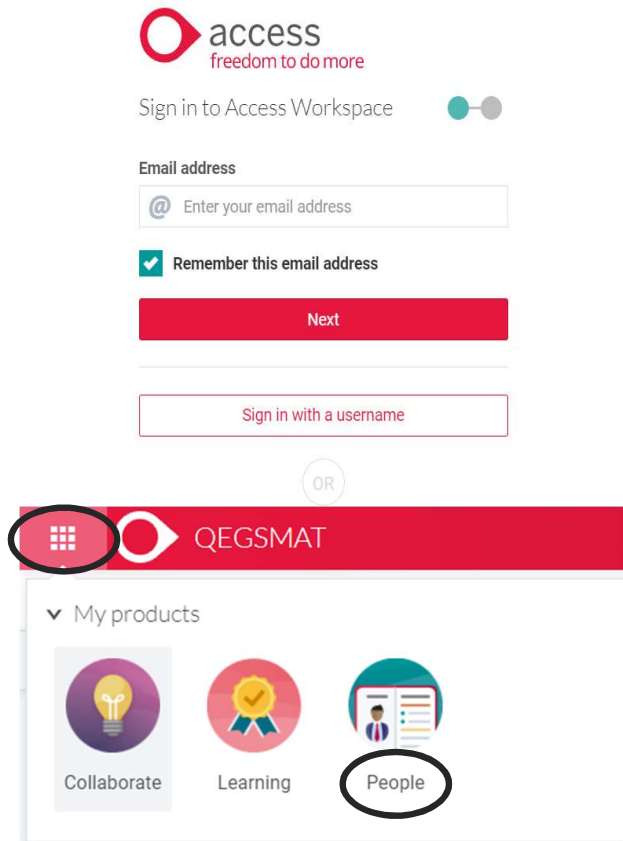


QEGSMAT
C·H·R·I·S

Quick Start Guide

Logging In



The image shows two screenshots from the QEGSMAT Access Workspace. The top screenshot is the login page, featuring the 'access' logo with the tagline 'freedom to do more'. It includes a 'Sign in to Access Workspace' link, an email address input field with an '@' icon, a 'Remember this email address' checkbox, a red 'Next' button, and a 'Sign in with a username' link. The bottom screenshot shows the dashboard header with the 'QEGSMAT' logo and a red navigation bar. On the left, a 'waffle' icon (a 3x3 grid of dots) is circled. Below the header, a 'My products' section displays three icons: 'Collaborate' (lightbulb), 'Learning' (award), and 'People' (person with a list), with the 'People' icon circled.

access
freedom to do more

Sign in to Access Workspace

Email address
@ Enter your email address

☒ Remember this email address

Next

Sign in with a username

OR

QEGSMAT

My products

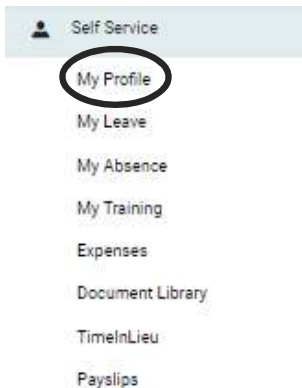
Collaborate Learning People

- Go to the following address – www.qegsmat.com/chris
- Use your work Email address to log in using the password you created when setting up your CHRIS account
- When logged in you should come to a page that looks like the screenshot on the bottom left, please click the waffle (9 dot Icon) on the top left and then click 'People'

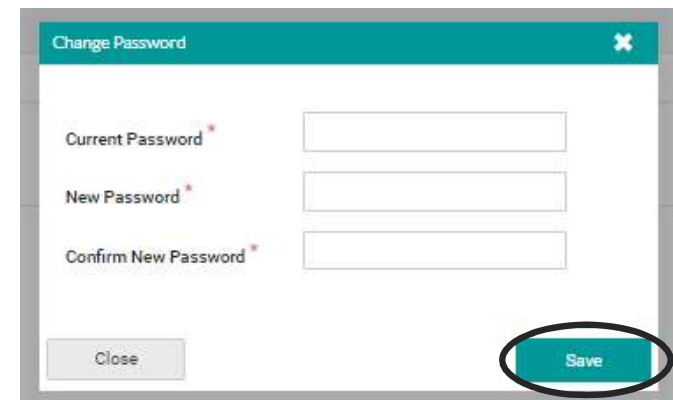
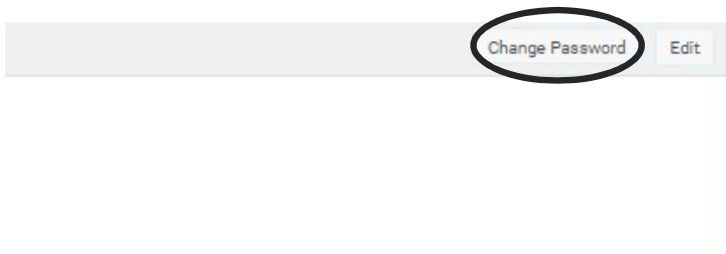
My Profile



Changing your Password



- To change your password, choose 'My Profile' from the 'Self Service' Menu.
- Then click the 'Change Password' button.
- Once you have changed your password press the 'Save' button

A screenshot of a 'Change Password' form. The form has a teal header with the title 'Change Password' and a close button (X). Below the header, there are three input fields labeled 'Current Password', 'New Password', and 'Confirm New Password', each with a red asterisk indicating it is required. At the bottom left is a 'Close' button, and at the bottom right is a 'Save' button, which is circled in black.

Changing Contact Information

Personal Mobile, Home Telephone, Personal Email



Profile

1 Employment

Name

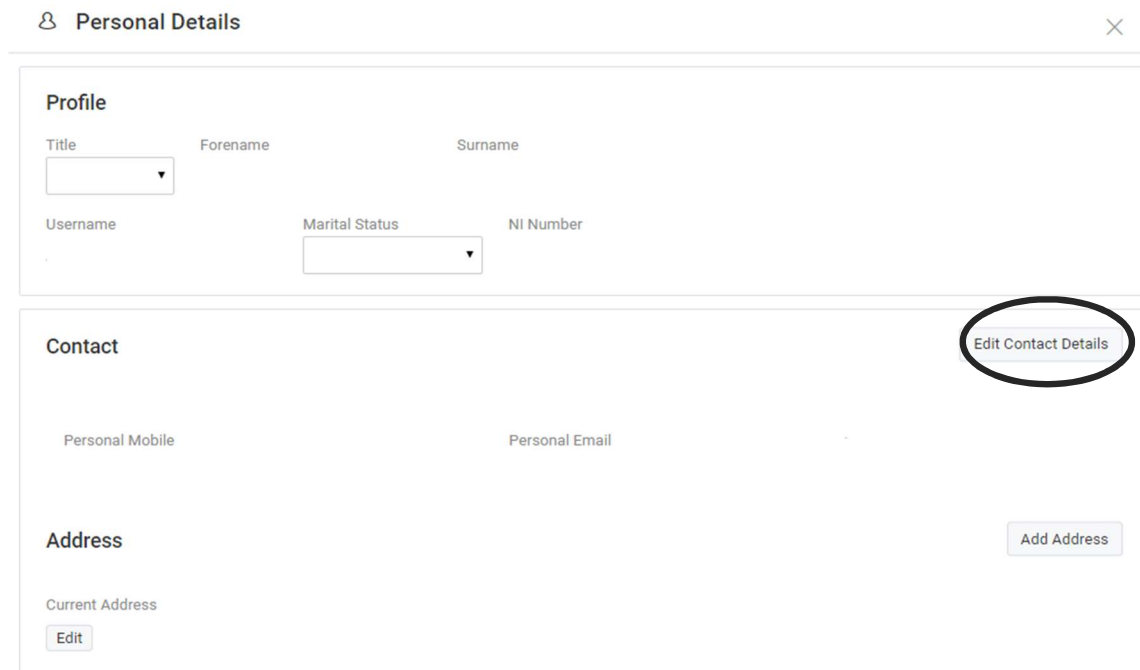
Marital Status

NI Number

Username

Change Password

Edit



Personal Details

Profile

Title

Forename

Surname

Username

Marital Status

NI Number

Contact

Personal Mobile

Personal Email

Address

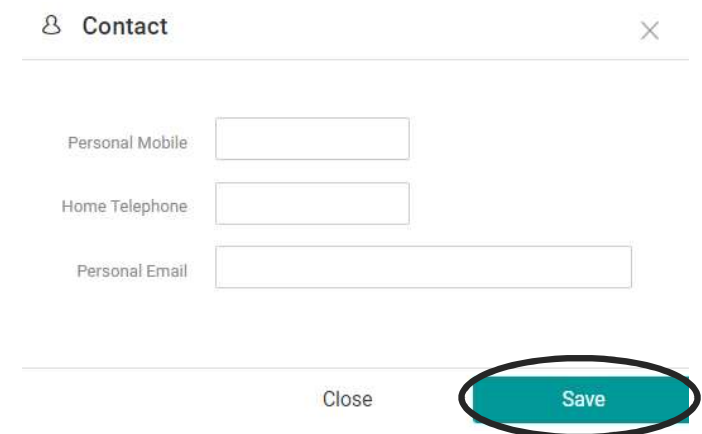
Current Address

Edit

Add Address

Edit Contact Details

- To change your Contact information from the 'My Profile' page click the 'Edit' button.
- Once you have clicked the 'Edit' button, you will then need to click the 'Edit Contact Details' button.
- To add your contact details such as 'Personal Mobile', 'Home Telephone' or 'Personal Email' you will need to complete the three boxes. Once completed press the 'Save' button.



Contact

Personal Mobile

Home Telephone

Personal Email

Close

Save

Changing Contact Information

Home Address Details

Personal Details ×

Profile

Title Forename Surname

Username Marital Status NI Number

Contact Edit Contact Details

Address Add Address

Current Address Edit

Close Save

× Address

Address Line 1*

Address Line 2*

Address Line 3

Address Line 4

Post Code* ⓘ

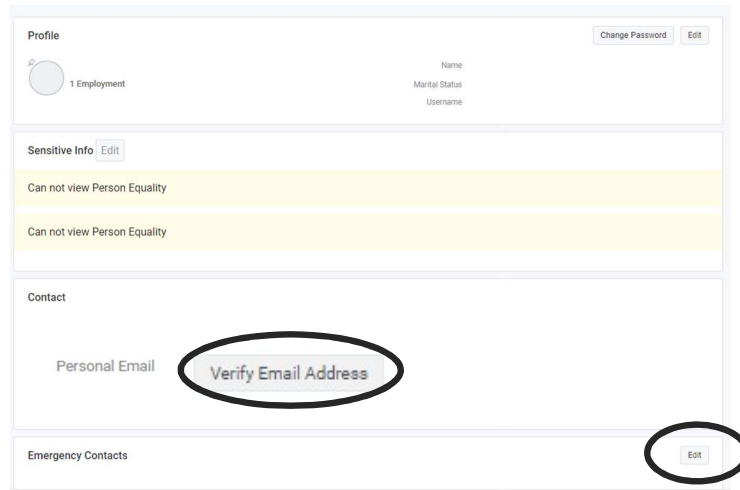
☒ Current Address

Close Delete Save

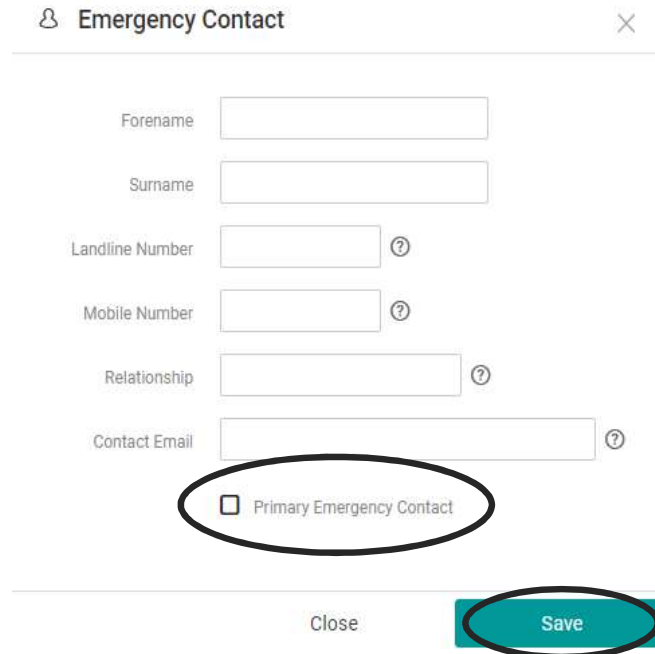
- To change your address, you will need to click the 'Edit' button below 'Address'.
- Once all Personal Details have been completed, click the 'Save' button.
- Once all address details have been completed click the 'Save' button.

Changing Contact Information

Emergency Contact Details

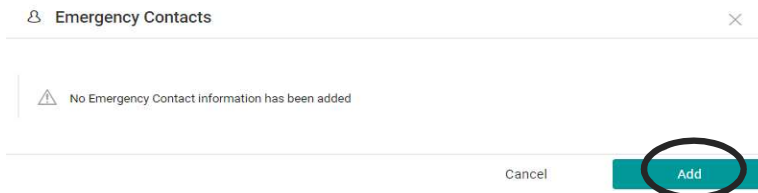


This screenshot shows a user profile page. The 'Contact' section is highlighted, showing a 'Personal Email' field with a 'Verify Email Address' button circled in black. Below this, the 'Emergency Contacts' section has an 'Edit' button circled in black.



This screenshot shows the 'Emergency Contact' modal form. It contains fields for 'Forename', 'Surname', 'Landline Number', 'Mobile Number', 'Relationship', and 'Contact Email'. Below these fields is a checkbox labeled 'Primary Emergency Contact', which is circled in black. At the bottom of the modal, there are 'Close' and 'Save' buttons, with the 'Save' button circled in black.

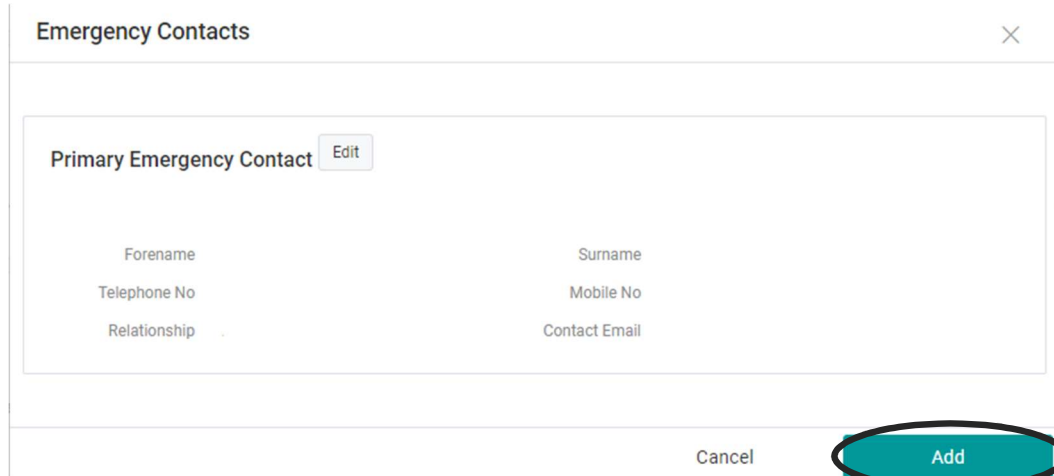
- To Edit 'Emergency Contacts' press the 'Edit' button.
- To add Emergency contact details you need to click on the 'Add' button.
- The next step will be to complete each field. Once all details are completed tick or un-tick the 'Primary Emergency Contact' depending on whether or not it is applicable. Then press the 'Save' button.
- Please also remember to verify your Personal Email Address. (check junk/spam if cannot find email to verify)



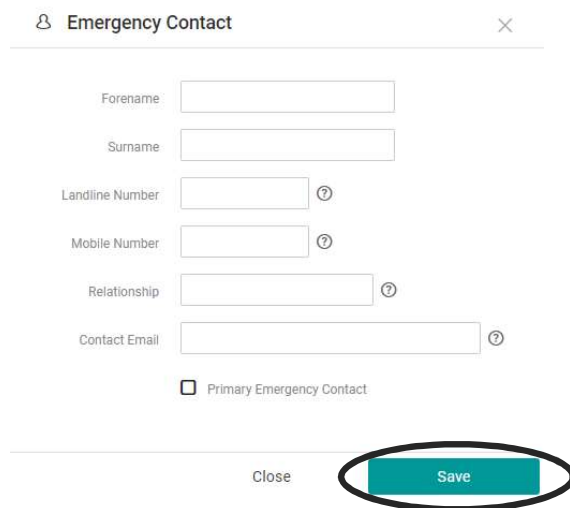
This screenshot shows the 'Emergency Contacts' modal at the bottom of the page. It displays a message: 'No Emergency Contact information has been added'. At the bottom, there are 'Cancel' and 'Add' buttons, with the 'Add' button circled in black.

Changing Contact Information

Emergency Contact Details



The 'Emergency Contacts' modal window displays a list of emergency contacts. The first contact is labeled 'Primary Emergency Contact' and has an 'Edit' button next to it. Below the contact name, there are fields for Forename, Surname, Telephone No, Mobile No, Relationship, and Contact Email. At the bottom right of the modal, there is a 'Cancel' button and a teal 'Add' button, which is circled in red.



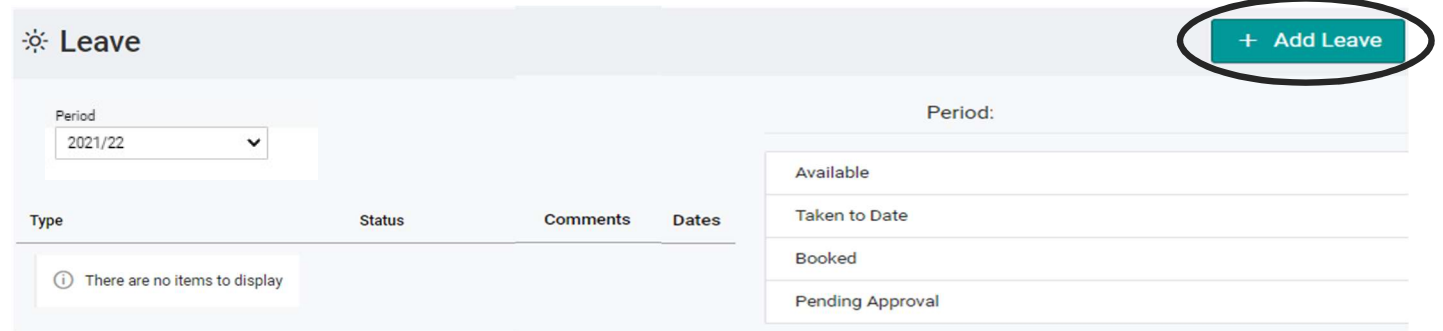
The 'Emergency Contact' form contains the following fields: Forename, Surname, Landline Number, Mobile Number, Relationship, and Contact Email. Each of the last four fields has a help icon (a question mark in a circle) to its right. Below these fields is a checkbox labeled 'Primary Emergency Contact'. At the bottom right of the form, there is a 'Close' button and a teal 'Save' button, which is circled in red.

- To add multiple Emergency Contact details, click the 'Add' button.
- Once all the relevant boxes under 'Emergency Contact' section are complete click the 'Save' button.

My Leave



Adding Leave

A screenshot of the 'Leave' request form. The form has a title bar with a gear icon and the word 'Leave'. The main form area is divided into two sections. The top section contains fields for 'Absence Category' (set to 'Annual Leave'), 'First Day' (07/10/2021), and 'Last Day' (11/10/2021). There are checkboxes for 'Part Day' next to each date field. The bottom section contains a checkbox labeled 'Use Working Pattern' which is checked and circled in black. Below this is a 'From Holiday Allowance' section and a 'Comments' text area. To the right of the form, there is a summary box showing 'Calendar Days 5', 'Working Days 4', and 'Working Hours 29.6'. At the bottom right, there is a large teal 'Submit' button circled in black.

- To add leave you will need go on 'My Leave' from the 'Self Service' drop down.
- Next, click on the '+ Add Leave' button.
- You will need to complete all of the fields required and make sure you select the correct Absence Category in order for your leave to be recorded correctly.
- Click the 'Use Working Pattern' box in order for your leave to be calculated correctly.
- Once completed click the 'Submit' button.
- This will then go to your line manager for approval.

Expenses



Adding Expenses



- To add Expenses, you will need to click on 'Self Service' and then click on 'Expenses'
- On Expenses you will be able to look at your current claims and claims history. You will also be able to add mileage and expenses on this part.
- However, to be able to claim mileage you will need to add a Vehicle, MOT and Insurance first.

A screenshot of the 'Expenses' page. The 'Current Claims' tab is selected and highlighted with a black oval. Below the tab are four buttons: 'Add Mileage', 'Add Expense', 'Add Allowance', and 'Add Fuel Receipt'. A 'Submit Claim' button is also visible. The page includes a search bar, a table with columns for Date, Ref, Category, Client, Description, and Total, and a sidebar with sections for Unsubmitted, Journeys, Locations, Vehicles, and Driving Licence Info.

Date	Ref	Category	Client	Description	Total
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Adding Vehicle Information

The 'Expenses' page features a sidebar on the left with a search icon, a 'Current Claims' tab, and buttons for 'Add Mileage', 'Add Expense', 'Add Allowance', and 'Add Fuel Receipt'. A 'Submit Claim' button is also present. The main area displays a table of claims with columns for Date, Ref, Category, Client, Description, and Total. The table contains two entries: one for a 'Whiteboard' on 19/09/2018 and another for a 'Parking Ticket' on 27/09/2018. On the right, a summary section shows 'Unsubmitted' total of £2.00, with breakdowns for Mileage (£0.00), Expenses (£2.00), Allowance (£0.00), and Miles Claimed (0 miles). Below this, there are sections for 'Journeys', 'Locations', 'Vehicles', and 'Driving Licence Info'. The 'Vehicles' section has a yellow bar and a circled 'Add' button.

Date	Ref	Category	Client	Description	Total
19/09/2018	R00001	Miscellaneous Other		Whiteboard	£1.00
27/09/2018	R00002	Parking & Tolls School Meeting		Parking Ticket	£1.00

- To add a vehicle, you will need to Click the grey 'Add' button.
- Next you will need to complete all the fields shown on the picture.
- You will also need to remember to click 'Primary Vehicle' if applicable.
- Once 'Vehicle Details' section is completed you need to press the 'Save' button.

The 'Vehicle Details' form includes fields for Registration, Make, Model, CO2, g/km, Type, Engine Size, cc, Fuel Type, and Vehicle > 3 Years Old. There are checkboxes for 'Primary Vehicle' and 'Company Vehicle'. A 'Change of Car Date' field is also present. At the bottom, there are buttons for 'Cancel', 'Delete', 'Add MOT', 'Add Insurance', and a circled 'Save' button.

Vehicle Details

☒ Primary Vehicle

Registration: [Yellow Bar] Make*: [] Model*: [] CO2: [] g/km

Type*: [] Engine Size: [] cc Fuel Type*: [] Vehicle > 3 Years Old: []

Change of Car Date: [] ☐ Company Vehicle

Cancel Delete Add MOT Add Insurance Save

Adding Vehicle Information

The form is divided into two main sections: Insurance and MOT. The Insurance section includes fields for Insurance Provider, Policy Number, Cover Type (a dropdown menu), Policy Holder, Business Use (a dropdown menu), and Expires. The MOT section includes fields for MOT Certificate No. and Expires. Both sections have an 'Upload Document' button with a note: 'Click or drag to upload: png, jpeg, jpg, PNG, JPEG, JPG, pdf, PDF'. At the bottom of the form, there are five buttons: 'Cancel', 'Delete', 'Add MOT', 'Add Insurance', and 'Save'. The 'Add MOT', 'Add Insurance', and 'Save' buttons are circled in black.

Insurance	
Insurance Provider	<input type="text"/>
Policy Number	<input type="text"/>
Cover Type	<input type="text"/>
Policy Holder	<input type="text"/>
Business Use	<input type="text"/>
Expires	<input type="text"/>

MOT	
MOT Certificate No.	<input type="text"/>
Expires	<input type="text"/>

Buttons: Cancel, Delete, Add MOT, Add Insurance, Save

- Once 'Vehicle Details' section is completed you need to press the 'Add MOT' button.
- Once you have completed the MOT section you will need to click 'Add Insurance' and complete all the sections.
- Once all sections are fully complete you will need to press the 'Save' button.
- Please note all sections from Vehicle, Insurance and MOT need to be fully complete in order for you to be able to claim mileage.

Adding Driving Licence Information

Driving Licence Info Edit

Full UK Licence
Licence Number
Expiry Date
Scan N/A

Driving Licence Info ×

Cancel Add Licence Save

Driving Licence Info ×

Full UK Driving Licence Held No ▼

Licence Number

Licence Expiry

Upload Document

Click or drag to upload: png, jpeg, jpg, PNG, JPEG, JPG, pdf, PDF

Cancel Add Licence Save

- To be able to claim mileage you will need to add a valid driving licence.
- To add a Driving Licence, you will need to click the grey 'Edit' button.
- Next you will need to click the 'Add Licence' button.
- Once you have completed all of the sections you will need to click the 'Save' button.

Adding Mileage

The screenshot shows the 'Current Claims' tab with a sub-tab 'Claims History'. Below the tabs are four buttons: 'Add Mileage' (circled), 'Add Expense', 'Add Allowance', and 'Add Fuel Receipt'. The 'Add Mileage' button is selected, opening a 'Mileage' form. The form has a left sidebar with 'Date*', 'Vehicle*', 'Purpose', and 'Description*'. The main area is titled 'Journey Details' and includes 'Standard Locations' with a 'Group' dropdown (set to 'Schools') and a 'Location' dropdown (set to 'Choose..'). Below this is 'My Locations' with a '(New)' entry and a 'Postcode' field (circled). An 'Add' button (circled) is next to the 'Postcode' field. At the bottom, there is a 'Return to Start' button (circled), a 'Miles Claimed' field, a 'Commute' checkbox, and a 'Save' button (circled). Other buttons at the bottom include 'Cancel', 'Memorise Journey', and 'Map'.


- To add mileage, click the 'Add Mileage' button and complete the boxes shown.
- Once all boxes are completed you will need to click 'Enter Journey Details'.
- First you will need to enter your total daily commute mileage.
- Next you will need to type in your starting postcode (e.g. Home) and click 'Add' for the start of the journey.
- You will need to choose the location you have travelled to, using either the 'locations' or entering the postcode and clicking 'Add'.
- Finally, you will need to click 'Return to Start' or enter the postcode of your destination and press 'Save'.
- Once you added any mileage or expenses claims you will need to 'Submit Claim'.







Adding Expenses

The screenshot shows the 'Current Claims' interface. At the top, there are two tabs: 'Current Claims' (active) and 'Claims History'. Below the tabs is a row of four buttons: 'Add Mileage', 'Add Expense' (circled), 'Add Allowance', and 'Add Fuel Receipt'. Below this is a modal window titled 'Expense' with a close button (X). The modal contains several input fields: 'Date*' (text box), 'Purpose*' (dropdown), 'Category*' (dropdown), 'Evidence*' (dropdown), 'Total Amount*' (text box with '£ 0.00' and a help icon), and 'VAT Amount' (text box with '£ 0.00' and a help icon). A 'Description*' text area is also present. A 'Policy' link is visible next to the 'Total Amount' field. At the bottom of the modal is an 'Upload Document' button (circled) with a note: 'Click or drag to upload: gif, jpg, jpeg, tiff, png, pdf, doc, docx, xls, msg'. At the very bottom of the modal are three buttons: 'Cancel', 'Delete', and 'Save' (circled).

- To add expenses, click the 'Add Expense' button and complete the boxes.
- Please note that claims are in accordance with the Expenses Policy.
- Once you have completed all of the sections you will need to press 'Save'.
- Once all the boxes are completed you will need to upload a picture of your receipt for your expense to be processed.
- Once you added any mileage or expenses claims you will need to 'Submit Claim'.

Submit Claim

 Submit Claim ×

		19/09/2021	Miscellaneo...	Other		Whiteboard		£1.00
		21/09/2021	Parking & To...	School Meet...		Parking Ticket		£1.00

You are submitting
2 Expenses

Total Value
£2.00

+ 0 Fuel Receipts (£0.00)

Description*

September 2021 claims.

Approver

Escalate

Cancel

Submit

- To submit a claim, click the 'Submit Claim' button
- Once you have added a description you will need to confirm your submission by clicking the 'Submit' button which will then be sent to the approver.