JOB AID: Contractor: Timecard and Expense Entry in the New UI

This job aid highlights how to enter a timecard and an expense report in the New User Interface as a contractor.

1. Access the IQNavigator system.

2. Select **USER LOGIN** (upper right hand corner of the screen).

   NOTE: The first time you log into the system you will need to accept the end user license agreement by selecting **OK**.

3. Enter USERNAME and PASSWORD (case sensitive). Passwords must contain:
   - **A.** eight characters minimum
   - **B.** one numeric character minimum

   Select **ENTER** to log into IQNavigator.

4. If you forget your password select the blue hyperlink, **FORGOT YOUR PASSWORD? CLICK HERE**. You will be brought to the FORGOT PASSWORD screen, enter in your USER NAME and EMAIL ADDRESS, and select **SUBMIT**. A temporary password will be emailed to you.

If you have questions or require assistance with the new application please call the IQNavigator Customer Service Desk at 1-877-706-4394 or send an e-mail to iqcustomerservice@iqnavigator.com.

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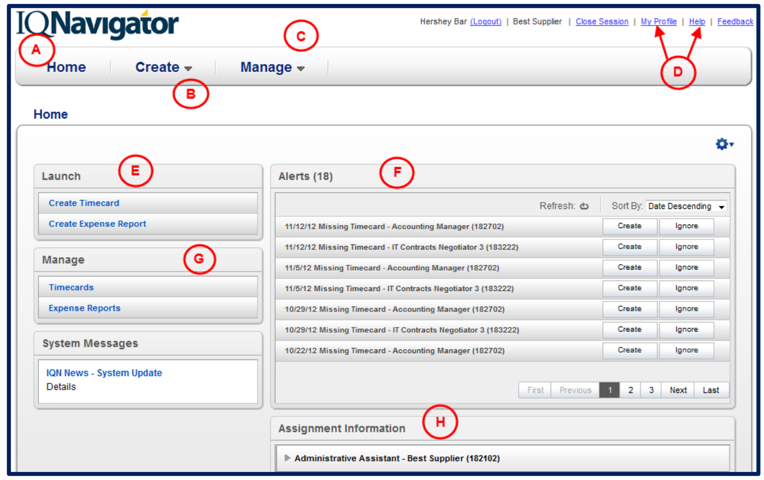
5. Once you login to the IQNavigator system, this will take you to your IQNavigator Dashboard. Many of these fields will be described in more depth throughout this job aid.
    - **A. HOME** Tab: You can click on this tab to get back to your dashboard at any time.
    - **B. CREATE** Tab: Clicking on this tab will create a dropdown where you can choose to Create a Timecard or Create and Expense Report.
    - **C. MANAGE** Tab: Here you can Manage and Review your submitted Timecards and Expense Reports.
    - **D. MY PROFILE** and **HELP**: By clicking on the MY PROFILE link, you can change your personal information. The HELP link gives you access to any help information your supplier has opted to populate this area with, including important contact information, help documentation, etc.
    - **E. LAUNCH:** Here you can create a timecard or an expense report by just clicking on the appropriate link.
    - **F. ALERTS:** This section is used to notify you of missing timecards, problematic timecards and other similar information. You can take action straight from ALERTS.
    - **G. MANAGE:** Similar to the MANAGE Tab; you just don't have to hover over it to get the dropdown menu.
    - **H. ASSIGNMENT INFORMATION:** Here is where you can find out pertinent information about your current assignment.



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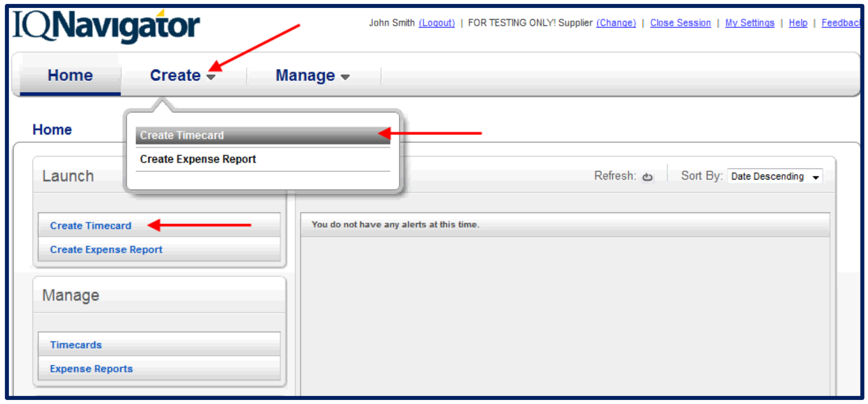
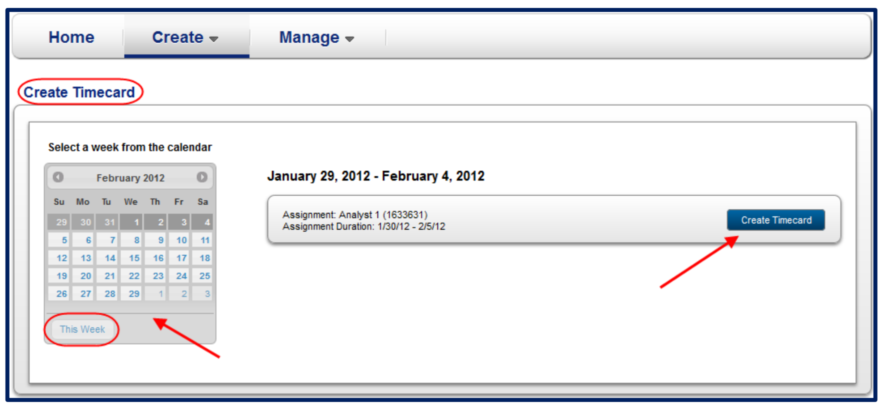
Creating a Timecard

6. From the dashboard, either hover over the **CREATE** tab and click on **CREATE TIMECARD** or navigate to the **LAUNCH** panel on the left hand side of the dashboard and click **on CREATE TIMECARD**.



7. This takes you to the CREATE TIMECARD screen. Here you will need to choose the week for which you would like to submit a timecard. Then click on the **CREATE TIMECARD** button.



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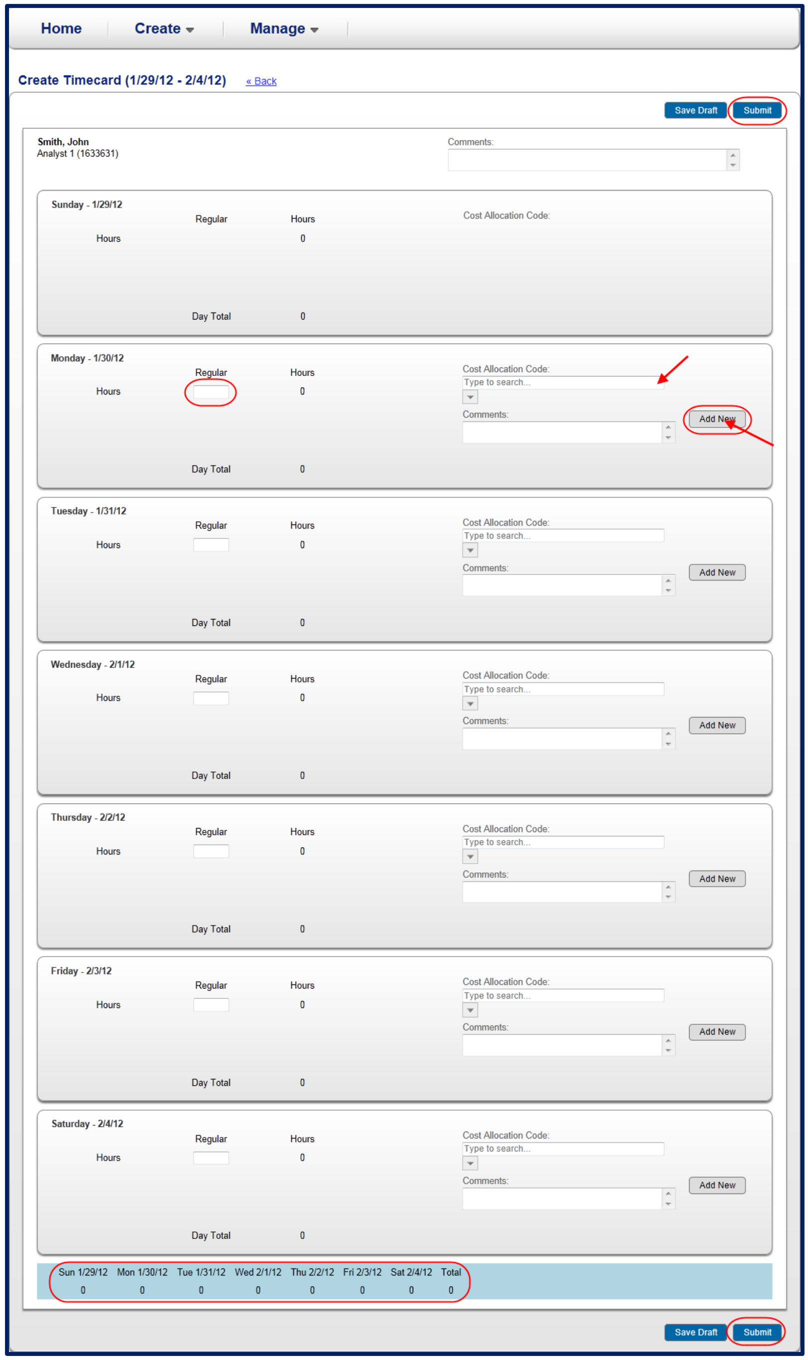


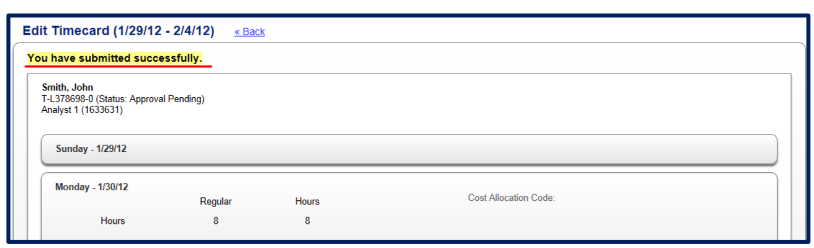
8. On the next screen you will enter your time for the week selected.

9. Enter the number of hours worked under the **REGULAR** hour's section. Enter the Cost Allocation Code associated with those working hours. If you worked hours under two different Cost Allocation Codes, click the **ADD NEW** button to add another timecard for that same day to split the time worked.

10. The total hours worked for the week will tabulate at the bottom of the screen.

11. You can either SAVE your timecard to add additional time during the week, or SUBMIT the timecard for approval.

12. You will see "You have saved successfully" highlighted in yellow once you have submitted your timecard.



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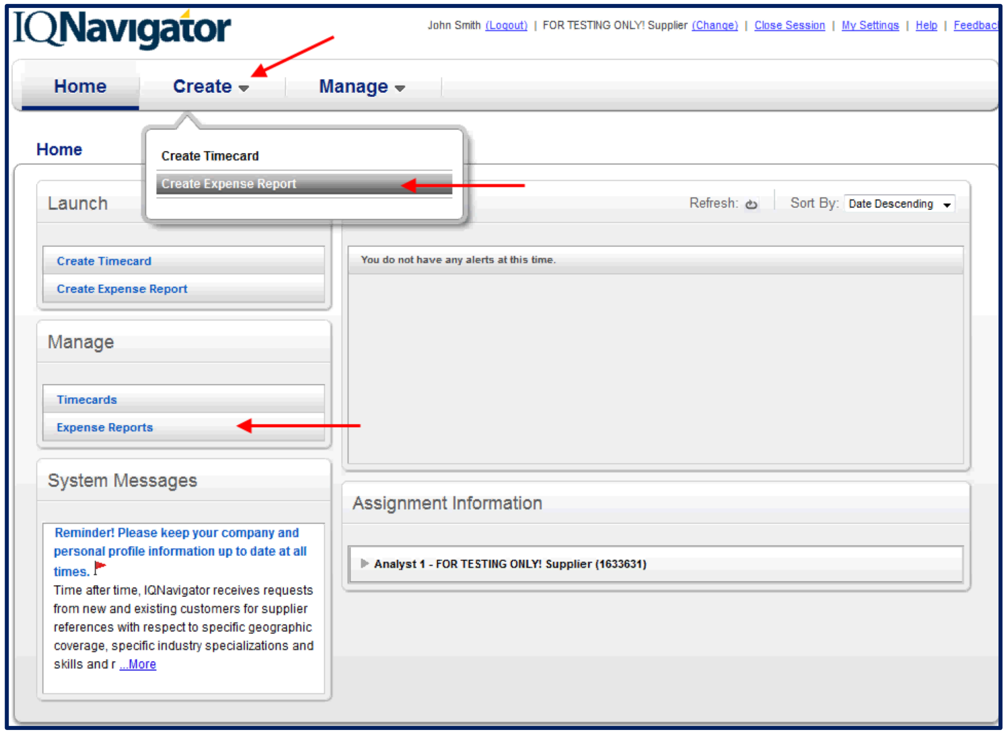
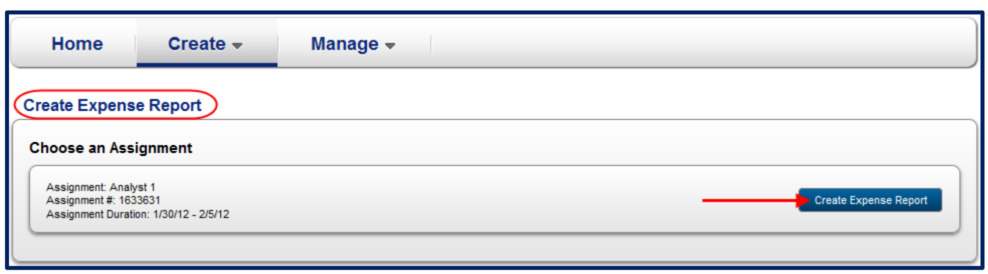
Creating an Expense Report

13. From the Dashboard, either hover over the **CREATE** tab and click on **CREATE EXPENSE REPORT** or navigate to the **LAUNCH** panel on the left hand side of the dashboard and click **on CREATE EXPENSE REPORT**.



14. This will take you to the **CREATE EXPENSE REPORT** screen. Your assignment should be listed below. Click on the **CREATE EXPENSE REPORT** button.



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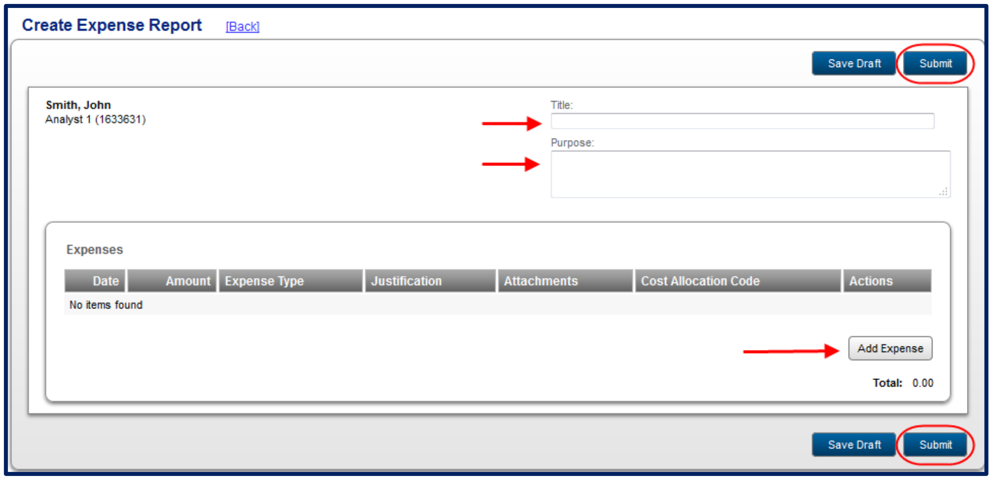
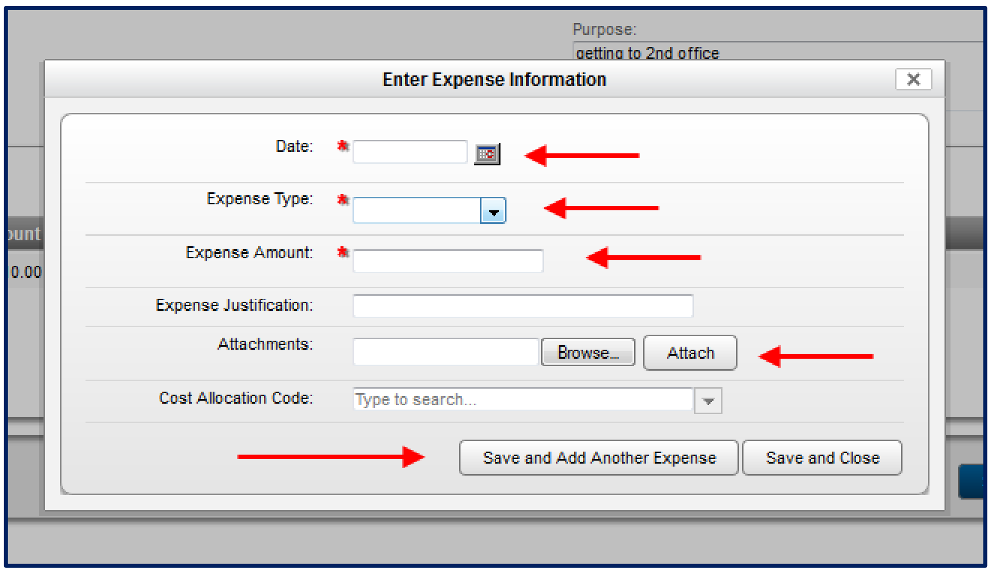
15. On the next screen, you will Title your Expense Report and can add a Purpose. Click on the **ADD EXPENSE** button to start adding expenses.



16. A pop up window will appear. Enter the required fields notated with a Red *: Date, Expense Type (chosen from the drop down menu), and expense amount. You can also enter a justification if needed, upload an attachment such as a scanned receipt and add the Cost Allocation Code. When you have the report the way you need it, you can either SAVE AND ADD ANOTHER EXPENSE or SAVE AND CLOSE. Click which ever button is appropriate.



17. You will return to the screen behind the pop up window. Click on the SUBMIT button to submit your expense report. (above screenshot).

18. You will see "You have saved successfully" highlighted in yellow once you have submitted your expense report.

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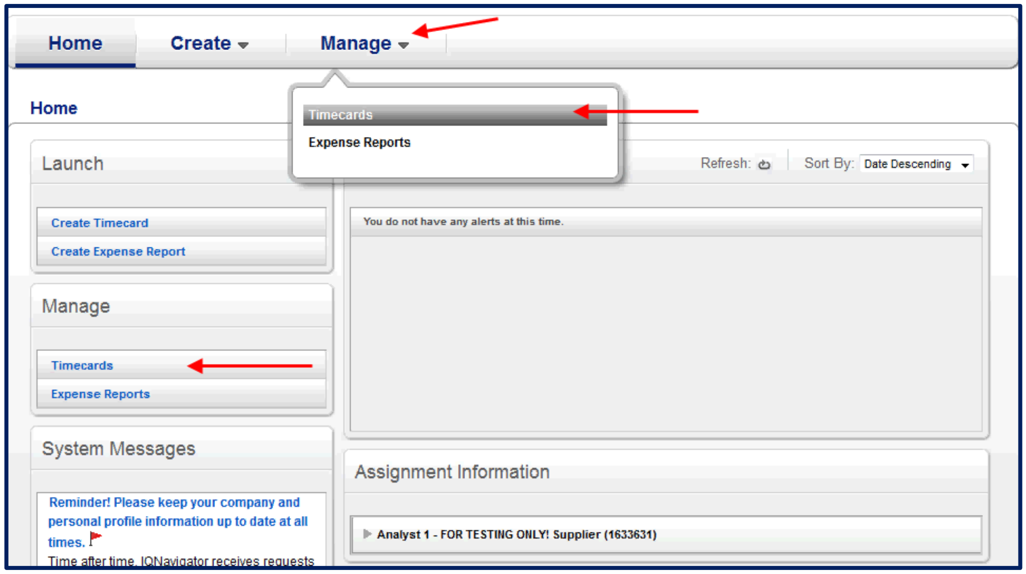
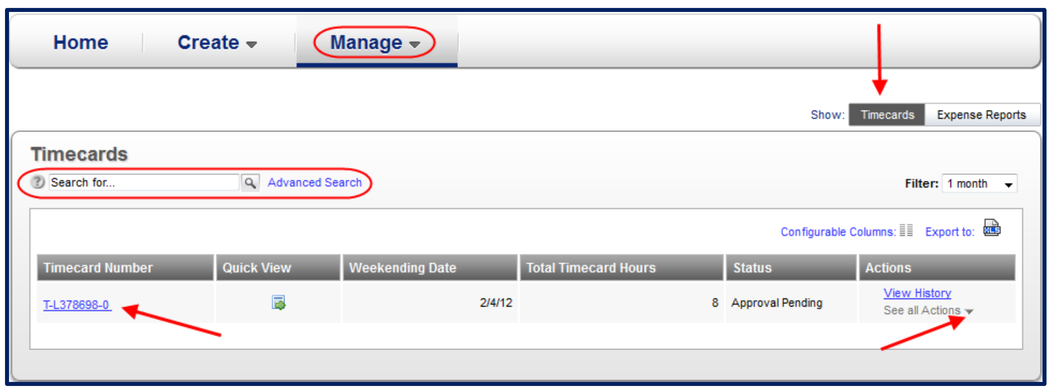
Managing Timecards and Expense Reports

19. You can view your pending timecards by clicking on the **MANAGE** tab and clicking on **TIMECARDS** from the dropdown menu. You can also use the left side pane under **MANAGE** and click on **TIMECARDS**.



This will bring up your TIMECARDS screen. There is a list of the timecards that have been submitted and the status they are currently in. You can also use the SEARCH functionality at the top of the screen to search for additional timecards.



To view your expense report, click on the number of the report in the left hand column, or click on the **VIEW HISTORY** or **SEE ALL ACTIONS** under the ACTIONS column on the far right hand side.

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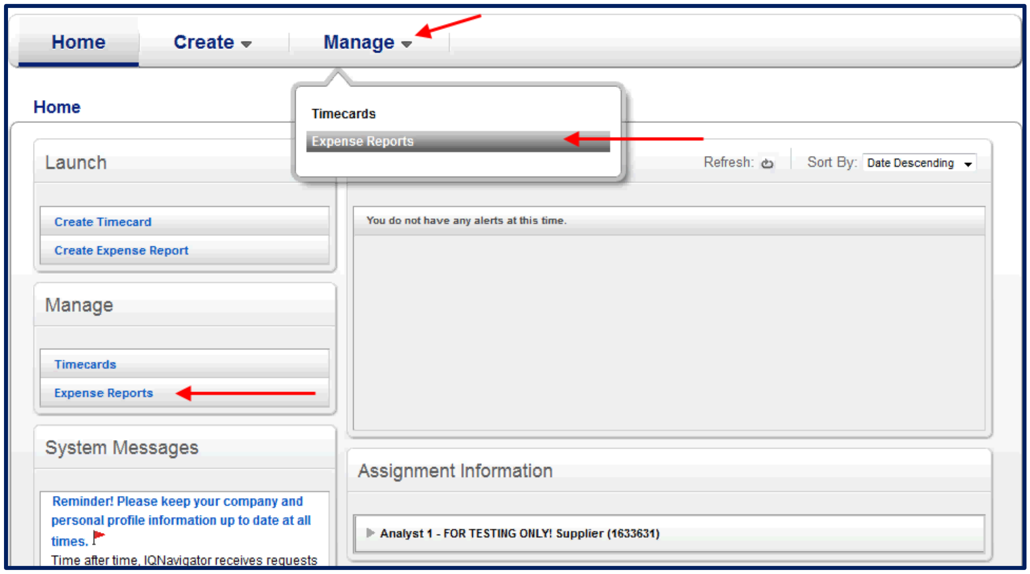
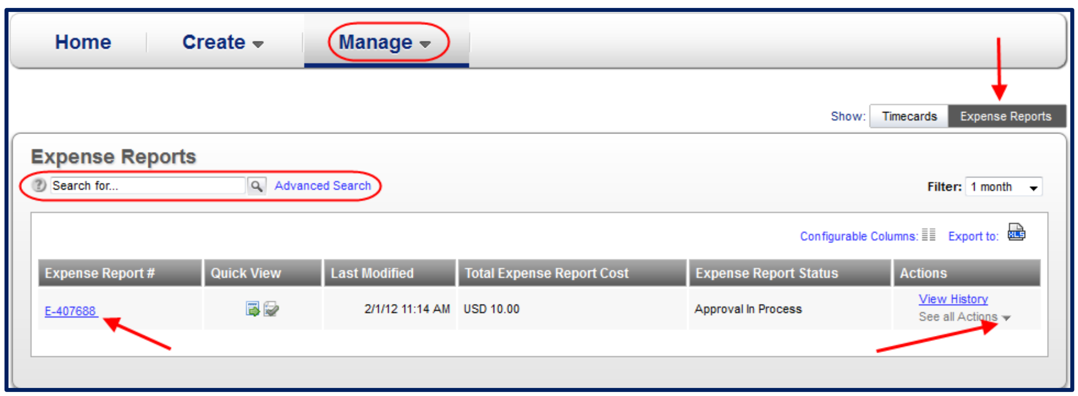
20. You can view your pending expense reports by clicking on the **MANAGE** tab and clicking on **EXPENSE REPORTS** from the dropdown menu. You can also use the left side pane under **MANAGE** and click on **EXPENSE REPORTS.**



This will bring up your **EXPENSE REPORTS** screen. There is a list of the expense reports that have been submitted and the status they are currently in. You can also use the SEARCH functionality at the top of the screen to search for additional expense reports.



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