

QUANTX OPS

Grow Together



# QuantX Ops — Administrator Guide

Setting the company up and keeping it running: organisation, people, approvals, access and the books.

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# 1. Welcome, administrators

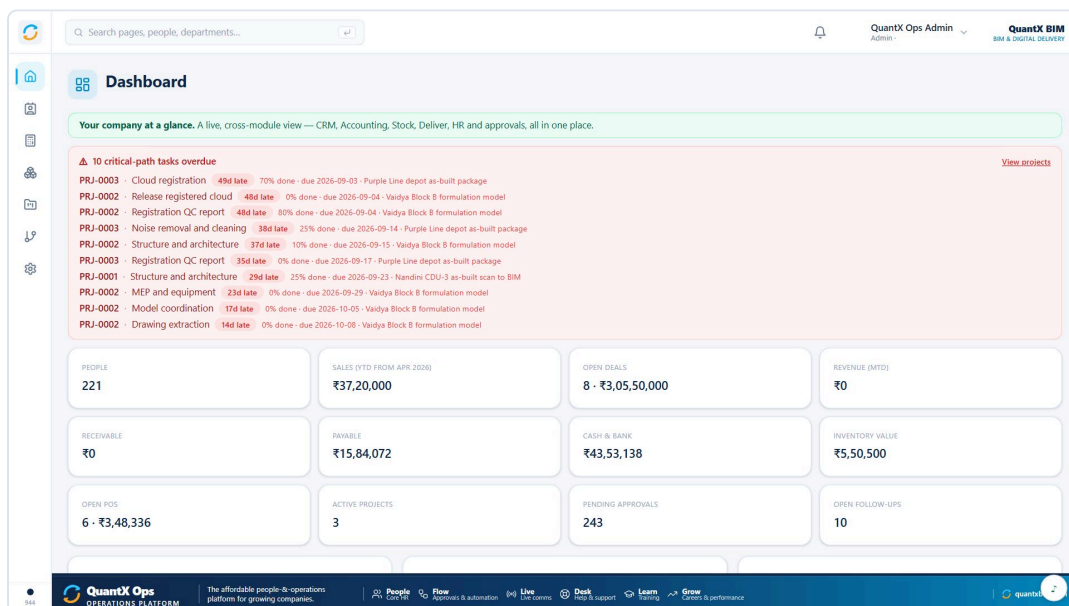
This guide is for the person who **sets the company up in QuantX Ops and keeps it running**: the portal administrator, HR lead or finance lead who decides who sits where, who may do what, and how approvals flow. Daily users have their own book, the **Operator Guide**. Read this one beside it.

## What you are responsible for

| Area                   | What you decide                                                                                                 |
|------------------------|-----------------------------------------------------------------------------------------------------------------|
| <b>The company</b>     | Sites, tax registration, the organisation chart of <i>seats</i> and who occupies them.                          |
| <b>Data</b>            | Loading people, seats and opening balances; keeping the masters (leave types, shifts, salary components) right. |
| <b>People and time</b> | Joining and leaving, shifts, leave balances, salary inputs and payroll.                                         |
| <b>Approvals</b>       | Who approves what, in which order, and what happens when nobody can.                                            |
| <b>Access</b>          | What each duty role may open and do, and which outside systems may call QuantX Ops.                             |
| <b>Money setup</b>     | The books the whole company posts to.                                                                           |

## Signing in

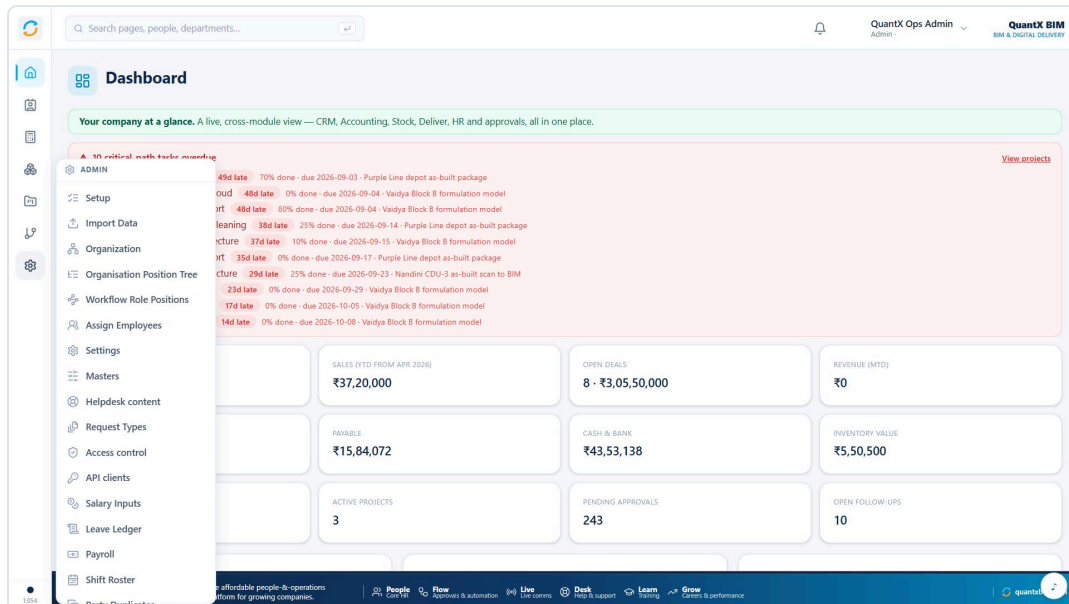
Every person signs in with a **Login ID**: the company code, a dash and a number, for example `CONCR-117`. It is *not* the employee code. Your own Login ID and first password come from whoever set up the company. If you are asked to set a new password at first sign-in, choose one of at least 8 characters.



*The administrator's home screen. The menu on the left shows only what your role may use.*

## The menu

The icons down the left open **flyouts** that group related screens. As an administrator you will use these most:



The Admin group: Setup, Import Data, Organization, the position tree, Masters, Settings and the access screens.

| Group                                   | You use it for                                                            |
|-----------------------------------------|---------------------------------------------------------------------------|
| Home / Me                               | Your own records, tasks and approvals.                                    |
| Admin (gear icon)                       | Setup, organisation, masters, access, helpdesk content, documents, email. |
| Workflow                                | Approvals, request types and the workflow designer.                       |
| People, CRM, Deliver, Stock, Accounting | The business modules, administered here and operated by your staff.       |

The search box at the top finds pages, people and departments from anywhere.

## Permissions in one page

QuantX Ops is **closed by default**: a person sees and does only what their role grants, and that applies to reading as well as changing. Three ideas make it manageable:

1. **Duty roles** are bundles of permissions, such as *HR*, *Accounts* or *Purchase / Stores*. People hold one or more.
2. **Workflow roles** are different: they answer "who approves?", such as *Line Manager* or *Concerned HR*, and are found from the organisation chart (chapter 7).
3. **Data scope** limits which records a person sees inside a page they may open.

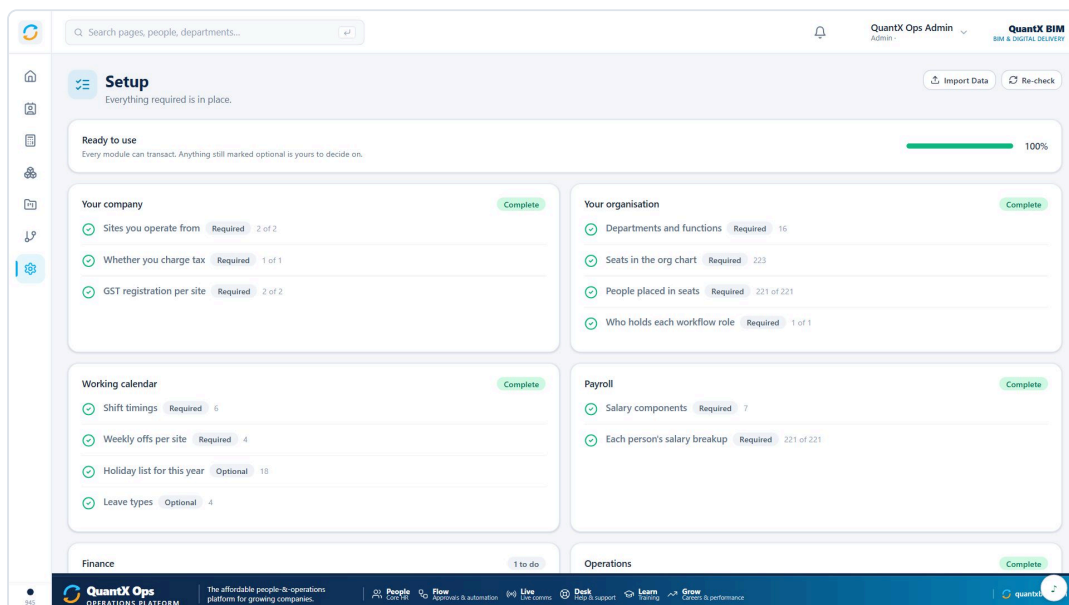
Keep these three apart in your head. Most "I cannot see it" questions are a duty role, and most "it did not reach anyone" questions are a workflow role.

## How this guide is laid out

Chapters follow the order in which a company is normally set up: first setup (2), the organisation (3), loading data (4), people (5), time and pay (6), approvals (7), access (8), money (9), business modules (10), helpdesk content (11), and finally a decision table for when something looks wrong (12).

## 2. First setup

A new company starts at **Setup**. It is a checklist that shows, in plain language, what must exist before each module can work, and how much is done.



Setup on a finished company: "Everything required is in place", 100%. Each card is one area, with its items tagged **Required** or **Optional**.

## Reading the checklist

The bar at the top reads **Ready to use** once every *required* item is complete. Anything marked **Optional** is yours to decide on. Each card carries a **Complete** badge, or a count of what is still *to do*.

| Card                     | Items                                                                                                    |
|--------------------------|----------------------------------------------------------------------------------------------------------|
| <b>Your company</b>      | Sites you operate from; whether you charge tax; GST registration per site.                               |
| <b>Your organisation</b> | Departments and functions; seats in the org chart; people placed in seats; who holds each workflow role. |
| <b>Working calendar</b>  | Shift timings; weekly offs per site; the holiday list for this year; leave types.                        |

|                            |                                                  |
|----------------------------|--------------------------------------------------|
| <b>Payroll</b>             | Salary components; each person's salary breakup. |
| <b>Finance, Operations</b> | What the accounts and stock modules need.        |

Two buttons at the top: **Import Data**, which loads whole sets from files (chapter 4), and **Re-check**, which recounts after you have made changes elsewhere.

## The order that works

Do things in this order, because each step refers to the one before:

1. **Sites** (Organization, Locations). Everything else refers to a site.
2. **Seats**: the positions of the organisation chart, with their functions and sites.
3. **People**, each placed in a seat.
4. **Workflow roles**: who answers *Line Manager*, *Concerned HR* and so on.
5. **Calendar**: shifts, weekly offs, holidays, leave types.
6. **Salary components and each person's breakup**.
7. **Finance and stock**, if you use those modules.

## What "ready" means

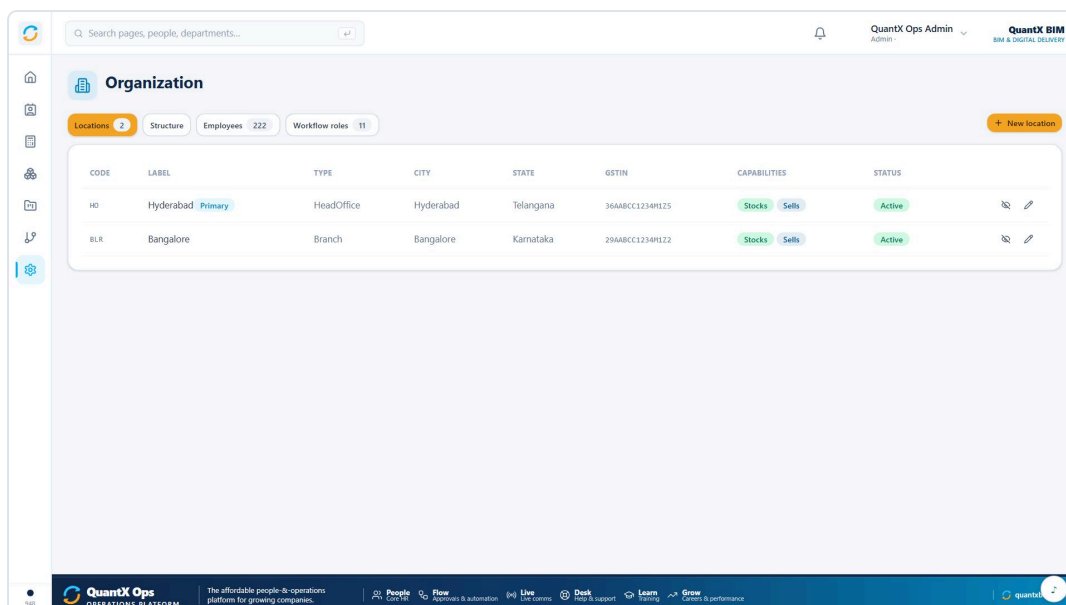
Ready means every module *can transact*, not that every detail is perfect. Come back to **Setup** whenever the company changes. A new site, for example, will show *GST registration per site* as to do until you fill it in. If an item will not turn green, the page it belongs to is the one named in the table above; fix it there and click **Re-check**.

## 3. Describing the company

QuantX Ops models the organisation as **seats**. A **seat** (a position) exists whether or not anyone sits in it. A **person** occupies a seat. Reporting lines, grades, approvers and the requirements for appraisal all belong to the seat, so when people move, nothing else needs to be redrawn.

### Organization

**Organization** has four tabs: **Locations**, **Structure**, **Employees** and **Workflow roles**, each with a count.



*Locations. Each site has a code, label, type, city, state, GSTIN, what it does (**Stocks**, **Sells**) and its status.*

A **location** is a site you operate from. Click **New location**.

*The New location form.*

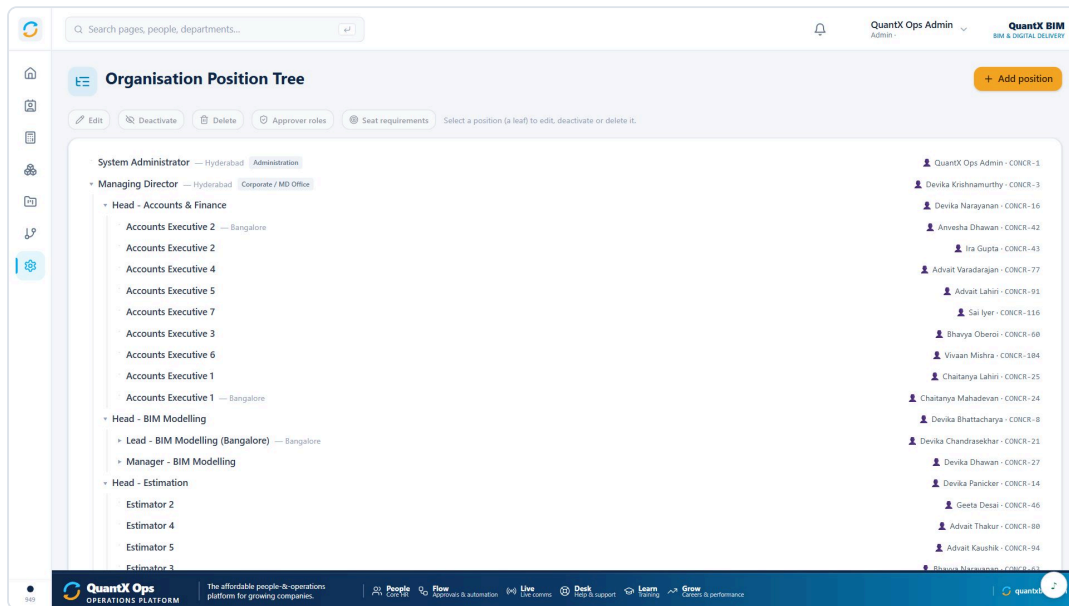
| Field                         | What to enter                                                                                            |
|-------------------------------|----------------------------------------------------------------------------------------------------------|
| <b>Code, Label</b> (required) | A short code, such as <b>H0</b> or <b>BLR</b> , and the name shown everywhere.                           |
| <b>Type</b> (required)        | Head office, branch and so on.                                                                           |
| <b>Street address</b>         | Appears on invoices raised from this site.                                                               |
| <b>City, State</b> (required) | The <b>State</b> decides the place of supply on this site's invoices, and therefore IGST or CGST + SGST. |
| <b>GSTIN, PAN</b>             | Registered per state: each site's own GSTIN.                                                             |

|                                       |                                                           |
|---------------------------------------|-----------------------------------------------------------|
| <b>Time zone</b>                      | Attendance and shifts at this site are read in this zone. |
| <b>Pay cycle starts / ends on day</b> | Blank means the company setting.                          |

Use the pencil to edit a location, or the eye icon to hide one you no longer use. Mark one site **Primary**.

## The Position Tree

**Organisation Position Tree** (Admin menu) is the organisation chart. Each row is a seat, with its site, its function and, on the right, who sits in it.



*The position tree. Seats nest under the seat they report to; the person in each seat is shown on the right.*

Click a seat (a *leaf*) to enable the buttons across the top:

| Button                   | Does                                                                         |
|--------------------------|------------------------------------------------------------------------------|
| <b>Add position</b>      | Adds a seat. Choose what it reports to, its title, grade, function and site. |
| <b>Edit</b>              | Changes the seat's details.                                                  |
| <b>Deactivate</b>        | Retires the seat without losing its history.                                 |
| <b>Delete</b>            | Removes a seat that was never used.                                          |
| <b>Approver roles</b>    | Shows which workflow roles this seat answers.                                |
| <b>Seat requirements</b> | The KPIs this seat is measured on (chapter 5).                               |

Design the tree before you fill it. Deleting a seat that people or approvals depend on is refused; deactivate instead.

## Assign Employees

**Assign Employees** puts people into seats. On the left is the position tree; on the right, the **Assigned** list (everyone placed) and the **Unassigned** list (people with no seat).

**Assign Employees**

Empty seats: 1 vacant, 0 covered, 4 transactions waiting for an approver who does not exist. Cover is an extra responsibility, not a second seat — the tree, the reporting lines and the coverer's own grade all stand.

**Position tree** (vacant only):

- System Administrator — Hyderabad — Administration — QuantX Ops Admin - CONCR-1
- Managing Director — Hyderabad — Corporate / MD Office — Devika Krishnamurthy - CONCR-3
- Head - Accounts & Finance — Bangalore — Devika Narayanan - CONCR-16
  - Accounts Executive 2 — Bangalore — Anvesha Dhawan - CONCR-42
  - Accounts Executive 2 — Bangalore — Ira Gupta - CONCR-43
  - Accounts Executive 4 — Bangalore — Advait Varadharan - CONCR-77
  - Accounts Executive 5 — Bangalore — Advait Lahiri - CONCR-91
  - Accounts Executive 7 — Bangalore — Sai Iyer - CONCR-116
  - Accounts Executive 3 — Bangalore — Bhavya Oberoi - CONCR-68
  - Accounts Executive 6 — Bangalore — Vivaan Mishra - CONCR-184
  - Accounts Executive 1 — Bangalore — Chaitanya Lahiri - CONCR-25
  - Accounts Executive 1 — Bangalore — Chaitanya Mahadevan - CONCR-24
- Head - BIM Modelling — Bangalore — Devika Bhattacharya - CONCR-8
  - Lead - BIM Modelling (Bangalore) — Bangalore — Devika Chandrasekhar - CONCR-21

**Assigned (222)**

- Aadhya Choudhury CONCR-197 — BIM Modeller 15
- Aadhya Menon CONCR-157 — Registration Technician 12
- Aadhya Shah CONCR-117 — Team Lead - BIM (Bangalore) 5
- Aarav Chatterjee CONCR-81 — Survey Technician 4
- Aarav Kumar CONCR-185 — Registration Technician 13

**Unassigned (1)**

- Vikram Rao CONCR-224

*Assign Employees. The summary at the top counts **vacant** seats, seats being **covered**, and any transactions waiting for an approver who does not exist.*

**Drag** a person from the right-hand lists onto a *vacant* seat in the tree. To free a seat, use the ✕ beside a person in the Assigned list, or right-click the occupied seat to detach them. Tick **vacant only** to find empty seats, or use **Find position**. A person in no seat cannot be reached by any approval route, so clear the *Unassigned* list.

**Cover.** A vacant seat can be *covered* by someone else. Cover is an extra responsibility, not a second seat: the tree, the reporting lines and the coverer's own grade all stand.

## Workflow Role Positions

**Workflow Role Positions** shows, for every workflow role, whether it reaches a person. The aim is that nothing is left in "not defined".

**Workflow Role Positions**

Every seat, and whether each workflow role reaches it. The aim is nothing left in "not defined".

**Assigned (0)**

somebody names the holder — these are the ones to configure

Search roles...

No assigned roles.

**Derived (0)**

resolved per request from the position tree or the employee

Search roles...

No derived roles.

**Pick a role**

Choose a workflow role on the left.

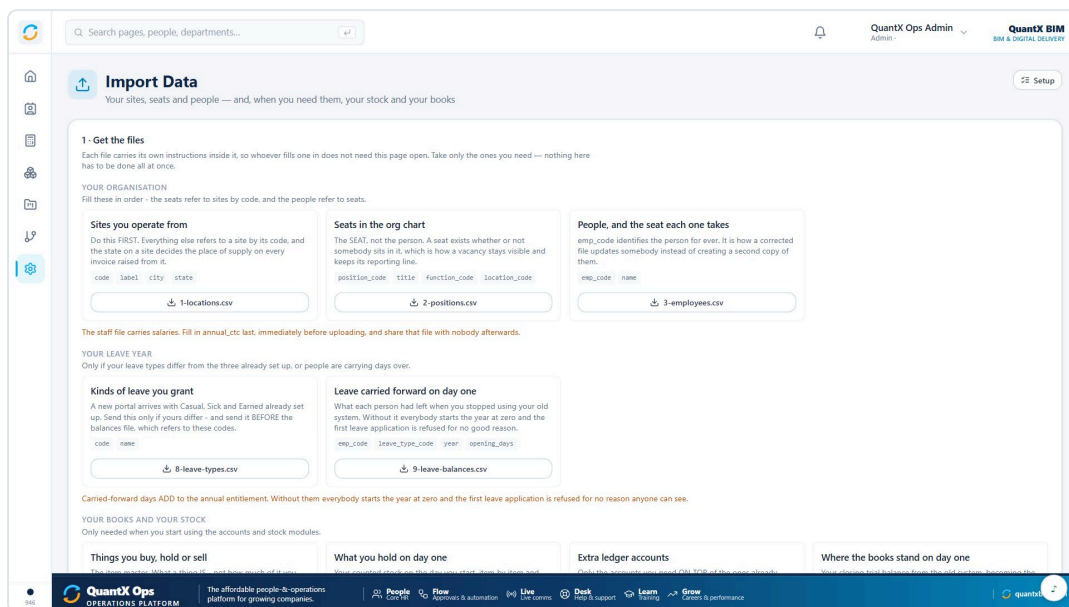
**Workflow Role Positions.** **Assigned** roles have a named holder to configure; **Derived** roles are worked out for each request from the position tree.

Most roles are **derived**: *Line Manager* is whoever the requester's seat reports to, so you configure nothing. Roles that cannot be derived, such as *Concerned HR*, need a holder named here. Pick a role on the left and choose who or which seat holds it. The workflow chapter (7) explains how routes use them.

## 4. Loading your data and keeping the masters

### Import Data

**Import Data** loads whole sets from CSV files instead of keying them one by one. It is the quickest way to bring in sites, seats and people from an older system.



*Import Data, step 1: get the files. Each file carries its own instructions inside it, so whoever fills one in does not need this page open.*

### The files

Take only the ones you need. Nothing here has to be done all at once.

| Group                                | File                | What it holds                                                                                                                                                                                              |
|--------------------------------------|---------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Your organisation<br>(in this order) | 1-<br>locations.csv | Sites: <code>code</code> , <code>label</code> , <code>city</code> , <code>state</code> . Do this <b>first</b> ; everything else refers to a site by its code.                                              |
|                                      | 2-<br>positions.csv | The <b>seats</b> : <code>position_code</code> , <code>title</code> , <code>function_code</code> , <code>location_code</code> . A seat exists whether or not anyone sits in it.                             |
|                                      | 3-<br>employees.csv | People and the seat each takes: <code>emp_code</code> , <code>name</code> . The <code>emp_code</code> identifies the person for ever: a corrected file updates somebody instead of creating a second copy. |

|                             |                      |                                                                                                                                                                                                                         |
|-----------------------------|----------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Your leave year</b>      | 8-leave-types.csv    | Only if your leave types differ from the three already set up (Casual, Sick, Earned). Send it <b>before</b> the balances file.                                                                                          |
|                             | 9-leave-balances.csv | What each person had left when you stopped using the old system. Carried-forward days <b>add</b> to the annual entitlement. Without them, everybody starts the year at zero and the first leave application is refused. |
| <b>Your books and stock</b> | Further files        | Items, opening stock, extra ledger accounts and the opening trial balance. Needed only when you start using the accounts and stock modules.                                                                             |

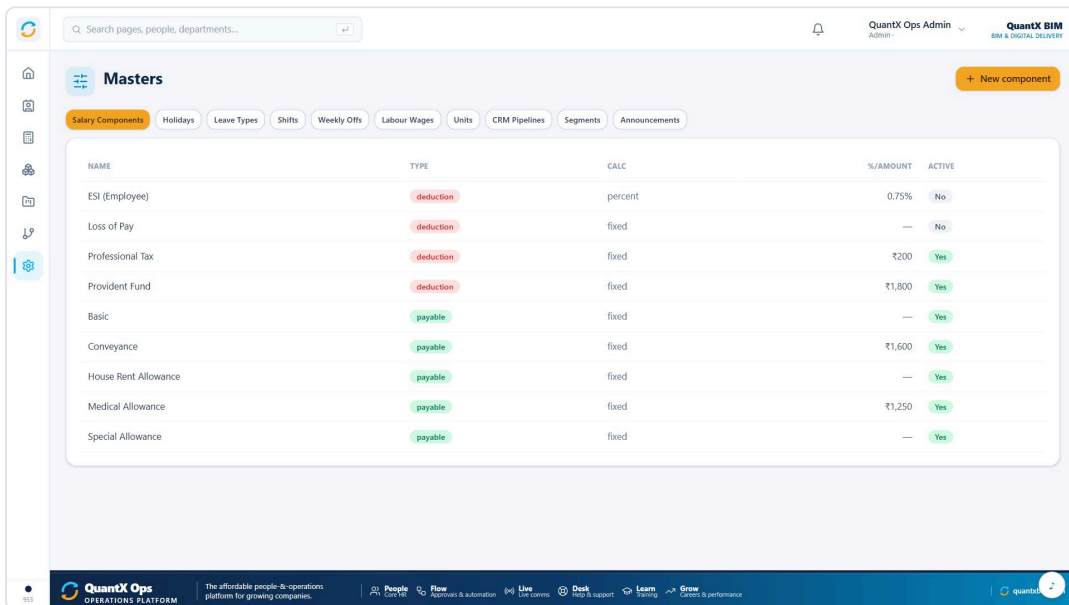
The staff file can carry salaries. Fill in `annual_ctc` **last**, immediately before uploading, and share that file with nobody afterwards.

## Uploading

Under step 2, choose each file you filled in (**Choose file name**), then click **Check these files**. Nothing is written yet: step 3 shows **What would happen**. If a file has problems, the page lists **every one** of them with its file and line number, so one pass through the files is enough, and it reads **Nothing will be imported**. Correct the files and check again. When the check is clean, click **Yes, import this**. Re-running a corrected file is safe, because rows match on their codes. If new logins are issued, they are shown once on the page: record them securely.

## Masters

**Masters** holds the lists the rest of the system draws on. It has ten tabs.



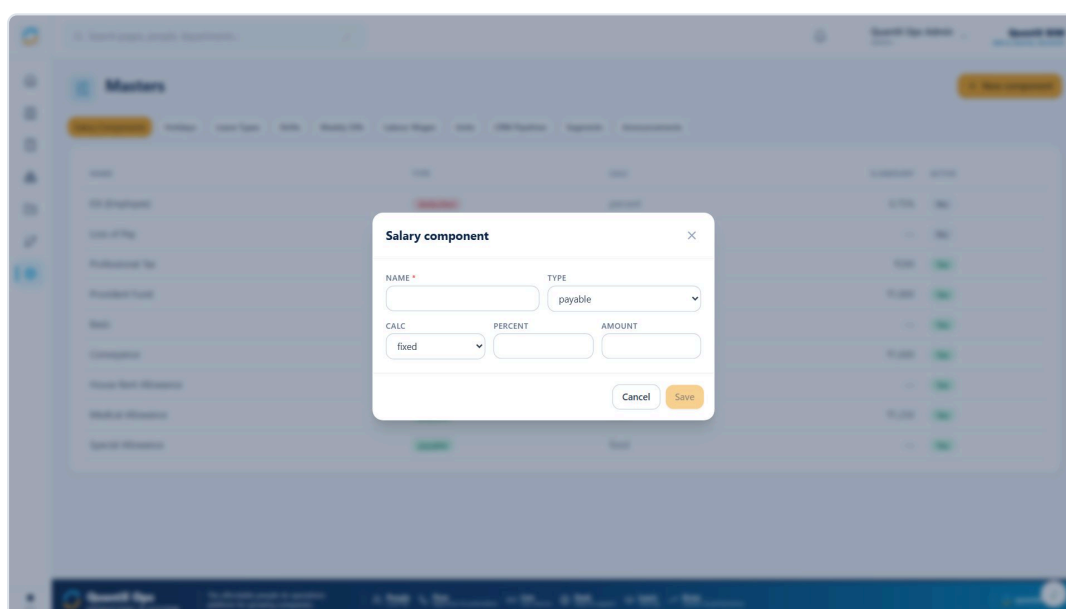
| NAME                 | TYPE      | CALC    | %/AMOUNT | ACTIVE |
|----------------------|-----------|---------|----------|--------|
| ESI (Employee)       | deduction | percent | 0.75%    | No     |
| Loss of Pay          | deduction | fixed   | —        | No     |
| Professional Tax     | deduction | fixed   | ₹200     | Yes    |
| Provident Fund       | deduction | fixed   | ₹1,800   | Yes    |
| Basic                | payable   | fixed   | —        | Yes    |
| Conveyance           | payable   | fixed   | ₹1,600   | Yes    |
| House Rent Allowance | payable   | fixed   | —        | Yes    |
| Medical Allowance    | payable   | fixed   | ₹1,250   | Yes    |
| Special Allowance    | payable   | fixed   | —        | Yes    |

**Masters, Salary Components:** each has a type (payable or deduction), a calculation (fixed or percent), an amount, and whether it is active.

| Tab                      | What it is                                                                                        |
|--------------------------|---------------------------------------------------------------------------------------------------|
| <b>Salary Components</b> | The pay elements: <i>Basic, House Rent Allowance, Provident Fund, Professional Tax</i> and so on. |

|                      |                                                                    |
|----------------------|--------------------------------------------------------------------|
| <b>Holidays</b>      | The company's holiday list for the year.                           |
| <b>Leave Types</b>   | Casual, Sick, Earned and your own.                                 |
| <b>Shifts</b>        | Shift timings.                                                     |
| <b>Weekly Offs</b>   | The weekly off days per site.                                      |
| <b>Labour Wages</b>  | Day rates by labour category, used in estimating and project cost. |
| <b>Units</b>         | Units of measure.                                                  |
| <b>CRM Pipelines</b> | The stages a deal moves through.                                   |
| <b>Segments</b>      | Customer segments for prospecting and campaigns.                   |
| <b>Announcements</b> | Notices shown to staff.                                            |

Click **New component** (or the equivalent button on other tabs) to add one.

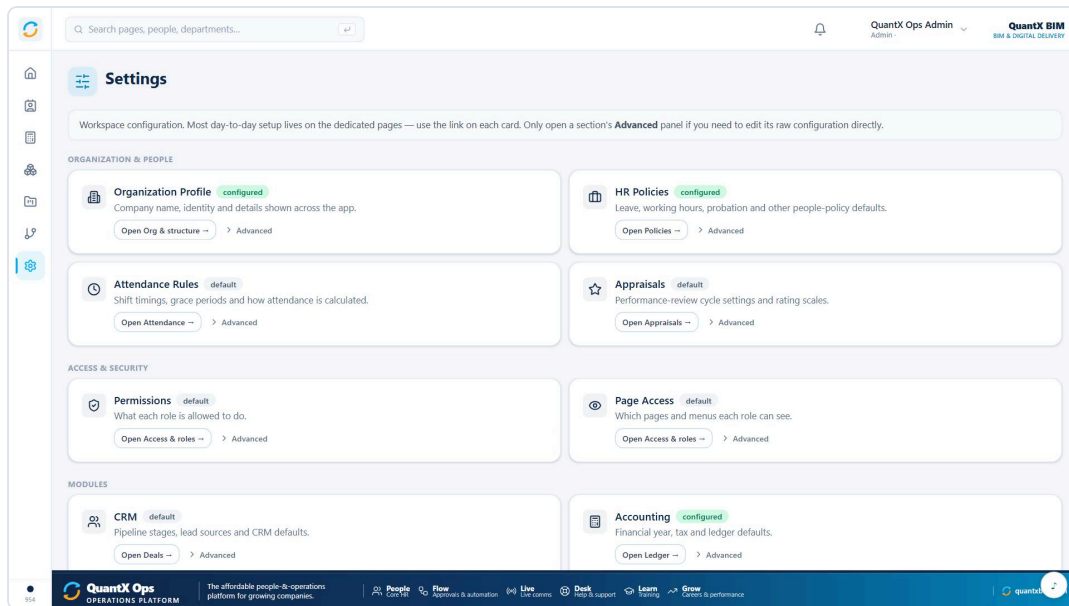


A salary component: **Name**, **Type** (payable or deduction), **Calc** (fixed or percent), and the **Percent** or **Amount**.

Mark a master **inactive** instead of deleting it when it is no longer used: history that refers to it stays readable.

## Settings

**Settings** is the workspace configuration. Most day-to-day setup lives on dedicated pages, so each card links there.



*Settings. Each card says whether it is **configured** or still on its **default**, and offers a link to the page that does the real work.*

| Card                                     | Leads to                                                       |
|------------------------------------------|----------------------------------------------------------------|
| <b>Organization Profile</b>              | Company name and identity shown across the app.                |
| <b>HR Policies</b>                       | Leave, working hours, probation and other defaults.            |
| <b>Attendance Rules</b>                  | Shift timings, grace periods and how attendance is calculated. |
| <b>Appraisals</b>                        | Review cycles and rating scales.                               |
| <b>Permissions, Page Access</b>          | The access screens (chapter 8).                                |
| <b>CRM, Accounting</b> and other modules | Pipeline stages, financial year, tax and ledger defaults.      |

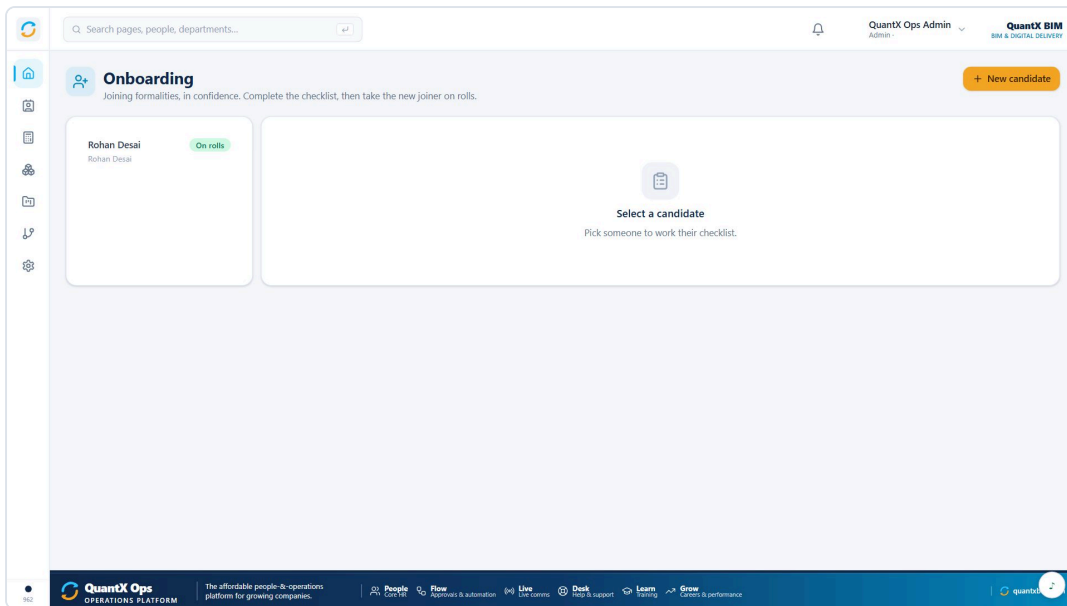
Each card has an **Advanced** panel with the raw configuration. Open it only when you must edit the stored values directly.

## 5. People administration

This chapter covers a person's whole life with the company, from the first checklist to the last clearance, and the requirements each seat carries.

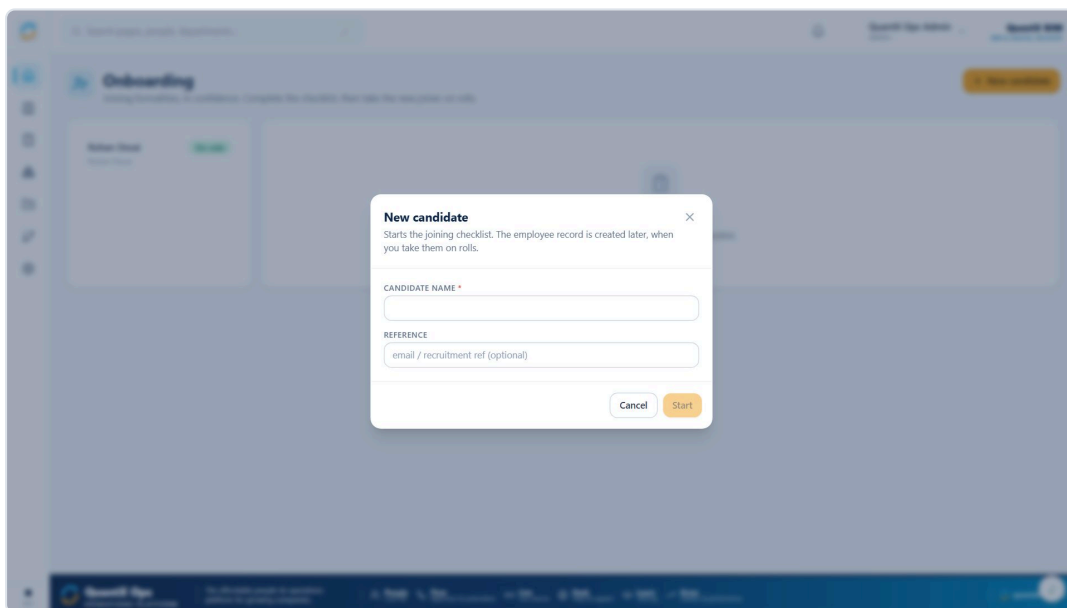
### Onboarding

**Onboarding** handles *joining formalities, in confidence*. You complete a checklist for the new joiner and then take them on rolls. **The employee record is created only at the end**, when you take them on rolls.



*Onboarding. Candidates are listed on the left; select one to work their checklist. This candidate is already **On rolls**.*

Click **New candidate**.

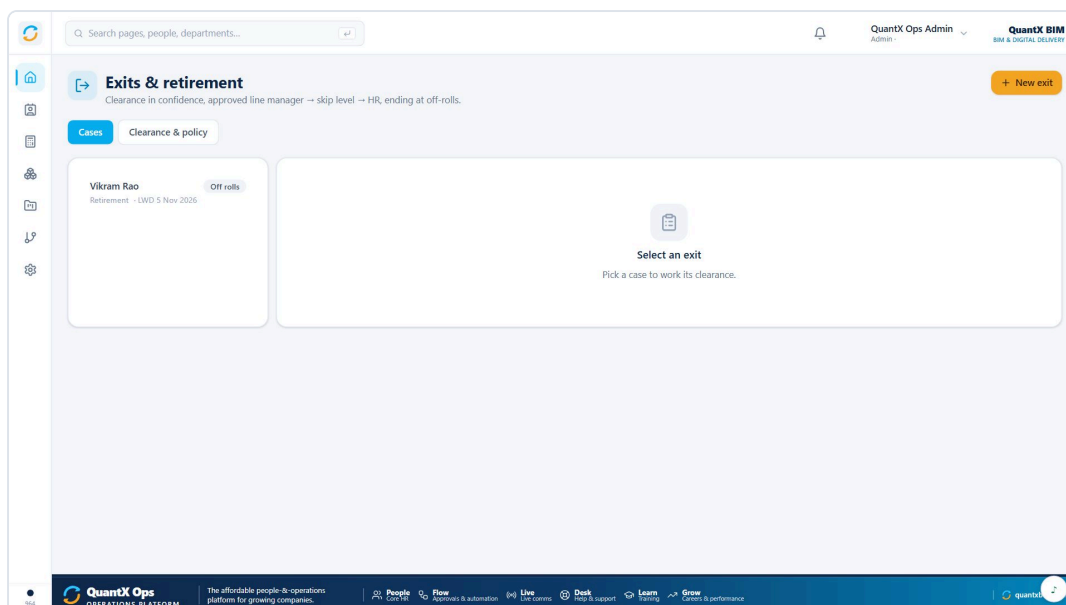


*Start with a name and, optionally, an email or recruitment reference.*

Select the candidate, work through the checklist items, and attach documents where asked, such as a background verification report. They are stored under **Documents** (chapter 10). The **Take on rolls** button stays unavailable until every *mandatory* step is done; it tells you how many are left. Then it opens a form where you enter the person's details and **choose their seat**. Taking them on rolls creates the employee, places them in the seat, records their family details and completes the onboarding.

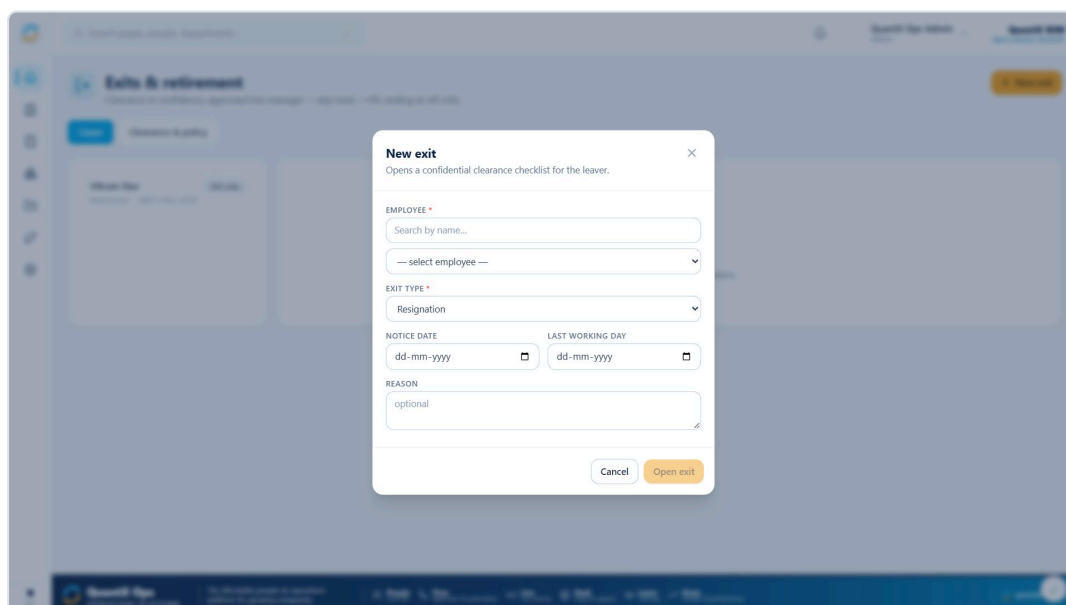
## Exits and retirement

**Exits & retirement** runs *clearance in confidence*: approved by the line manager, then the skip-level manager, then HR, ending at **off rolls**.



*Exits. Each case shows the person, the type of exit, the last working day and the status.*

Click **New exit**.



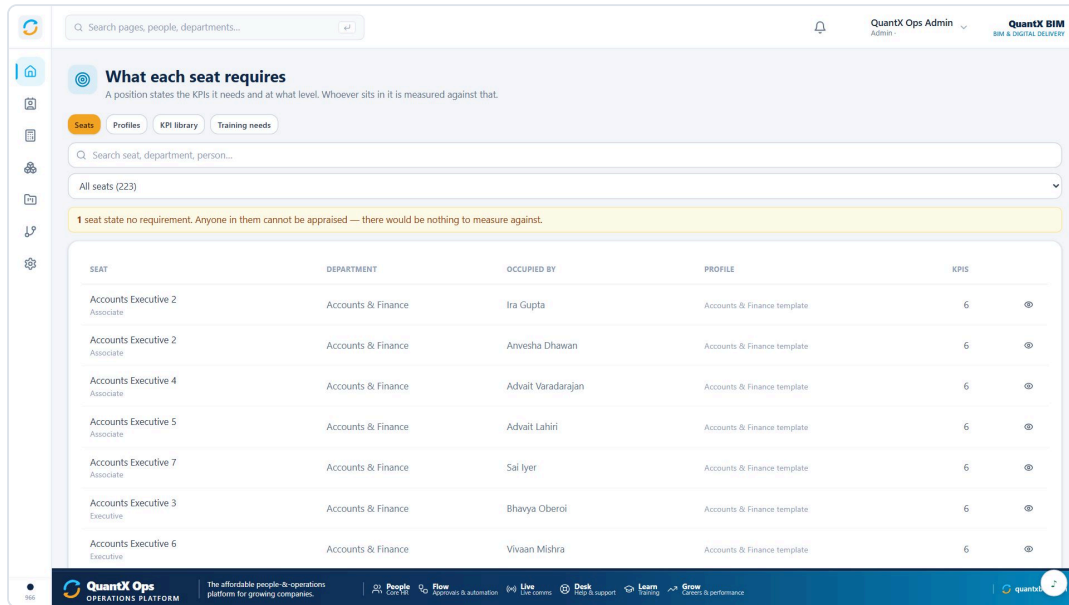
| Field                                | What to enter                      |
|--------------------------------------|------------------------------------|
| <b>Employee</b> (required)           | Search by name, then choose.       |
| <b>Exit type</b> (required)          | Resignation, retirement and so on. |
| <b>Notice date, Last working day</b> | The dates agreed.                  |
| <b>Reason</b>                        | Optional.                          |

Click **Open exit**. Select the case to work its clearance checklist. The second tab, **Clearance & policy**, holds the clearance items and the notice rules your company applies. The case then goes for approval: the line manager, the skip-level manager and finally HR, who act in **My Tasks. HR's final approval takes**

**the person off rolls:** their seat is vacated and their login is disabled. Their family details and documents are kept.

## What each seat requires

A seat states the **KPIs it needs and at what level**. Whoever sits in it is measured against that, and the gap between the requirement and the person is the training need.



*Seat requirements. Each seat shows its department, who occupies it, its profile and how many KPIs it carries. The banner warns of seats that state no requirement.*

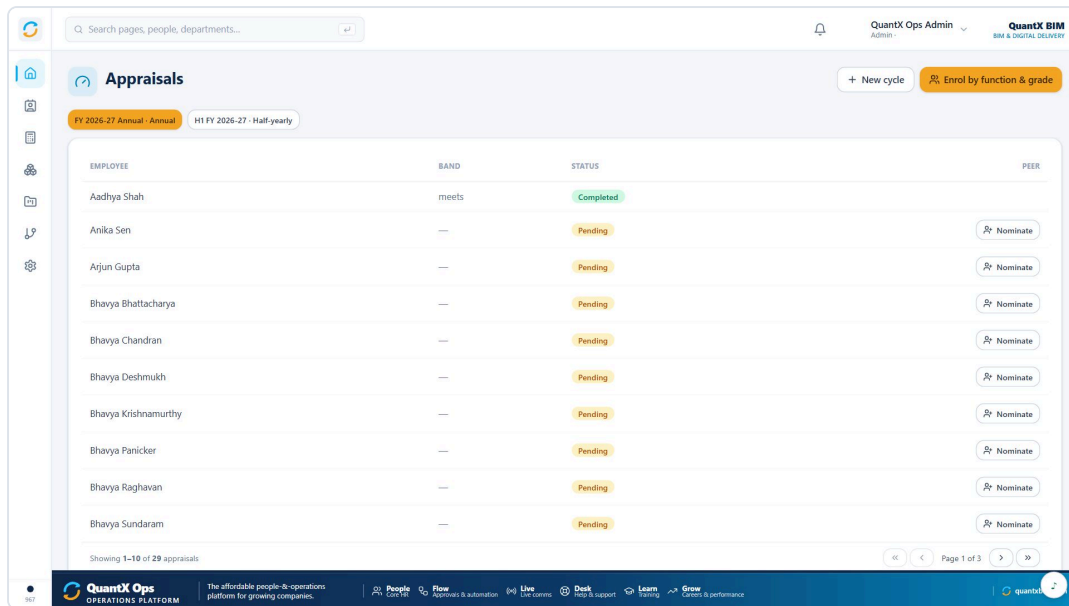
The four tabs:

| Tab                   | Use it to                                                                                                   |
|-----------------------|-------------------------------------------------------------------------------------------------------------|
| <b>Seats</b>          | See every seat and its KPI count. Click the eye to open one.                                                |
| <b>Profiles</b>       | Reusable sets of requirements ("templates"), such as <i>Accounts &amp; Finance</i> , applied to many seats. |
| <b>KPI library</b>    | The measures themselves.                                                                                    |
| <b>Training needs</b> | Where the people in seats fall short of what the seat requires.                                             |

**Anyone in a seat that states no requirement cannot be appraised**, because there would be nothing to measure against. The banner counts them, so clear it before an appraisal cycle starts.

## Appraisals

**Appraisals** runs the review cycles. Each cycle, for example *FY 2026-27 Annual* or *H1 FY 2026-27 Half-yearly*, is a tab listing every enrolled employee with a **Band** and a **Status** (*Pending, Completed*).



Appraisals. **Nominate** names the peers who will give feedback.

- **New cycle** creates a cycle with its dates and type.
- **Enrol by function & grade** adds whole groups at once instead of person by person.
- **Nominate** chooses the peer reviewers for one person.

Each appraisal then follows the **Appraisal with peer review** workflow: the person, their line manager and the peers contribute in turn, and the final sign-off is recorded (chapter 7). A key task is agreed in one cycle and assessed in the **next**.

## Greetings

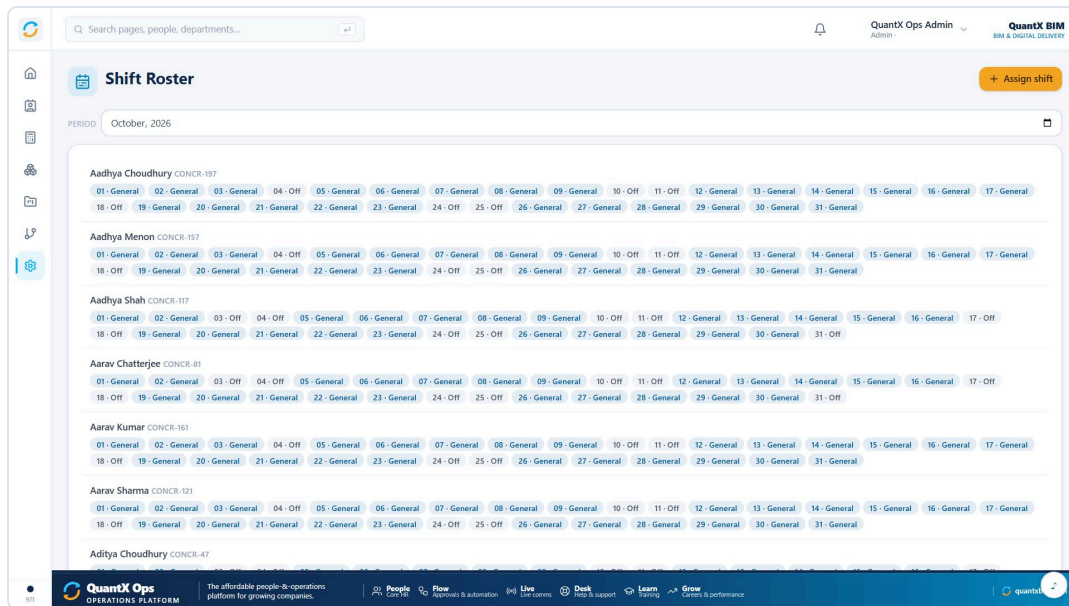
Greetings wishes people on birthdays and work anniversaries. If you hold the right permission, the Greetings screen shows a tab **Templates & calendar**: HR owns **one branded template per occasion**, with a **lead days** setting that says how early the greeting is prepared. An occasion with no template shows "No template yet", so set one for each occasion you use. Greetings sent by email appear in the **Email** outbox (chapter 10).

## 6. Time, leave and pay

Attendance, leave and pay form one chain: the roster says what is expected, attendance records what happened, leave explains the gaps, and payroll turns the result into money. Set them up in that order.

### Shift Roster

**Shift Roster** shows who works which shift on which day for a chosen month.

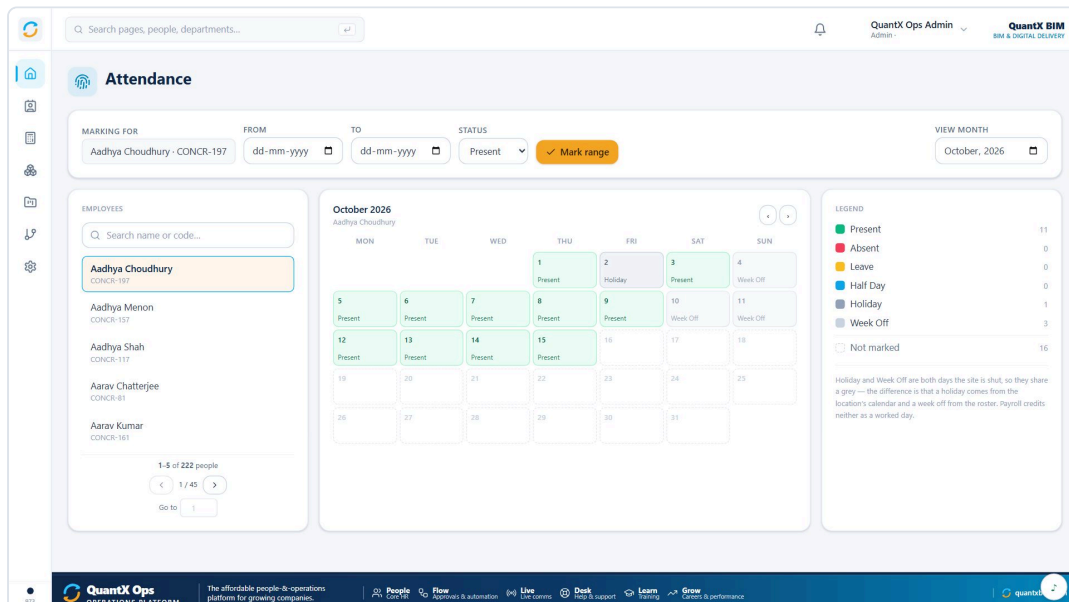


The roster. One row per person, one chip per day: **General** for a working day, **Off** for a weekly off.

Use **Assign shift** to give a person, or a group, a shift for a date range. Shift timings come from **Masters, Shifts**, and weekly offs from **Masters, Weekly Offs**. Holidays come from the location's calendar, not from the roster.

## Attendance

**Attendance** is where corrections are made. Choose a person from the list, set **From**, **To** and **Status**, and click **Mark range**. The month view colours each day.

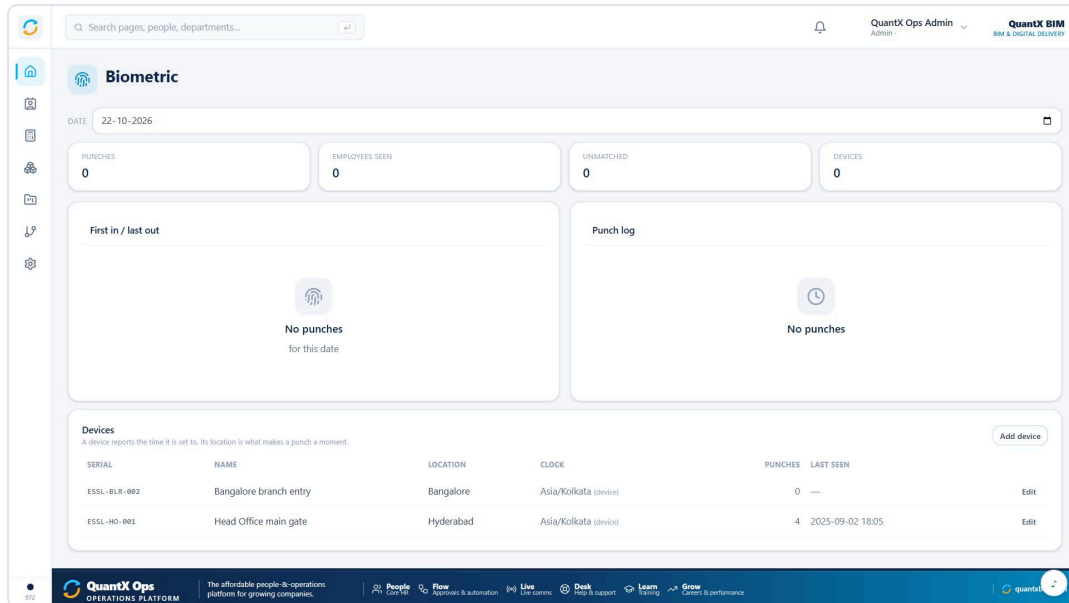


Attendance for one person. The legend counts each status for the month. A holiday comes from the location's calendar and a week off from the roster; **payroll credits neither as a worked day**.

Statuses are **Present**, **Absent**, **Leave**, **Half Day**, **Holiday** and **Week Off**. A day nobody has marked reads **Not marked**: staff cannot mark their own attendance, so unmarked days are yours or the manager's to fill. Fix them **before** you run payroll.

## Biometric devices

**Biometric** shows the punches received from attendance devices and the devices themselves.



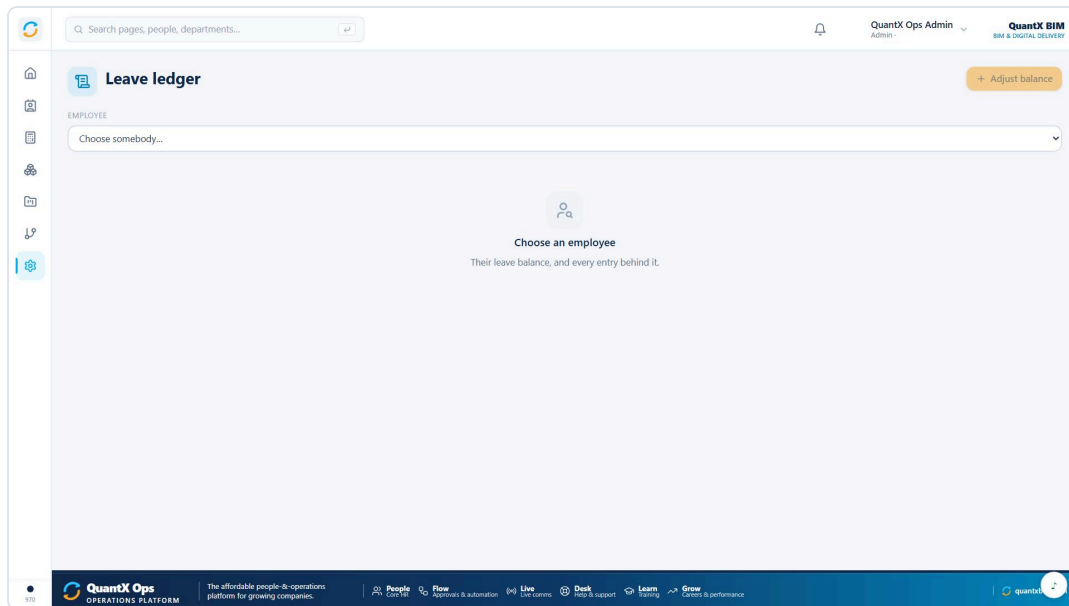
*Biometric.* The tiles count **Punches**, **Employees seen**, **Unmatched punches** and **Devices** for the chosen date. Below them, the device list.

Each device has a **serial**, a **name**, a **location** and a **clock**. A device reports the time it is set to, and **its location is what makes a punch a moment**: it is read in the location's time zone. Click **Add device** to register one, or **Edit** to move it to another site. An **Unmatched** punch belongs to a card or finger that no employee is linked to: link it, or the punch is lost to attendance.

The *first in / last out* panel summarises each person's day from their punches.

## Leave ledger

**Leave ledger** shows a person's leave balance and every entry behind it.



The leave ledger. Choose an employee to see their balance and each credit and debit.

**Adjust balance** makes a correction, with a reason that stays in the ledger. The leave year runs **1 April to 31 March**. Whether unused days **carry forward** is a policy per leave type, and the year roll recomputes balances accordingly. Opening balances from an older system arrive through Import Data (chapter 4).

## Salary Inputs

**Salary Inputs** holds each person's pay breakup for a period: one row per person and component.

| EMPLOYEE                   | COMPONENT            | TYPE    | AMOUNT     |
|----------------------------|----------------------|---------|------------|
| Aadiya Choudhury CONCR-197 | Basic                | payable | ₹15,000.00 |
| Aadiya Choudhury CONCR-197 | House Rent Allowance | payable | ₹6,000.00  |
| Aadiya Choudhury CONCR-197 | Special Allowance    | payable | ₹5,000.00  |
| Aadiya Menon CONCR-157     | Basic                | payable | ₹22,000.00 |
| Aadiya Menon CONCR-157     | House Rent Allowance | payable | ₹8,800.00  |
| Aadiya Menon CONCR-157     | Special Allowance    | payable | ₹5,000.00  |
| Aadiya Shah CONCR-117      | Basic                | payable | ₹30,000.00 |
| Aadiya Shah CONCR-117      | House Rent Allowance | payable | ₹12,000.00 |
| Aadiya Shah CONCR-117      | Special Allowance    | payable | ₹5,000.00  |
| Aarav Chatterjee CONCR-81  | Basic                | payable | ₹15,000.00 |

*Salary Inputs for October 2026. Each row is an employee, a component, its type (payable or deduction) and the amount.*

Choose the **Period**, then **Set input** to add or change a row. **Delete** removes one. Components come from **Masters**. Only people with the right permission may see this page: it carries salaries.

## Payroll

**Payroll** computes and posts a month.

Search pages, people, departments...

QuantX Ops Admin

QuantX BIM

**Payroll**

PERIOD (YYYY-MM) 2026-10 WORKING DAYS 26

Process Post to ledger

Register - 2026-10

Not processed  
Process the period to compute payslips.

Project time vs attendance - 2026-10 Informational — expected hours = attended days × 8h/day; does not affect payroll

| NAME             | ATTENDED DAYS | EXPECTED HRS | PROJECT HRS | VARIANCE |
|------------------|---------------|--------------|-------------|----------|
| Aadiya Choudhury | 11            | 88           | 0           | -88h     |
| Aadiya Menon     | 11            | 88           | 0           | -88h     |
| Aadiya Shah      | 10            | 80           | 0           | -80h     |

QuantX Ops OPERATIONS PLATFORM The affordable people- & operations platform for growing companies.

People Can fill Flow Approvals & automation Live Live center Desk Help & support Learn training Grow Careers & performance

*Payroll before processing: "Not processed. Process the period to compute payslips." Below, project time against attendance for the month.*

1. Enter the **Period** ( YYYY-MM ) and the **Working days**.
2. Click **Process**. Payslips are computed from attendance, leave and the salary inputs, and the **Register** fills.
3. Read the register. If a figure is wrong, correct the cause (attendance, an input) and process again.
4. Click **Post to ledger** to record the payroll in the books.

The panel **Project time vs attendance** compares hours recorded on projects with days attended (expected hours are attended days × 8). It is informational and **does not affect payroll**.

Before **Process**: every day marked, every leave decided, every joiner and leaver dated, every salary input set. After **Post to ledger**, treat the month as closed.

## 7. Approvals: workflows, routing and request types

Anything that needs somebody's agreement in QuantX Ops is a **request that follows a route**. You design the routes; your staff see them as their **Approvals** inbox. Three screens do the work: **Workflow** (the routes themselves), **Workflow Role Positions** (who answers each role; chapter 3) and **Request Types** (the forms people can raise).

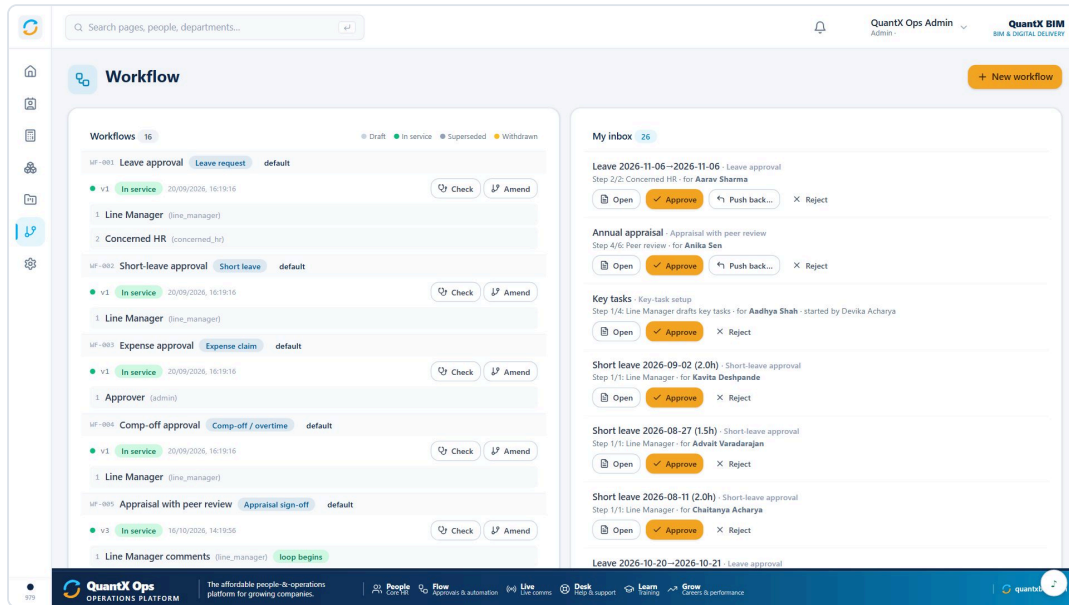
### How a request finds its approver

A route is a list of **steps**. Each step names a **workflow role**, such as *Line Manager* or *Concerned HR*, never a person. When the request is raised, each role is resolved at that moment from the organisation chart, so it reaches whoever holds the seat **now**. Chapter 3 explains seats and roles. If a role resolves to

nobody, the route stalls at that step; that is why **Assign Employees** warns of "transactions waiting for an approver who does not exist".

## The Workflow screen

**Workflow** (Workflow menu) lists every route on the left and **My inbox** (your own pending approvals) on the right.



*Workflow. Each workflow shows its number (WF-001), its process, its version and state, and its steps in order. Your own inbox is on the right.*

Each workflow carries a **state** for every version:

| State             | Meaning                                           |
|-------------------|---------------------------------------------------|
| <b>Draft</b>      | Being changed; not yet used.                      |
| <b>In service</b> | The version new requests follow.                  |
| <b>Superseded</b> | Replaced by a newer version; kept in the history. |
| <b>Withdrawn</b>  | Taken out of service.                             |

Workflows marked **default** are built in: they cannot be deleted or withdrawn. To stop requiring approval for one, submit a version with no steps. That is explicit, versioned and attributable.

## Changing a route safely

1. Click **Amend** on the in-service version. A **draft** copy is made. Requests already in progress are not touched.
2. **Add step** (or the pencil to change one; the bin to remove one). For each step set its name, the **workflow role** that answers it and any conditions.
3. Click **Check**: a **dry run**. Choose a sample requester and sample values and see which steps would fire and **who each would land on**. Nothing is saved and no request is created. This finds a role that resolves to nobody *before* a real request meets it.

4. Click **Submit**. Requests already in progress finish on the version they started under; yours applies **from the next request**.

An earlier version can be **Restored** into a draft; the old version itself is not altered.

### What a step can do

| Feature                        | What it does                                                                                                                                                                                                                                              |
|--------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Conditions</b>              | A step fires only <i>if</i> a field meets a test, for example an amount above a limit. Several conditions combine with <i>and</i> .                                                                                                                       |
| <b>Parallel group</b>          | Several approvers act at once; the group completes when <b>any</b> one or <b>all</b> have acted.                                                                                                                                                          |
| <b>Loop begins / loop ends</b> | A review that goes back and forth until both sides are content, such as an appraisal between employee and line manager. At the loop's end the approver sees <b>Push out</b> instead of <b>Approve</b> , and may <b>Send for review</b> to go round again. |
| <b>Needs costing</b>           | The step requires a costing to be completed before it can be approved.                                                                                                                                                                                    |

### A route with no steps approves itself

If you submit a version with **no steps**, every request of that type is approved the moment it is raised. The page asks you to confirm, and the process then shows a warning, *Approved automatically*. Use this only on purpose.

### Pending routing

If a request is raised for a process that has **no workflow in service**, it is not approved. It waits in **Pending routing**, with who raised it and when. For each one, click **Route...** and choose a workflow and a step to send it to. A banner at the top lists every process with no workflow in service. The aim is that this list is always empty.

**Workflow activity** at the bottom lists every request that has run through a workflow, filterable by *active*, *approved* or *rejected*, with **Open** to read one and its history.

### Request types

**Request Types** lists every process a workflow can run: the **built-in** ones (leave, overtime, expense claim, exit clearance, key-task setup and so on) and any your organisation designs.

| PROCESS                          | KIND     | FORM          | WORKFLOW IN SERVICE            | RAISED     |
|----------------------------------|----------|---------------|--------------------------------|------------|
| Key-task setup<br>key_task_setup | built-in | module screen | Key-task setup v1 4 steps      | 0 Workflow |
| Exit clearance<br>exit_clearance | built-in | module screen | Exit clearance v1 3 steps      | 0 Workflow |
| <b>Other</b>                     |          |               |                                |            |
| Leave request<br>leave           | built-in | module screen | Leave approval v1 2 steps      | 0 Workflow |
| Short leave<br>short_leave       | built-in | module screen | Short-leave approval v1 1 step | 0 Workflow |
| Comp-off / overtime<br>compoff   | built-in | module screen | Comp-off approval v1 1 step    | 0 Workflow |
| Overtime claim<br>overtime       | built-in | module screen | Overtime approval v1 1 step    | 0 Workflow |
| Expense claim<br>expense         | built-in | module screen | Expense approval v1 1 step     | 0 Workflow |

Request types. Each shows its kind, its form, the workflow currently in service with its number of steps, and how many have been raised.

Click **Workflow** on a row to open its route. To add your own, click **New request type**.

**New request type**  
A form, a workflow to carry it, and where the approved result is kept

NAME \*  APPEARS UNDER

WHAT IT IS FOR

Shown to the person choosing which request to raise

FORM \*  NUMBER PREFIX

Only published forms — a draft is still being changed

WHO MAY RAISE IT  HOW OFTEN

Blank means as often as they like

WHO MAY SEE IT AFTERWARDS  WHOSE NAME IS SHOWN

☒ Keep the approved request as a searchable record

A workflow is created for this type as a **draft with no steps**. Add the approval steps under Workflow and submit it — until then, requests wait in the routing queue rather than being approved unchecked.

Cancel Save

| Field                       | What to enter                                                                                                                                      |
|-----------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Name, What it is for</b> | What staff see when choosing a request to raise.                                                                                                   |
| <b>Appears under</b>        | Which menu it is raised from, normally <i>Requests</i> .                                                                                           |
| <b>Form</b>                 | The web form it uses. Only <b>published</b> forms can be chosen. Use <b>Build Web Forms</b> to design one.                                         |
| <b>Number prefix</b>        | Letters for the document numbers, for example <code>SUG</code> . Must be <b>unique</b> : two types sharing one would number documents identically. |

|                                                         |                                                   |
|---------------------------------------------------------|---------------------------------------------------|
| <b>Who may raise it, How often</b>                      | Anyone or a role; a limit, or none.               |
| <b>Who may see it afterwards</b>                        | For example <i>them and whoever approved it</i> . |
| <b>Whose name is shown</b>                              | The raiser's name, or anonymous where that suits. |
| <b>Keep the approved request as a searchable record</b> | Keeps the approved answers as the agreed record.  |

Saving creates the type and a **draft workflow with no steps**. Until you add the approval steps under **Workflow** and submit it, requests raised for the new type **wait in the routing queue** rather than being approved unchecked.

## 8. Access and security

### The principle: closed by default

A person sees and does only what a role grants them, and that applies to **reading** as well as changing. If a menu group or page is missing for someone, or a page says **You do not have access to this**, the cause is nearly always a role that does not grant it. Granting access is the fix, never an exception.

### Access control

Access control has four tabs.

| ROLE                                | CODE         | PERMISSIONS | MEMBERS |        |
|-------------------------------------|--------------|-------------|---------|--------|
| Portal Admin <small>system</small>  | portal_admin | all         | 1       | Manage |
| HR                                  | hr           | 6           | 14      | Manage |
| Sales / CRM                         | crm          | 4           | 18      | Manage |
| Purchase / Stores                   | store        | 2           | 5       | Manage |
| Accounts                            | accounts     | 10          | 10      | Manage |
| Project Planning                    | planning     | 5           | 10      | Manage |
| Execution                           | execution    | 4           | 148     | Manage |
| Management <small>read-only</small> | management   | 12          | 5       | Manage |
| Reports <small>read-only</small>    | reports      | 1           | 17      | Manage |
| System Admin                        | sysadmin     | 9           | 10      | Manage |

Showing 1-10 of 12 roles

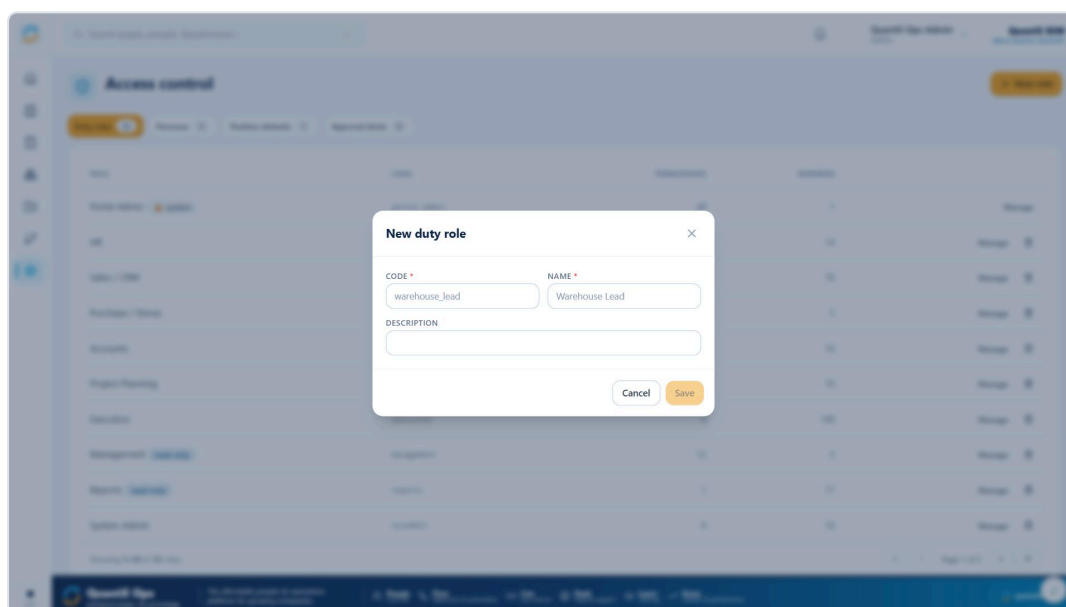
*Duty roles. Each shows its code, how many permissions it grants and how many people hold it. Portal Admin is the system role and holds **all**.*

| Tab               | What it is                                                                                                                                                                                      |
|-------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Duty roles</b> | Bundles of permissions, for example <i>HR, Accounts, Purchase / Stores, Project Planning, Execution, Management</i> and <i>Reports</i> . Roles marked <b>read-only</b> can look but not change. |

|                          |                                                                                                                                                                                                                                                                                                                         |
|--------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Personas</b>          | Policies about <b>what data</b> is visible: for each kind of record, whether it can be read or written and whether personal details are masked. A persona is assigned to the employees it applies to ( <b>New persona</b> , then add policies and assign people).                                                       |
| <b>Position defaults</b> | Duty roles that <b>attach automatically to a seat</b> . Whoever occupies the seat gets those roles without anyone ticking boxes. After changing the defaults, run the sync action on the tab to grant them to the people already in those seats.                                                                        |
| <b>Approval limits</b>   | One ceiling per <b>grade</b> on the value a person of that grade may approve: purchase orders, indents released to purchase, expense claims, proposals and projects. <b>Blank means no limit</b> . Anything above the approver's ceiling is blocked and must go to a higher grade. Administrators are always unlimited. |

## Creating and changing a duty role

Click **New role**.



A duty role is a code, a name and a description. The permissions are chosen after it is created, with **Manage**.

Click **Manage** on a role to choose the permissions it grants and to see and change its members. The **Members** column tells you how many people a change will affect, so check it before you change a large role such as *Execution*.

Good practice:

- Grant **the least** a person needs to do the job.
- Prefer roles and **position defaults** to ticking things person by person.
- A person may hold more than one role; their access is the sum.
- Review **Members** of powerful roles (Portal Admin, System Admin, Accounts) from time to time.

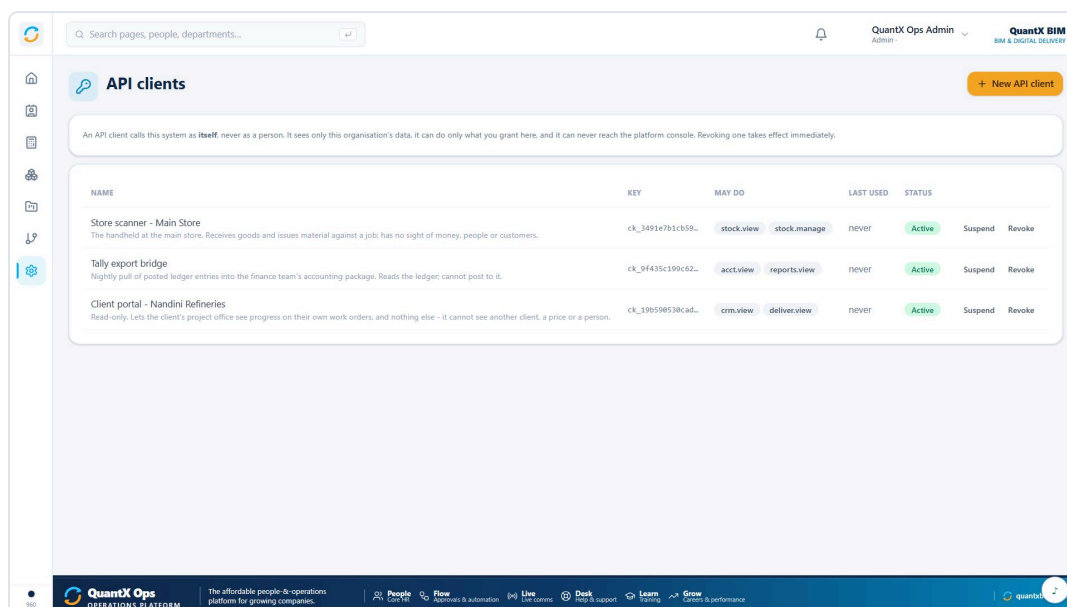
## Separation of duties

Some pairs of permissions should not sit with one person, for example raising and approving the same payment. **Approval limits** stop a junior approver releasing a large amount. Beyond that, keep the two

sides in different hands when you design routes (chapter 7), and do not defeat the separation by giving one person every role.

## API clients

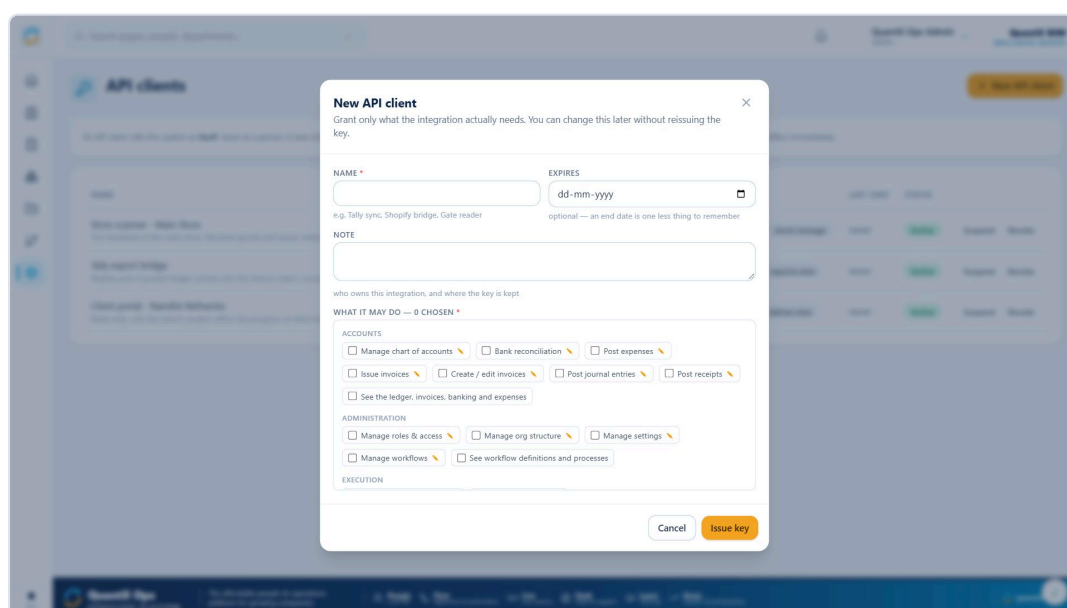
An **API client** lets another system, such as a store scanner, an accounting package or a customer portal, call QuantX Ops **as itself, never as a person**.



*API clients. Each shows its key prefix, what it **may do**, when it was **last used** and its status. **Suspend** pauses it; **Revoke** ends it. Revoking takes effect immediately.*

An API client sees **only this organisation's data**, can do **only what you grant**, and can **never** reach the platform console.

Click **New API client**.



| Field | What to enter |
|-------|---------------|
|-------|---------------|

|                                      |                                                                                                                                                                                 |
|--------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Name</b> (required)               | What it is, for example <i>Tally sync</i> .                                                                                                                                     |
| <b>Expires</b>                       | Optional. An end date is one less thing to remember.                                                                                                                            |
| <b>Note</b>                          | Who owns the integration and where the key is kept.                                                                                                                             |
| <b>What it may do</b> (at least one) | Tick permissions in groups (Accounts, Administration, Execution and so on). Grant only what the integration needs. You can change this later <b>without reissuing the key</b> . |

Click **Issue key**. **The full key is shown once**. Copy it to wherever the integration will keep it, because it cannot be shown again; if it is lost, revoke the client and issue another. Never paste a key into email or chat.

## Passwords and sign-in

- Every person has a **Login ID** (company code, dash, number). Passwords are stored in a form nobody can read back. Where a person must choose their own, they are asked to, with at least 8 characters.
- Hand a first or reset password to the person directly, never by a shared channel.
- Repeated failed sign-ins in a minute make the system ask the person to wait. This protects the account; it is not a fault.
- When a person leaves, **Exits** (chapter 5) disables their login.
- Do not share logins. Everything done in QuantX Ops is recorded against the person who did it.

## What is recorded

QuantX Ops keeps who did what and when. Approvals keep each action, its time and any comment, and ledger entries, stock movements and leave-ledger entries are kept as entries, not overwritten. Use this when a decision has to be explained afterwards; it is also why corrections are made as **new, visible entries** (a credit note, a stock adjustment, a leave-ledger adjustment) and not by editing history.

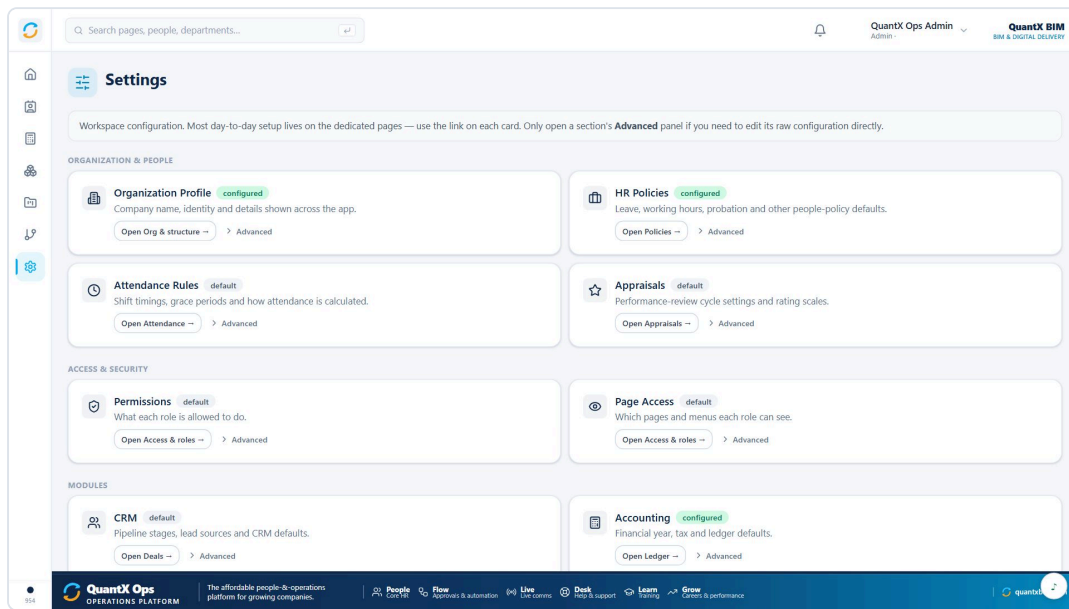
# 9. Money setup

Almost everything that touches money (stock receipts and issues, payroll, project billing, invoices, receipts and payments) posts to the **ledger** by itself, with the right accounts. Your job is to set the books up once, keep them honest, and check them at each month end. The Operator Guide (chapter 9) shows what staff do day to day; this chapter is what stands behind it.

## Before anyone posts

| Setting                       | Where                      | Why it matters                                                                                                                                                          |
|-------------------------------|----------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Sites and GSTIN</b>        | Organization, Locations    | Each site's state decides the place of supply, and therefore IGST or CGST + SGST, on every invoice raised from it. A site with no GSTIN shows as <i>to do</i> in Setup. |
| <b>Whether you charge tax</b> | Setup, <i>Your company</i> | Required before invoicing.                                                                                                                                              |

|                                                |                                          |                                                                                                                                            |
|------------------------------------------------|------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Financial year, tax and ledger defaults</b> | Settings, <i>Accounting</i> card         | The defaults the ledger uses. Open the card's link, <b>Open Ledger</b> , to reach the books.                                               |
| <b>Opening balances</b>                        | Import Data, <i>Your books and stock</i> | The closing trial balance from the old system, so the books start where you stopped. Needed only when you begin using the accounts module. |
| <b>Extra ledger accounts</b>                   | Import Data                              | Only the accounts you need <b>on top of</b> the ones already provided.                                                                     |



*Settings. The Accounting card reads **configured** once the financial year, tax and ledger defaults are set.*

## The ledger

**General Ledger** (Accounting menu) shows the **Chart of Accounts**: each account's code, name, type (asset, liability, income or expense) and subtype. Beside it, the **Trial Balance** carries a green **Balanced** mark when total debits equal total credits.

The screenshot shows the 'General Ledger' page in the QuantX Ops Admin interface. It features a sidebar with navigation icons and a main content area with two tables: 'Chart of Accounts' and 'Trial Balance'. The 'Trial Balance' table has a green 'Balanced' status.

| CODE | NAME                        | TYPE      | SUBTYPE |
|------|-----------------------------|-----------|---------|
| 1001 | Cash in Hand                | Asset     | Cash    |
| 1002 | Bank                        | Asset     | Bank    |
| 1200 | Accounts Receivable         | Asset     | AR      |
| 1301 | Input CGST (recoverable)    | Asset     | Tax     |
| 1302 | Input SGST (recoverable)    | Asset     | Tax     |
| 1303 | Input IGST (recoverable)    | Asset     | Tax     |
| 1500 | Inventory                   | Asset     | —       |
| 1510 | Work in Progress            | Asset     | —       |
| 2010 | Salary Payable              | Liability | —       |
| 2015 | Employee Deductions Payable | Liability | —       |

| CODE | NAME                              | DEBIT           | CREDIT          |
|------|-----------------------------------|-----------------|-----------------|
| 1002 | Bank                              | ₹43,89,600.00   | ₹36,462.00      |
| 1200 | Accounts Receivable               | ₹43,89,600.00   | ₹43,89,600.00   |
| 1301 | Input CGST (recoverable)          | ₹1,20,834.00    |                 |
| 1500 | Inventory                         | ₹7,69,640.00    | ₹2,19,140.00    |
| 1510 | Work in Progress                  | ₹74,800.00      |                 |
| 2010 | Salary Payable                    |                 | ₹1,10,59,791.67 |
| 2015 | Employee Deductions Payable       |                 | ₹4,10,000.00    |
| 2100 | Accounts Payable                  | ₹36,462.00      | ₹16,20,534.00   |
| 2101 | Output CGST                       |                 | ₹44,730.00      |
| 2102 | Output SGST                       |                 | ₹44,730.00      |
| 2103 | Output IGST                       |                 | ₹5,80,140.00    |
| 2400 | Goods Received / Invoice Received | ₹7,08,200.00    | ₹6,89,800.00    |
| 4000 | Sales                             |                 | ₹37,20,000.00   |
| 5001 | Salaries & Wages                  | ₹1,14,69,791.67 |                 |

*The chart of accounts and the trial balance.*

Two rules protect the books:

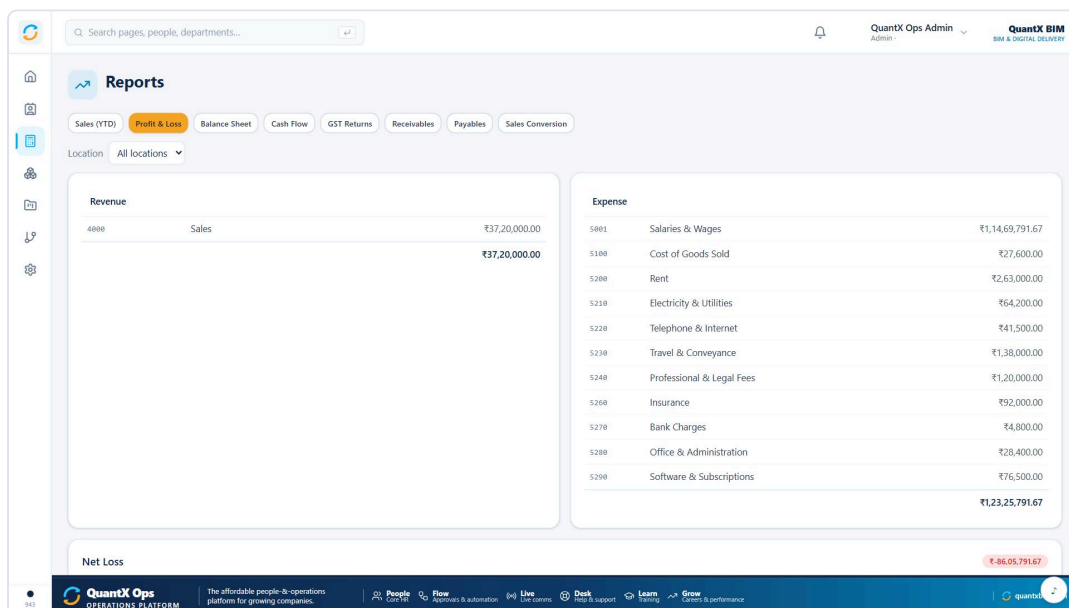
1. **Post through the screens, not by hand. Post journal** exists for the rare adjustment nothing else covers. It must balance before it can be posted.
2. **Correct by adding, never by editing.** An issued invoice cannot be edited: raise a credit note. A wrong stock count is corrected by an adjustment with a reason. Each correction is visible, with who made it.

If the trial balance ever stops reading **Balanced**, stop posting and find out why before anything else is done.

## Month-end checks

Work down this list in order; each step makes the next one trustworthy.

1. **Attendance and leave** are complete for the month (chapter 6).
2. **Payroll** is processed, read, and posted to the ledger.
3. Every supplier bill received is entered under **Supplier Bills**, and goods received but not yet billed are understood.
4. Every sale is invoiced; anything *Draft* is issued or deleted.
5. **Cashbook**: receipts and payments for the month are recorded.
6. **Bank Reconciliation** for each bank and cash account: enter the statement date and balance, tick the lines on the statement, and **Reconcile** when the **Difference** is zero.
7. **Stock**: if a count was done, the adjustment is posted.
8. **Trial Balance** reads **Balanced**.
9. **Reports**: read the **Profit & Loss**, **Balance Sheet** and **Cash Flow**, and prepare the figures on the **GST Returns** tab. **Receivables** and **Payables** show who owes whom.



*Reports. Use the **Location** filter to look at one site or all of them.*

## Who may do what

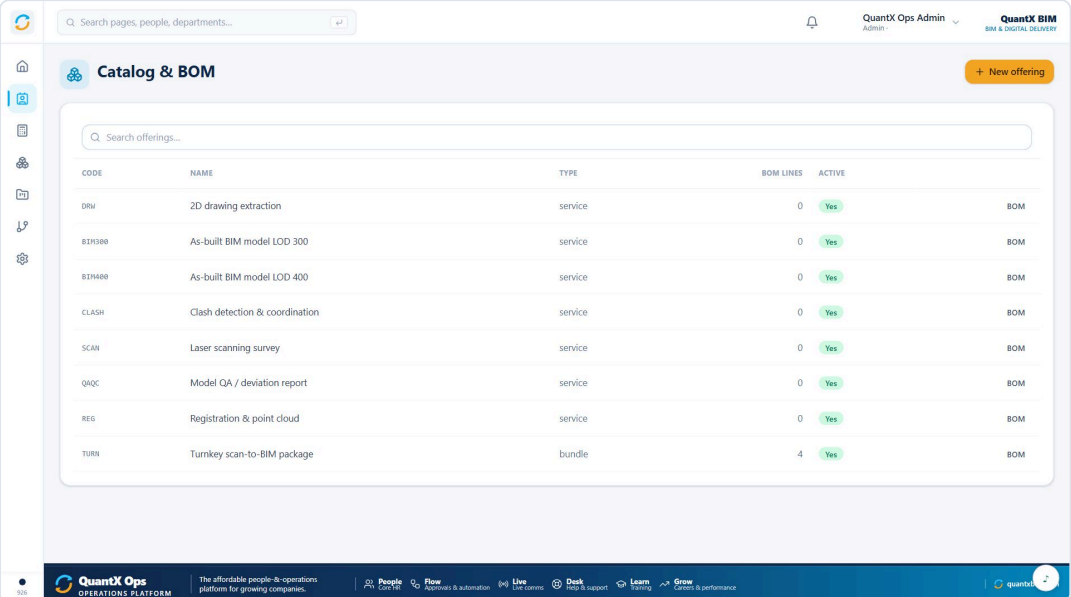
Money screens are the ones to keep tight. Give **Accounts** to the finance team only, use **Approval limits** (chapter 8) to cap what each grade can approve, and let an **API client** that reads the ledger (for example a nightly export to an accounting package) hold the **view** permission only. It then cannot post.

## 10. The business modules, administered

Your staff operate CRM, Deliver, Stock and Accounting daily (see the Operator Guide). This chapter covers the parts that **you** look after: the catalogue, the shared records, documents and email.

### Catalog & BOM

**Catalog & BOM** lists what the company sells. Each **offering** has a **code**, a **name**, a **type** and whether it is **active**.



| CODE   | NAME                           | TYPE    | BOM LINES | ACTIVE |     |
|--------|--------------------------------|---------|-----------|--------|-----|
| DRM    | 2D drawing extraction          | service | 0         | Yes    | BOM |
| BTH300 | As-built BIM model LOD 300     | service | 0         | Yes    | BOM |
| BTH400 | As-built BIM model LOD 400     | service | 0         | Yes    | BOM |
| CLASH  | Clash detection & coordination | service | 0         | Yes    | BOM |
| SCAN   | Laser scanning survey          | service | 0         | Yes    | BOM |
| QAQC   | Model QA / deviation report    | service | 0         | Yes    | BOM |
| REG    | Registration & point cloud     | service | 0         | Yes    | BOM |
| TURN   | Turnkey scan-to-BIM package    | bundle  | 4         | Yes    | BOM |

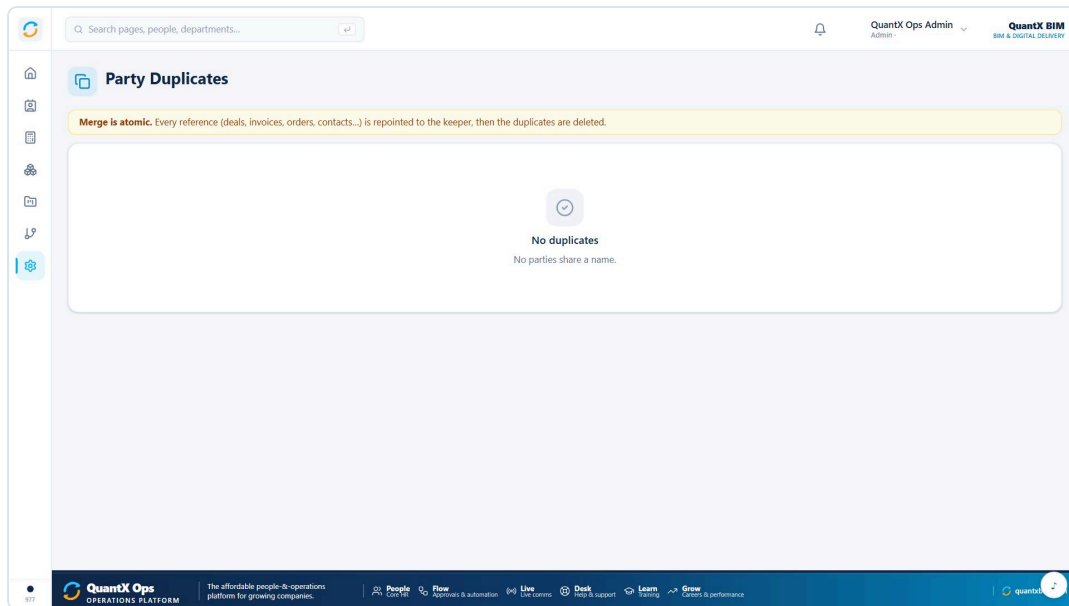
The catalogue. A **service** is sold on its own; a **bundle** is built from other items, shown by its number of **BOM lines**.

- **New offering** adds one.
- **BOM** on a row opens its **bill of materials**: the items or services a bundle is made of. A bundle such as a turnkey package carries its lines; a simple service has none.
- Mark an offering inactive rather than deleting it once it has been sold.

Estimates draw on the catalogue, so a clear, current catalogue keeps estimates and proposals consistent.

### Party Duplicates

All customers, suppliers and other counterparties live in one **Party** master. The same company entered twice splits its deals, invoices and history. **Party Duplicates** lists parties that share a name so you can merge them.

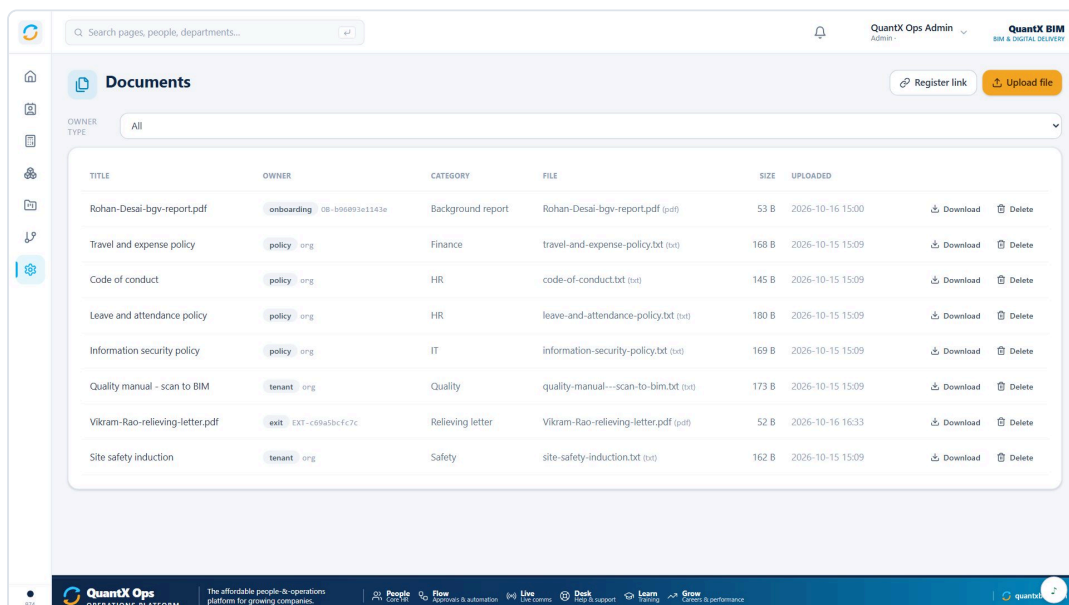


*Party Duplicates: "No parties share a name." The warning explains that merging is atomic.*

**Merge is atomic:** every reference (deals, invoices, orders, contacts) is moved to the party you keep, and then the duplicates are deleted. Choose the keeper carefully; a merge cannot be undone. Check by name and, for customers, by tax number, before you merge.

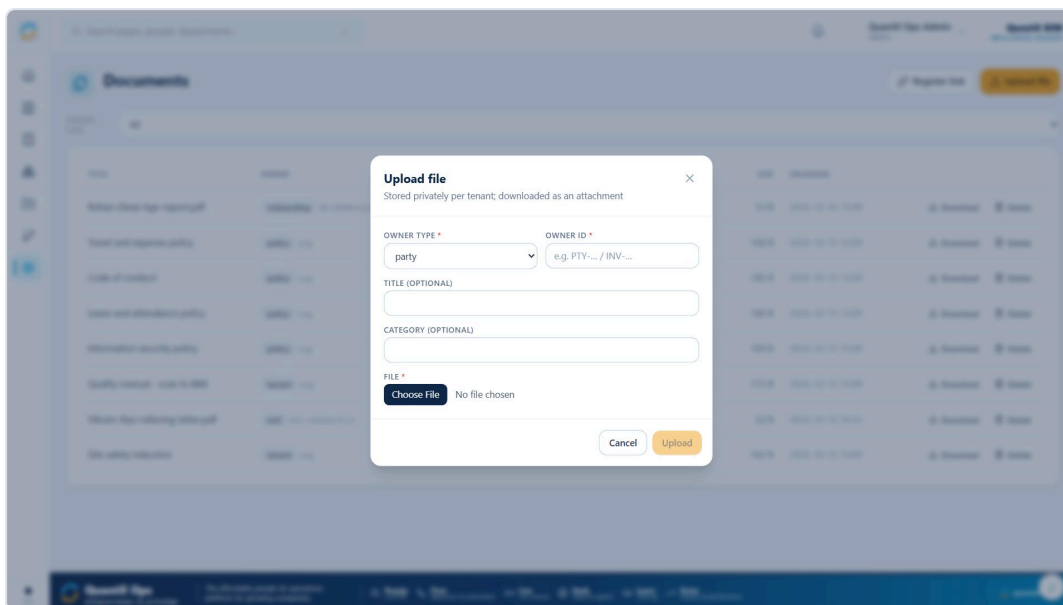
## Documents

**Documents** is the company's file store. Each file belongs to an **owner**: a party, an invoice, a policy, an onboarding or exit case, and so on.



*Documents. Each file shows its owner type, its category, size and when it was uploaded, with **Download** and **Delete**.*

Click **Upload file**.



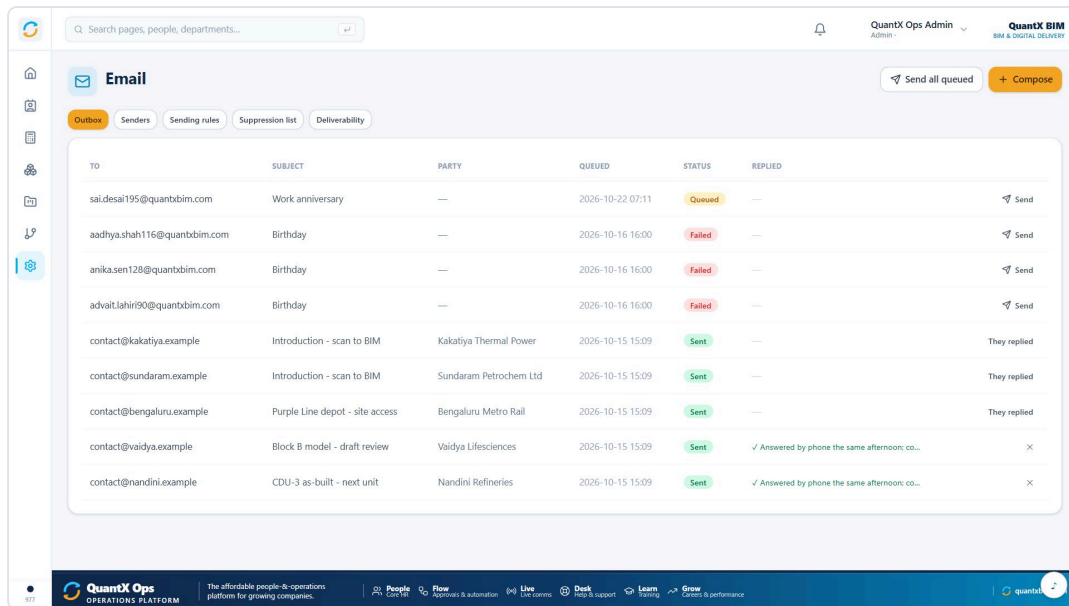
| Field                        | What to enter                                                         |
|------------------------------|-----------------------------------------------------------------------|
| <b>Owner type</b> (required) | What the file belongs to, for example <i>party</i> or <i>policy</i> . |
| <b>Owner ID</b> (required)   | The record's number, for example a party or invoice number.           |
| <b>Title, Category</b>       | Optional but recommended, so the file can be found.                   |
| <b>File</b> (required)       | The file to store.                                                    |

Files are **stored privately for your company** and downloaded as attachments. **Register link** records a link to a document kept elsewhere instead of a copy.

Documents of type **policy** are what staff read under **Policies**. You can add them here, but the **Policies** page itself is the simpler way (chapter 11).

## Email

**Email** manages outgoing mail from QuantX Ops: campaigns, greetings and messages to customers.



The outbox. Each message shows who it is to, its subject, the party, when it was queued, its status and whether the other side replied.

| Tab                     | What it is for                                                                                                                                                                          |
|-------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Outbox</b>           | Every message: <b>Queued</b> , <b>Sent</b> or <b>Failed</b> . <b>Send</b> sends one; <b>Send all queued</b> sends the rest. <b>Compose</b> writes a new one.                            |
| <b>Senders</b>          | The SMTP identities mail is sent from. Add one with its server details; its <b>password is encrypted</b> and, when you edit a sender, leaving the password blank keeps the current one. |
| <b>Sending rules</b>    | The limits on sending; save them after changing.                                                                                                                                        |
| <b>Suppression list</b> | Addresses that must <b>not</b> be mailed: unsubscribes, bounces and manual blocks. You can add an address by hand.                                                                      |
| <b>Deliverability</b>   | Where sending through Amazon SES is finished off, so bounces and complaints are handled and mail is accepted rather than treated as junk.                                               |

A **Failed** message stays in the outbox. Read why, correct the address or the sender, and press **Send** again. Never remove someone from the suppression list unless they have asked to be mailed again.

## CRM and prospecting, from the administrator's side

- **CRM Pipelines** and **Segments** (in **Masters**) define the stages a deal moves through and the groups customers fall into.
- The **WhatsApp** and **Campaigns** screens record what has been sent to prospects and customers; access to them is a CRM duty-role permission (chapter 8).
- Follow-ups created from renewal and re-prospect dates appear in each owner's own list.

## Projects and billing, from the administrator's side

- A **work order** becomes a **project**; the project plan is a **copy** of the estimate, so editing the plan never changes the estimate or accepted proposal.

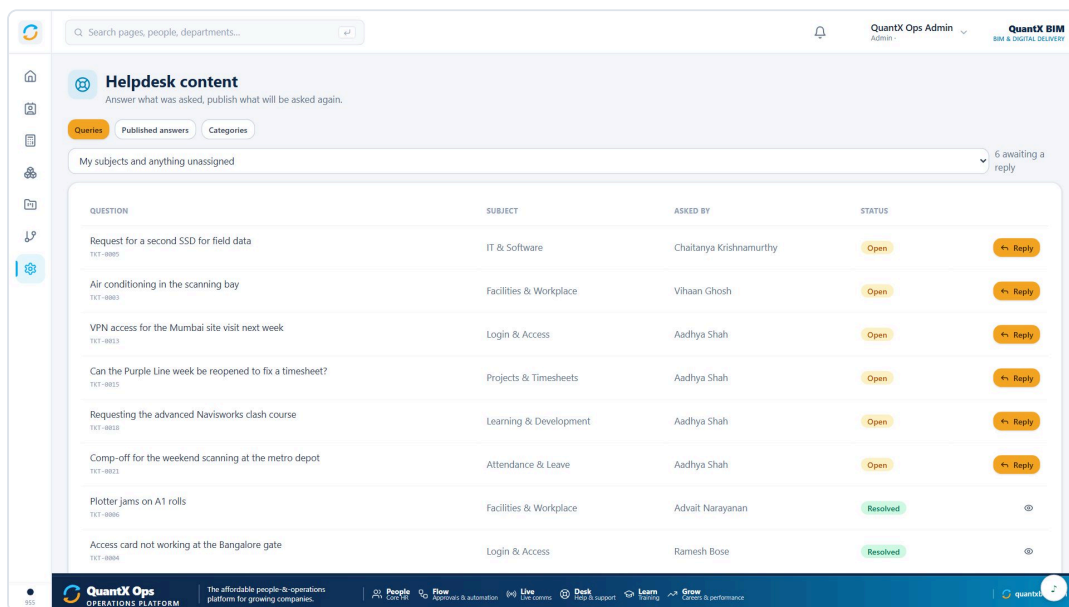
- **Labour Wages** (in Masters) feed estimates and project cost.
- Project billing is always **against the work order**; milestones come from the contract, not from project dates.
- *Project closure, project task sign-off, proposal approval and daily report review* are processes whose routes you may design in **Workflow** (chapter 7).

## 11. Helpdesk content and policies

The **Helpdesk** is how staff ask questions and find answers. As administrator you decide who answers which subject, and you grow the published library so the same question need not be answered twice.

### Helpdesk content

**Helpdesk content** has three tabs: **Queries**, **Published answers** and **Categories**. Its subtitle says it all: *answer what was asked, publish what will be asked again*.



*Queries. Each shows its ticket number, the subject (category), who asked, and its status. **Reply** answers it. The counter at the right reads "6 awaiting a reply".*

### Queries

The list is filtered by a drop-down; the default is **My subjects and anything unassigned**, so you see the subjects you answer and anything nobody owns. Change it to see all.

1. Click **Reply** on a query. The window shows the ticket number, who asked and the subject.
2. Write the answer, "as you would to their face".
3. If the question will be asked again, tick **Will this be asked again? Publish it so the next person finds it**, and choose the category to publish under.
4. Click **Send reply**. The answer goes to the asker **by email and** appears on their Helpdesk page under **My queries**. If the person has no email address on record, it still appears on their page, and the confirmation says so.

An *Open* query has not yet been answered. Answer promptly: it is the first thing staff judge the system by. Answered queries remain in the list, marked **published** where you published them, with an eye icon to read them.

## Published answers

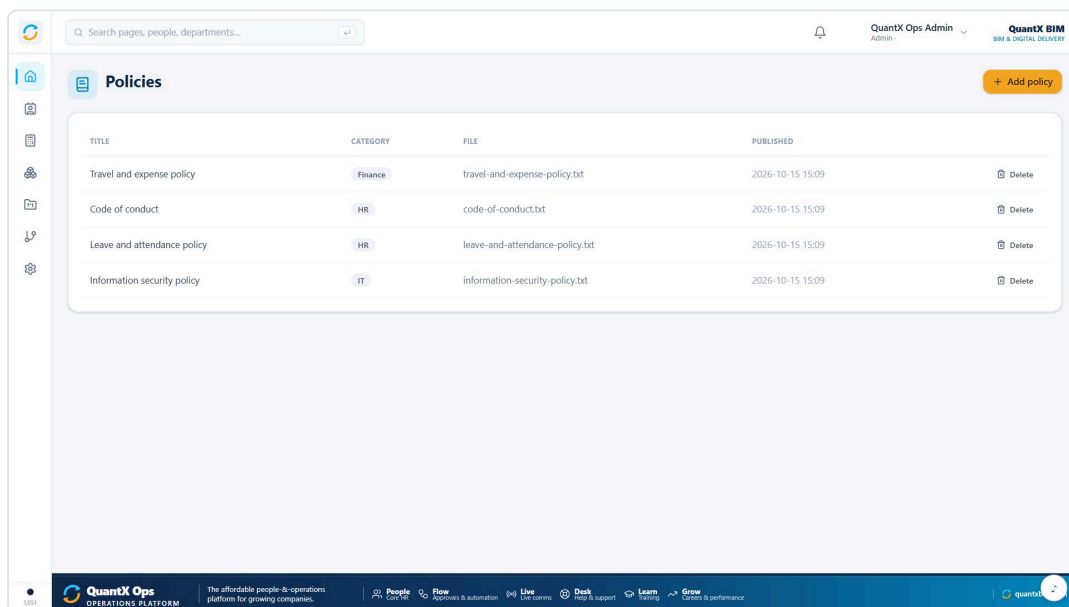
The **Published answers** tab is the library that everyone in the company can read **before** they ask. Besides publishing from a reply, you can write one directly: **New answer**, with the question *as the person would type it*, the answer, and its category. Write for a newcomer: a clear question, a short answer, steps where steps are needed. Use the toggle on a row to **make an answer inactive** when it goes out of date, rather than leaving it to mislead.

## Categories

A **category** is a subject such as *IT & Software, Facilities & Workplace, Login & Access, Attendance & Leave, Projects & Timesheets* or *Learning & Development*. Click **New category** and give it a name, a short description shown under the name, and an **owner**: *who should answer questions about this?* Keep the list short and obvious. A category with **nobody** as owner is shown in amber, and its queries land in "anything unassigned", so give every active category an owner.

## Policies

**Policies** (Home menu) is where the company's policies are published. **Everyone signed in can read and download them. Only an administrator can publish or remove one.** Each policy is a file with a title and a category such as HR, Finance or IT.



The Policies page as an administrator sees it. Everyone else sees the same list with **Download**, and none of the buttons that change it.

Maintain them like this:

1. Click **Publish policy**, give it a clear **title** and a **category**, choose the file (up to 25 MB) and click **Publish**.

2. When a policy changes, publish the new file and **Delete** the old one, so that staff are never offered two versions.
3. Tell staff when something material changes, for example through an **Announcement** (Masters, Announcements).

## 12. When something looks wrong

Find the symptom, check the likely cause, and go to the screen named. Most problems are one of three things: **a role that does not grant access**, **a role that resolves to nobody**, or **a month that was not completed before the next step**.

### Access

| Symptom                                           | Likely cause                                                          | Where to look                                                                         |
|---------------------------------------------------|-----------------------------------------------------------------------|---------------------------------------------------------------------------------------|
| A person cannot see a menu group or page          | Their duty role does not grant it.                                    | <b>Access control</b> , the person's roles, then the role's permissions.              |
| A page says <b>You do not have access to this</b> | The page needs a permission the person's roles lack.                  | <b>Access control</b> , <b>Manage</b> on the right role.                              |
| A new joiner sees nothing useful                  | They are in no seat, or the seat has no position default.             | <b>Assign Employees</b> ; <b>Access control</b> , <i>Position defaults</i> .          |
| A person got access they should not have          | They hold an extra role, or a seat default adds it.                   | <b>Access control</b> , <i>Duty roles</i> <b>Members</b> ; <i>Position defaults</i> . |
| An integration stopped working                    | The API client was suspended, revoked, or has passed its expiry date. | <b>API clients</b> , its status and <b>Expires</b> .                                  |
| Repeated "please wait" at sign-in                 | Too many failed attempts in a minute.                                 | Wait a minute; check the Login ID format with the person.                             |

### Approvals

| Symptom                                                   | Likely cause                                          | Where to look                                                                   |
|-----------------------------------------------------------|-------------------------------------------------------|---------------------------------------------------------------------------------|
| A request is stuck at a step                              | The role resolves to nobody, or the approver is away. | <b>Workflow Role Positions</b> ; <b>Assign Employees</b> (vacant seats, cover). |
| "Transactions waiting for an approver who does not exist" | A seat that holds a role is vacant.                   | <b>Assign Employees</b> ; place someone, or arrange <b>cover</b> .              |
| A request was approved the moment it was raised           | Its workflow has <b>no steps</b> .                    | <b>Workflow</b> : <i>Approved automatically</i> banner; add a step and submit.  |
| A request is not approved but nobody has it               | No workflow is in service for its process.            | <b>Workflow</b> , <i>Pending routing</i> , then <b>Route....</b>                |
| A new request type's requests never arrive anywhere       | Its draft workflow has no steps yet.                  | <b>Workflow</b> : add steps and <b>Submit</b> .                                 |

|                                                     |                                                       |                                                  |
|-----------------------------------------------------|-------------------------------------------------------|--------------------------------------------------|
| A route change did not affect a request in progress | Requests finish on the version they started under.    | Normal; new requests use the new version.        |
| A request above a limit was blocked                 | The approver's grade ceiling is lower than the value. | <b>Access control</b> , <i>Approval limits</i> . |

## People, time and pay

| Symptom                                                | Likely cause                                | Where to look                                                                                                          |
|--------------------------------------------------------|---------------------------------------------|------------------------------------------------------------------------------------------------------------------------|
| Setup will not reach 100%                              | A required item is incomplete.              | <b>Setup</b> ; open the card that is not <i>Complete</i> .                                                             |
| An import is refused                                   | A file has problems.                        | <b>Import Data</b> : <i>Check these files</i> lists every problem with its line; sites first, then seats, then people. |
| A first leave application is refused                   | No opening leave balance was loaded.        | <b>Leave ledger</b> , <b>Adjust balance</b> ; or the leave-balances import.                                            |
| Unmarked days on attendance                            | Nobody has marked them.                     | <b>Attendance</b> ; mark them <b>before</b> payroll.                                                                   |
| Biometric punches show as <b>Unmatched</b>             | A card or finger is not linked to a person. | <b>Biometric</b> ; link the user to the employee.                                                                      |
| Punch times look hours out                             | The device or location time zone is wrong.  | <b>Biometric</b> , device <b>Location</b> ; <b>Organization</b> , the location's <b>Time zone</b> .                    |
| Payroll shows nobody                                   | The period was not processed.               | <b>Payroll</b> : enter the period and working days, click <b>Process</b> .                                             |
| A person is missing from payroll or has a wrong figure | No salary inputs, or wrong attendance.      | <b>Salary Inputs</b> for the period; <b>Attendance</b> .                                                               |
| A person cannot be appraised                           | Their seat states no requirement.           | <b>Seat requirements</b> ; the banner counts such seats.                                                               |

## Money and records

| Symptom                                                        | Likely cause                                      | Where to look                                                                                      |
|----------------------------------------------------------------|---------------------------------------------------|----------------------------------------------------------------------------------------------------|
| <b>Trial Balance</b> is not <i>Balanced</i>                    | Something was posted wrongly.                     | Stop posting. Review recent <b>Post journal</b> entries in <b>General Ledger</b> ; ask who posted. |
| An invoice must be changed after issue                         | Issued invoices are locked.                       | Raise a <b>credit note</b> from the invoice.                                                       |
| Tax shows IGST where CGST + SGST was expected (or the reverse) | The place of supply or the site's state is wrong. | <b>Organization</b> , the location's <b>State</b> ; the invoice's <b>Place of supply</b> .         |
| Stock quantity looks wrong                                     | A receipt or issue was missed or entered twice.   | <b>Adjustments</b> , with a clear reason.                                                          |

|                                  |                                                                        |                                                                            |
|----------------------------------|------------------------------------------------------------------------|----------------------------------------------------------------------------|
| The same customer appears twice  | A duplicate party.                                                     | <b>Party Duplicates, merge</b> (it cannot be undone).                      |
| An email did not go              | The message <b>Failed</b> , or the address is on the suppression list. | <b>Email</b> , <i>Outbox</i> and <i>Suppression list</i> .                 |
| A policy is not listed for staff | It was never published, or was deleted.                                | <b>Policies</b> , as an administrator: <b>Publish policy</b> (chapter 11). |

## Before you ask for help

Note **which screen** you were on, **what you did**, **what you expected** and **what you saw**, with the person's Login ID and the date and time. A screenshot makes it much quicker. For anything involving the platform itself, such as the service being unavailable, contact your QuantX Ops support.

# Index

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Every topic in this document, alphabetically, with the page it is explained on.

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