User Guide

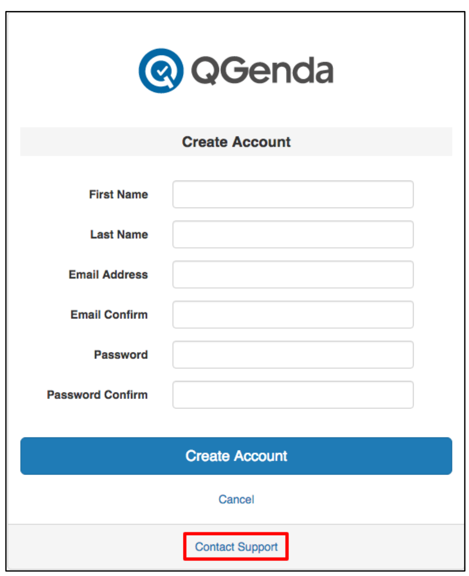
QGenda Support: **855-399-9945** (ext 2)
www.QGenda.com

Creating an Account

1. Begin by going to QGenda.com in any internet browser (ie. Chrome, Firefox, Internet Explorer)
2. Click on the “Customer Access” button in the top right:

3. Clicking “Customer Access” will lead you to the log in screen. To create your account for the first time, click on the “Create Account” button:

4. Fill out your information, the email address should match the one that has been entered in QGenda – This is how it will identify which company you belong to. The password is case sensitive. Click ‘Create Account’.



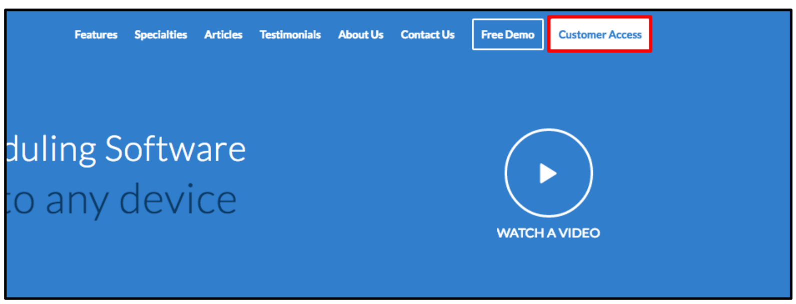
If you need help, you may click the support link, and a QGenda representative will work to resolve your issue as soon as possible.

5. You will receive a confirmation message telling you that your account has been created successfully. Log in to your account using your new credentials using the blue "Log In" button.

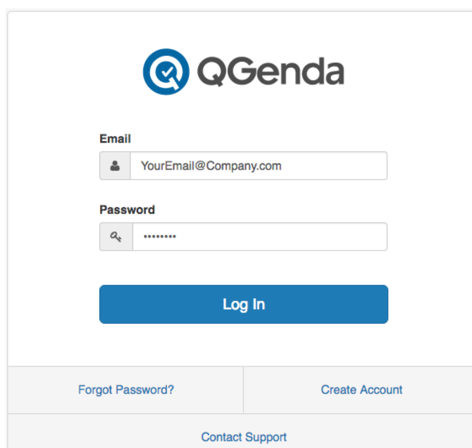
6. After logging in, you should see your company's name in the top left corner of your screen, by the QGenda logo. If "Join a Company" appears on your screen, then the email address you used to log in does not match the email address within the database. Contact your administrator or call our support line so that your email address can be updated.

Logging In

1. Go to QGenda.com in any internet browser.
2. Click on the "Customer Access" button in the top right:



3. Type in your credentials which were determined when you created your account:



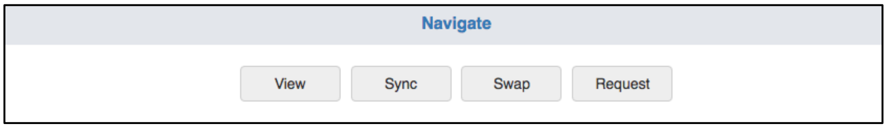
4. Click the blue "Log In" button to complete logging in.

The Home Screen

The Home Screen is the first screen that you will see upon logging in. It is divided into several sections, each of which is detailed below.

The Navigation Panel

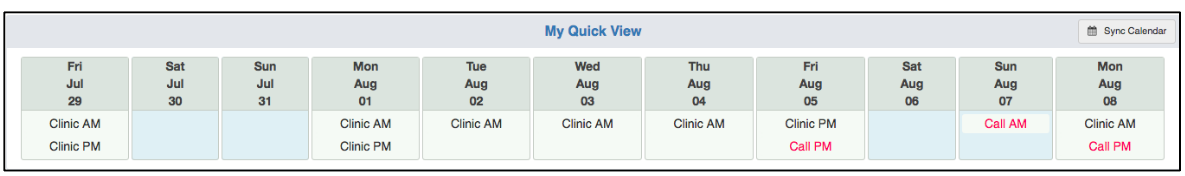
This area is used to navigate between the different tabs in QGenda:



- **View** - This tab is a highly-customizable tab used to view your schedule and the schedules of others in your practice.
- **Sync** - This tab will launch instructions for syncing your QGenda calendar with your personal calendar. This could be an Outlook, iPhone, or Andriod Calendar, or any other calendar that supports subscription URLs.
- **Swap** - This tab is used to trade shifts amongst providers. For information on how to use the Swap Tab, please see the Swap Manual.
- **Request** - This tab is for requesting changes to your schedule in the form of additions or removals of tasks. For information on how to use the Request Tab, please see the Request Manual.

Don't worry if you do not have every tab shown here; users will only have access to tabs that they need.

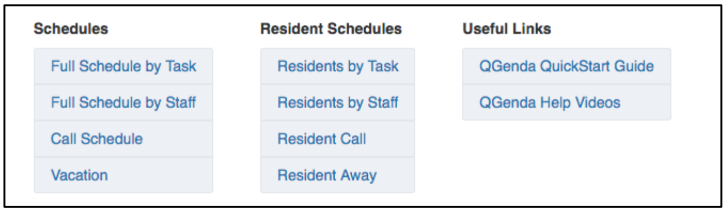
My Quick View



My Quick View is a snapshot of the next ten days of your schedule. It includes any tasks that you have been assigned over the next ten days.

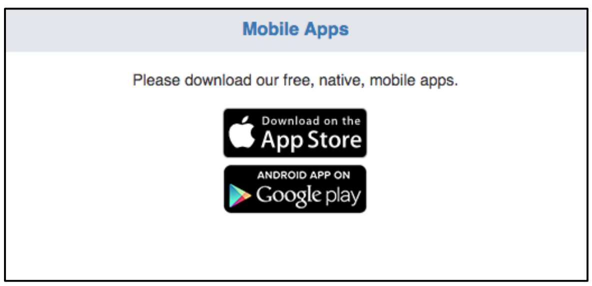
The Dashboard

The dashboard contains links to pre-defined views of your schedule as well as any additional links that your Admin has deemed useful. These are a great way to view your schedule without going through the View Tab.



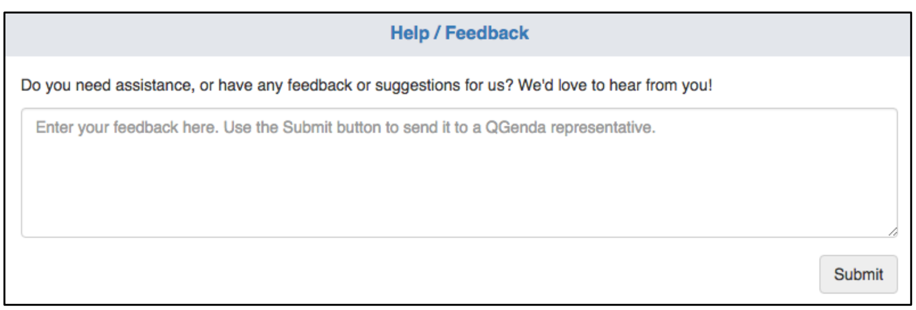
Mobile Apps

QGenda offers a mobile app on both iOS and Android platforms. The app features secure messaging capabilities and is a great way to view schedules on your mobile device. Click on either the 'Apple App Store' or the 'Android Google Play' store to download the QGenda mobile app.



Help/Feedback

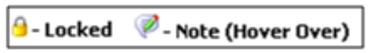
Use this field to get help using the system or to provide feedback. Once submitted, your message will be sent to the QGenda Engineer responsible for maintaining your practice's account.



Navigating the View Tab

Legend

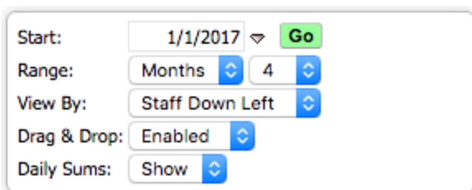
In the Upper Right Hand Corner there will be a legend listing the icons you may see throughout this tab.



- **Locked** – This symbol, when displayed next to a task name, means that the 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.

Selecting a Date Range

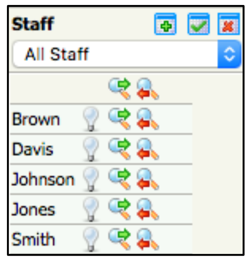
- Select a **Start Date** from the field in the top left corner. As its name implies, the start date will be the first day you view schedule. Upon clicking in the start date field, a calendar will appear for you to select a start date. **You must select a specific day within the calendar** to tell QGenda where to set the viewing range.



- Choose the **Range** you wish to see on the screen by using the dropdown boxes to select the number of days, weeks, or months you would like to view.
    - ***Note**: The more schedule you view, the longer it will take to load. We recommend viewing no more than three months of schedule at a time.*
- There are several formats to choose from when viewing the schedule:
    - **Staff Down Left** – Staff names listed along the left side of the schedule grid, the dates across the top, and task assignments in the grid
    - **Tasks Down Left** – Tasks listed along the left side of the schedule grid, the dates across the top, and staff member assignments in the grid
    - **Calendar *Staff** – A calendar view with the staff names listed before the shift
    - **Calendar *Task** – A calendar view with the shift listed before the staff member
- Once you have selected your desired options, click the green **Go** button

Staff Box

The staff box appears underneath the viewing options. Here, you will see a list of all of the staff members with several icons next to their names.



There are three icons next to each name:

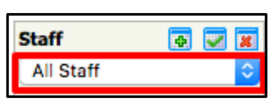
- **Lightbulb** Icon - Clicking this icon will highlight the corresponding person's name or assignments on the schedule (depending on which view you are looking at.) Clicking the icon again will return their assignments to their normal color.
- **Hide** Icon - This icon is used to hide staff members from the schedule. Clicking the "Hide All" icon above all of the staff names will hide everyone at once
- **Show** Icon - This icon is used to show staff members on the schedule. Clicking the "Show All" icon above all of the staff names will show everyone at once

The and icons are used in tandem to customize your view. If you only want to view a few staff members, click the "Hide All" icon, and then click the "Show" icon next to each person that you would like to view.

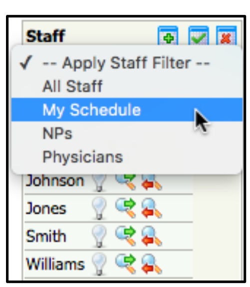
Staff Filters

Staff Filters are pre-defined lists that tell QGenda which staff members to show and hide. Filters are shown in the dropdown menu at the top of the Staff Box.

***Tip**: To show everyone, select the "All Staff" filter.*

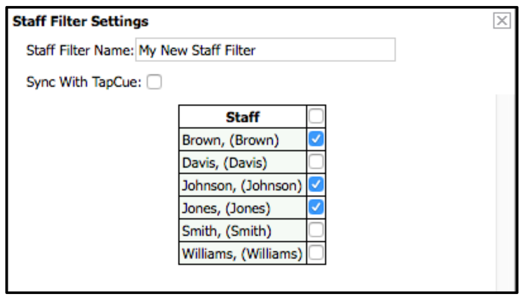


You may or may not have pre-defined filters set up already. Choose a Staff Filter by selecting it from the dropdown menu at the top of the staff box.



If there is a group of staff members (or even just a single staff member) that you view often, you can create a Staff Filter so that you do not have to click the show and hide icons each time.

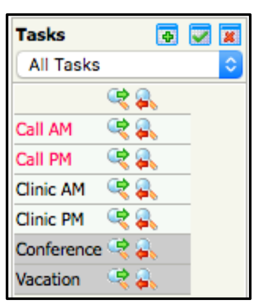
- Creating a Staff Filter
  - Click above the dropdown menu in the Staff Box to create a filter.
  - Enter the new name of the Staff Filter in the “Staff Filter Name” field.
  - Click the “Add” button to add the Staff Filter.
  - Check the name of each person that you would like to include in the Staff Filter.
  - Click the in the top right corner to exit the creation screen. Your changes will be saved.



- Editing a Staff Filter
  - Select the Staff Filter you would like to edit in the dropdown menu.
  - Select the icon to edit the filter.
    - ***Note**: You cannot edit or delete any predefined Staff Filters*
  - Make changes to your Staff Filter, and then click the in the top right corner to save your changes
- Deleting a Staff Filter
  - Select the Staff Filter you would like to delete in the dropdown menu
  - Click the icon to delete the Staff Filter

Task Box

The Task Box appears on the left side of the screen under the Staff Box. Here, you will see a list of all of the tasks associated with your account.

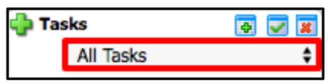


There are two icons next to each task:

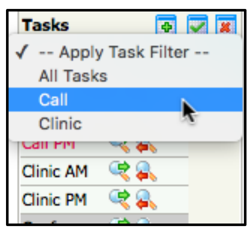
- **Hide** Icon - This icon works in conjunction with the "Show" icon. Clicking this icon next to any task will hide that task from the view. Clicking the "Hide All" icon above all of the tasks will hide all of the tasks from view.
- **Show** Icon - Clicking this icon next to each task will show the corresponding task in the grid. Clicking the "Show All" icon above the task listing will show all of the tasks.

Task Filters

Task Filters are pre-defined lists that show and hide tasks as a group. These work in the same way as Staff Filters and are available in the dropdown menu at the top of the Task Box.

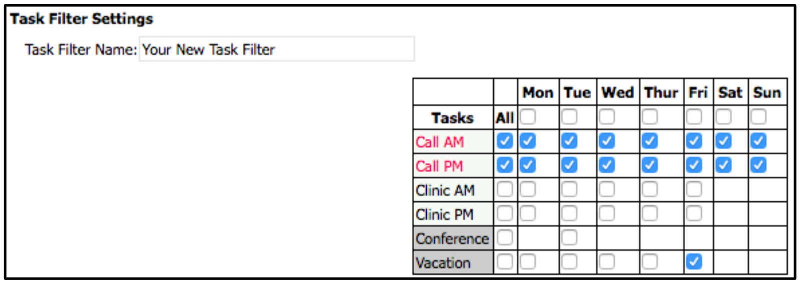


You may or may not have predefined Task Filters already. Choose a Task Filter by selecting it from the dropdown menu at the top of the Task Box.



You are able to create your own Task Filters for custom views.

- Creating a Task Filter
  - Click above the dropdown menu in the Staff Box to create a filter
  - Enter the new name of the Task Filter in the "Task Filter Name" field
  - Click the "Add" button to add the Staff Filter
  - Check the box next to each task that you would like to include in your Staff Filter.
    - You can include different tasks on different days
    - ***Tip***: *Check the "All" box next to a task to include that task for every day*
  - Click the in the top right corner to exit the creation screen. Your changes will be saved.

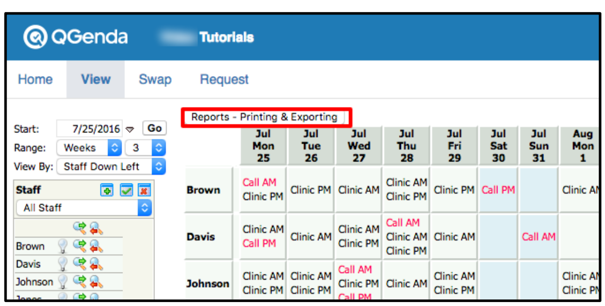


- Editing a Task Filter
    - Select the Ttaff Filter you would like to edit in the dropdown menu
    - Select the icon to edit the filter
        - *Note: You cannot edit or delete any predefined Task Filters*
    - Make changes to your Task Filter, and then click the in the top right corner to save your changes
- Deleting A Task Filter
    - Select the Task Filter you would like to delete in the dropdown menu
    - Click the icon to delete the Staff Filter

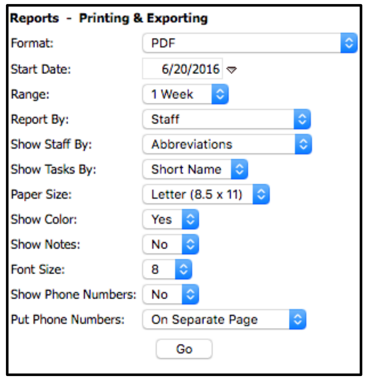
Reports - Printing & Exporting

QGenda recommends viewing schedules online so that you are viewing the most up-to-date version, but sometimes there is a need to print or export the schedule, and this can be done directly from the View tab.

- To print or export a report, click the **Reports – Printing & Exporting** button at the top of the screen



- This will launch a dialog box with several options for printing or exporting your schedule
    - ***Note**: The system will only export or print what you are currently viewing on the View Tab. If you have any Staff or Task Filters applied, they will be used when exporting the schedule*



The export is highly-customizable, so there are several options to choose from:

- **Format**:
  - **PDF** - Opens with Adobe Reader or Internet Browser (document cannot be modified)
  - **Excel** - Opens with Microsoft Excel (document can be modified as an Excel worksheet)
  - **Calendar** – iCal Default Calendar: File that is able to be imported by Google Calendar and Microsoft Outlook. It is not recommended to sync your calendar this way, since this is a one-time sync and any changes in QGenda would not be reflected on your calendar.
  - **Calendar** – vCal: A file that is able to be imported by older software such as Microsoft Calendar 2003. It is not recommended to sync your calendar this way, since this is a one-time sync and any changes in QGenda would not be reflected on your calendar.
  - **Text** - Exported as a delimited file
  - **CSV** - Exported as a comma delimited file. Export functions must be set up by an administrator
- **Start Date** - Sets the first day of the calendar export
- **End Date** - Sets the last day of the calendar export
- **Report By** - Choose how you would like to view the export
  - **Staff** – Exports in a Staff Down Left view
  - **Tasks** – Exports in a Tasks Down Left view
  - **Calendar By Staff** – Exports a calendar view with Staff names first
  - **Calendar By Task** – Exports a calendar view with the Task names first
- **Show Staff By** - Provides options for displaying staff names
- **Show Tasks By** - Provides options for displaying task names
- **Range**: For a PDF export, you'll choose a duration for the export instead of a start and end date
- **Paper Size** - Allows you to specify which size you want to print on
- **Show Color** - Turns colors on or off for printing
- **Show Notes** - Allows you to choose to export notes attached to tasks
- **Font Size** - Allows you to modify the font size of the export

QGenda Support: 855-399-9945 (ext 2)