

HOW TO UTILIZE QEMS

Step by Step Guide

Candid Color Systems, Inc. / TSS Photography

2/12/2016



How to Utilize QEMS

Step by Step Guide

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QEMS

Quick Event Management System

Used as an event management and scheduling system

QEMS includes the following:

- Event Calendar
- Scheduling Assistant
- Payroll capabilities
- Reporting

Event Calendar

The event calendar allows you to book your events and schedule photographers.

The screenshot shows the QEMS Event Calendar interface. At the top, there are navigation tabs: Messages, Customers, Calendars, Organizations, Reports, Schedule, Setup, and Admin. The main area displays a weekly calendar view for the period from August 28, 2016, to September 24, 2016. The calendar is organized by day, with event lists provided for each day. A filter section is visible on the left side, allowing users to filter events by identity, sort order, and location. The interface also includes options for adding, finding, and editing events.

Create an Event

1. Go to the calendar tab and choose Add Event

This screenshot shows the QEMS Event Calendar interface with a red arrow pointing to the 'Add Event' button in the left sidebar. The calendar view is focused on the week of August 28 to September 2, 2016. The 'Add Event' button is highlighted with a red arrow, indicating the next step in the process of creating a new event.

2. Choose an organization

QEMS Candid Color Systems

Messages Customers **Calendars** Organizations Reports Schedule Setup Admin

Event Calendar **Add Event**

Event List

Find Event

Add Event

Assignment Sheet

Bulk Edit

Host Group: OklahomaPartyPics.com

- Organization List (0 members; 0 guests)
- Graduations (36 members; 1371 guests)**
- School & Dance Portraits (0 members; 0 guests)
- Social Events (0 members; 375 guests)
- Sports (0 members; 165 guests)
- Tailgating - Fan Photos (2115 members; 657 guests)
- Tests (0 members; 0 guests)
- XXXXX-Races-Redirect-Do Not Use (0 members; 1 guests)

Next >>

3. Enter event information

QEMS Candid Color Systems

Messages Customers **Calendars** Organizations Reports Schedule Setup Admin

Event Calendar **Add Event**

Event List

Find Event

Add Event

Assignment Sheet

Bulk Edit

CCS Account: 1904:Candid Color Photography

CCS Order Number:

Link To: CORE Retail Website

Custom Link:

*Event Name:

*Event Type: Choose one...

*Event Date:

Start Time: TBA 12:00 AM

Duration: 0 Hours

Hide Event Date

Arrival Time: TBA 12:00 AM

Location:

Street Address:

City/State/Zip:

Auto create face recognition job when rolls are first locked

Campus: Default Campus

Price Tier: None

Ad Campaign: None

Customer Account:

of Attendees:

Attire:

Confirmed by/ Dates:

Departure location & time:

Photographers: 1 (Number of Photographers Required)

Active: Auto: QEMS automatically controls the status. (Recommended)
 Yes: The event is always active.
 No: The event is never active.

Extend: No: The event is stored at CCS for 3 years beyond the posting date.
 Yes: The event is stored at CCS for 5 years.

Millage: Photographers can enter the millage

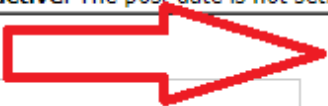
Create

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[/QEMS/Events/Add.aspx?GroupID=2291](#)

4. Add Booking Information by clicking Booking Information link

Vatterott College Graduation: Event Summary
Organization: Vatterott College

X The event is **not active**. The post date is not set. To manually activate, [click here](#).

General Setup  **Booking Information**

| | | | |
|----------------------|---|------------------------|--|
| CCS Account: | 1904 | Booking Source: | Manual: tracee.palmer@candid.com |
| Order Number: | 27009786 | Booking Time: | 6/28/2017 4:07:00 PM |
| Linked to: | CORE Retail Website | Contact Name: | Tanecia Davis |
| Name: | Vatterott College Graduation | Contact Phone: | 314-749-1650 |
| Event Type: | Graduation | Contact Email: | tanecia.davis@vatterott.edu |
| Host: | NormanPartyPics.com | Comments: | Graduates will fill out Grad cards @ 6:00 pm the day of Graduation |
| Organization: | Organization List College Vatterott College | Text Color: | |
| Price Tier: | None | System Settings | |
| Campus: | Graduation | Post Date: | |
| Ad Campaign: | None | Expire Date: | |
| Active: | | Online Sent: | No |
| Extend: | Yes | Expire Sent: | No |
| Date: | Fri, July 14, 2017 | | |

5. Complete Booking Data and Comments (comments can be seen by the event staff)

Vatterott College Graduation: Booking Information
Organization: Vatterott College

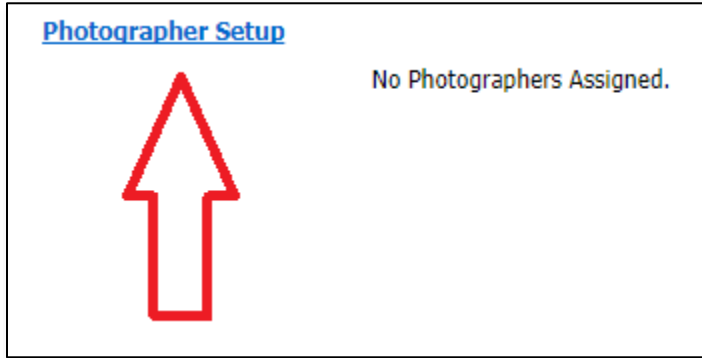
Booking Source: Manual: tracee.palmer@candid.com
Booking Time: 6/28/2017 4:07:00 PM
Contact Name: Tanecia Davis
Contact Phone: 314-749-1650
Contact Email: tanecia.davis@vatterott.edu

Comments: Graduates will fill out Grad cards @ 6:00 pm the day of Graduation

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[/OEMS/Events/BookingSetup.aspx?EventID=200916](#)

Schedule Event Staff

1. To Schedule Staff for an event, click on the photographer setup link within the event



2. Check the box next to the photographers that you wish to assign and choose their role then click Save button at the bottom of that page

| <input type="checkbox"/> | Role | Name | Availability | Location | Action |
|-------------------------------------|-----------------|---------------------------------|---------------------|----------|-------------------------------|
| <input checked="" type="checkbox"/> | Assistant | Steve Foisy-405.209.5555-OUGRAD | Not Available (N/A) | Off Site | View Schedule |
| <input type="checkbox"/> | Assistant | Steven Howell | Not Available (N/A) | Off Site | View Schedule |
| <input type="checkbox"/> | Party Pics | Summer Little | Not Available (N/A) | Off Site | View Schedule |
| <input type="checkbox"/> | Venue Lead | Sydney Wyatt | Not Available (N/A) | Off Site | View Schedule |
| <input type="checkbox"/> | Photographer | Tabitha Callan | Not Available (N/A) | Off Site | View Schedule |
| <input type="checkbox"/> | Office | Tammy Ward | Not Available (N/A) | Off Site | View Schedule |
| <input type="checkbox"/> | Jump Studio | Tasia Allen | Not Available (N/A) | Off Site | View Schedule |
| <input type="checkbox"/> | Training | Tatianna Williams | Not Available (N/A) | Off Site | View Schedule |
| <input type="checkbox"/> | Portraits | Taylen Marzolf-OUHELPER | Not Available (N/A) | Off Site | View Schedule |
| <input type="checkbox"/> | Photobooth | Taylor Carter | Not Available (N/A) | Off Site | View Schedule |
| <input type="checkbox"/> | Office-Check-In | Thomas Keneda | Not Available (N/A) | Off Site | View Schedule |
| <input type="checkbox"/> | Outdoor Sports | | | | |
| <input type="checkbox"/> | School Groups | | | | |
| <input type="checkbox"/> | Race | | | | |
| <input type="checkbox"/> | Sales Table | | | | |

3. Photographers will receive an email allowing them to accept or decline the assignment
4. When a photographer has accepted an assignment the acknowledged box will change to Yes

Photographer Setup

| | Employee | Acknowledged |
|--------------|-------------------------|--|
| Assistant | Brooke Elkins-9122 | Yes |
| | Dan Hays Special-OKC | Yes |
| | Krista Walker | Yes |
| | Shelby Owen | Yes |
| Photographer | Caleb Grosse | No (Mark Acknowledged) |
| | Cole Trotter | No (Mark Acknowledged) |
| | Courtney Slaughter | No (Mark Acknowledged) |
| | Madison McKinnis | Yes |

Run Payroll

1. Go to the Reports tab and click the Run Payroll link

The screenshot shows the QEMS application interface. At the top, there is a navigation bar with tabs: Messages, Customers, Calendars, Organizations, Reports, Schedule, Setup, and Admin. The 'Reports' tab is selected. On the left, a sidebar menu lists various options: List, Payroll, Manage Time, Email Reports, Payroll History, Credit Cards, and Process Credit Cards. The main content area displays 'Select a report:' followed by 'Payroll Reports' and 'Other Reports'. Under 'Payroll Reports', there are three links: 'Run Payroll', 'Manage Time', and 'Payroll History'. A red arrow points to the 'Reports' tab in the navigation bar, and another red arrow points to the 'Run Payroll' link in the main content area.

2. Choose date range and select users to pay

The screenshot shows the 'Generate Payroll' form in the QEMS application. The navigation bar and sidebar are the same as in the previous screenshot. The main content area is titled 'Generate Payroll' and 'Step 1: Select Period and Users'. It shows 'Run payroll for Account Number: 1904:Candid Color Photography'. Under 'Set Period', there are two date pickers: 'Start Date: 07/24/2017 12:00 AM' and 'End Date: 08/07/2017 12:00 AM'. There are two checkboxes: 'Include all unpaid events?' (checked) and 'Include all events, even if no hours have been entered?' (unchecked). A 'Refresh Users' button is below. Under 'Select Users', there is a 'Check All' checkbox and a list of 15 users, each with a checked checkbox. A red arrow points to the 'Check All' checkbox, and another red arrow points to the date range. A 'Next' button is at the bottom right. The footer contains copyright information: 'Copyright © 2002-2017 Candid Color Systems. /QEMS/Reports/Payroll.aspx'.

3. Review amounts and hours

QEMS Steve 0 of 0

Messages Customers Calendars Organizations **Reports** Schedule Setup Admin

Generate Payroll
Step 1: Review and Edit Figures
 Please review the following values very carefully before committing this pay period. After the pay period is committed it is not possible to edit the values, only delete the pay record.
 Payroll Period: 07/24/2017 - 08/07/2017. Older events are marked with an asterisk.

| Name | Amount | Time | Hours | Rate | Frames | Per-Frame | Emails | Per-Email | DriveTime | Per-Hour | Expenses | Bonus | Total |
|--|-------------|--------------------|--------------|-------|----------|-----------|----------|-----------|-------------|----------|-------------|-------|-------|
| Robby Thomas - Remove | | | | | | | | | | | | | |
| [1904] Quail Creek Swim Team 2012* (7/10/2017) | 0.00 | 3:30 PM - 5:00 PM | 2.50 | 0.00 | 0 | 0.00 | 0 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| Totals | 0.00 | | 2.50 | | 0 | | 0 | | 0.00 | | 0.00 | | |
| Brooke Elkins - Remove | | | | | | | | | | | | | |
| Office Hours | 0.00 | Click To Edit | 28.37 | 14.00 | 0 | 0.00 | 0 | | 0.00 | | 0.00 | 0.00 | 0.00 |
| Totals | 0.00 | | 28.37 | | 0 | | 0 | | 0.00 | | 0.00 | | |
| Krista Walker - Remove | | | | | | | | | | | | | |
| Office Hours | 0.00 | Click To Edit | 17.55 | 12.00 | 0 | 0.00 | 0 | | 0.00 | | 0.00 | 0.00 | 0.00 |
| Totals | 0.00 | | 17.55 | | 0 | | 0 | | 0.00 | | 0.00 | | |
| Erin Snow - Remove | | | | | | | | | | | | | |
| [1904] School Day Training* (7/10/2017) | 0.00 | 9:15 AM - 12:00 PM | 2.75 | 8.00 | 0 | 0.00 | 0 | 0.00 | 0.00 | 8.00 | 0.00 | 0.00 | 0.00 |
| [1904] School Day Training* (7/12/2017) | 0.00 | 11:00 AM - 4:45 PM | 5.75 | 8.00 | 0 | 0.00 | 0 | 0.00 | 0.00 | 8.00 | 0.00 | 0.00 | 0.00 |
| Totals | 0.00 | | 8.50 | | 0 | | 0 | | 0.00 | | 0.00 | | |
| Madison McKinnis - Remove | | | | | | | | | | | | | |
| [1904] School Day Training* (7/10/2017) | 0.00 | 9:00 AM - 12:00 PM | 3.00 | 8.00 | 0 | 0.00 | 0 | 0.00 | 0.00 | 8.00 | 0.00 | 0.00 | 0.00 |
| [1904] School Day Training* (7/12/2017) | 0.00 | 9:00 AM - 4:30 PM | 7.50 | 8.00 | 0 | 0.00 | 0 | 0.00 | 0.00 | 8.00 | 0.00 | 0.00 | 0.00 |
| Totals | 0.00 | | 10.50 | | 0 | | 0 | | 0.00 | | 0.00 | | |
| YuYang Wu - Remove | | | | | | | | | | | | | |
| [1904] Quail Creek Swim Team 2012* (7/10/2017) | 0.00 | 3:30 PM - 5:00 PM | 2.50 | 0.00 | 0 | 0.00 | 0 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| [1904] School Day Training* (7/10/2017) | 0.00 | 9:00 AM - 12:00 PM | 3.00 | 8.00 | 0 | 0.00 | 0 | 0.00 | 0.00 | 8.00 | 0.00 | 0.00 | 0.00 |
| [1904] School Day Training* (7/11/2017) | 0.00 | 9:00 AM - 12:00 PM | 3.00 | 8.00 | 0 | 0.00 | 0 | 0.00 | 0.00 | 8.00 | 0.00 | 0.00 | 0.00 |
| [1904] School Day Training* (7/12/2017) | 0.00 | 11:00 AM - 4:45 PM | 5.75 | 10.00 | 0 | 0.00 | 0 | 0.00 | 0.00 | 8.00 | 0.00 | 0.00 | 0.00 |
| Totals | 0.00 | | 14.25 | | 0 | | 0 | | 0.00 | | 0.00 | | |

4. Click review at the bottom right of the page

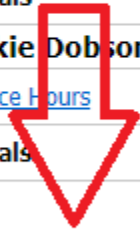
| | | | | |
|--|------|-------------|------|------|
| | 8.00 | 0.00 | 0.00 | 0.00 |
| | 8.00 | 0.00 | 0.00 | 0.00 |
| | 8.00 | 0.00 | 0.00 | 0.00 |
| | | 0.00 | | |
| | | 0.00 | 0.00 | 0.00 |
| | | 0.00 | | |

[Review](#)

Powered by  VelocitySquared.


5. Commit payroll once accurate – bottom left of page


| | |
|---|------------------------|
| Caleb Grosse | Remove |
| [1904] School Day training* (7/10/2017) | |
| [1904] School Day training* (7/11/2017) | |
| [1904] School Day training* (7/12/2017) | |
| Totals | |
| Jackie Dobson | Remove |
| Office Hours | |
| Totals | |



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[/OEMS/Reports/PayrollSummary.aspx?sd=07%2f24%2f2017&ed=08%2f07%2f2017&us=3574%2c5239%2c5120%2c5054%2c5235%2c5070](#)

- Once committed, you can export payroll as a spreadsheet to enter into a payroll system
- Review reports from payroll cycles by going to Payroll History
- Payroll goes into CORE margin reports if it is run through QEMS

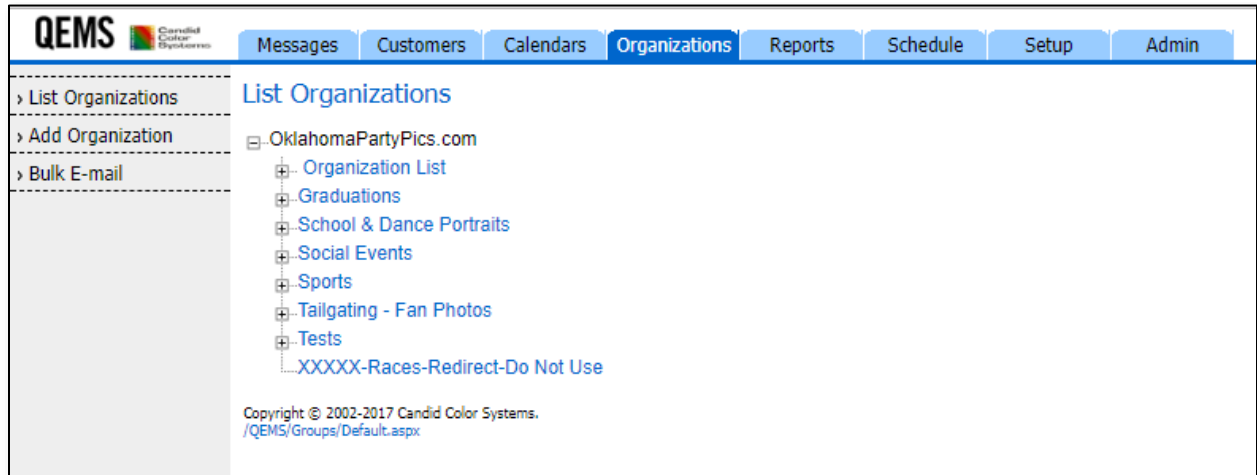
| QEMS  | | | | | | | | |
|--|---|---------------|---------------|---------------|--------------------------|-------------------------|--------------------------|--------------------------------|
| Messages Customers Calendars Organizations Reports Schedule Setup Admin | | | | | | | | |
| > List | Payroll History | | | | | | | |
| > Payroll | Search for specific users >> | | | | | | | |
| > Manage Time | Show Reports between <input type="text"/> and <input type="text"/> Filter | | | | | | | |
| > Email Reports | Date | Amount | Payees | Events | | | Account | |
| > Payroll History | Jul 10 2017 - Jul 24 2017 | 297.50 | 1 | 0 | By event | Summary | Expenses | 1904: Candid Color Photography |
| > Credit Cards | Jul 2 2017 - Jul 10 2017 | 3517.57 | 27 | 55 | By event | Summary | Expenses | 1904: Candid Color Photography |
| > Process Credit Cards | Jun 26 2017 - Jul 2 2017 | 504.00 | 12 | 11 | By event | Summary | Expenses | 1904: Candid Color Photography |
| | Jun 25 2017 - Jul 2 2017 | 2159.50 | 6 | 11 | By event | Summary | Expenses | 1904: Candid Color Photography |
| | Jun 18 2017 - Jun 25 2017 | 2539.59 | 11 | 9 | By event | Summary | Expenses | 1904: Candid Color Photography |
| | Jun 11 2017 - Jun 18 2017 | 3414.79 | 17 | 0 | By event | Summary | Expenses | 1904: Candid Color Photography |
| | Jun 4 2017 - Jun 11 2017 | 5738.39 | 29 | 0 | By event | Summary | Expenses | 1904: Candid Color Photography |
| | May 28 2017 - Jun 4 2017 | 5058.84 | 27 | 0 | By event | Summary | Expenses | 1904: Candid Color Photography |
| | May 14 2017 - May 21 2017 | 21246.70 | 65 | 0 | By event | Summary | Expenses | 1904: Candid Color Photography |
| | May 11 2017 - Jun 25 2017 | 200.00 | 1 | 9 | By event | Summary | Expenses | 1904: Candid Color Photography |
| | May 7 2017 - May 14 2017 | 26153.12 | 73 | 0 | By event | Summary | Expenses | 1904: Candid Color Photography |
| | May 1 2017 - May 22 2017 | 1479.60 | 10 | 0 | By event | Summary | Expenses | 1904: Candid Color Photography |
| | May 1 2017 - May 28 2017 | 650.00 | 1 | 0 | By event | Summary | Expenses | 1904: Candid Color Photography |
| | May 1 2017 - May 29 2017 | 13934.97 | 53 | 0 | By event | Summary | Expenses | 1904: Candid Color Photography |
| | Apr 30 2017 - May 7 2017 | 12459.49 | 53 | 0 | By event | Summary | Expenses | 1904: Candid Color Photography |
| | Apr 23 2017 - Apr 30 2017 | 6813.25 | 38 | 0 | By event | Summary | Expenses | 1904: Candid Color Photography |



Create Organizations

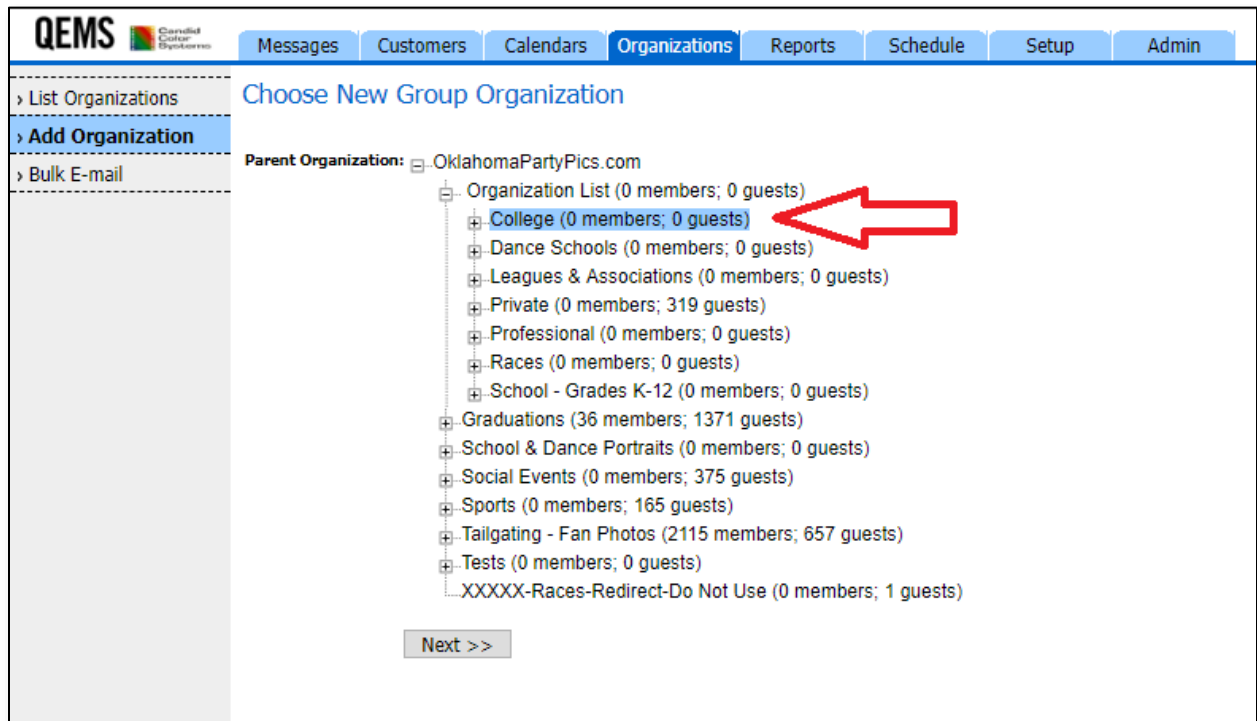
Organizations are how you will group your events. You will need organizations for your event type as well as any school, league, or company that you do business with. When you create an event, you will choose the organization that it belongs to each time you do an event for them.

1. Click on Organizations tab at the top of the page
2. Click on Add Organization



The screenshot shows the QEMS interface with the 'Organizations' tab selected. The main content area is titled 'List Organizations' and displays a tree view under the parent organization 'OklahomaPartyPics.com'. The tree includes the following items: Organization List, Graduations, School & Dance Portraits, Social Events, Sports, Tailgating - Fan Photos, Tests, and XXXXX-Races-Redirect-Do Not Use. A copyright notice at the bottom reads: 'Copyright © 2002-2017 Candid Color Systems. /QEMS/Groups/Default.aspx'.

3. Choose the parent Organization (usually sport, league, school etc)



The screenshot shows the QEMS interface with the 'Organizations' tab selected. The main content area is titled 'Choose New Group Organization'. The 'Add Organization' option in the left sidebar is highlighted. The main content area shows a tree view under the parent organization 'OklahomaPartyPics.com'. The tree includes the following items: Organization List (0 members; 0 guests), College (0 members; 0 guests), Dance Schools (0 members; 0 guests), Leagues & Associations (0 members; 0 guests), Private (0 members; 319 guests), Professional (0 members; 0 guests), Races (0 members; 0 guests), School - Grades K-12 (0 members; 0 guests), Graduations (36 members; 1371 guests), School & Dance Portraits (0 members; 0 guests), Social Events (0 members; 375 guests), Sports (0 members; 165 guests), Tailgating - Fan Photos (2115 members; 657 guests), Tests (0 members; 0 guests), and XXXXX-Races-Redirect-Do Not Use (0 members; 1 guests). A red arrow points to the 'College (0 members; 0 guests)' item. A 'Next >>' button is located at the bottom of the tree view.

4. Enter the organization name then click create

QEMS Messages Customers Calendars **Organizations** Reports Schedule Setup Admin

List Organizations
Add Organization
Bulk E-mail

Add Organization

Name:

Greek Letters:

Identity: Oklahoma Party Pics

Organization Type: None

Password:

Organization Email:

Booking Password:

President:

Picture Rep:

Social Chair:

Contract Dates:

Custom Fields:

Campus: Default Campus

Price Tier: None

Ad Campaign: None

Custom HTML Message:

Custom HTML Booking Message:

Options:

- Password Protected: A password (or link) is required to access this organization.
- Always Show Extended Events: If set, Extended Events will be shown regardless of the system-wide setting.
- Enabled: This organization, its children, and its events are visible on the web site.
- Send E-mail Notifications: Online and Expiration notices will be sent to this group.
- Allow Ascent: Allow customers who access this organization to access this organization's parent and it's siblings.
- Allow Join: Allow customers who access this organization to join the organization mailing list.
- Visible: Allow customers to access this organization by navigating through the parent menus. If the organization is not visible the only way people will see it is through the link provided in the online email.
- Lock Titles: Block customers from changing the titles when they book an event.
- Auto Add Customers: QEMS will automatically add a customer to this organization when they order from an event hosted by this organization.
- Require Email Login Prompt: Forces customers to enter their email address before viewing the list of events (NOTE: Will automatically add customer as a guest of the organization if they are not currently a member, guest or lead)

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QEMS@ou.edu/AddressBook.htm?GroupID=24500

Create a User

You will create a user for each employee that will be using QEMS. This can be office staff, photographers, sales staff or assistants

1. Go to the setup tab and click User Accounts

The screenshot shows the QEMS User Manager interface. The top navigation bar includes tabs for Messages, Customers, Calendars, Organizations, Reports, Schedule, Setup, and Admin. The Setup tab is active. The left sidebar contains a list of setup options: Site Setup, Manage Identities, Color Codes, CCS Accounts, Event Types, Organization Types, E-mail Settings, Manage Crests, User Accounts (highlighted with a red arrow), Payroll Settings, and Revision History. The main content area is titled 'User Manager' and contains a table with columns for Email, Name, Admin, and CustSvc. A red arrow points to the 'Setup' tab in the top navigation bar.

2. Enter employee information under Add A New User on the right side of the screen. Check the box of every location they are trained for and choose their Access level. Admin will have full rights to all features including payroll.

The 'Add A New User' form contains the following fields and options:

- Full Name:
- Email:
- Password:
- Access: Administrator, Customer Service, Photographer
- Locations: Default Campus, Fan Photos, Graduation, Group, Indoor Sports, Jump Studio, Office, Other, OU Graduations, Outdoor Sports, Party Pics, Photobooth, Portraits, Projection, Race, School Day, Young Masters
- Pay Level:
- Base Rate: per Hour
- Employee ID:
- Phone Number:
-