

Office and Project Management Solution

ArchiOffice 2011 Getting Started Guide



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Introduction

Welcome to ArchiOffice® from BQE Software, Inc!

ArchiOffice is a project management solution for architects. It is networkable, multi-user software, which operates on both PCs and Macs. It was created by Architects, for Architects, and has continued to evolve to meet the needs of a growing customer base worldwide. ArchiOffice takes all the disparate pieces of information in your office and organizes them in a most remarkable way by offering solutions such as contact management, document management, task and project management, time and expense tracking, billing and reporting.

Your employees can access ArchiOffice from anywhere, using any operating system. You can make ArchiOffice instantly accessible to local and remote users via the Internet while retaining all the features and functionality that your business depends on. This solution is simple, affordable, secure, scalable, and very fast.

The goal of this **ArchiOffice Getting Started Guide** is to help you install and begin the set up process while familiarizing yourself with the ArchiOffice program. It explains the concepts and procedures involved in setting up of ArchiOffice, focusing on its installation and registration. Thus, this Guide enables you to educate yourself quickly on how to run and start ArchiOffice effectively and efficiently. It also explains some troubleshooting issues at the end, highlighting your most often encountered problems or queries.

The ArchiOffice Getting Started Guide is not a complete training solution. It is a guided tour designed to set up and familiarize you with ArchiOffice. After completing the guide, we recommend that you explore the <u>ArchiOffice Help</u>. In particular, check out the How Do I help items. Based on your preferred learning style and available time, you can choose self-learning or guided learning. Guided learning provides custom training courses to get you up and running with ArchiOffice as quickly as possible. *Check out <u>www.bqe.com/Services</u> for more information*.

System Requirements

For successful installation and implementation of ArchiOffice software, be sure your computer systems meet or exceed the minimum requirements. System requirements are different for Servers and Clients, depending on whether you are using Windows or Mac operating system.

Server Requirements

Windows

- Pentium III, IV, M, D IGHz or higher processor
- 2 GB RAM
- 2 GB free disk space
- Microsoft Windows 2000, 2003, 2008 Server, XP, Vista, Windows 7 operating systems (32 & 64 bit)
- Java Standard Edition runtime environment 6, updates 20 to 27 (download)
- Networking TCP/IP
- Port 8081, 1099 and 2638 open and accessible for use by ArchiOffice exclusively

Macintosh

- I GHz or higher Intel processor. Must have a 64 bit processor, if running in Leopard.
- 2 GB RAM
- 2 GB free disk space
- Mac OS X 10.5 (Leopard, 64 bit only), 10.6 (Snow Leopard), or 10.7 (Lion)
- Java SE 6 (20 to 27)
- Networking TCP/IP
- Port 8081, 1099 and 2638 open and accessible for use by ArchiOffice exclusively

Client Requirements

Windows

- Pentium III, IV, M, D IGHz or higher processor
- 2 GB RAM
- Microsoft Windows XP, Vista, Windows 7 operating system (32 & 64 bit)
- Java Standard Edition runtime environment 6, updates 20 to 27 (download)
- Networking TCP/IP
- Word 2003, 2007 or 2010 for document/invoice creation

Macintosh

- I GHz or higher Intel processor. Must have a 64 bit processor, if running in Leopard.
- 2 GB RAM
- Mac OS X 10.5 (Leopard, 64 bit only), 10.6 (Snow Leopard), or 10.7 (Lion)
- Java SE 6 (20 to 27)
- Networking TCP/IP
- Word 2004, 2008 or 2011 for document/ Word 2004 only for invoice creation

Recommendations for Best Practices

- We suggest ArchiOffice be installed on a dedicated server to prevent incompatibilities.
- ArchiOffice cannot be hosted from a server that is also functioning as a BIM server.

Installation

ArchiOffice 2011 is a server-based application requiring one machine to function as a 'Server' that hosts the ArchiOffice data. If you have only a single license for your firm, the machine you use to access ArchiOffice will also function as the server. **Besides a current version of the Java runtime environment, there is no need for you to install any software on your client computer**. You can access the database files from your client machines via a link to the server using your ArchiOffice server's IP address and the port number 8080 or 8081 (*explained later in the Guide*).

PBefore installing the software, please read the End User License Agreement (EULA).

The following instructions are for installation on a <u>PC</u> and <u>Mac</u> machine that will be hosting ArchiOffice. Please find your correct operating system before proceeding.

If you are an existing ArchiOffice user, you can upgrade to the new ArchiOffice 2011 version. Please check the <u>Upgrade from ArchiOfficeV8</u> whitepaper for conversion details.

Installation on a PC System

If you have purchased ArchiOffice, you should have received a link via email for where you can download the installation file (setup) as well as this Getting Started Guide. Please download the installer from our website as instructed in the email.

The installer or setup is a zipped file and will require an extraction program such as WinZip to unzip the file.

Follow the steps below to install ArchiOffice on the machine that will be hosting the ArchiOffice data (this applies to both multi and single users):

- I. Log in to your computer as an Administrator.
- 2. Download the ArchiOffice 2011 installer/setup file and unzip the contents to your desktop.
- 3. Double-click or right-click on the setup icon on your desktop and click **Open**.
- 4. If prompted to install Java, please click **Install** and continue. If this prompt does not appear, continue to the next step.
- 5. When the ArchiOffice 2011 InstallShield Wizard appears, read the information and follow the instructions on each screen and click **Next**.

Installation



6. Read the License Agreement and select the 'l accept...' option to proceed. Click **Next**.

🛿 ArchiOffice 2011 - InstallShield Wizard	×
License Agreement Please read the following license agreement carefully.	0
BQE Software Inc. End User License Agreement IMPORTANT: THIS SOFTWARE END USER LICENSE AGREEMENT ("EULA") IS A LEGA AGREEMENT BETWEEN YOU AND BQE SOFTWARE INC. READ IT CAREFULLY BEFORE COMPLETING THE INSTALLATION PROCESS AND USING THE SOFTWARE. I PROVIDES A LICENSE TO USE THE SOFTWARE AND CONTAINS WARRANTY INFORMATION AND LIABILITY DISCLAIMERS. BY INSTALLING AND USING THE SOFTWARE, YOU ARE CONFIRMING YOUR ACCEPTANCE OF THE SOFTWARE AND AGREEING TO BECOME BOUND BY THE TERMS OF THIS AGREEMENT. IF YOU DO NOT AGREE TO BE BOUND BY THESE TERMS, DO NOT INSTALL THE SOFTWARE AN RETURN THE SOFTWARE TO YOUR PLACE OF PURCHASE FOR A FULL REFUND.	IL T ID
I accept the terms in the license agreement O I do not accept the terms in the license agreement InstallShield	
<pre>Cancel Cancel Canc</pre>	el

- 7. Enter your User Name and Organization, making sure to check the option Anyone who uses this computer (All Users) so that anyone using this computer will have adequate access to ArchiOffice. Click **Next**.
- 8. Accept the default installation location. Once the installation begins, a progress bar displays until the installation is complete.
- 9. When done, click **Finish**. If prompted, restart your computer for a successful installation.



It will display the post installation instructions page (Welcome to ArchiOffice) guiding you to <u>license your software</u>.

Your Internet/Antivirus Security software may prompt you to allow program access. Please ALLOW (or Unblock) access whenever prompted. *If you don't, ArchiOffice will not function properly.*

If you are experiencing problems while installing ArchiOffice, please check the <u>Troubleshooting</u> section of this Guide or <u>Knowledgebase Articles</u>. Else, contact us at (800) 371-0130 (ext#0) or <u>support@ArchiOffice.com</u>.

Installation on a Mac System

If you have purchased ArchiOffice, you should have received a link via email from where you can download the installation file (setup) as well as this Getting Started Guide. Please download the installer from our website as instructed in the email.

Follow the steps below to install ArchiOffice on the machine, which will be hosting the ArchiOffice data (this applies to both multi and single users):

- I. Close any open applications.
- 2. Log in to your computer as the first Administrator.
- 3. Download the ArchiOffice 2011 installer package or setup file.
- 4. The ArchiOffice 2011 installation screen opens. Click **Continue** to begin the installation.
- 5. It displays the Software License Agreement. Click **Continue** to Agree to the terms of the agreement.



- 6. Customize the Installation Type depending upon whether you are a new user or an existing user. Select the **Upgrade from V8** option *only* if you are upgrading from ArchiOffice V8 to 2011. Click **Continue**.
- 7. Click **Install** to perform a standard installation.
- 8. Enter your computer password (Admin) and click **OK**.

Installation

 Introdu Name: ArchiOffice License Password: Destina Installat Installat Summary 	
ArchiOffice	stall Location

9. You are warned about restarting your computer after the installation. Click **Continue** Installation to install the software now.

000	😺 Install ArchiOffice 2011
e Introduct	When this software finishes installing, you must restart your computer. Are you sure you want to install the software now?
🖯 License	Cancel Continue Installation
O Destinati	of
Installation Type	this software for all users of this computer. All
 Installation 	users of this computer will be able to use this software.
Archi	Office
bge	Change Install Location
	Go Back Install

10. The installation process starts and displays the progress. As soon as the installation is complete, restart your computer when prompted.

Installation

00	🔪 Install ArchiOffice 2011
 Introduction License Destination Select Installation Type Installation Summary 	Installing ArchiOffice 2011 Writing files Install time remaining: About 11 minutes
bqe	Go Back Continue

II. After restarting your computer, read the Post Installation Instructions. This instructions page also serves as the ArchiOffice Control Panel, and can be launched manually from

/Applications/ArchiOffice 2011/Control Panel/

The Control Panel will allow you to start or stop the server, and provides access to both the client and admin portals. You need to <u>license your software</u> to continue.

12. Once the server portion is licensed, launch the client for the first time by clicking Client from the Control Panel. This initial launch process will create a desktop shortcut and prompt you to install several Java Plugins that are necessary for the program to function.

If you are experiencing problems while installing ArchiOffice, please check the <u>Troubleshooting</u> section of this Guide or <u>Knowledgebase Articles</u>. Else, contact us at (800) 371-0130 (ext#0) or <u>support@ArchiOffice.com</u>.

Licensing

You are required to license the ArchiOffice software prior to use. When you purchase the software, license keys and instructions are emailed to you, based upon the company name and number of users. ArchiOffice requires two types of license keys –Server License Key and Client License Key.

Server Licensing

•

The first step in the licensing process involves the licensing of the ArchiOffice Server using the ArchiOffice Admin Portal.

I. Do the following to License the ArchiOffice Server:

PC: Open the ArchiOffice Admin Portal from the Start, All Programs, ArchiOffice 2011 menu or your desktop (Launch Admin Portal icon). You can also open it directly from the browser by typing this URL: http://servername:port/servoy-admin/ where 'servername' is the IP address of the computer on which you installed ArchiOffice and 'port' is the port on which the software was installed. By default, it is 8081. http://ServerIPaddress:8081/servoy-admin/

 Mac: Open the ArchiOffice Admin Portal from the ArchiOffice Control Panel, found in

/Applications/ArchiOffice 2011/Control Panel. You can also open it directly from the browser by typing this URL: http://servername:port/servoy-admin/ where 'servername' is the IP address of the computer on which you installed ArchiOffice and 'port' is the port on which the software was installed. By default, it is 8081.

http://ServerIPaddress:8081/servoy-admin/

 Before the Admin Portal opens, you will be prompted for a login. Please enter the default user name and password:

User name:	Administrator
Password:	fullthrottle



- 3. Click on the Licenses option on the left to open the Licenses screen.
- 4. Enter your company name, server license key and number of licenses **exactly** as emailed to you (case-sensitive). Make sure to leave the Licensed Product set to *Client*.

Menu	Licenses
	License Information
AU	You currently have 100 valid licenses, which allows 100 clients to connect.
ArchiOffice	Enter your license information in the fields below:
APPLICATION SERVER	Company name: Fountainhead Architects
	Licenses: 100
Servoy Server Home	License code: 234596-128168-101352
Network Settings	Licensed product Client 👻
Server Plugins Database Servers Clients	Check code Delete code Code OK
Solutions	
Transactions	Company name:
Batch Processors	Licenses:
Upload Library	License code:
Licenses	Licensed product Client •
Server Log Performance Data	Check code

- 5. Click **Check Code** to verify the license key. When successful, it displays *Code OK*.
- 6. Next, if desired, you can change the default password for the Administrator. Click the **Users** option on the left to access the Users screen.
- 7. Click **Administrator** in the User list at the bottom of the screen.

Menu	Users
AO	To create a new user fill in the form below. To edit an existing user (rename, password change, add/remove groups) click on the user's name in the list below. To delete a user, click on the \aleph image after the user's name.
ArchiOffice	Create new user
APPLICATION	Username:
SERVER	Password:
Servoy Server Home	Password (again):
Network Settings Profiles	User uid (optional):
Server Plugins Database Servers Clients Solutions	Create user
Locks	User list
Transactions	Administrator 💥 🗶
Batch Processors	13
Upload Library	
Licenses	
Server Log	
Performance Data	

8. On the Edit user screen, enter a new password for the Administrator. When done, click **Change Password** and then exit.

Menu		Edit user
AO	Edit user name Username:	Administrator
	Rename user	(
Server Server Here	Change password Password:	
Servoy Server nome	Password (again):	••••••
Network Settings Profiles Server Plugins Database Servers Clients Solutions Locks	Change password Edit user uid User uid: Change user uid	1
Transactions Users Batch Processors Upload Library	Add to group Group:	users 💌
Licenses Server Log Performance Data	Add to group Group list Administrators	(

Do not lose this password as is it cannot be recovered and regaining access will require downtime, and an additional fee, while we obtain your database and reset the password.

- 9. You have successfully licensed your server application. To initialize the Server License, you need to reboot the server.
 - **PC**: Reboot the server as usual.
 - Mac: Shut down and then restart the server.

Now you can proceed to license the client application.

Client Licensing

The second step in the licensing process involves the licensing of the ArchiOffice Client. When you launch the application for the first time, you are prompted by the Preferences-System-Company screen to enter your company name and client license key.

- I. To launch ArchiOffice Client:
 - **PC:** Open the ArchiOffice Client application from the Start, All Programs, ArchiOffice menu or your desktop (Launch Client Access icon).
 - Mac: Open the ArchiOffice Client application using the desktop alias or opening the ArchiOffice Control Panel found in /Application/ArchiOffice 2011/Control Panel and clicking Client.
- 2. The system downloads and verifies the application using Java Web Start.
- 3. Next, you may import your data from a previous version *if* you are using an upgrade setup that allows import of data from an older version of ArchiOffice. *Please check* the <u>Upgrade from ArchiOfficeV8</u> whitepaper or contact our Technical Support for assistance.

Java Web Sta	art 🛛 🛛
Verifying	application.
Name: Publisher: From:	ArchiOffice 2011 BQE Software http://127.0.0.1:8081
	Cancel

- 4. After data conversion, if any, ArchiOffice then prompts you for licensing.
- 5. On the *Preferences* screen, enter the company name and client license key, **exactly** as emailed to you (case-sensitive). Click the **Validate License** button to verify the license key.

Preference	ces	
F	Register Company Name Your Company Name Client License Code License Count Validate License Validate License	
	ArchiOffice 2011 By changing your company name, your license key will become void, and you will not be able to use ArchiOffice 2010.If you would like to change your company name, please contact a sales associate at BQE Sales by either calling 800-371-0130 (ext #0), or 310-602-4020, or by sending an email to sales@archiOffice.com. If you have a different set of license and registration keys and would like to proceed with the company name change, then click Yes below. Otherwise, click No. Are you sure you want to proceed with changing your company name?	
Ple	Yes No Nease enter company and license information to continue Continue	

After entering your company name, you may get a warning message about changing your company name. Ignore it and click Yes.

- 6. Next, you will see a list of current users in the system.
 - **New Installation**: If this is a new user installation, you will see only the pregenerated Admin user and will already have a license allocated to it. Click **Continue**.
 - **Upgrade**: If this is an upgrade installation and you imported data from a previous version, you will see all the users from your older database. You need to authorize users to log in and use the software, depending upon the number of licenses purchased by you (displayed at the bottom).

Preferences						
	Us	e Licensed Seat Name	Status	Group		
		Admin Admin	Active	Administrators 🖌 💼	^	
					~	
Please check which users you want to have licensed. Up to 5						

You must authorize and provide a license to at least one user from the 'Administrators' group.

Log-in

Administrator and other users of ArchiOffice are supposed to log into the program to access its functions and features. Once the licensing has been validated, you are prompted to log into the application.

Your Administrator will provide you with a User Name and Password. If you have imported your data from an older version of ArchiOffice, all existing users will have the same user names and passwords.

To start with, the Administrator uses these defaults:

User Name: **Admin** Password: **Admin**

You will be prompted to specify the documents storage path in your Operating System from the Preferences-Documents-Paths screen, unless this information was brought in

ArchiOffice - Security - Clie	int (_ 🗆 🔀
AO AI Power Please	ChiOffice your office. Empower yourself.	
User Name Password	Admin	
	Cancel	J
Ready	S5L	

with a data conversion. This is *required* for creating projects and documents in ArchiOffice.

ArchiOffice Setup

At least one person (Administrator) should be assigned the task of setting up ArchiOffice. The Administrator will need to review and update the Preferences area as explained below. This will establish all default settings for the application.

If your system/network is protected by a firewall, your IT/System Administrator should *make sure* to open Port 8081 and Port 1099 for the server.

You can access the Preferences screen from the Home page, View menu or Window menu to set up your company profile, users and specify other preferences. You can specify the following important settings from there:

It is critical to set up preferences prior to entering any additional information in ArchiOffice. If you have imported data from an older version of ArchiOffice, much of the information will be imported for you; however you should still review and verify its accuracy.

System: Enter your company information, report and invoice logos, default dropdown menu options, number format details as well as your printing standards.

Preferences				
System System System Report Logos Defaults Print Set Up Backup Morkgroups Workgroups Contact Project Contact Project Documents Documents Sulling Web Access Web Access Reports	Company name Address1 Othy State Zip Country Phone Email Fax	Fountainhead Architects 2601 Airport Drive Suite 380 Torrance CA 90505 United States of America 310-602-4010 archioffice@bge.com 3126639552	Home Screen Logo	+ The sead hitects
	Client License Code License Count	Validate License	Optimal size	550 x 550 pixels at 72 dpi.

Workgroups: Establish workgroups and their accessibility to information in various screens as well as reports in ArchiOffice. This enables you to set and control user access to information and features on a group basis; rather than one employee at a time.

Preferences								
i Import i Workgroups	Groups	•	-	-	Privile	ges: Administrators	Billing & Payments	*
Security Departs	Name	Defaul	t		Allowe	d Name		
Users	Administrators		Î	^		Access Billing		~
🗄 🛅 Contact	Architects		Û			Create Invoices		
🗄 🧰 Project	Architect Intern		ŵ			Create Invoice for Non Approved S	lips	
E-C RFP	Principals		Û			Preview and Print Invoices		
Billing					~	Create Transaction		
E C Reports						Edit Transaction		
🗉 🧰 Web Access					~	Delete Transaction		
🛨 📋 Register						Delete Invoice		
					~	Edit Invoice		
						Preview and Print Transaction		
					~	View Invoices		
						View Transactions		
				~				

Users: Enter ArchiOffice user profiles and all corresponding details such as human resource information, time and expense, sync privileges, calendar details, etc. In addition, you can override the user's workgroup security here in the Security section. You can also enter their cost and charge rates, which is vital for project's profitability. This information must be entered in its entirety prior to setting up a project.

Preferences	
System System Import Workgroups	Users Contact Details Home Howard Roark
Users	Use Licensed Seat Verticipal Go to Contact Assign Contact Name Status Group
Formats	Dominique Franco: Active Architecte V m A Name Howard Roark
	Title Principal
 Time/Exp 	Call Walvand Active Architects Address 123 Main Street
Other Options	Suite 300
 Security 	Howard Roark Active Administrators V City Torrance
 Reports Darbhoards 	Peter Keating Active Principals V III State CA Zip 90505
Quick View	Country
🗄 🧰 Contact	Communications 🐥
Project REP	🗘 Phone 💌
Documents	💠 Phone 💌 📑 🗊
🗄 🛅 Billing	🗘 Email 💟 🖂 🖾
Keports Web Access	Cellular V III
🗄 🛅 Register	Projects ♣
	Starts With Contains Name Role Active
	Name app or V Feasibility Study - Hourly with Cap Principal V 🗊 🛆
	Ferris Heatth Clinic Principal
	Status Active On Leave Terminated Fountainhead Architects Principal
	Group Y Health Care Facility - % of Constur Principal 🖓 🏦 ⊻

Contact: Set the defaults and formats for your contacts.

Preferences			
System System Import Workgroups Ontact Defaults Formats Project Formats Surface S	Formats Contact Name Format Sample Format Tags	<lastname>, <firstname></firstname></lastname> Roark, Howard + First Initial + First Name + Middle Initial + Last Initial + Last Name	Update

Project: Set the defaults for the projects so that when creating new projects in ArchiOffice, users will have consistent numbering, phase and job codes as well as additional project management information. In addition, you can set the defaults for project dropdown menus, milestones and tasks. Properly setting up this information will ensure that all new projects in ArchiOffice will conform to your practices and project standards. This information must be entered in its entirety prior to setting up a project.

Import	Pr	oject Types 🛛 👻		Defaults			
Users		Туре			roject Number	2011 0005	
Contact	÷	Commercial	1		ruject Number	2011-0003	-
- Defaults	\$	Interior Design	Û	Defau	it Unit of Area	Sq Ft 🔼	
Roles	\$	Mixed Use	Û			Use Contact's Address	
Submittals	\$	Residential New	Û	Dep	artment Label	Office	
 SF330 Milestones 	+	Residential Remodeling	Û			If empty, then Department is used by default	
Teams	\$	Residential Addition	Û				
Phases		Space Planning	Û				
Job Codes	\$	School: K-6 New Construction	Û				
 Tasks Miscellaneous 	\$	School: K-6 Remodeling	Û				
RFP	\$	School: K-6 Addition/Remodeling	Û				
Documents	\$	Restaurant	Û				
Billing	\$	Hospitality	Û				
Keports Web Access	\$	Feasibility Study	Û				
Register	\$	Urban Design	Û				
	\$	Institutional	Û				
	\$	School: University	Û				
	\$	Internal	Û				
	\$	Hospice	Î				

RFP: Set defaults for your 'Request for Proposal' projects (projects representing all your pre-contract work). These projects are set up similarly as the regular ones, but these defaults represent the project before it becomes billable. An RFP project can roll over to a billable project once the client has signed a contract. This is better than creating a brand new billable project.

Preferences	Phases	Use Tasks for Time on new Projects:	
Users Users Contact Project Official of the second	 1. Initial Phase 2. Research Phase 3. RFQ Phase 4. Interview / Presentation Phase 5. Follow-up Phase 6. Contract Award Phase 	Task Details Task Research Client Task Detail	
Tasks Tocuments T	Administration vot to client Research Client Research site Research Program Tinitial response to client	Hours Responsible Responsible Howard Roark Howard Roark Peter Keating Elsworth Toohey Gail Wynand Dominique Francon	

Documents: This represents the default document management structure to be used in ArchiOffice. Here you can modify document Notebooks and dividers as well as add your own templates to ArchiOffice. ArchiOffice works with most conventional document types and comes with more than 70 templates, which can be customized to suit your needs. It is important to set the location where you installed the ArchiOffice Documents folder. If you do not have the path specified properly, you will not be able to create a project.

Preferences System Jimport Workgroups Workgroups Others Contact Project Project	Document Templates main sub the the the Templates 1. PROJECT & DRAWING INFO the the	Template Details Title Letter File Name Template Text Create Word Description Send letter to contact V Show in QuickDoc Date 12/10/10 1:29 PM V Requires Contact Data Size 33,434 Requires Project Data Use Sequence Number Restrict Users Unique For Project Attach File Edit Template Test File
		Edit Template Edit Template Test File File Path Mac Users/Burns/Documents/AO DOCS 2010/Templates/letter.rtf File Path Pc D:/Documents and Settings/Dirk/My Documents/AO2010 Documents/Templates.

If you have imported your data from a previous version of ArchiOffice, the path to your Documents folder will be imported during the data conversion process.

Billing: This information may require collaboration with an Accountant or Bookkeeper. It sets the defaults for billing preferences such as invoice numbering, payment terms, expense markups, tax models and billing labels. Here you can also customize expense types if necessary. This information must be entered in its entirety prior to setting up a project.

Import Defaults Import Invoice Number Import Invoice Balance Due Show Project Balance Invoice Total Import Invoice Balance Invoice Total Import Import Import Import Import Import Import Import Import Import Import Import <	Preferences		
	System Grant Description Grant Description Grant Description Decuments Grant Defaults Grant Defaults Gr	Defaults Invoice Number 11-58 Payment Terms 30 Slips Require Approval Show Billing Header & Footer Invoice Balance Due Show Project Balance Show Invoice Total Timer Round To Minutes 15 Expense Markup 20 9% Slilling Efficiency Target % 25 Slilling Period Calendar Month Invoice Targelate Invoice Output PPF Invoice S Path Mac Alsers/Burns/Documents/AO DOCS 2010/Invoices Invoices Path Mac I_Jsers/Burns/Documents/AO DOCS 2010/Invoices Invoices Path Ple Z/LO DOCS 2010/Invoices	

If you have imported your data from a previous version of ArchiOffice, the path to your Invoices folder will be imported during the data conversion process.

Web Access: Set your default map URL. The Contacts portal provides links directly from your contacts information using the maps you choose here. This information can be used for easy mapping of contact addresses or driving directions.

Preferences				
System Gymet Gymet	Web Access			_
Contact Project	Detauit mapping web site	Google Maps Google Maps		l
Documents	Map URL	http://maps.google.com/maps?f=q&hl=en&q=< <address>>,<<city>>,<<state>>,<<zip>>,<<country>>&ivvloc dr</country></zip></state></city></address>	=ad	
Control Reports Control Reports Control Reports Control Reports Control Reports Control Reports	Directions URL	, http://maps.google.com/maps?daddr=< <to address="">>,<<to city="">> <<to state="">> <<to zip="">>, <<to Country>>&saddr=<<from address="">>, <<from city="">>, <<from zip="">>, <<from Country>>&f=d8hl=en&layer=&ie=UTF&z=14&om=1</from </from></from></from></to </to></to></to></to>		
	Flash Help URL	http://www.bge.com/archioffice2011/help/	1	

ArchiOffice Basics

This section focuses on the basics of ArchiOffice including navigation options available in the program. Before proceeding, please review the <u>Setup</u> section to ensure all default settings have been set up properly to meet your needs.

Navigation

You can navigate ArchiOffice using the following navigation options:

• **Menu**: Context-sensitive menu with dropdown options, e.g., File, Edit, View, Help, etc.



• **Tabs**: Color-coded tabs (title bars) provide access to various modules in ArchiOffice, such as Contacts, Time/Exp, Projects, etc.



• **Master Control**: Options to go to the Home page, previous and next screens visited, sync with external applications, etc.



• **Preferences Bar:** Options based on the user's access privileges, including Accounting Sync, Preferences, Support, User Setup, Login, etc.

• **Dashboards**: Area that displays system charts, lists, logo, portal, etc. You can configure an unlimited number of dashboards holding a mix of charts data portals. The dashboard is customizable- you can edit or zoom charts and access right-click options.



Tutorial

This tutorial covers the basic processes involving project setup, time tracking, billing, payments, project management and reporting.

Contacts

The Contact screen allows you to create and maintain a profile of your contacts including clients, vendors, sub contractors, consultants, and anyone related to your projects. Contact information can be entered manually or, if your contacts are maintained in another application, you can import that data into ArchiOffice as well as synchronize them with Outlook or Address Book.

To enter contact information:

- I. From the Home page, select the **Contacts** tab.
- 2. It displays a list view of your contacts. Click **New** on the button panel to add a new contact.

Contact	Outl	ook 🕒 add 🍳 v	view 🖸 🔯 🔯 🛗 🗮 🔤	luplicate new delete
Work Here Name Mr. Peter Keating Company Fountainhead Architects Title Principal Type Employee Active Mailings Outlook Brochure Lock Party	Ome Peter Company Fountainhead Architec Address1 2601 Airport Drive Address2 Suite 380 City Torrance State CA Country United States of Ameri Directory Billing	Keating Image: Constraint of the second se	Email Pk@fountainheadbqe.com Cellular (310) 802-2345	
Documents Type Documents Logs Title	Events Proj	rojects Misc	reated by 🔽 🖓	new find Ist
P2006-0002-D88561.doc P2006-0002-D83753.doc Rearden Lake House SiteDiagram.pdf Rearden Site Plan 3.6.06 JPG P2006-0002-D102287.doc P2006-0002-D98177.doc P2006-0002-D98189.doc	Image: Second prior Image: Second	Word 0.9/07/2010 Word 0.9/07/2010 Word 0.9/07/2010 PDF 0.9/07/2010 Image 0.9/07/2010 Word 0.9/07/2010	Inspection Inspection 2010-0002 Rearden - Aspen Residenci 2010-0002 Rearden - Aspen Residenci	Howard Roark Howard Roark Ho

3. Enter the required information about the contact on the Work tab such as Name, Company, Address, Phone, etc. When a new contact is created, default settings specified in the Preferences are automatically applied.

> You can add more tabs to this screen by clicking the **Add** icon **+**. Additional tabs provide the ability to enter multiple addresses and phone numbers, i.e., home, billing, job site, assistant, his/hers. This helps keep the contact details organized and easily accessible.

4. Before proceeding to create a project, you must have entered the client's contact details (address and phone) first. All projects are built based on the client's contact information.

Projects

The Projects screen allows you to create and maintain a profile of your projects or jobs. When a new project is created, default settings specified in the Preferences are automatically applied.

- I. From the *Contacts* screen, select the client's contact record.
- 2. In the detail view, select the **Projects** tab below the contact details.

Contact			Outlook	😜 add . ey vi	ew	find re-find	mylist list duplication	e new delete
•	Home 🗊 🐏 Wor	k 🗊 🖶						
Name	Howard Roark	Name Hov	vard Roa	rk 🖂	Phone	~		[🗊 🔼 🕈
Company	Fountainhead Architects	Company Fountainhead	I Architects		Phone	~		
Title	Principal	Address1 123 Main Stre	et	밑	‡ Email	~		
Туре	Employee	Address2 Suite 300			Cellula	11 V		
Active	Referral	City Torrance	7: 0050	-	∓ Fa×	×	I	
Outlook	Mailings	Country	Zip 9030					
Lock	Referral	Directory V Billing	Mailing 🔽	Sync 🗖				~
		Director) 💽 Diring	C maning C					
Project	S Category	💙 🏹 Status	<mark>∼</mark> 24	Proj	~		New Pew	Q 📰
Docur	ments Logs	Events	Projects	Misc		Invoices	Transactions	
Project No	Project Name	Туре	Category	Status		Principal	Leader	
2009-0143	Roark Residence	Residential New	Billable	Active		Howard Roark	Ellsworth Toohe	y îî
2010-0000	Fountainhead Architects	Internal	Internal	Active		Howard Roark	Howard Roark	Â
2010-0004	Ferris Health Clinic	Institutional	Billable	Active		Howard Roark	Howard Roark	Â
T-0001	Single Family Residential - Fixed F	Residential New	Billable	Template				â
T-0002	Single Family Residential - Hourly	Residential New	Billable	Template				â
T-0003	Health Care Facility - % of Constu	Institutional	Billable	Template				Û
T-0004	Health Care Facility - Fixed Fee	Institutional	Billable	Template				Û
T-0005	Feasibility Study - Hourly with Ca	Feasibility Study	Billable	Template				Û
T-0006	Restaurant - Fixed Fee with Hour	y Restaurant	Billable	Template				Û

- 3. Click the **New** button to create a new project.
- 4. It prompts you to enter the required information such as type of project Billable (contract work that will be billable), RFP (pre-contract) or Internal (internal office work that is non-billable or project related); client, project name and number.
- 5. On entering this information, you automatically move from the *Contacts* screen to the *Projects* screen.
- 6. On the *Details* tab, you can enter the project's basic details such as employees (team) working on this project, phases and job codes included in the scope of this project and as stipulated in your contract. In addition, phases and job codes can have sub classifications to accommodate consultant's fees or any other sub categories related to budgeted phases and job codes.

Projects 201	0-0002: Rearden - Aspen Resider	ce			Q	o re-find	my list list	duplicat	e new	delete
Details	General Logs		Documents	Event	s Checklists	3	Slips		Billi	ng
					eam Phase	es 🗌	Job Codes			
🚷 Project No	2010-0002		Project Team	Assign Er	nployee Assign Tea	am	Update Rates	Appr	ove Slips	
Project Name	Rearden - Aspen Residence		Employee		Role		Bill Rate		Active	
Project Type	Residential New 🗸		Howard Roar	k	Principal		\$250.00			1
Billing Client	Rearden, Henry Reassign		Peter Keating		Project Architect		\$185.00	V	V	Î
Office	Boulder Office	-	Gail Wynand		Architect Intern		\$175.00			Ū.
Project Status	Active	-	 Ellsworth Loc Dominique En 	hey	Architect		\$170.00			
	Billable RFP Internal	-	+ Dominique 114	ancon	Dialiter		\$155.00			
Color	— 🏂									
Project Address	Use Billing Client Address 🏻 🎒 🇀									
Address 1	165 Durant Avenue									
Address 2										
City	Aspen									
State	CO Zip 81611									
Country		·								
Key People	1									
Originator	Howard Roark	7 9								
Principal	Howard Roark	72								
Project Leader	Peter Keating	4 9								
	,									
										~
		_								

- 7. Next, move to the *Billing–Options* tab and set the project's invoice method. This is important prior to entering the project's budget.
- 8. Move to the *Billing–Budgets* tab where the phases (sub phases), job codes (sub-job codes) have already been set. Enter the fees and hours budgeted for each phase. This will coincide with information stipulated in your contract.

It is imperative that budgets are set for ALL projects, whether hourly, stipulated sum, percent of construction or unit cost. Without a budget, you will not be able to effectively report on or evaluate the efficiency of your project(s). Though hourly projects do not necessarily need a budget, it is important for you to estimate your fees and time that you will be spending on each phase of the project so you can manage each project accurately to ensure profitability.

After project setup, you and your team members can begin tracking their time on it.

Time and Expense

The Time/Exp screen is the central location for all time and expenses entered in ArchiOffice. The Time & Expenses list view displays all the existing time and expense entries in the system.

- I. From the Home page, select the **Time/Exp** tab.
- 2. On the *Time Card* tab, select the desired Employee from the dropdown list (your name is pre-selected by default).

Time & E	Expen	se												fi	Q	O	list
Time Ca	ard	Exp	enses		Detail	F	ilter										
Employee	Howard	Roark	~ (Ме													
Week begin	nning	۹ 🖬 ک	Totals	s:	Sunday	Mo	nday	Tuesda	ıy.	Wednesd	ay	Thursday	F	riday		Saturday	
Sun, 12 Ju	n, 2011	5			06/12/2011	06/1	3/2011	06/14/201	11	06/15/201	1	06/16/2011	06/1	7/2011		06/18/2011	1
Hours Cha	argeable	•	15.75	i .	-	7	.00	6.50		2.25		-		-		-	
Hours Non	n-Charge	eable	-		-		-	-		-		-		-		-	
Hours Inte	ernal		10.5		-	1	.00	1.50		5.00		3.00		-		-	_
Hours Ente	ered		26.25	;	-	8	.00	8.00		7.25		3.00		-		-	
Hours Req	luired		40		-		8	8		8		8		8		-	
Hours Ren	naining		13.75	•	-		-	-		0.75		5		8		-	_
Slip Efficie	ncy		39%			8	8%	81%		28%		0%		0%			
Howard	Roar	k - Wed	nesday,	June	15, 2011												
Date	Emp	Project			Project Phase		Job Code		Descri	ption			Ch	arge	Hours		
06/15/11	5 HR															+	4
06/15/11	HR	Rearden -	Aspen Resid	dence	03 Design Dev	elopment	Administra	tion	Send	Package of F				Image: A state of the state	1.00	- Di	Ì 🔼
06/15/11	HR	Fountainhe	ead Architec	ts	In-House Meet	ings	Office				Staff	meeting		 Image: A set of the set of the	1.00	21	Ì
06/15/11	HR	Rearden -	Aspen Resid	dence	03 Design Dev	elopment	Basic Serv	/ices	Zonin	g & Code Ana				 Image: A second s	1.25	- D (1	Ì
06/15/11	HR	Fountainhe	ad Architec	ts	Paid Time Off		Vacation				surfin	g			4.00	1	Ì
														_			×
													Total		7.25		

- 3. Enter the required information such as Date, Project Name, Job Code, Description, Hours, etc. in the section below the grid.
- 4. Specify whether the time entry is chargeable or not by checking/un-checking the Charge option.
- 5. Click the **Add** icon $\stackrel{\text{le}}{=}$ to add and save the time entry.
- 6. Similarly, on the *Expenses* tab, enter the required information such as Date, Project Name, Expense Type, Quantity, Cost, etc in the section below the grid.
- 7. Specify whether the expense entry is non-reimbursable and/or employee reimbursable by checking the relevant *Reimb* option.
- 8. Enter the quantity and cost of the expense.
- 9. Click **Add** icon 🖶 to add and save the expense entry.

If you prefer, both time and expense information can be entered in the Time/Exp–Detail screen. On this tab, you have the option of using a timer to track your time, place a slip on Hold, enter notes, etc.

Billing

ArchiOffice provides several options for generating invoices and applying payments. For each project, you can generate invoices using the Projects- screen. Here you can set the defaults and billing options for a project. You can also perform the billing functions from the Billing screen.

To generate invoices:

1. On the *Projects* screen, select the **Billing-Options** tab.

Projects 2010-0002: Reard	len - A	spen R	esidei	nce					Q find	O re-find	mylist lis	t duplicate	new d	i elete
Details General		Logs	;	Docun	nents	E١	rents		Checklists		Slips		Billing	
	Sur	nmary		nvoices	Transac	tions	Opt	ions	Bud	gets	Mainten	ance		
Basic Services			Bud	get			Ac	tual 👘			In	voiced		
Pasic services Ed. Ed.	%	Hrs	\$ / Hr	Fees+Exp	Hr Fees	%	Hrs	\$ / Hr	Fees+Exp	%	Fees+Exp	Hr Fees	Remain	
01 Pre-Design		100	\$150		\$15,000	52%	40	\$197	\$7,870	52%		\$7,870	\$7,130	^
02 Schematic Design	20%	593	\$135	\$80,000		88%	361	\$195	\$70,566	100%	\$80,000		\$0	
03 Design Development	25%	741	\$135	\$100,000		39%	209	\$188	\$38,950	75%	\$75,000		\$25,000	
04 Construction Documents	42%	948		\$168,000		14%	14		\$23,563	54%	\$90,100		\$77,900	
06 Contract Administration	13%	392		\$52,000									\$52,000	
Totals:	100%	2774	\$135 Bude	\$400,000	\$15,000	34%	624 Ac	\$226 tual	\$140,948	61%	\$245,100 In	\$7,870 voiced	\$154,900	~
Additional Services		Hrs	\$/Hr	Fees		%	Hrs	\$ / Hr	Fees+Exp	%	Fees		Remain	
Existing Facilities Survey		27	\$135	\$3,600		45%	9	\$174	\$1,613	45%	\$1,613		\$1,988	
Value Analysis		44	\$135	\$6,000		12%	3	\$250	\$750				\$6,000	^
Detailed Cost Estimating		18	\$135	\$2,400										
a Construction Monorcount													\$2,400	
 Construction wanagement 		133	\$135	\$18,000									\$2,400 \$18,000	
Construction wanagement		133	\$135	\$18,000									\$2,400 \$18,000	~
Construction wai lagement Totals:		133 222	\$135 \$135	\$18,000 \$30,000		8%	12	\$193	\$2,363	5%	\$1,613		\$2,400 \$18,000 \$28,388	<

- 2. Enter an amount to be billed (if billing by stipulated sum).
- 3. Choose the criteria for the Invoice Format and the Invoice Output.
- 4. Generate the invoice by clicking the **New** button.

Once an invoice is generated, it becomes a Draft invoice, which can then be finalized and sent to the client after review.

The Billing screen allows you to view and generate invoices for projects. You can also view outstanding, draft and historical invoices from here as well as apply payments to outstanding invoices.

The list view provides a listing of all invoices in the system.

- I. From the *Home* page, select the **Billing** tab.
- 2. On the Billing-Projects screen, specify filters to view the desired invoices.

Billing									ſ	ind re-find	list
Projects	Outstanding	Dr	afts	History							
Active InActive Cancelled Completed	All Project with unapp Project with unapp Project with unbilk Project with hold \$	proved Slips ed Slips Slips	Clien Principa Invoice Method Click on	t data in unde	erlined columns to	 ✓ S² La ✓ S² ✓ S² go to the record 	st Invoice From	5	То		st ~~
Project No.	Project	Client	Las [.] Invo	t lice	Last Invoice Amount	Total Invoiced To Date	Total Paid To Date	Balance Due		Invoice Method	All
2009-0143	Roark Residence	Howard Roark	02/	28/2011	\$15,000.00	\$69,000.00	\$70,000.00	-\$1,000.00	E F	Percent of Const.	🔲
1 2010-0001	Taggart Corporate He	. Dagny Taggart	: 11/	30/2010	\$57,968.75	\$372,914.36	\$324,187.50	\$48,726.86	E F	Percent of Const.	🔲
2010-0002	Rearden - Aspen Res	. Mr. Henry Rea	rden 05/	31/2011	\$34,878.80	\$259,510.60	\$230,810.60	\$28,700.00		Stipulated Sum	
2010-0003	PHU Science Center	Dr. Robert Stad	dler 12/	31/2010	\$67,512.60	\$414,012.60	\$346,500.00	\$67,512.60		Stipulated Sum	
2010-0004	Ferris Health Clinic	Dr. Floyd Ferris	s 02/	28/2011	\$33,906.25	\$114,528.20	\$87,500.00	\$27,028.20	0 0 0	Hourly Rate	
Number of Proj	jects: 5 Invoice Cuto	ff Start	5 En	Totals:	\$170,261.73 011 5 7	\$1,229,965.76 Invoice	\$1,058,998.10 Date 06/22/2011	\$170,967.66	Gene	rate Invoices	

- 3. Select the checkbox for the projects you want to bill.
- 4. Click the **Generate Invoices** button at the bottom to create new invoices. This moves them to the Drafts status.
- 5. On the *Drafts* tab, finalize an invoice by checking the appropriate draft invoice, and then clicking the **Finalize** button. Finalized invoices can then be printed from each individual project.

Payments

Payments can be applied for the individual projects using the Projects screen.

To apply payments:

1. Open the Projects screen and select the **Billing-Transactions** tab.

Projects 2	009-0143: 1	Roark I	Residence				find re-find	mylist list	duplicate new delete
Details	Ge	eneral	Logs	Doci	uments	Events	Checklists	Slips	Billing
			Summary	Invoices	Transactions	Dptions	Budgets	Maintenan	ce 🛛
Billing Clier	Roark, How	ard		From	5 То	5 🖓		[📑 🔍 🗉
									new find list 🖓
Date	Invoice No	Notes				Payment	Credit	Retaine	r Refund
03/16/2011						\$1,000.00	\$0.00	\$0.0	0 \$0.00 🔒
03/16/2011	11-17					\$9,000.00	\$0.00	\$0.0	0 \$0.00 🚷
03/14/2011						\$0.00	\$0.00	\$15,000.0	0 \$0.00 🔂
10/13/2010	2010-0027					\$14,000.00	\$0.00	\$0.C	0 \$0.00 🔒
10/12/2010	2010-0023					\$7,000.00	\$0.00	\$0.0	0 \$0.00 🔒
06/16/2010	2010-0010					\$5,000.00	\$0.00	\$0.0	0 \$0.00 🖁
06/15/2010	2010-0014					\$15,000.00	\$0.00	\$0.0	0 \$0.00 🔒
05/28/2010	2010-0010					\$7,000.00	\$0.00	\$0.0	0 \$0.00 🔒
03/23/2010	2010-0004					\$12,000.00	\$0.00	\$0.0	0 \$0.00 🔒
					Totals:	\$70,000.00	\$0.00	\$15,000.00	\$0.00
								Total Paid:	\$70,000.00
								Total Invoiced:	\$69,000.00
								Project Balance:	-\$1,000.00

- 2. Click the **New** button to record a new payment.
- 3. Enter the payment date and corresponding notes (i.e., check number payment details, etc.).
- 4. Select the **Payment** option.
- 5. Enter the amount of payment received and confirm the amount to apply.
- 6. Choose **Apply** for the corresponding invoice. Finally, click **Done**.

If you prefer to enter the payment in a batch method, you can do so from the Billing screen.

- 1. Open the *Billing* screen and select the **Outstanding** tab.
- 2. Find the corresponding invoice for the payment, using filter options at the top if necessary.

Billing								Q find	re-find list
Projects	s	Outstanding	Drafts	History					
From		📅 То	5 🖓	Project	*		✓ 🖓		
Invoice	Method		∽ 🕫	Client	✓ 47				_
			F	Principal	✓ 177	Aging	✓ 5 ⁴		
			C	lick on data in underlined columns	to go to the record				ାଣ
Date	<u>Invoice No.</u>	Invoice Method	Project No.	Project	<u>Client</u>	Aging	Total	Paid	Balance Due \$
11/30/2010	2010-0038	Percent of Construction	2010-0001	Taggart Corporate Headquarters	Dagny Taggart	174	\$48,726.86	\$0.00	\$48,726.86 🚮
05/31/2011	11-67	Stipulated Sum	2010-0002	Rearden - Aspen Residence	Mr. Henry Rearden	0	\$28,700.00	\$0.00	\$28,700.00 🐋
12/31/2010	2010-0041	Stipulated Sum	2010-0003	PHU Science Center	Dr. Robert Stadler	143	\$67,512.60	\$0.00	\$67,512.60 🛃
02/28/2011	11-16	Stipulated Sum	2010-0004	Ferris Health Clinic	Dr. Floyd Ferris	84	\$27,028.20	\$0.00	\$27,028.20 🛃
Number o	of Invoices:	4				Totals:	\$171,967.66	\$0.00	\$171,967.66

- 3. Apply the payment by going to the end of the row for the invoice entry. Click the payment icon.
- 4. It will automatically open the Projects-Billing-Transactions screen where you can enter the payment (as explained above).

Reports

The Reports screen allows you to save and run standard and custom reports in a detailed or summarized layout. You can also view your reports in different formats, such as PDF, RTF or Excel. It is recommended that you should check each category and run the reports included and see how each would best represent your data. Once you have the report filters and criteria set properly, saving the report for future can be very helpful.

- I. From the *Home* page, select the **Reports** tab.
- 2. Select the desired report from the Standard Reports list on the left.

🤷 ArchiOffice - Reports - Client Software	
File Edit Records Window Help	
Fountainhead Architects	Image: Contacts Image: Contacts <td< th=""></td<>
Reports	
Standard Reports	Time Card Report
Grinacts Grinacts	This is a detailed version of the general slip report. It is pre-set to only show time slips, and show summary totals for employee, project and weeks. If you want to limit it to one employee, you will need to select that in the search criteria.
Silp Report with Cost Silp Report with Notes Time Card Custom Time Card Custom Time Card Profitability Report Silp report with Invoced amount Projects Billing Calendar	Display Details Type O Detail Sort By Employee Role Service Type Project Name Project No Expense Type
Guetam Banarta	Totals O Daily O Weekly O Monthly O Only Summary Totals
DF 1-9 2010 Image: Second Se	Records to Include Perform a search to Use current found set 0 Records in found set Perform a search to Output Format 0 0 OPDF Vlewer RTF Export
×	Save Report Run Report
Roward Roark	Version: 2011.25
Ready	INS SSL

- 3. Specify the Display Details for the selected report, such as Type, Sort By, Output Format, etc.
- 4. After building the report settings, click the **Run Report** button to view it.

	Q 100%	•		
Fountainhead				
		Time	Card Report from 03/18/2004 to	07/01/2010
mployee	Hours	Time \$	Total	Total+Tax+ Markup
rchitect Architect	624.25	\$ 45,145.00	\$ 45,145.00	\$ 45,145.00
hristy Jameson	2,713.15	\$ 7,106.46	\$ 7,106.46	\$ 7,106.46
olin Sullivan	145.00	\$ 3,625.00	\$ 3,625.00	\$ 3,625.00
aniel Menitoff	172.50	\$ 14,706.25	\$ 14,706.25	\$ 14,706.25
arl Bankstrom	4,147.50	\$ 293,109.20	\$ 293,109.20	\$ 293,109.20
dward Thompson	3,583.10	\$ 340,661.93	\$ 340,661.93	\$ 340,661.93
dwin Sanchez	157.00	\$ 11,000.00	\$ 11,000.00	\$ 11,000.00
mily Simpson	1,940.75	\$ 146,697.74	\$ 146,697.74	\$ 146,697.74
ary Beal	4,779.25	\$ 520,435.99	\$ 520,435.99	\$ 520,435.99
reg McGihon	2,791.50	\$ 194,615.35	\$ 194,615.35	\$ 194,615.35
oward Roark	3,328.85	\$ 265,453.68	\$ 266,260.73	\$ 266,268.73
ohn Smith	3,389.25	\$ 258,170.45	\$ 258,170.45	\$ 258,170.45
ohn Young	2,117.43	\$ 187,330.09	\$ 187,330.09	\$ 187,330.09
en Shiokawa	59.50	\$ 4,352.50	\$ 4,352.50	\$ 4,352.50
ristin Farnsworth	3,216.25	\$ 179,857.94	\$ 179,857.94	\$ 179,857.94
like Rhineland	4,838.00	\$ 374,984.26	\$ 374,984.26	\$ 374,984.26
ally Holcomb	5.00	\$ 0.00	\$ 0.00	\$ 0.00
am Morgenstern	3,313.25	\$ 310,271.82	\$ 310,271.82	\$ 310,271.82
oberto Trujillo	3.00	\$ 120.00	\$ 120.00	\$ 120.00
	3 082 25	\$ 217,296.67	\$ 217,296.67	\$ 217,296.67
teven Gold	0,002.20			

5. If you wish, click **Save Report** to save your report under the *Custom Reports* category.

Project Management

ArchiOffice provides many ways to measure the efficiency of your projects. The following features can provide you with useful information to review your projects and track their progress.

Projects Summary

Projects–Billing–Summary screen: This view allows you to measure efficiency based on the projects budget, compared to the actual time and fees to what has been invoiced. This information is updated in real-time and represents the status of your project.

Project Profitability

Projects–General–Quick View screen: This view displays the most pertinent information relating to your project's profitability. Here you will see the Total Cost to Date, the Total Net Billings or Payments Received, which then reflects your actual Profitability. In addition, this view provides a breakdown of the budgeted time on a project compared to the actual hours spent, as well as the cost for each project phase.

Troubleshooting

Various technical issues that may be encountered during the installation and startup of the ArchiOffice application have been explained here:

Error

Java has discovered application components that could indicate a security concern. This applies to Java version(s): 6.0, 6u19+.

Symptoms

While attempting to run Java based applet or application, a security warning appears: 'Java has discovered application components that could indicate a security concern.'



Cause

Signed Java Web Start applications and applets that contain signed and unsigned components could potentially be unsafe unless the mixed code was intended by the application vendor. As of the Java SE 6 Update 19 release, when a program contains both signed and unsigned components, a warning dialog is raised.

Solution

Referring to the above screenshot, if the user clicks **Yes**, it blocks potentially unsafe components from running, and the program will terminate. If the user clicks the *No* button, the application or applet continues normally.

Error

While trying to launch ArchiOffice, I either receive a blank Servoy screen or am not able to access the ArchiOffice data on the server.

Solution

This installation issue can be confirmed and fixed by following these steps:

PC Users:

1. On the Server, verify the ArchiOffice Servey Server is running. Go to *Control Panel, Administrative Tools* > Services and check whether the Servey Application Server service has a status of Started.

(🖏 Removable Storage			Manual	Local System
(🖏 Routing and Remote A	Offers rout		Disabled	Local System
4	🖏 Secondary Logon	Enables st	Started	Automatic	Local System
(🖏 Security Accounts Man	Stores sec	Started	Automatic	Local System
(🖏 Security Center	Monitors s		Disabled	Local System
4	Server 🗧	Supports fil	Started	Automatic	Local System
	Servoy Application Ser	Servoy Ap	Started	Automatic	Local System
(🖏 Shell Hardware Detection	Provides n	Started	Automatic	Local System
4	🖏 Smart Card	Manages a		Manual	Local Service
4	🖏 SQL Anywhere - AODB		Started	Automatic	Local System
6	SSDP Discovery Service	Enables dis	Started	Manual	Local Service
4	🖏 Symantec Lic NetConn	Symantec		Automatic	Local System
(🖏 System Event Notificat	Tracks syst	Started	Automatic	Local System
4	🖏 System Restore Service 🛛	Performs s	Started	Automatic	Local System
4	🖏 Task Scheduler	Enables a		Manual	Local System
(🎇 TCP/IP NetBIOS Helper	Enables su	Started	Automatic	Local Service
4	🖏 Telephony	Provides T	Started	Manual	Local System
4	🖏 Telnet	Enables a r		Disabled	Local System
6	🎇 Terminal Services	Allows mult	Started	Manual	Local System

If it does not show Started, then go to C:\Program Files\ArchiOffice
 2011\Servoy\application_server\database and delete all the log files.

📁 database					
File Edit View Favorites Tools	Help				
🚱 Back 🝷 🕥 🕤 🏂 🔎 Si	earch 😥 Folders 🛛 🔃 👻	Folder Sync			
Address 🛅 C:\Program Files\ArchiOffice	2011\Servoy\application_server\data	base			💌 🔁 Go
	Name 🔺	Size	Туре	Date Modified	
File and Folder Tasks 🛛 🖄	🔊 ao_data_migrator.db	22,068 KB	Data Base File	6/22/2011 8:34 AM	
Move the selected items	🗐 ao_data_migrator.log	320 KB	Text Document	6/22/2011 8:15 AM	
	🔊 archioffice.db	101,828 KB	Data Base File	6/22/2011 12:00 PM	
Copy the selected items	🗐 archioffice.log	68,864 KB	Text Document	6/22/2011 11:29 AM	
Publish the selected items	🔊 servoy_repository.db	65,576 KB	Data Base File	6/22/2011 8:34 AM	
to the web	🗐 servoy_repository.log	576 KB	Text Document	6/22/2011 8:15 AM	
E-mail the selected items					
X Delete the selected items					
	Delete t	hese 3 highlight	ted log files.		
Other Places 🙁					

- 3. Now start the ArchiOffice 2011 Server again. Confirm whether the Servoy Application Server has started (*as in the first step*).
- 4. Turn off your Firewall.
- 5. On the Client, turn off/down UAC on Vista/Windows 7 computers.

- 6. Update Java to the latest version. This is *critical* if you are not able to open the ArchiOffice Client. You may need to uninstall all versions of java, and then reinstall the current version. If you are using the latest version, try uninstalling Java, and then re-installing it (<u>www.java.com</u>).
- 7. Once you update Java, Go to Control Panel > Java > General > Settings and click **Delete Files** to clear your Java Cache.
- Re-launch the ArchiOffice Client application by clicking the desktop shortcut or entering the correct server IP address into a web browser. E.g., http://192.168.100.50:8081/servoy-client/archioffice_client.jnlp

Mac Users:

- On the server, check to make sure the ArchiOffice Servoy Server is running. Go to /Applications/ArchiOffice 2011/Control Panel and launch the ArchiOffice Control Panel. It should indicate whether the server is running at the top.
- 2. If it does not indicate that the server is running, please contact ArchiOffice Technical Support at (310)602-4030.
- 3. Turn off your Firewall.
- 4. On the Client, update Java to the latest version. This is *critical* if you are not able to open the ArchiOffice Client. If you already have the latest version, check your Java Preferences and move the Java v6 versions to the top of the list.
- 5. Clear your Java Cache from Java Preferences-Network screen by clicking Delete Files.
- Re-launch the ArchiOffice Client application by clicking the desktop shortcut or entering the correct server IP address into a web browser. E.g., http://192.168.100.50:8081/servoy-client/archioffice_client.jnlp

Error

Mac installer allows only the original Admin account (Me) to have Read/Write privileges.

Symptoms

In spite of creating an Administrator account and having a successful installation, after restarting the computer and logging in with the same Admin account, the 'Welcome to ArchiOffice' startup instructions screen doesn't launch. This Admin account does not have access permissions as shown by the Applications folder. Even though the installer allows installation for all users of the computer, it doesn't actually do so.

Solution

Please follow these steps to fix the problem:

1. Select the Applications/ArchiOffice 2011 folder and click command-I, or go to the File dropdown menu and select Get Info.

- 2. On the ArchiOffice 2011 Info screen, click the small lock in the bottom-right.
- 3. Enter the Admin password.
- 4. Click the **Add** icon # in the bottom-left of the screen to add a new privilege.
- 5. Select **Administrators** and make sure it has *Read* & Write privileges.
- 6. Then select **everyone** (which is already part of the privileges) and change it to *Read & Write* privilege instead of 'No Access'.
- To the right of the +/- buttons in the bottomleft of the screen is a button with a gear. Click it and select the **Apply to Enclosed Items** option. This will propagate these privileges to all subfolders and files.

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▼ General:		
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Error Not able to connect to ArchiOffice from a Client machine

Symptoms

After installing ArchiOffice and licensing it, I am not able to connect to it from a Client machine/system.

Solution

To connect to ArchiOffice from the Client system, open your browser and type http://[ServerIPAddress]:8081

To find the Server IP address for Windows OS:

- 1. On the Server machine, select **Start > Run**, type **cmd** and press **Enter** to access the Windows Command prompt.
- 2. Type **ipconfig**. Press **Enter**. This will display the IP address (e.g., 192.1.5.168) to be used for the clients on your network.

This displays the ArchiOffice Client Application launch page, which will download the Client application from the Server and create a shortcut on the desktop. During the download, you will be asked to verify or accept the security certificates. You can launch the Client application from the desktop shortcut from now onwards, without using the browser and the Server's IP address.

If the shortcut **does not** appear on the desktop, it is because of your settings. Control Panel, Java, Advanced, Shortcut Creation has an option set that prevents all Java shortcuts from being downloaded and saved. You need to change this setting to permit shortcuts or else use the web browser to launch your Client application each time.

For more technical issues, check our ArchiOffice Knowledgebase at <u>www.bqe.com/ArchiOfficeKB</u>.

Congratulations! You have now successfully installed ArchiOffice and understood its basic functionality. To learn more about this program, check the <u>ArchiOffice Help</u> or visit www.ArchiOffice.com/ProductOverview.

For more information, visit us at <u>www.ArchiOffice.com</u>. If you have any trouble in using ArchiOffice, please contact ArchiOffice Support at (800) 371-0130 (ext #0) or <u>support@ArchiOffice.com</u>. For other questions, please call us at (888) 245-5669 (US and Canada) or (310) 602-4020; or email <u>sales@ArchiOffice.com</u>.