 and throws up another error telling you that you now have a punch with notes (‡) but you are also still missing a punch (9).

In this case, you need to add an In punch of 8:32. Therefore, you are going to click on the empty box below the 14:44 punch. This will open the Punch Properties box.




Enter 08:32 in the Punch Time.

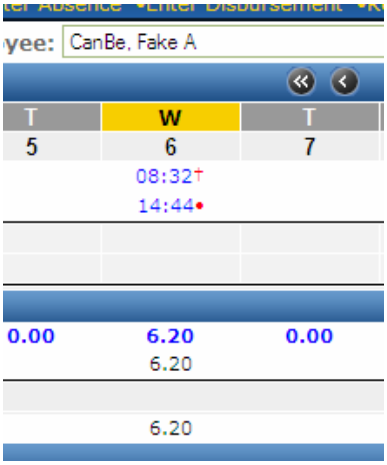
Allow the computer to AUTO our In/Out.

Enter a Note saying: "Forgot to punch in..."

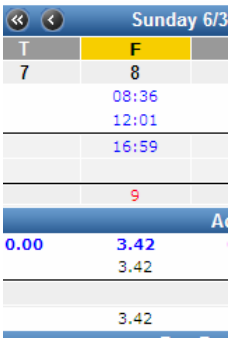
Then click Submit.

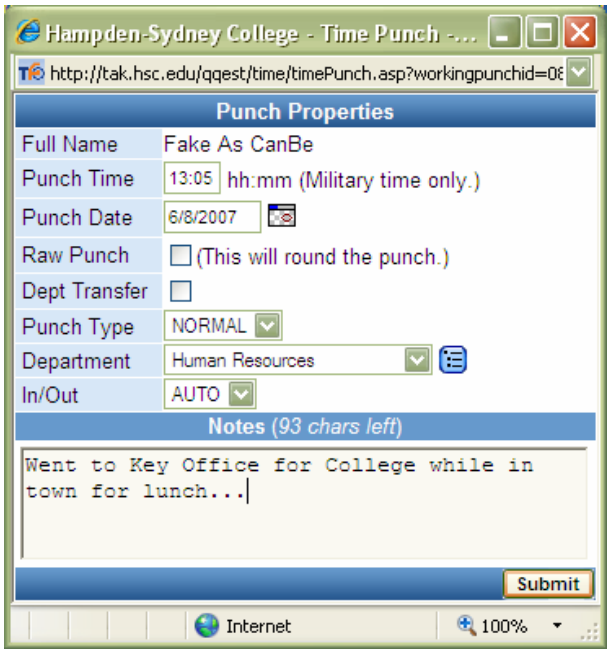
If the Punch Properties box does not automatically close, use the RED X to close the box.

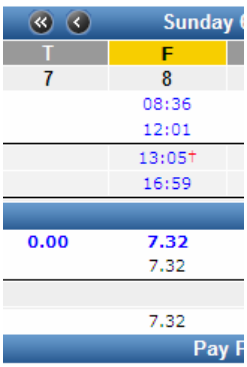
You can now see that Fake has an In of 08:32‡ and an Out of 14:44•




Below are sample screens showing a missing punch. The punch that is missing is the IN punch from the end of the lunch break. Correct this by adding a punch at 13:05 and a note saying "Went to Key Office for College while in town for lunch." This results in a 13:05‡ punch.



## Entering an Absence

Absences document when an employee has taken time off from work.

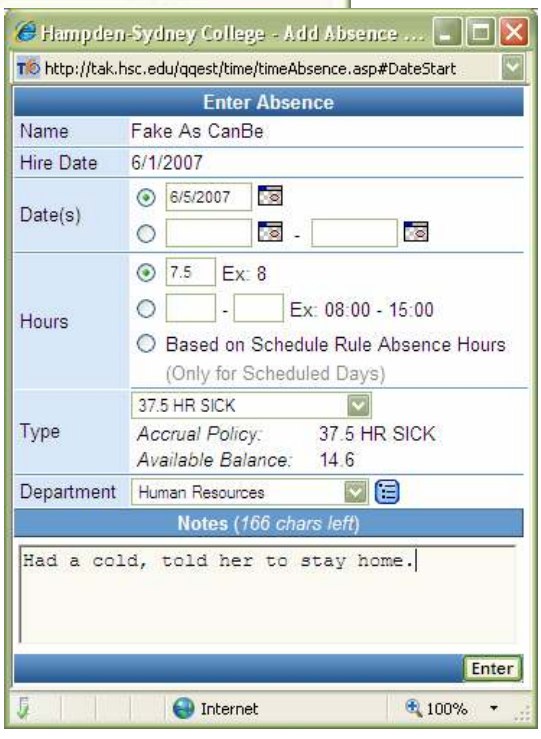
From the Timecard, click on the Enter Absence link. The Add Absence box will appear.

Note: Any time you have the option of manually entering a date you will also have the option of clicking on the Calendar icon.

This will allow you to select a date directly from the calendar by clicking on it.

Fake As CanBe was out sick on Tuesday the 5th. You need to Enter an Absence on her behalf.

You can see from this screen that Type has a drop-down box that will allow you view all of the Absence Codes available. By highlighting one and clicking it you will be assigning a Code to the Absence you are creating.



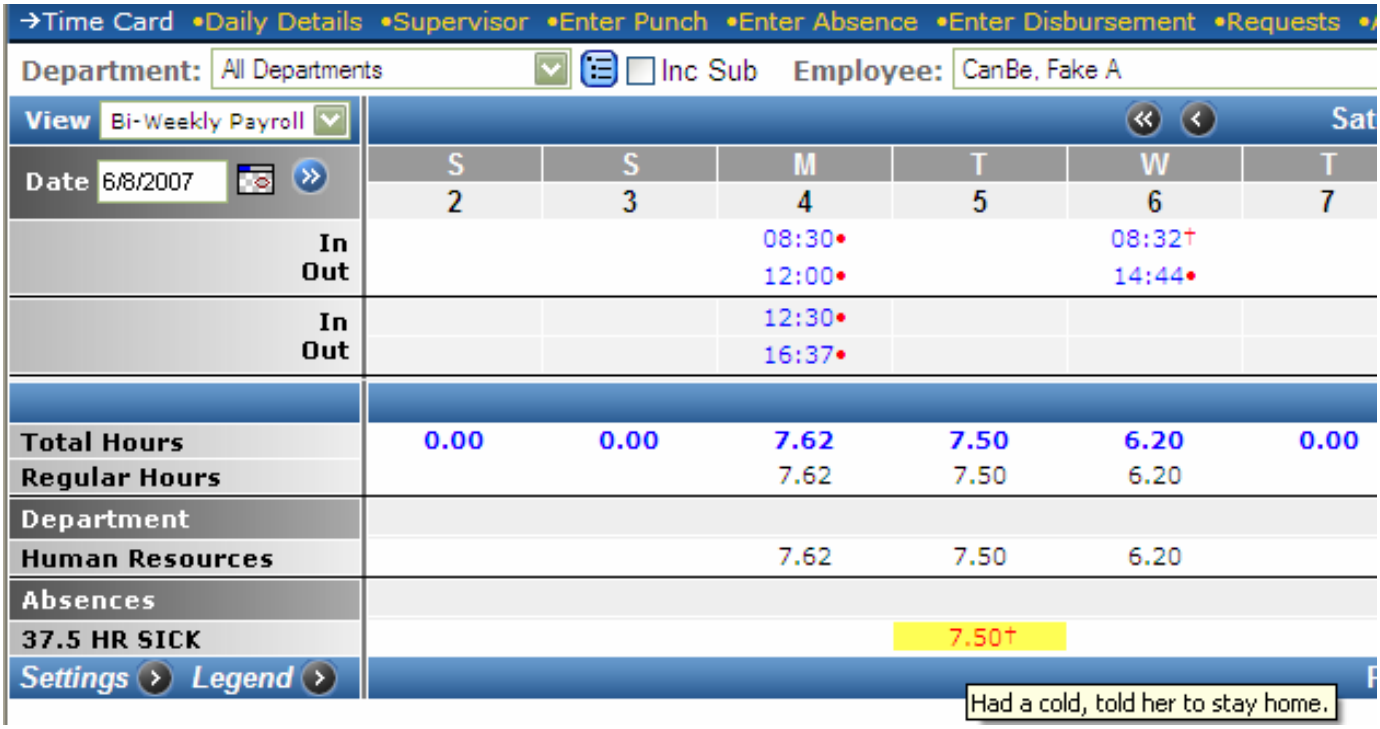

You have now created an Absence for Fake, for 6/5/2007. She is a 37.5 hour employee, so we've given her 7.5 hours off in the Hours field.

We've also told the system that it should take these 7.5 hours from the 37.5 HR SICK. As you can see she had an available balance of 14.6 hours.

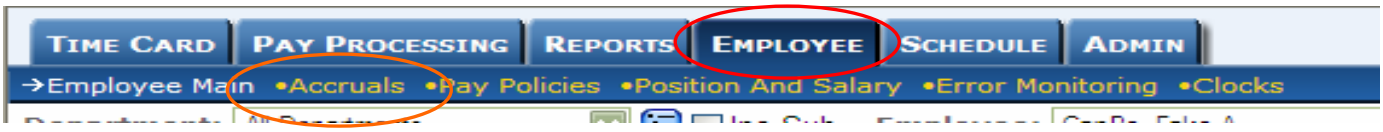
We've added a note saying that Fake was at home with a cold.

Make sure you click Enter when you're done!

Below is what Fake's Timecard now looks like. Note the 7.5 hours does not show up in her punches In and Out, but instead shows up in the Absences row of the Timecard. In the illustration below the mouse is 'hovering' over the 7.50† showing us the message box that shows the note attached to the Absence.




As mentioned before, Fake had 14.6 hours of Sick Leave available. She used 7.5 of those hours. If you go to the Employee tab and click on Accruals, it will open Fake As CanBe's Accrual screen for you.



From here you can see that Fake had 14.6 hours of 37.5 HR SICK banked. She has Used YTD (year to date) 7.5 hours. She has 7.10 hours Available.

# Requests

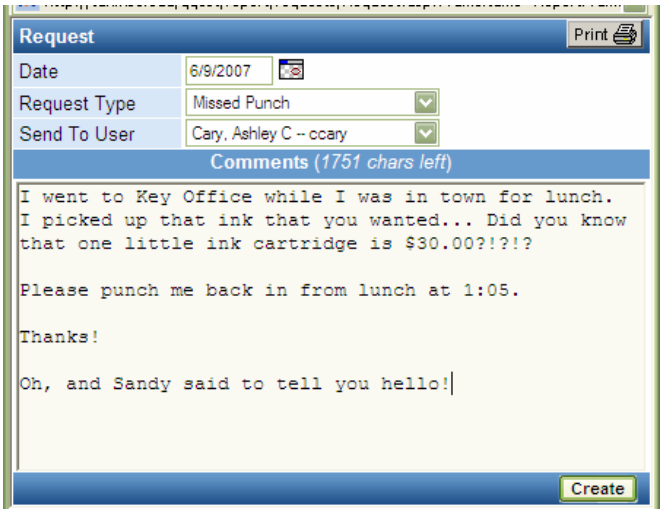
The program allows you to submit requests to a supervisor. As a Supervisor it allows you to receive and respond to the requests sent to you by the employees you supervise. There are two different types of requests, "General Requests" and "Absence Requests."

## General Requests

General Requests are those that involve Missed Punches, Support, or Time Adjustment. Back on Page 6, you walked through editing a Missing Punch, a General Request is what Fake would have submitted to let you know that she missed her 13:05 punch because she went to Key Office.

The Request screen looks like this:

Click on Create Request to open the Request box...




1) Select the Date
2) Select the Request Type
3) Select who you want to send your Request to
4) Type in the Comment you want to send

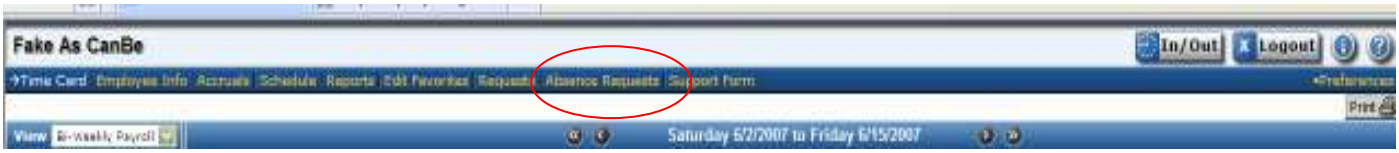
<u>If you are telling your Supervisor you missed a punch, be sure to tell them what the punch should be and why you missed it.</u>

5) Click Create
6) A prompt box will open asking if you want to send your Supervisor (or whoever you sent the Request to) an email. If you answer yes, your Email program will open with an already created email that you may send to your Supervisor. ☠ **<u>If you are using a shared computer, or if you do not have an Email account of your own on the computer you are using – CLICK NO. Then verbally tell your supervisor that you submitted a request or you may submit a paper Missing Punch Form to your supervisor.</u>**

# Absence Requests

Absence Requests begin on the Employee's side of things. Let's take a look at how that's done.

First you, the employee, will click on Absence Request.




The Absence Request/Message Report screen will open. The Employee clicks on the Create Absence Request link.

The Absence Request box will open.

1) Enter the Date or Dates that you need to take off. Type in your dates or use the Calendar icon.

2) Choose what days of the week correspond

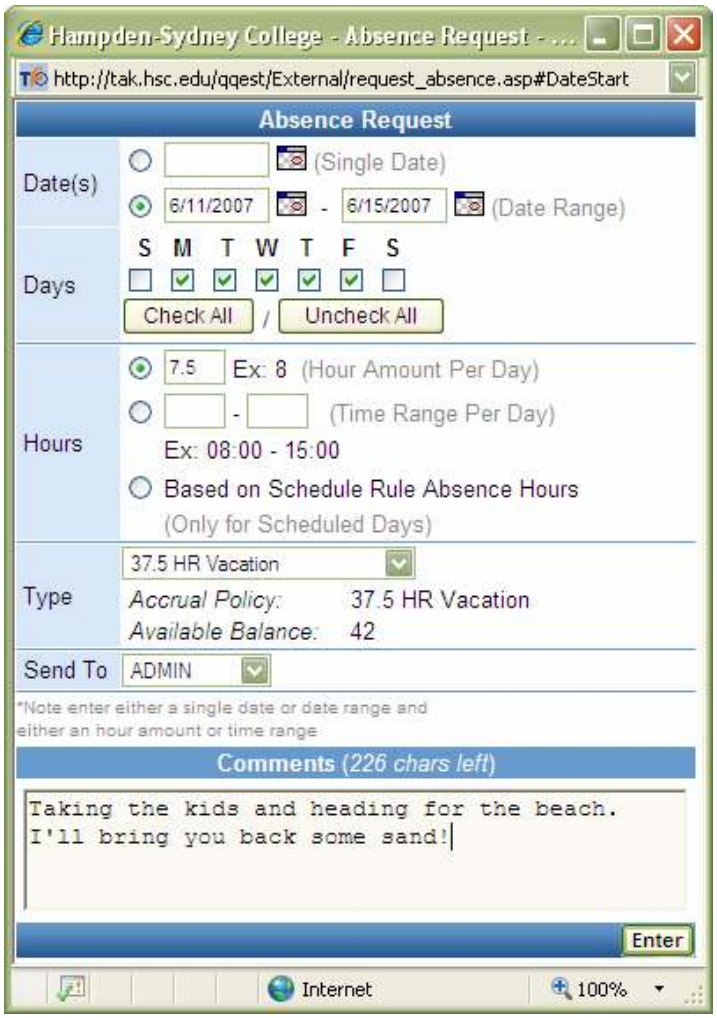
3) Enter the number of hours you will be out each day. 37.5 hour employees would enter 7.5 if taking off the entire day; 40 hour employees would enter 8.

4) Tell the system what TYPE of leave you are taking

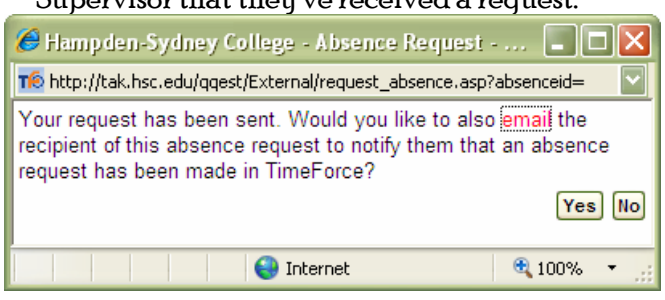
5) Choose your supervisor for Send To

6) Add a Comment so your supervisor knows why you are requesting time off. You can provide them as much information as will fit.

7) Click on the Enter button and your request will be transmitted to your Supervisor.




1) The system will ask if you'd like to email your Supervisor that they've received a request.



If you answer yes, your Email program will open with an already created email that you may send to your Supervisor. ☠ **If you are using a shared computer, or if you do not have an Email account of your own on the computer you are using – CLICK NO. Then verbally tell your supervisor that you submitted a request or you may submit a paper Absence Request Form to your supervisor.**

9) When this box closes you will see your Absence Request/Message Report screen again. The request that you just submitted is listed at the bottom of the screen. It will stay there until your Supervisor approves it.

Now, on the Supervisor side of things it appears on the same Absence Requests/Message Reports Screen.

Click on the i bubble to open the Absence Request–Pending dialog box.

From this box you will review the information your employee submitted and Approve or Deny the Absence Request.

If you aren't ready to do either, simply click Close.

If you click Approve, the box closes and the request is automatically put into the employee's Timecard.

Below is the employee's Timecard reflecting her vacation as requested.

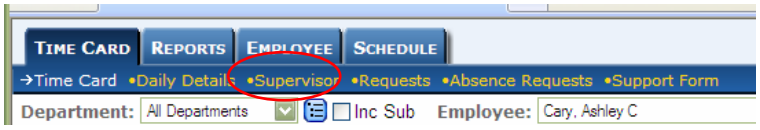
To illustrate what happens if you Deny a request, we've had Fake submit a request for 4.5 hours of Vacation on a day that she's already taken off. The Supervisor recognized that, based off the date, this was probably a date error on her part. The Supervisor typed a message back to Fake asking if the date was correct, and Denied the request.

When Fake goes into her Absence Request/Message Report screen again, she will see her request with a red d bubble beside it. (You must have ☑ Show Completed marked to see already completed requests).

If you click on the d bubble, the Absence Request–Denied box will open. In the box you can read the Supervisors message. The only option from here is to Close. If Fake did indeed type in the wrong date, she will have to Create a New Absence Request and submit it to her Supervisor.

## Supervisor

The Supervisor section of the Timecard screen allows the user to view information about their employees. It is the Supervisor Dash Board.

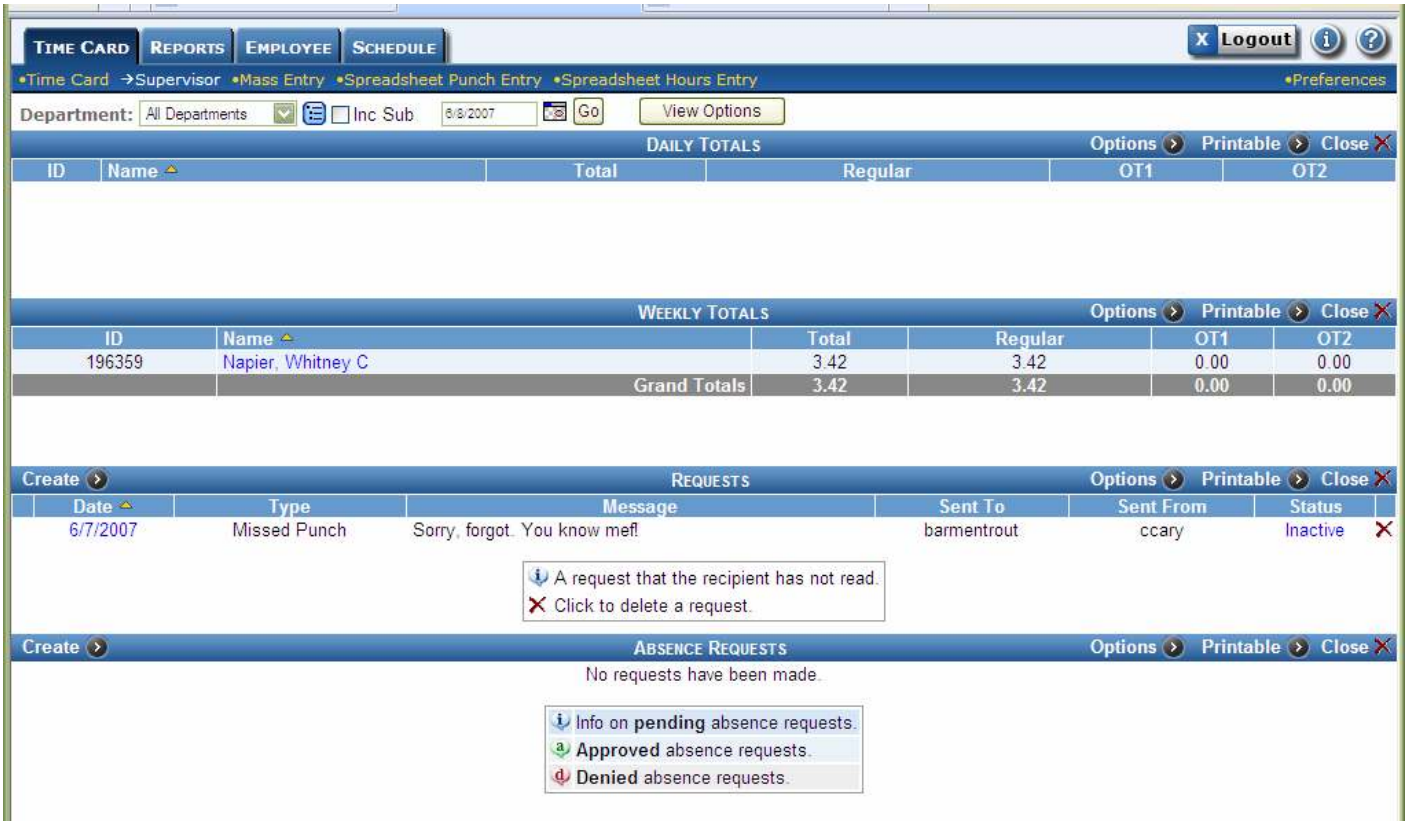



Click on the Supervisor link to open the page.

From this screen you can navigate through your employee(s).

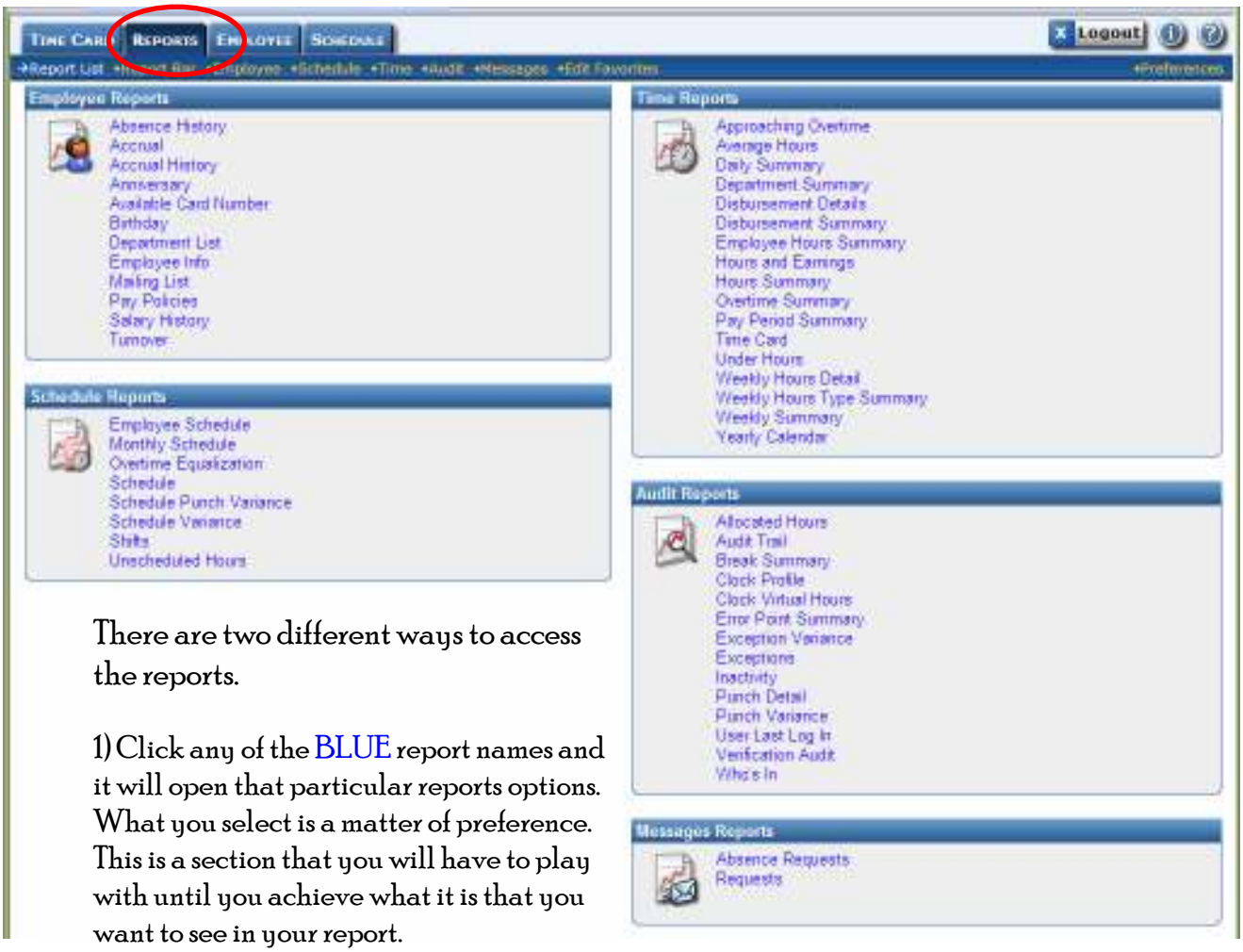
Anything that shows up in BLUE is a link that can be clicked on for more information. In this example: Napier, Whitney C. is a link in the Weekly Totals section; 6/7/2007 is a link in the Requests section, as is Inactive.

If the system gives you an option to make something Inactive, it is allowing you to remove that information temporarily.
If you were to click on the ✘ beside Inactive you would <u>permanently</u> remove the information from the system. It cannot be restored once it has been deleted (✘).



# REPORTS

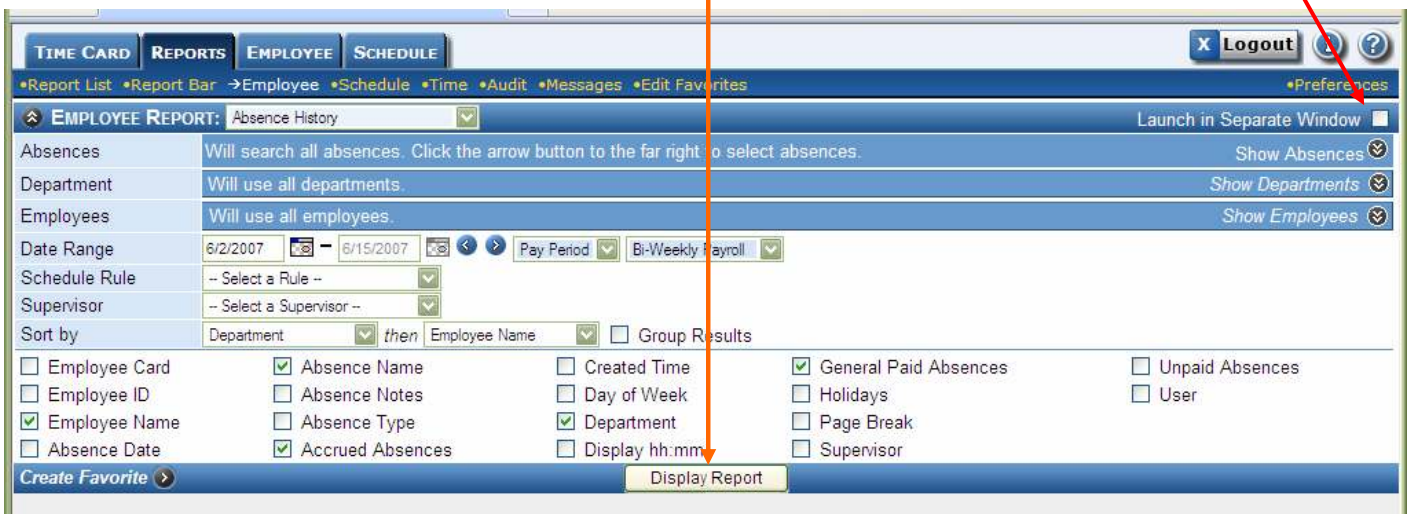
The Reports section of the program allows you to print comprehensive reports containing your Timecard, Human Resources, and Employee information.



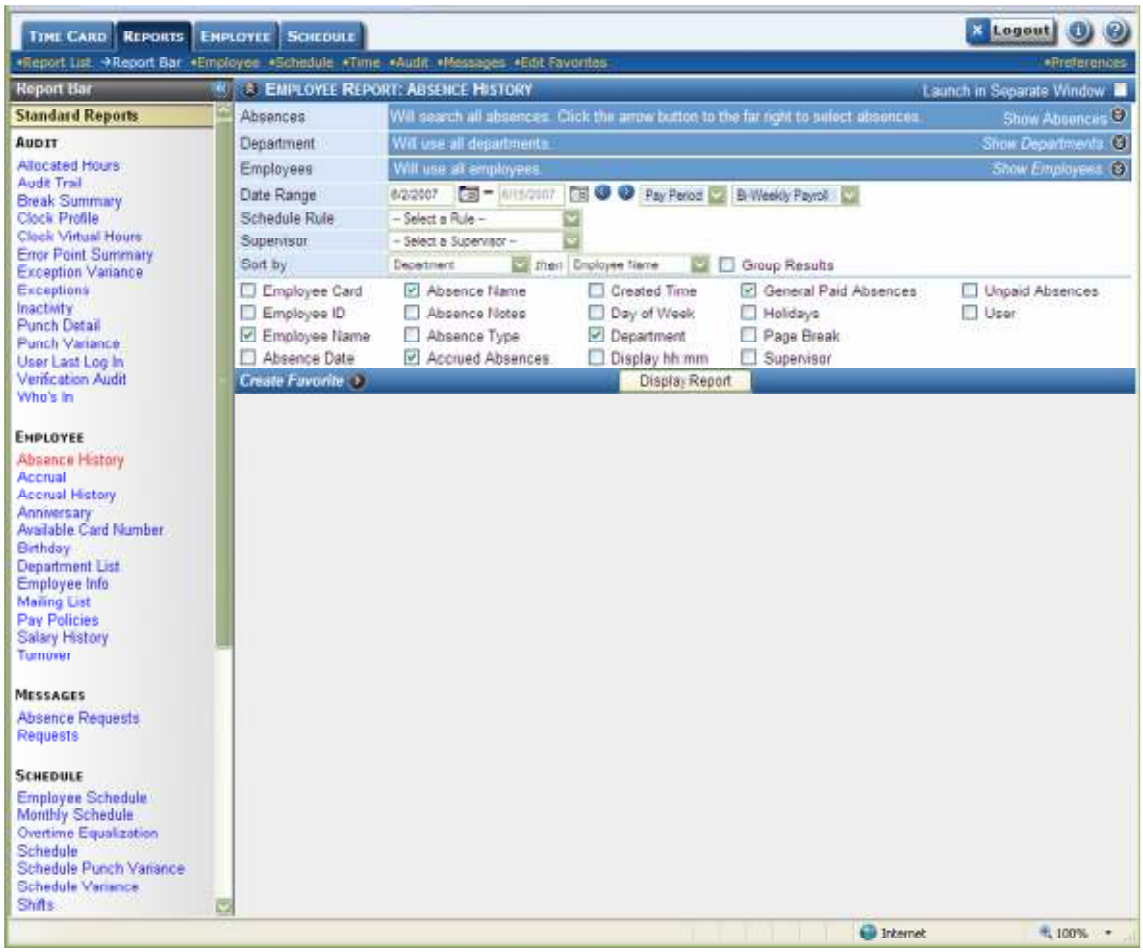

There are two different ways to access the reports.

1) Click any of the BLUE report names and it will open that particular reports options. What you select is a matter of preference. This is a section that you will have to play with until you achieve what it is that you want to see in your report.

If you do not want to make any changes, click Display Report. You will see the report as it is pre-defined. If you find that viewing the report in the window below the options is hard for you to read, mark the Launch in Separate Window box.



2) Click on Report Bar and this is how the same information will appear. The main difference between the two options is that by using the Report Bar the list of reports is constantly visible on the left side of your screen.




To <u>view</u> a Report click on the Display Report button.

To <u>print</u> the displayed report click on the Printer icon.

# Report Favorites

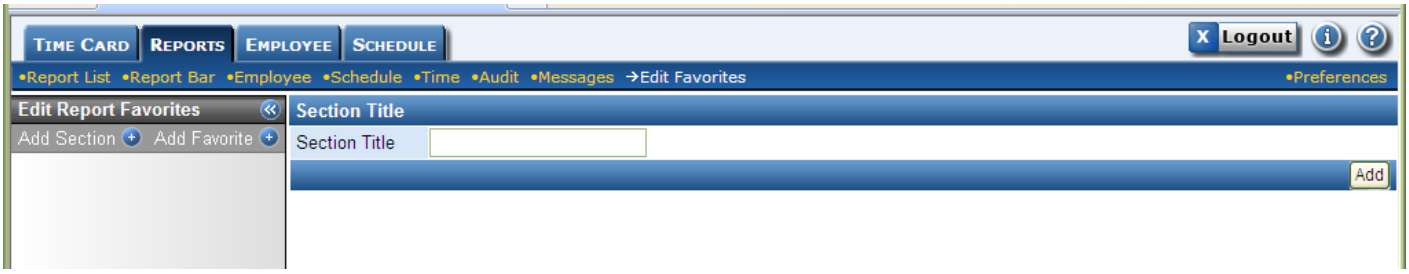
This program allows you to create a section of your favorite reports. A favorite can consist of a single report or multiple reports to be displayed on the screen at once. You can even have multiple instances of the same report, but with different report criteria for each one.

The system automatically saves the report criteria of any report favorite. This makes it so that you do not have to select the same report settings each time you run the report.

Creating favorites consists of two steps: Creating 'Sections' and 'Adding Favorites'.

## Creating a Favorite Section

1) Click on the Reports tab at the top of the screen
2) Click on the Edit Favorites link
3) Click on the Add Section + icon. The Section Title screen appears to the right.
4) Enter the name you would like to use for this report in the Section Title field.
5) Click the ADD icon to add the new section title. To remove a section you would use the ✘



## Adding Favorites

1) Click on the main Reports tab at the top of the screen
2) Click on the Edit Favorites link
3) Click on the Add Favorite + icon. The **Favorite** screen appears to the right.
4) Enter a Name for this favorite as you would like it to appear in the program.
5) In the Section Title field select the section you want this favorite to be assigned to. If you do not select a section, one will be automatically created based on the report group that the first report in the favorite comes from.
6) In the **Automatic Behavior** section, select Close Bar. This tells the program to automatically close the Report Bar when you are viewing your report.
7) In the **Automatic Behavior** section, select Save Changes. This tells the program to automatically save the settings specified in the Report Criteria section. This prevents you from having to re-enter the same criteria settings each time the report is run.
8) In the **Icon** section, Icon allows you to select the color and shape that you would like to use for this favorite icon. This is to help you recognize the report quickly.
9) In the **Icon** section, Icon Position allows you to assign the order in which you want your icons to be displayed.
10) In the **Reports** section, use % Percentage for your Height Type.
11) In the **Reports** section, use the drop down boxes to select the report(s) that you want to make up this favorite.
12) Once you have finished click the **ADD** icon to save the report favorite. The favorite is now listed in the Edit Favorites section on the left-hand side of the screen.

# EMPLOYEE

The Employee section is broken up into three different screens. Supervisors do not have the ability to edit employee profile information.

The three options are as follows:

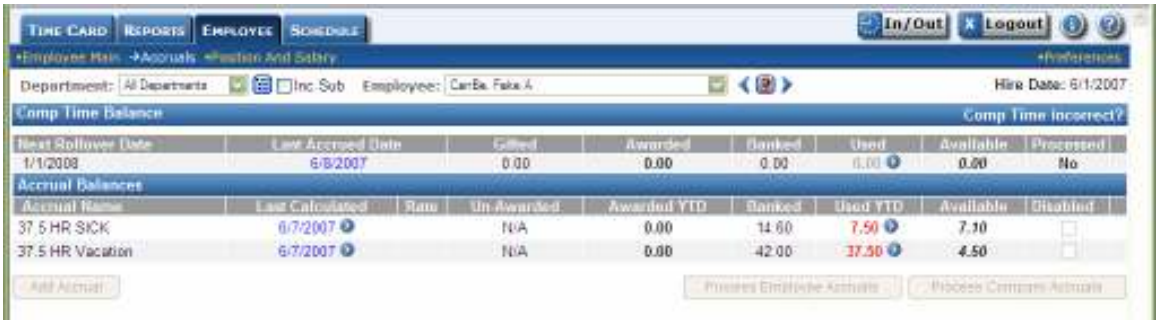
- Employee Main
- Accruals
- Position and Salary – We are not using this system to track this information.

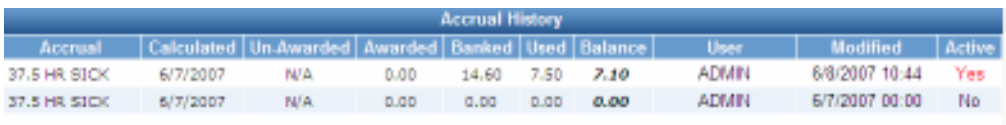
## Employee Main

As with the Timecard screen, you can use your Employee drop down list or the Previous and Next buttons.

## Accruals

By clicking on the BLUE dates you can view the Accrual History box.



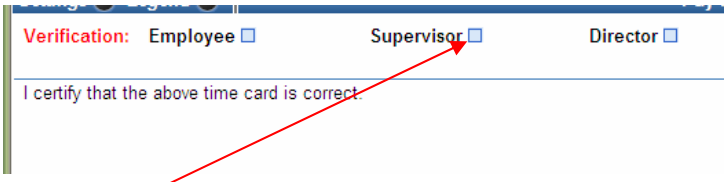
Accrual History

| Accrual | Calculated | Un-Awarded | Awarded | Banked | Used | Balance | User | Modified | Active |
|---|---|---|---|---|---|---|---|---|---|
| 37.5 HR SICK | 6/7/2007 | N/A | 0.00 | 14.60 | 7.50 | 7.10 | ADMIN | 6/8/2007 10:44 | Yes |
| 37.5 HR SICK | 6/7/2007 | N/A | 0.00 | 0.00 | 0.00 | 0.00 | ADMIN | 6/7/2007 00:00 | No |

# Approving the Timecards for Payroll

**You are required to login and approve your employee's timecards for payroll. This must be done by noon on the Tuesday following the end of the pay period.**

On the Timecard there is a small section at the bottom left that looks like this:




You must click on the box beside Supervisor in order to Approve the Timecard.