

## QGenda Getting Started Guide

### Part 1 – Initial Login

1. Go to [www.QGenda.com](http://www.QGenda.com).
2. Click “Create Account”.
3. Fill in the information, making sure to use the same email address that has been entered in QGenda – this is how it will identify to which company you belong. Click “Sign Up”. The password is case sensitive. Please make sure you remember the password you create as you will use that password and your email address to log in going forward.
4. Once you are confirmed you will log in with the email and password you specified.
5. If you log in and there is not a company listed for you to access, that means the email you entered does not match up with the one that was entered into QGenda or the Scheduling Administrator has not assigned you a profile within QGenda. You need to contact your Scheduling Administrator to have them either change the email in QGenda to match the one with which you signed up or add you to a profile under User Profiles. Once this is done you will be able to access your company.
6. The company name should then show up on your screen with the option “View”. Click this to access the schedule. Once the View Tab has loaded you will select the date range you wish to view as well as the Staff and Task Filters (from the respective drop down boxes) to populate the people and tasks on the screen.

### Part 2 – View Tab

The View Tab is where you will view the schedules that have been published by the scheduling administrator.

#### Legend

In the Upper Right Hand Corner there will be a legend listing the icons you may see throughout this tab.

 - Locked    - Note (Hover Over)

- **Locked:** The locked symbol on a shift means that that shift was requested on that day. Either the shift was put into the system using the Request Tab (if enabled) or the Admin entered the shift as a request.
- **Note:** The note symbol means that the shift assignment has a note from an Administrator attached to it. To see the note, hover your cursor over the icon.




Requested 1st Call







An example of a locked 1<sup>st</sup> Call Assignment with a note

## Selecting a Date Range

By default the View Tab Date Range will always load the current week, with Monday as the Start date and Sunday as the End date.



- ❖ Choose the Start date from the field in the top left corner. A calendar will appear when you click in the field and you will be able to select a date. You cannot type one in.
- ❖ Choose the Range you wish to see on the screen using the drop down boxes to select the number and “Days”, “Weeks”, or “Months”.
- ❖ Choose under the View By drop down box whether you wish to see.
  - **Staff Down Left:** Staff down the left side of the screen
  - **Tasks Down Left:** Tasks down the left side of the screen.
  - **Calendar \*Staff:** A calendar view with the Staff Member’s name listed before the Shift
  - **Calendar \*Task:** A calendar view with the Shift Name listed before the Staff Member
- ❖ Once you have selected these options, click Go .

## Staff Box







- ❖ Click  above the drop down box to add a New Staff Filter (grouping of staff),  to edit the Filter, and  to delete the Filter. Note you will not be able to Edit or Delete Filters that were created by the Scheduling Administrator.
  - When you Add a Filter, you will need to enter a Staff Filter Name in the field provided and click Add. Then you will check the checkbox next to each staff member’s name to define who is viewable with this Filter. When finished, click the  in the top right corner of the box.
  - Once you Add or Edit a Filter, QGenda will prompt you to “Please click here to refresh your changes.”
  - Note that when you create a new Filter it will be available only to you.
- ❖ The drop down box allows you to select the Staff Filter you wish to print, export, or view on the screen.
- ❖ Beneath the drop down box you will see the list of staff members within the Staff box. Next to each task there are three icons:
  -  Highlight off  Highlight on
    - Highlights (in blue) the staff member on the schedule that you have just specified. Note that you can highlight multiple staff members simultaneously. To turn off highlighting click the icon again.

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-  Show
  - Shows that person on the scheduling screen. The icon at the very top of the list will show all staff members in the staff box.
-  Hide
  - Hides that person on the scheduling screen. The icon at the very top of the list will hide all staff members in the staff box.

## Tasks Box

- ❖ Click  above the drop down box to add a New Task Filter (grouping of tasks),  to edit the Filter, and  to delete the Filter. Note you will not be able to Edit or Delete Filters that were created by the Scheduling Administrator.
  - When you Add a Filter, you will need to enter a Task Filter Name in the field provided and click Add. Then you will click the checkbox next to each task's name to define what is viewable with this Filter. When finished, click the  at the top right of the box.
  - Once you Add or Edit a Filter, QGenda will prompt you to "Please click here to refresh your changes"
  - Note that when you create a new Filter it will be available only to you.
- ❖ The drop down box allows you to select the Task Filter you wish to view on the screen, print or export.
- ❖ Under the drop down box you will see the list of tasks. Next to each task there are two icons:
  -  Show
    - Shows that task on the scheduling screen. The icon at the very top of the list will show all tasks in the tasks box.
  -  Hide
    - Hides that task on the scheduling screen. The icon at the very top of the list will hide all tasks in the task box.

## Printing or Exporting the Schedule

- ❖ Click the "Reports" button at the top of the screen, and the "Reports – Printing & Exporting" screen will appear.
  - Format: Choose from the following
    - PDF: opens with Adobe Reader – cannot be modified
    - Excel: opens with Microsoft Excel – can be modified as an Excel worksheet
    - Calendar – iCal Default Format: used for most current calendars such as Google Calendar and Microsoft Outlook 2007 \*
    - Calendar (vCal): used for older calendar programs that are not using the current iCal standards such as Microsoft Calendar 2003 and some Palm calendars \*

- Text: saved as a comma-delimited file
- Start Date: Click to choose the date from the pop up calendar that you want to begin viewing
- End Date: Click to choose the date from the pop up calendar that you want to stop viewing
- Report By: Select Staff if you wish to view the staff names down the left side of the page or Tasks if you wish to view the tasks down the left side of the page. Swaps and Requests view the input logs, respectively.
- Show Staff By: Choose how you wish the staff names to appear
- Show Tasks By: Choose how you wish the task names to appear

Choosing the PDF format will generate the following options for you to set

- Range: Rather than select an end date, for PDF format you must select a range that you wish to export
- Paper Size: Choose what paper size you wish to print on
- Show Color: (Yes or No) Whether you want the colors to appear or not
- Show Notes: (Yes or No) Whether or not to print the notes you have access to see
- Font Size: Select how large you would like the font to be on your PDF

\* Please note that QGenda simply creates the formatted file to be exported to a calendar program. We do not have control over how your specific computer and software programs will interact with and import the file. As a general rule, when using the iCal format, it should give you the option to automatically open into Outlook 2007 after you click Go. If you decide to Save the file then you can choose to Import the file once you have logged into your Google Calendar. We suggest either contacting an IT person within your company or calling the support for your particular software program to assist you in importing the file if it is not working properly.