Getting Started Guide

ArchiOffice

ArchiOffice Online Getting Started Guide

Power Your Office. Empower Yourself.

ArchiOffice

Contents

INTRODUCTION 1

ArchiOffice Online Setup Checklist 2

SYSTEM REQUIREMENTS 3

Hardware Requirements 3
Software Requirements 3

START-UP 4

ARCHIOFFICE ONLINE ACCOUNT 4
ARCHIOFFICE ONLINE COMPANY FILE 5
LOG-IN 7
UPGRADE 8
NAVIGATION 8
Navigation Bar 8
Dashboard 9

ARCHIOFFICE ONLINE BASICS 10

ARCHIOFFICE ONLINE SETUP 10
TUTORIAL 12
Contacts 12
Projects 13
Time and Expenses 15
Billing 16
Reports 17
PROJECT MANAGEMENT 18
Projects Summary 19
Project Profitability 20

Introduction

Welcome to ArchiOffice Online® from ***BQE Software****!*

ArchiOffice Online is a subscription-based, Software-as-a-Service (SaaS) solution offered by BQE Software. It is a web-based version of ArchiOffice that is hosted by BQE, providing you with a secure, hassle-free project management solution for architects. It was created by architects, for architects and continues to evolve to meet the needs of a growing customer base worldwide. ArchiOffice Online 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, task and project management, time and expense tracking, billing and reporting. This software program is simple, affordable, secure, scalable, and very fast.

Being a SaaS solution, ArchiOffice Online involves no software installation and your data is stored at our hosted site (called the 'cloud'). In addition, BQE automatically backs up your data.

The goal of this ***ArchiOffice Online Getting Started Guide*** is to help you get started with the program. It explains the concepts and procedures involved in setting up an ArchiOffice Online account, focusing on its subscription, setup, basic and main functionalities. This Guide enables you to quickly learn how to run and use ArchiOffice Online effectively and efficiently.

The ArchiOffice Online Getting Started Guide is not a complete training solution. It is a guided tour designed to familiarize you with ArchiOffice Online. After completing the guide, please explore the ArchiOffice Online Help. 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 an expert trainer who helps you get up and running with ArchiOffice Online as quickly as possible. Check out www.bqe.com/Services for more information.

ArchiOffice Online Setup Checklist

	✓	Task	Resources and References
Pre-Deployment	☐	Decide about the ArchiOffice Online plan that fits your need	Plan and Pricing
	☐	Check our system requirements	Hardware Requirements Software Requirements
Start-Up	☐	Set up ArchiOffice Online account	ArchiOffice Online New Account
	☐	Create your online company	ArchiOffice Online Company
	☐	Log into your ArchiOffice Online company	Login
Deployment	☐	Set up your ArchiOffice Online company file and preferences	Setup
	☐	Start using ArchiOffice Online	ArchiOffice Online Help ArchiOffice Online Trainings

System Requirements

For successful running of the ArchiOffice Online solution, you need an Internet connection and a web-browser. Your computer should meet these basic requirements:

Hardware Requirements

- Any Intel x86-compatible microprocessor (Intel i3 or later recommended)
- 2 GB RAM or more (4 GB recommended)

Software Requirements

- Windows 8/7/Vista/XP, Mac OS 10.0 or later
- Microsoft Internet Explorer 10.0 or later, Chrome 30.0 or later, Firefox 30.0 or later, Opera 20.0 or later, Safari 6.0 or later

Be sure to install the latest Windows or Mac service packs and critical updates. Some versions include an Automatic Update option.

If you are experiencing problems with ArchiOffice Online, please check our [Knowledge Base Articles](). Otherwise, contact us at 310-602-4030 or support@ArchiOfficeOnline.com.

Start-Up

Basic start-up procedure for ArchiOffice Online involves these key steps (*see below for details*):

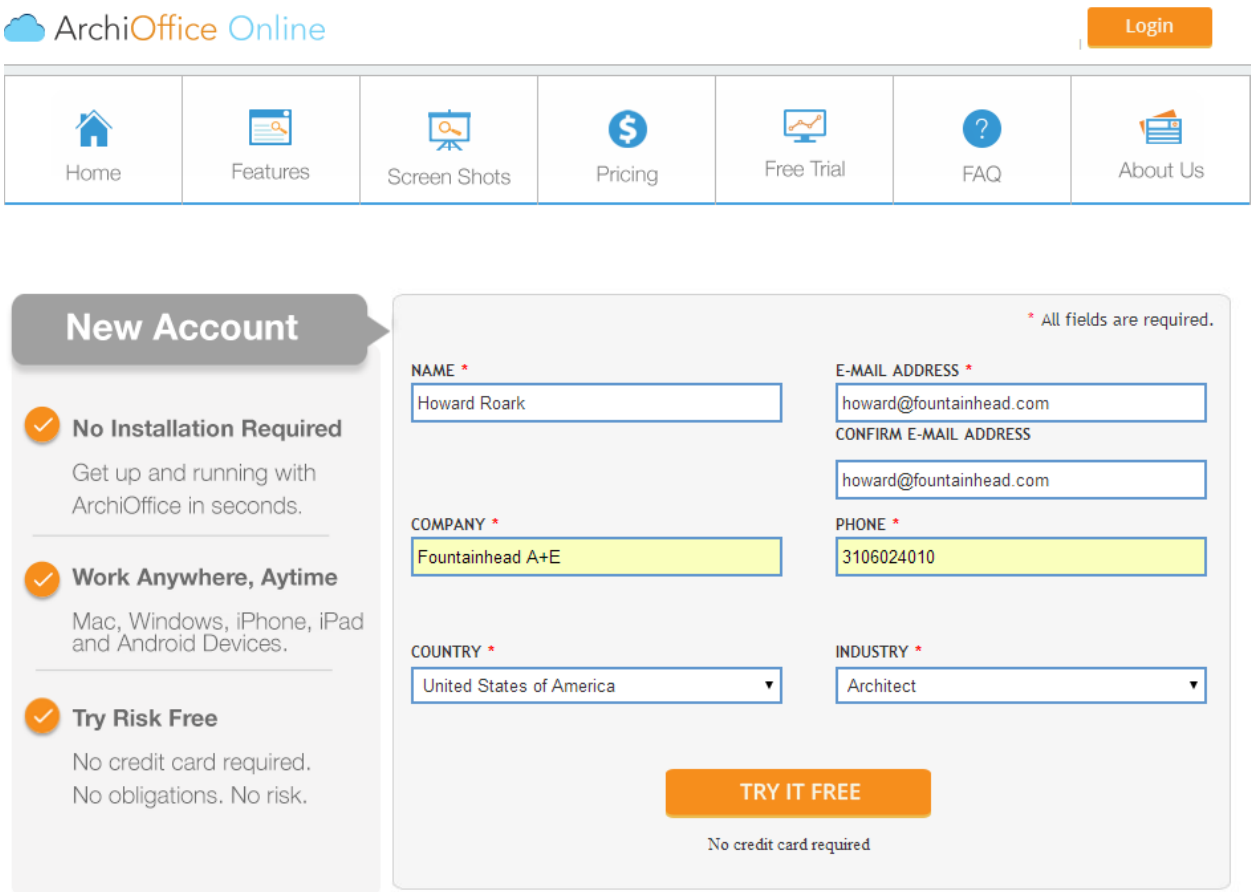
1. Sign up for an ArchiOffice Online account.
2. Create an online company file.
3. Log in to ArchiOffice Online.
4. Navigate ArchiOffice Online.

Before subscribing to the software, please read the Service Level Agreement (SLA).

ArchiOffice Online Account

To use ArchiOffice Online, you need to subscribe to it or sign up for a 15-day trial version at www.ArchiOfficeOnline.com. During these 15 days, you can check out the full functionality of ArchiOffice Online, with a new or sample database.

To get started, you have to sign up for an account on the New Account page by clicking on Free Trial. Creating a new account involves creating a new company file. You have to provide the required information, including a unique email address. ***Subscription is based on this unique email ID***. After this, you will receive an email confirming your free trial along with a login ID and temporary password. You have to use these credentials to validate your account and log into the program. Your email address is marked as the Owner of the company file.

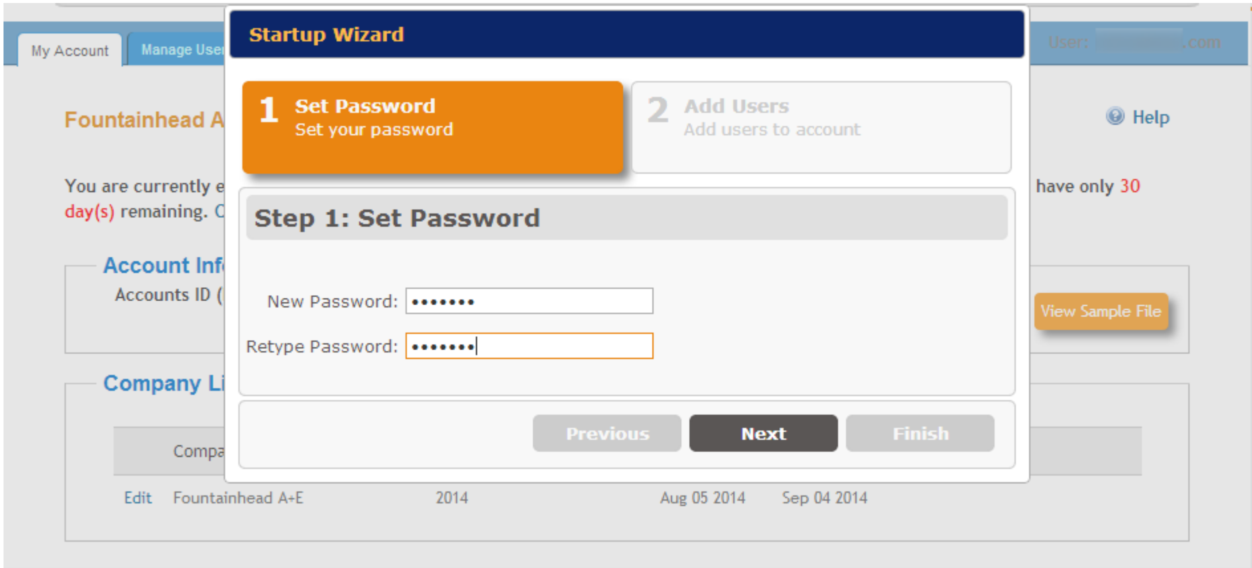


After you log into your ArchiOffice Online account, you have the option to buy the subscription directly instead of using a trial version. You can go to your account's Buy Now tab and purchase the plan you want.

> If you are using Internet Explorer with Google toolbar, you need to turn off the pop-up blocker for Internet Explorer (Tools > Internet Options > Privacy) as well as Google toolbar (Settings next to the Search button).

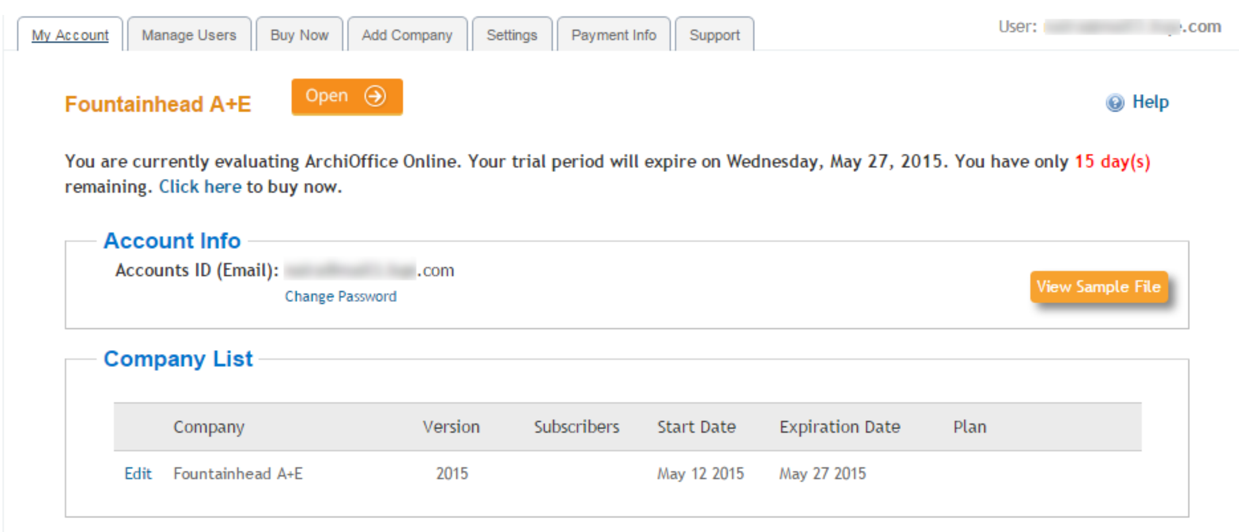
ArchiOffice Online Company File

ArchiOffice Online displays the Startup Wizard as soon as you validate your account. It prompts you to change the password and add users, if desired. You can create up to 100 named users for your company file during your evaluation period. After subscribing to it, you can purchase more than 100 named users.



When you create an account, ArchiOffice Online creates your database using the company name provided by you. If you want to add another company to your ArchiOffice Online account, you can do so from the Add Company tab using the same email address. However, you have to purchase separate licenses for users in each company.

If you created multiple databases, you will be prompted to choose the company you want to access before viewing the account details on the My Account tab.



Your email address is marked as the Owner of the company file. When you add new users (Employee), you can set them as an Administrator or a Standard user. By default, an Administrator has full access to ArchiOffice Online. However, you can change these permissions using the Preferences screen within the program. Designating someone as an Administrator or a Standard user does not affect the subscription price.

As an Owner, you will be responsible for the company account, especially adding other users and entering company data. You can enter your company data into ArchiOffice Online in one of the two ways:

- If you have purchased the subscription, have BQE migrate your existing data into the ArchiOffice Online database and upload it for you. *Call your Account Rep for the details.*
- Manually enter data into a fresh company database

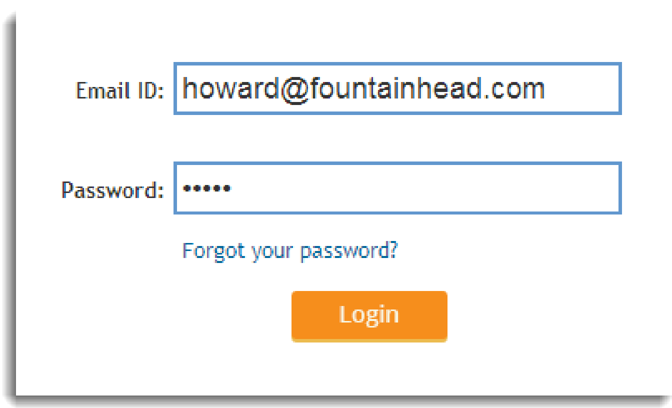
The Owner has various privileges to create multiple databases, view account details and manage the overall account. The various options available to the Owner are:

- My Account tab—Manage ArchiOffice Online account
- Manage Users tab—Add ArchiOffice Online users
- Buy Now tab—Purchase subscriptions
- Add Company tab—Add multiple company databases
- Settings tab—Specify options for the online company
- Payment Info tab—View payment history of your online account
- Support tab—Email Technical Support if there is any problem with your online account

The above options available to a user will differ based on the user type set by the Owner. A Standard user will only be able to view his or her account information (that too limited) while the Administrator will be able to manage the account and view all information with some exceptions.

Log-in

You must be an ArchiOffice Online User to log in and use the program. On the [Login]() page, enter your unique **Email ID** and **Password**.



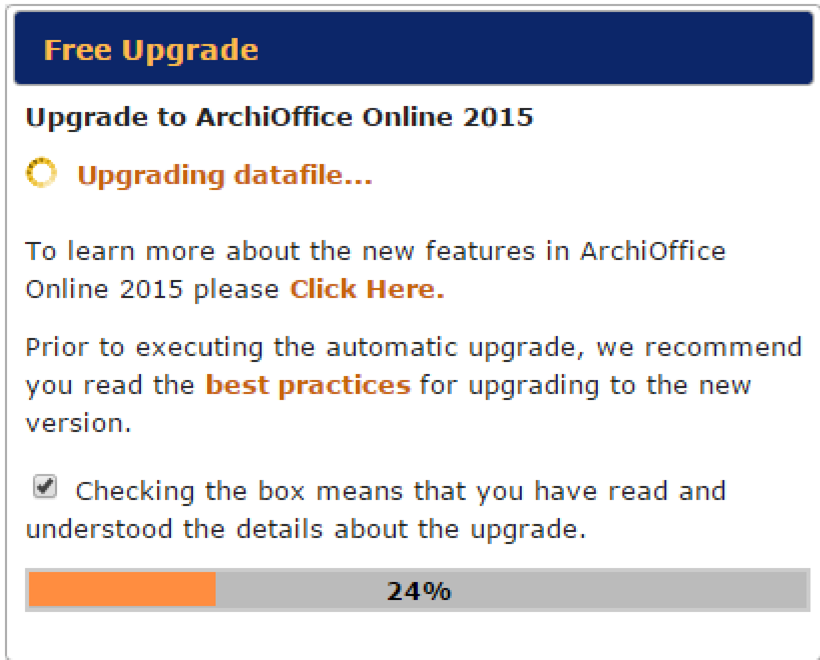
After creating an ArchiOffice Online account and registering for trial use, BQE Software emails you a link to activate your account along with a temporary password to log into the program. The Email ID used during the trial period remains the same when you purchase subscription to ArchiOffice Online.

When you log in for the first time as an Owner, you must change your password. After changing it, you should use the new password to access ArchiOffice Online in future. This password can be changed any time from the My Account tab. When you add other users to the online account, they receive activation emails with login instructions.

To start working with ArchiOffice Online, click Open on any of the tabs to open your company database. After doing so, the ArchiOffice Dashboard (home page) displays.

Upgrade

When a new upgrade is available for ArchiOffice Online, you will be prompted with that message upon login. The upgrade is an automatic process and free for all online users. You can choose to upgrade or get a reminder later.

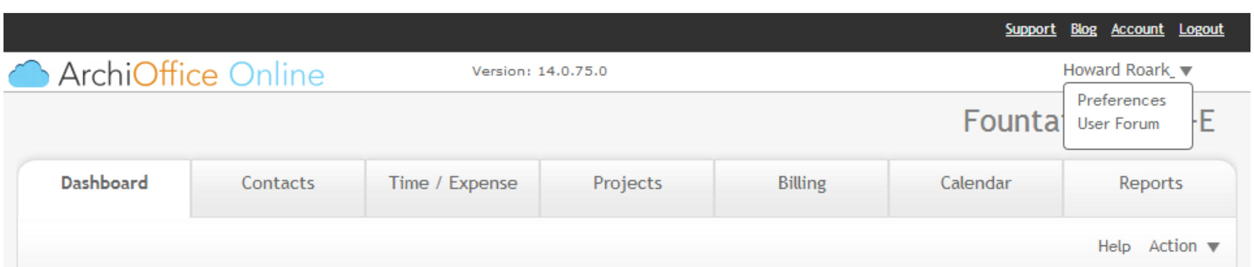


Navigation

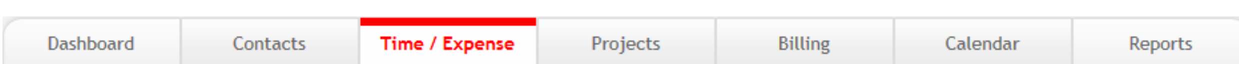
After logging in to ArchiOffice Online and opening your company file, you can access various functions and features of the program using the following navigation options:

Navigation Bar

Above the main navigation bar, ArchiOffice Online provides some links, including your online Account and Logout. You have more options under the drop-down menu at the top right such as Preferences and User Forum. These options are based on your access privileges.



ArchiOffice Online displays a navigation bar at the top with color-coded tabs that represent a major function or module of the program. Clicking each tab on the navigation bar displays the respective screens. E.g., Clicking Time/Expense on the navigation bar displays a group of tabbed screens like Time, Expense, etc. You can click on each tab to view or enter data in each screen.

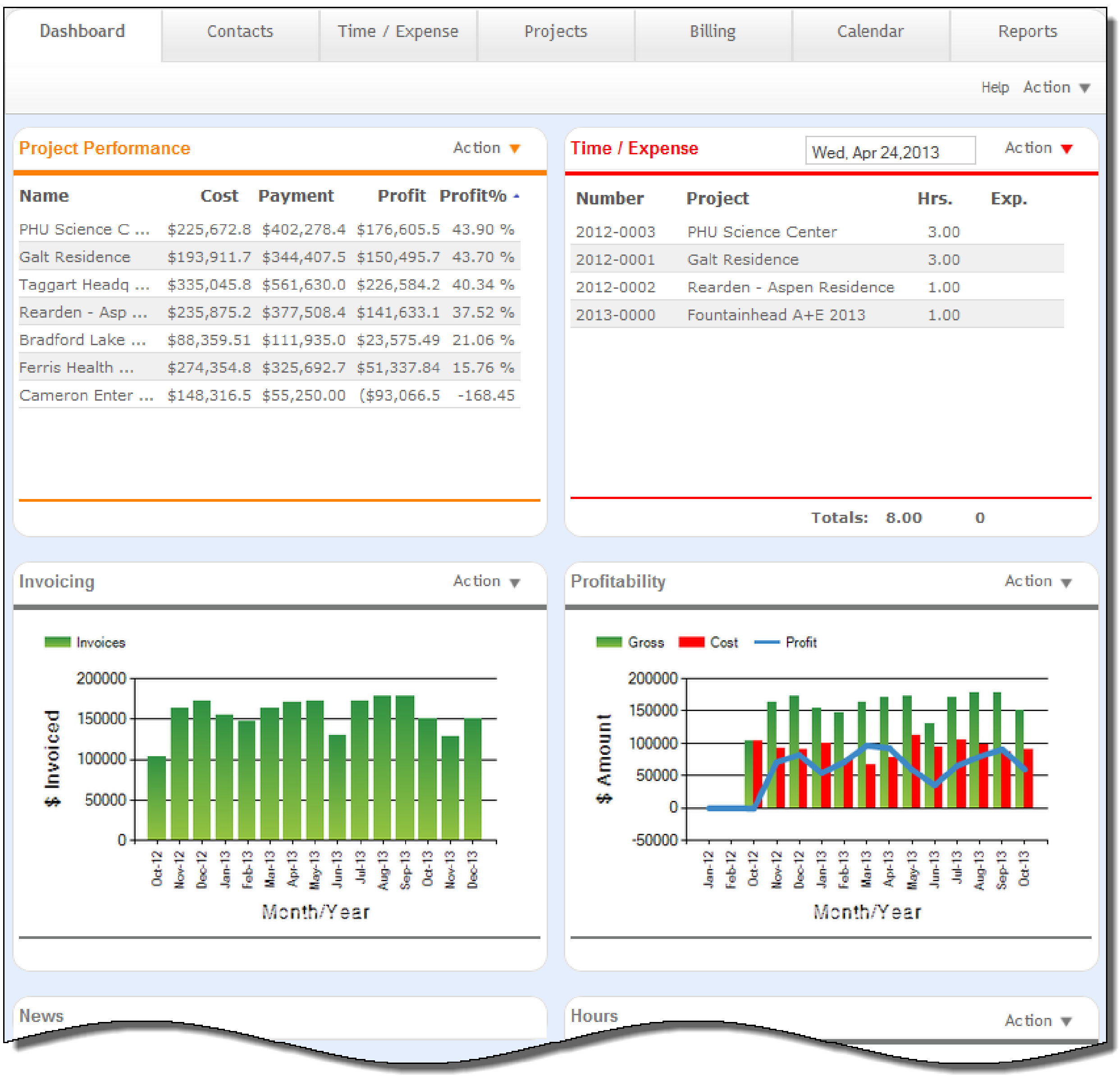


Dashboard

The home page of ArchiOffice Online displays a dashboard with highly useful and customized information, charts, and links. You can access

- product related News
- [ArchiOffice Online Help]()
- lists such as Time/Expense, Contacts, Projects, etc.
- important charts such as profitability, A/R, realization, etc.

All this information is customized based on your user profile and privileges. You can choose to expand or collapse each panel by clicking on them and apply filters to the charts.



ArchiOffice Online Basics

This section focuses on the initial setup of ArchiOffice Online including the default settings and tutorial.

ArchiOffice Online Setup

At least one person (Administrator) should set up the ArchiOffice Online company. The administrator must review and update the Preferences (*explained below*). This establishes the default settings for the program.

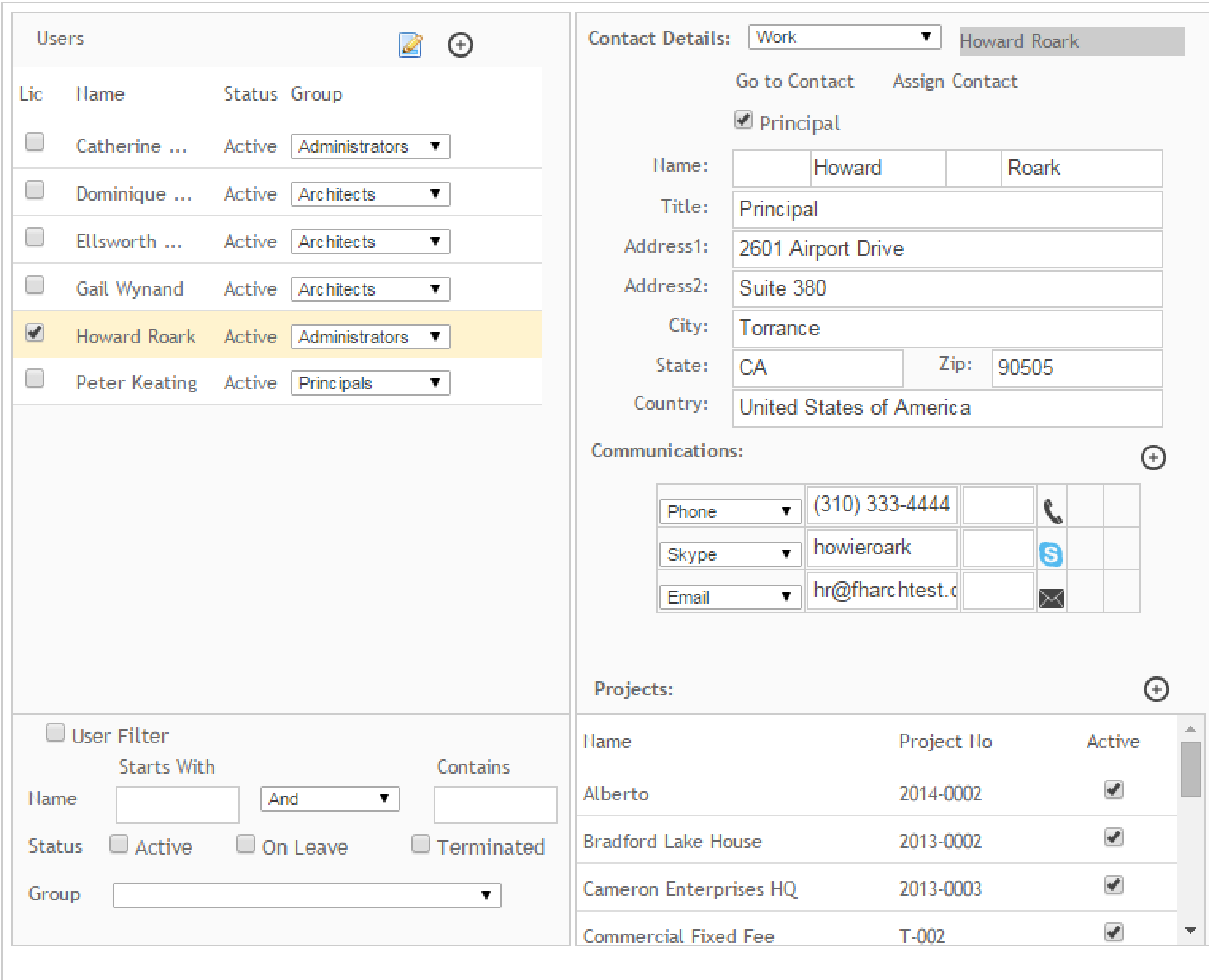
To access the Preferences screen, select Preferences from the drop-down menu at the top-right corner of the program. You can set up your company defaults, users and other settings from this screen.

It is critical to set up preferences prior to entering any additional information in ArchiOffice Online.

Preferences-System: Enter required information or specify settings for report and invoice logos, system defaults, number formats, printing standards, etc.

Preferences-Work Groups: Establish workgroups and their access permissions (security settings and privileges) for various screens and reports. This saves time by setting permissions on a group basis, rather than for each employee.

Preferences-Users: Enter ArchiOffice Online user profiles and other details such as default rates, addresses, HR items, time and expense options, security settings, and so on. You can also override the user's workgroup security here. You must enter their cost rates (to track the project's profitability) and charge rates (used when employee records time slips against a project) prior to setting up a project. *The DPE and DSE rates are required to establish the value of the time slips only if a project uses the invoice method of Multiple of DPE/DSE.*



Preferences-Contact: Set the contact defaults and name formats for your ArchiOffice Online contacts.

Preferences-Project: Set the defaults for the projects so that when creating new projects in ArchiOffice Online, users will have consistent numbering, phase and job codes as well as other project management information. You can set the defaults for roles, submittals, milestones, teams, associated tasks, etc. Properly setting up this information will ensure that all new projects in ArchiOffice Online will conform to your company policy and standards. *All this must be entered in its entirety prior to setting up a project.*

Preferences-Billing: The billing setup might require collaboration with your accountant or bookkeeper. Here, you set the defaults for invoice numbering and templates, payment terms, expense markups, account codes, tax models, and billing labels. You can customize the expense types, if needed. *This information must be entered in its entirety prior to setting up a project but can be overridden at the project level.*

Preferences-Web Access: Set your default mapping website and address. The Contacts portal provides links directly from the contact information using the maps you choose here (say Google Maps). This information is used for mapping of contact addresses or driving directions.

Tutorial

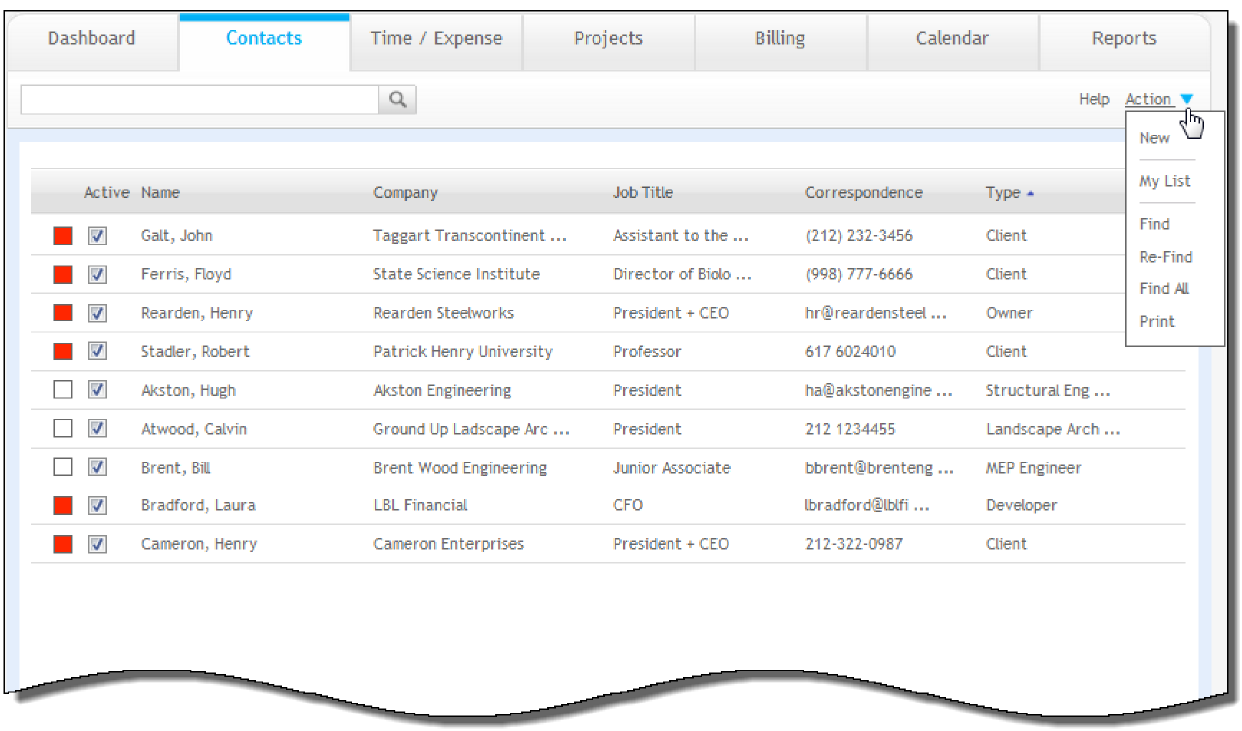
This tutorial covers the basic procedures involved in project setup, time tracking, billing, payment, project management and reporting. For details, please refer to the [ArchiOffice Online Help.]

Contacts

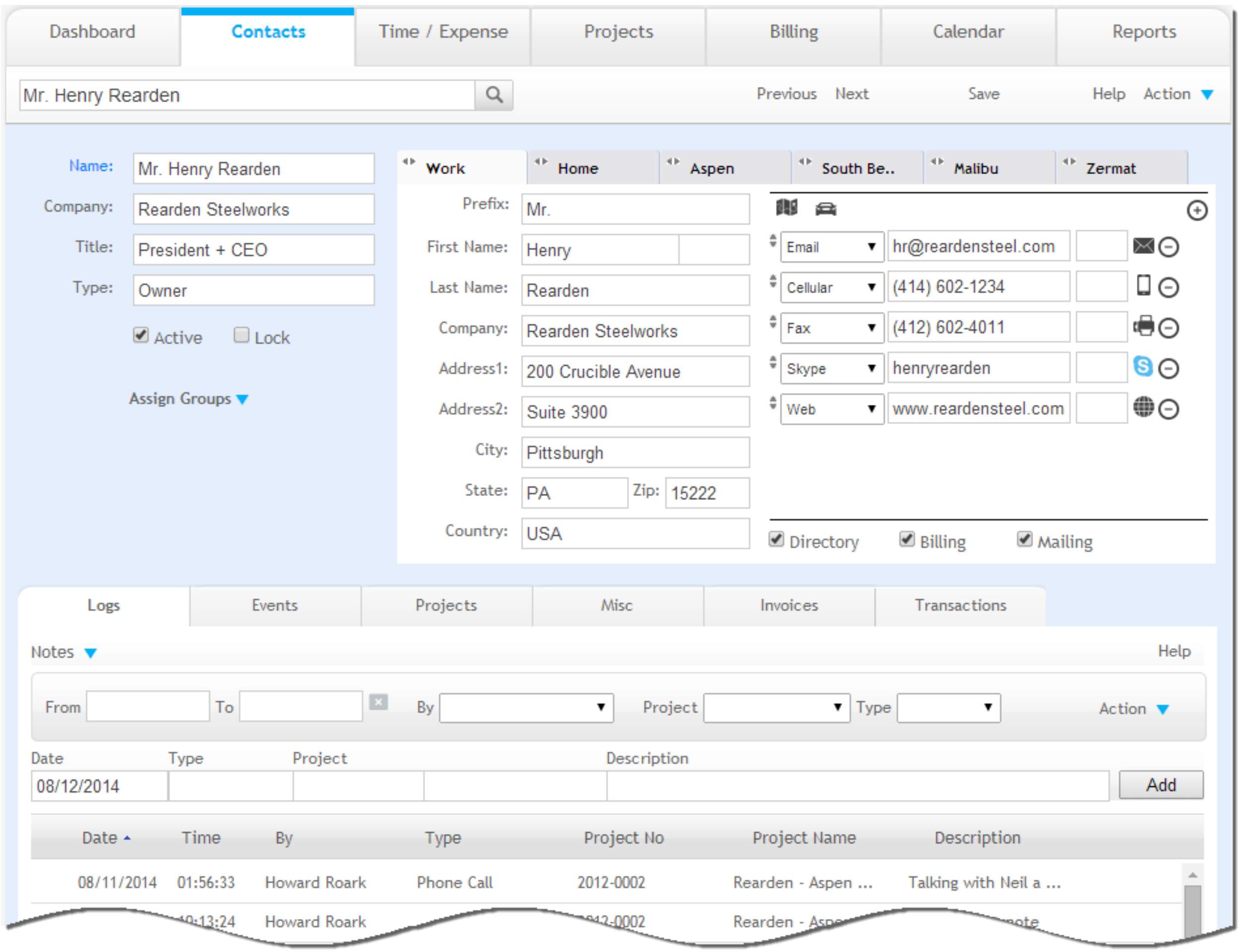
The Contacts screen allows you to create and maintain a profile of your contacts including employees, clients, contractors, consultants, and anyone related to your projects.

To enter contact information:

1. Select the Contacts tab on the navigation bar.
2. The grid displays a list view of your contacts, if any. Select a contact to edit details or click Action > New on the button panel to add a new contact.



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 address tabs to this screen by clicking on the right. Additional tabs provide the ability to enter multiple addresses and phone numbers, that is, home, billing, job site, assistant, etc. This helps keep the contact details organized and easily accessible.

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

Projects

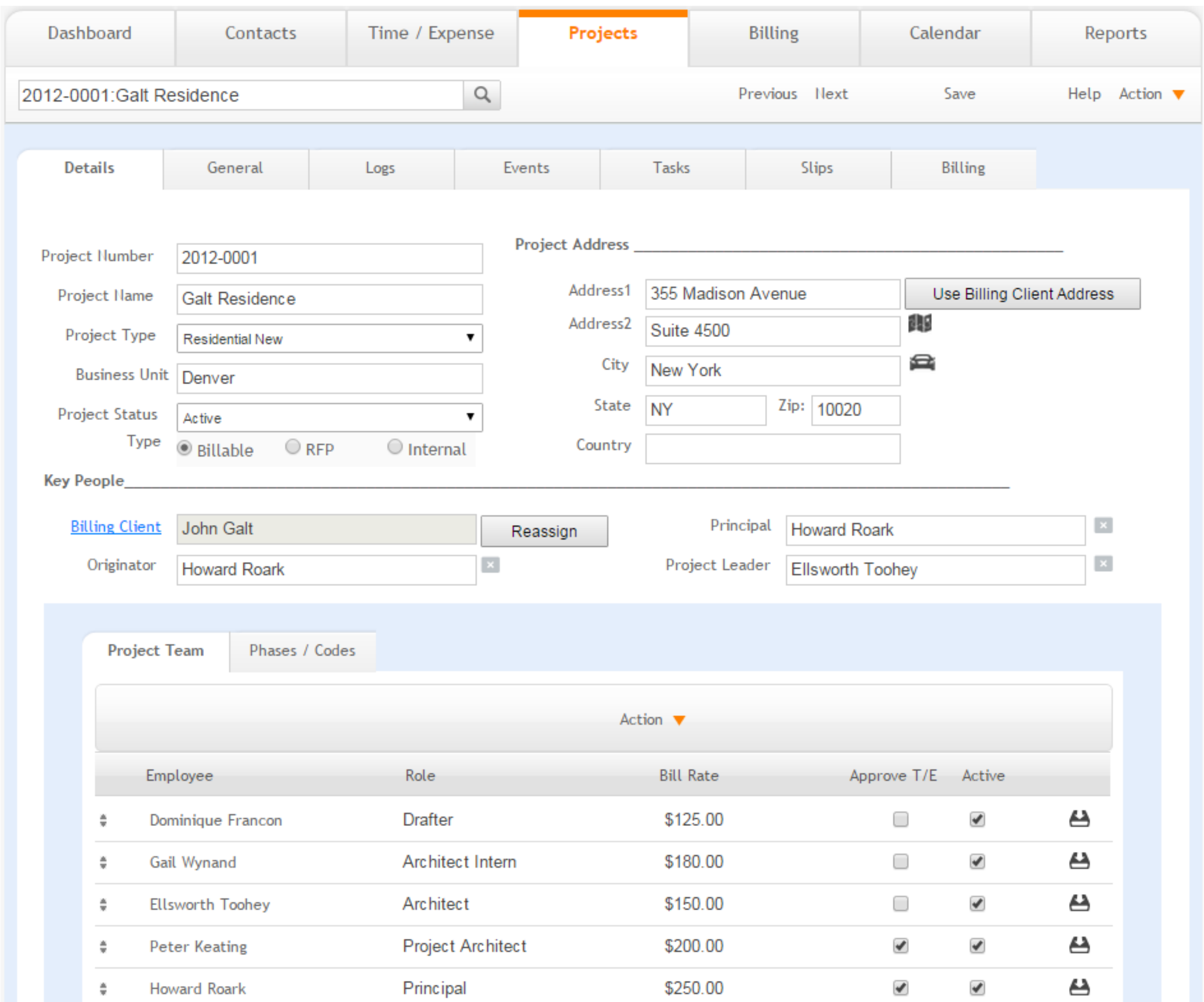
The Projects screen allows you to create and maintain a profile of your projects or jobs. When a new billable or RFP project is created, default settings specified in the Preferences screen are automatically applied. If you create a new project from a project template, ArchiOffice Online ignores Preferences and uses the template's settings. Internal projects adopt no settings from Preferences.

1. From the *Contacts* screen, select the client's contact record. In the detail view, select the **Projects** tab below the contact details and select Action > New. You can also select Projects directly on the navigation bar and select Action > New in the list view.

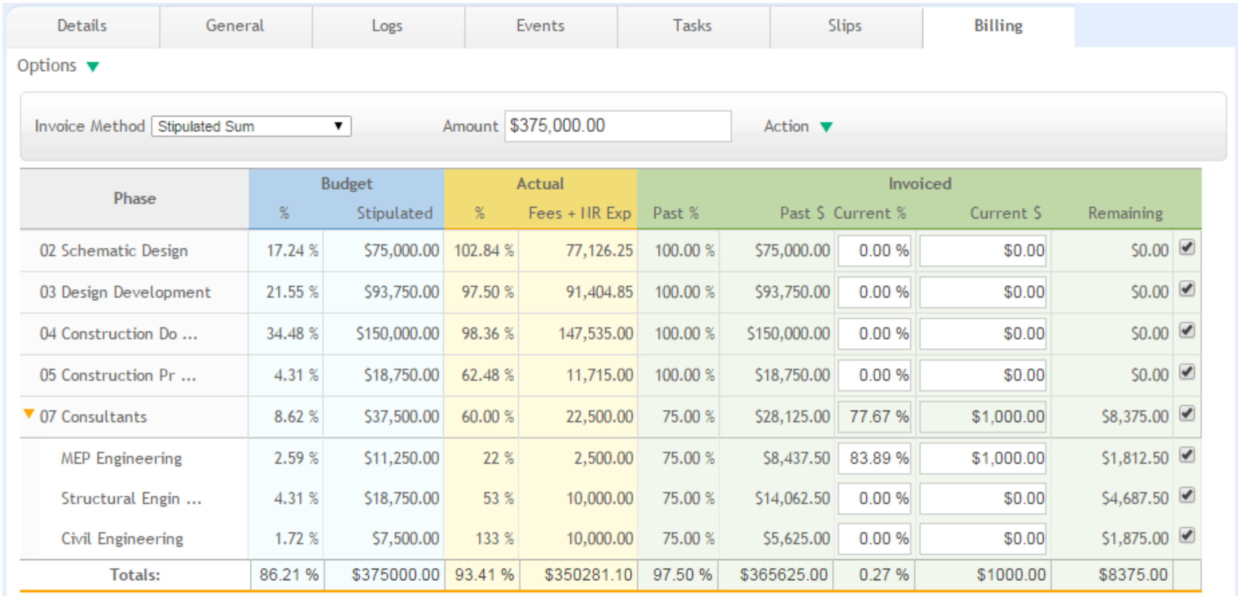
2. It prompts you to enter the required information such as type of project—Billable (contract work that will be billable), RFP (pre-contract) or Internal (internal office work that is non-billable or project related), client, project name and number.

   On entering this information, you automatically move from the *Contacts* screen to the *Projects* screen.

3. On the *Details* tab, you can enter the project's basic details such as employees working on this project (teams and rates), 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 subcategories related to budgeted phases and job codes. Click Save.



4. Now, click on the *Billing tab* and select *Options* from the drop-down list on the left to set the project's Invoice Method. *This is important prior to entering the project's budget.*



Phase	Budget %	Budget Stipulated	Actual %	Actual Fees + IIR Exp	Invoiced Past %	Invoiced Past $	Invoiced Current %	Invoiced Current $	Remaining
02 Schematic Design	17.24 %	$75,000.00	102.84 %	77,126.25	100.00 %	$75,000.00	0.00 %	$0.00	$0.00
03 Design Development	21.55 %	$93,750.00	97.50 %	91,404.85	100.00 %	$93,750.00	0.00 %	$0.00	$0.00
04 Construction Do ...	34.48 %	$150,000.00	98.36 %	147,535.00	100.00 %	$150,000.00	0.00 %	$0.00	$0.00
05 Construction Pr ...	4.31 %	$18,750.00	62.48 %	11,715.00	100.00 %	$18,750.00	0.00 %	$0.00	$0.00
07 Consultants	8.62 %	$37,500.00	60.00 %	22,500.00	75.00 %	$28,125.00	77.67 %	$1,000.00	$8,375.00
MEP Engineering	2.59 %	$11,250.00	22 %	2,500.00	75.00 %	$8,437.50	83.89 %	$1,000.00	$1,812.50
Structural Engin ...	4.31 %	$18,750.00	53 %	10,000.00	75.00 %	$14,062.50	0.00 %	$0.00	$4,687.50
Civil Engineering	1.72 %	$7,500.00	133 %	10,000.00	75.00 %	$5,625.00	0.00 %	$0.00	$1,875.00
Totals:	86.21 %	$375000.00	93.41 %	$350281.10	97.50 %	$365625.00	0.27 %	$1000.00	$8375.00

5. Next, on the same Billing tab, select *Budget* from the drop-down list where the phases (sub-phases) and job codes (sub-job codes) have already been set. Enter the fees and hours budgeted for each phase. This will coincide with the information stipulated in your contract.

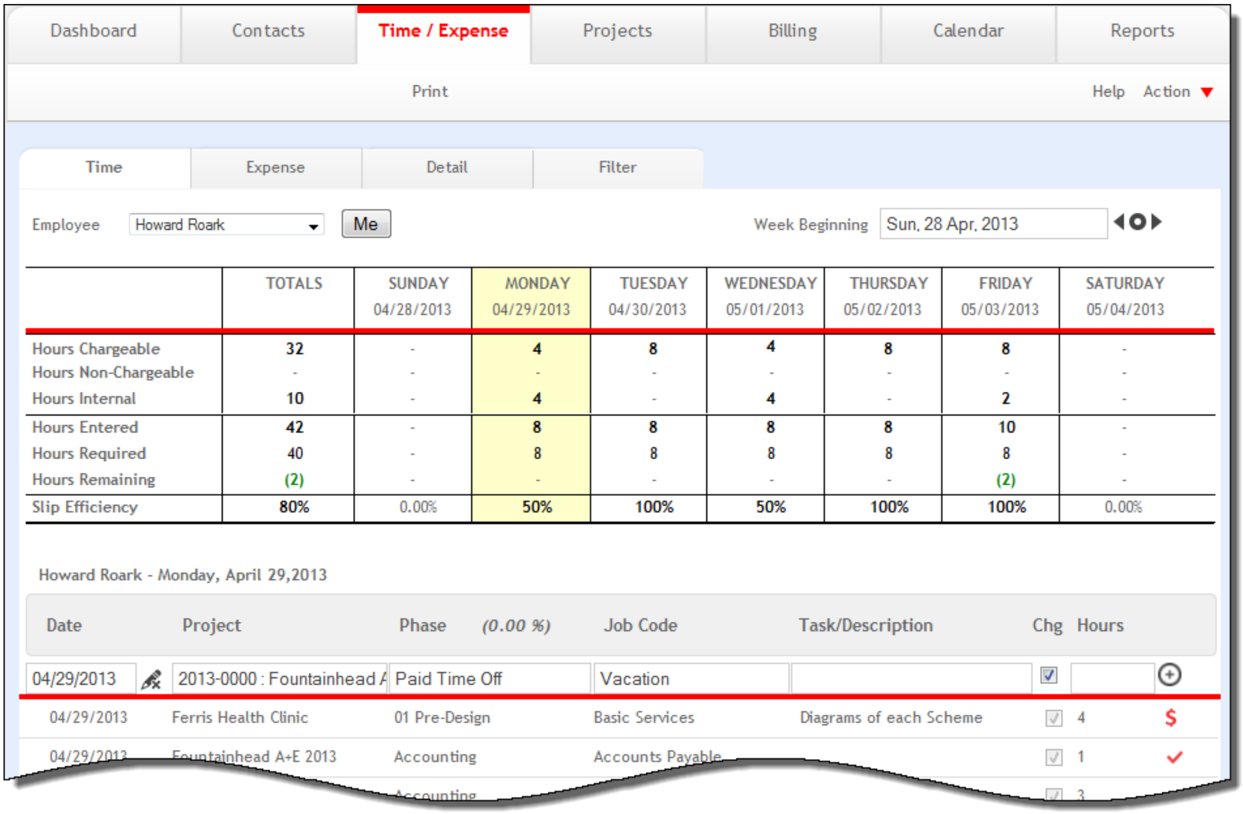
> It is imperative that budgets are set for ALL projects, whether hourly, stipulated sum, percent of construction or unit cost. Without a budget, you will not be able to effectively report on or evaluate the efficiency of your projects. Though hourly projects do not necessarily need a budget, it is important 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 and expenses on it.

Time and Expenses

The Time/Expense screen is the used for entering time and expenses slips in ArchiOffice Online. The screen also displays the existing time and expenses in the system.

1. Select the Time/Expense tab on the navigation bar.
2. On the *Time* tab, select the desired Employee from the drop-down list (your login name is pre-selected by default).



3. ArchiOffice Online auto sets the time card to the current date (highlighted in yellow). If you want to enter time for another day, just click that day on the grid and then enter time in Hours along with other required information such as Project, Phase, Job Code, and Task/Description in the area below the grid.
4. Specify whether the time entry is chargeable or not by checking or un-checking the Charge option. By default, all time is chargeable.
5. Click to add and save the time entry.
6. Similarly, on the *Expense* tab, pick a date on the grid and then enter the required information such as Project, Expense Type, Description, etc.
7. Specify whether the expense entry is non-reimbursable (NR) by the client or reimbursable (ER) to the employee by checking the relevant option.
8. Enter the Quantity and Cost of the expense.
9. Click to add and save the expense entry.

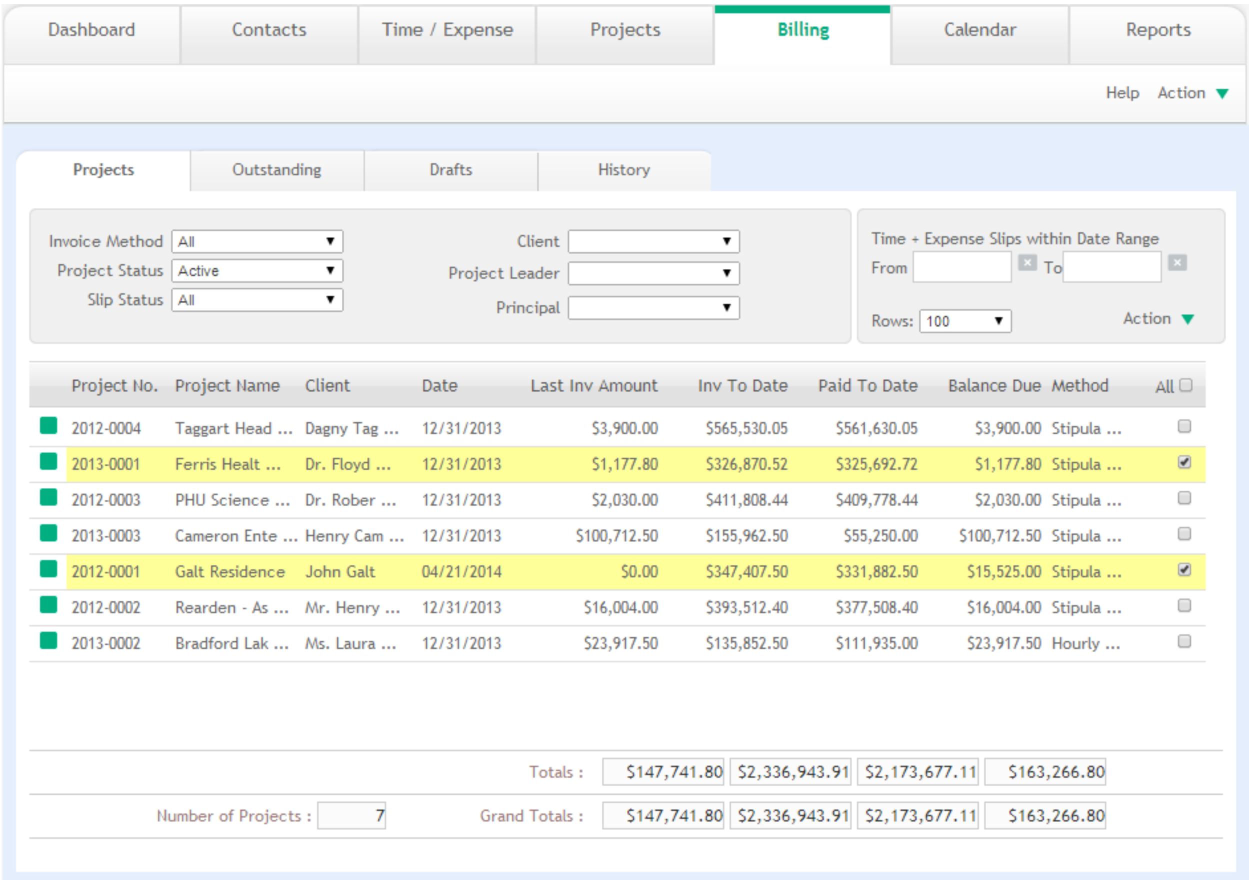
If you prefer, both time and expenses can be entered on the Detail tab. Here, you have the option of using a timer to track your time, place a slip on hold, enter notes, and so on.

Billing

ArchiOffice Online provides several options for generating invoices and applying payments. For a selected project, you can generate invoices using the Projects > Billing > Invoices and Projects > Billing >

Options screen. The Options screen also allows you to set the billing defaults and options used for generating invoices for a project.

Alternatively, you can batch bill projects directly from the Billing screen. You can also view outstanding, draft and historical invoices from here, and apply payments to outstanding invoices.

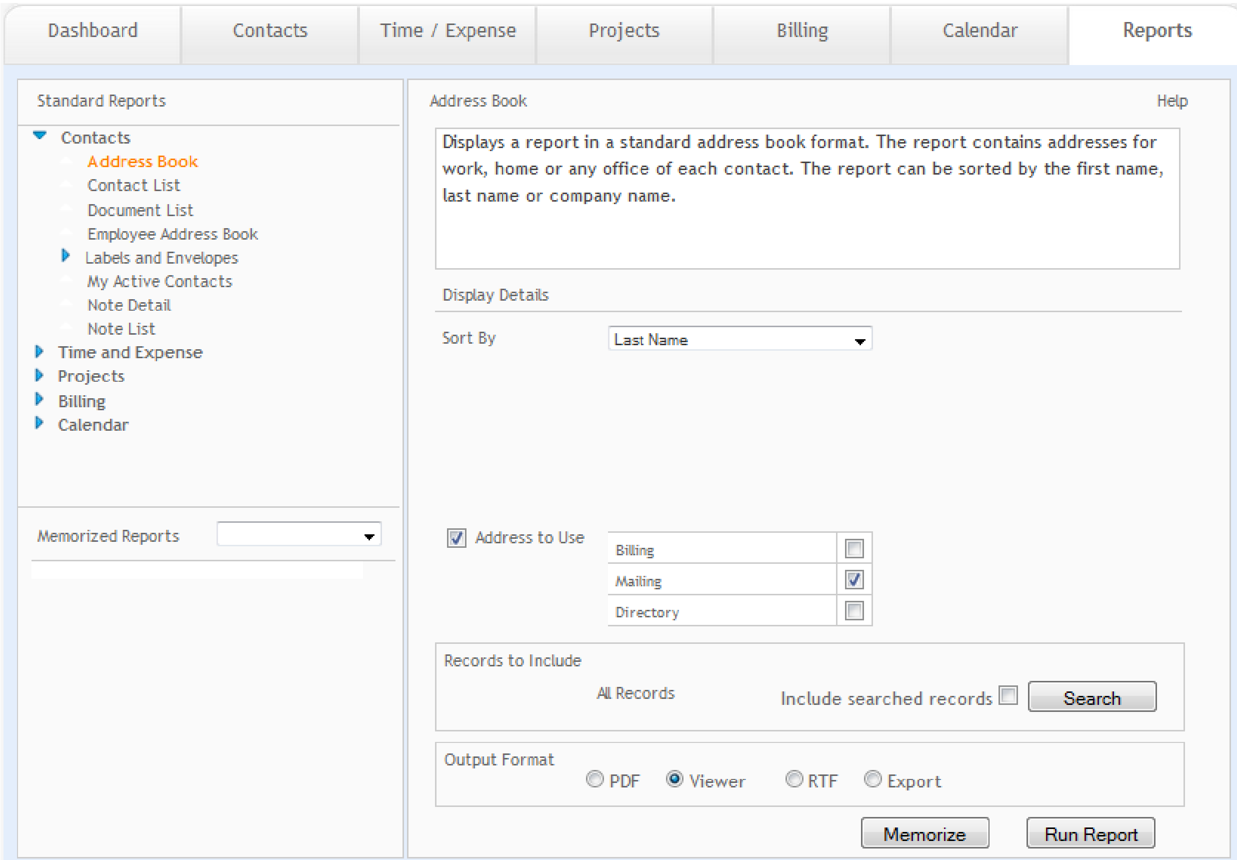


Payments can be recorded for the individual projects using the Projects screen. If you prefer to enter the payment in a batch mode, you can do so from the Billing screen. *Please see the [ArchiOffice Online Help](#) for more information.*

Reports

The Reports screen allows you to 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. We recommend that you check each category and run the reports, and see how each would best represent your data. After you have set the report filters and criteria properly, memorize the report for future use to save time and effort.

1. Select the Reports tab from the navigation bar.



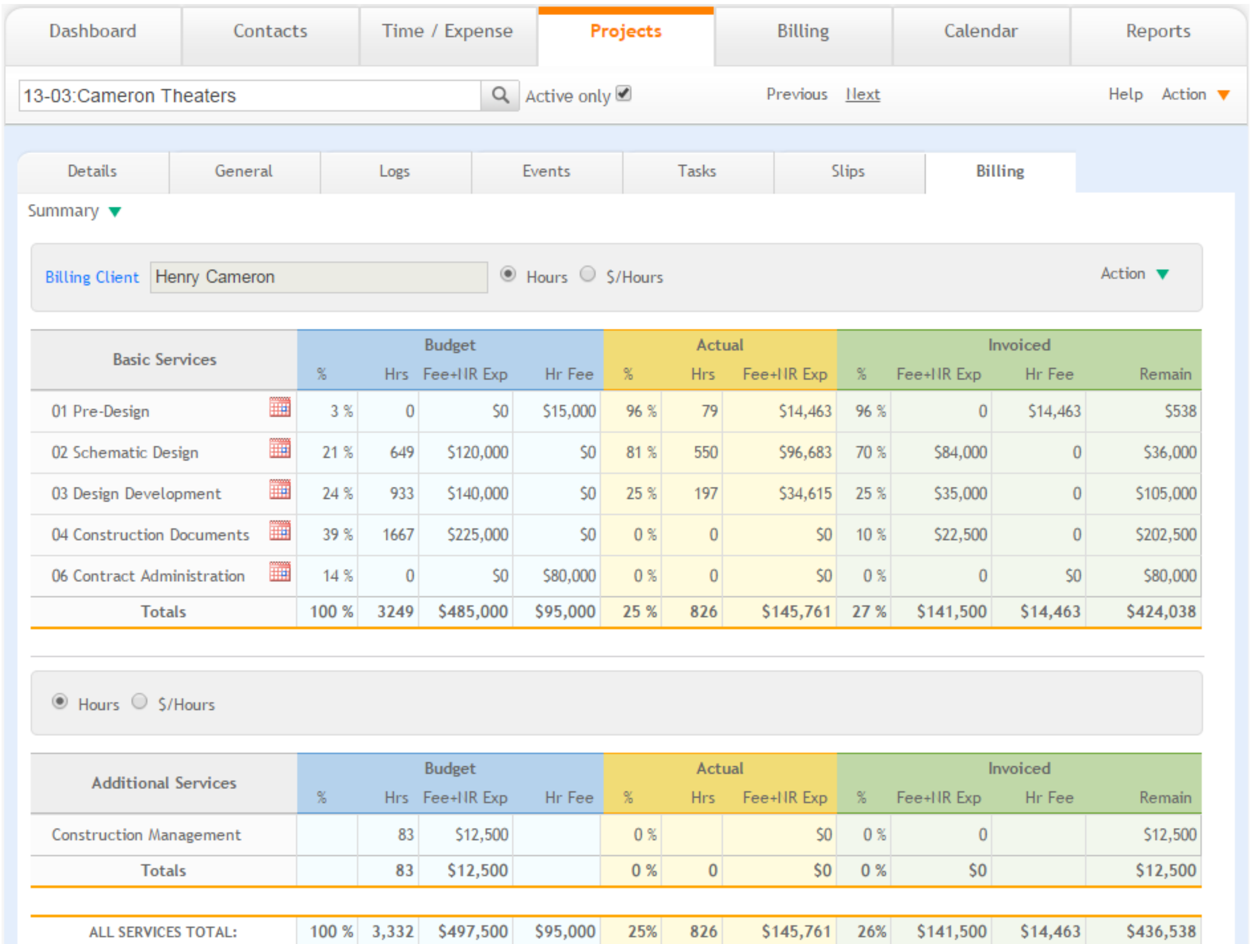
2. Then choose the desired report from the Standard Reports list on the left.
3. Specify the Display Details for the selected report, such as Type, Sort By, Output Format, etc.
4. After building the report settings, click Run Report to view it.
5. After applying filters on the report, click Memorize to save it as a custom report, if desired.

Project Management

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

Projects Summary

Projects–Billing–Summary screen: This view allows you to measure the efficiency of a project by comparing its budgeted, actual and invoiced amounts. This information is updated in real time and represents the status of your project.

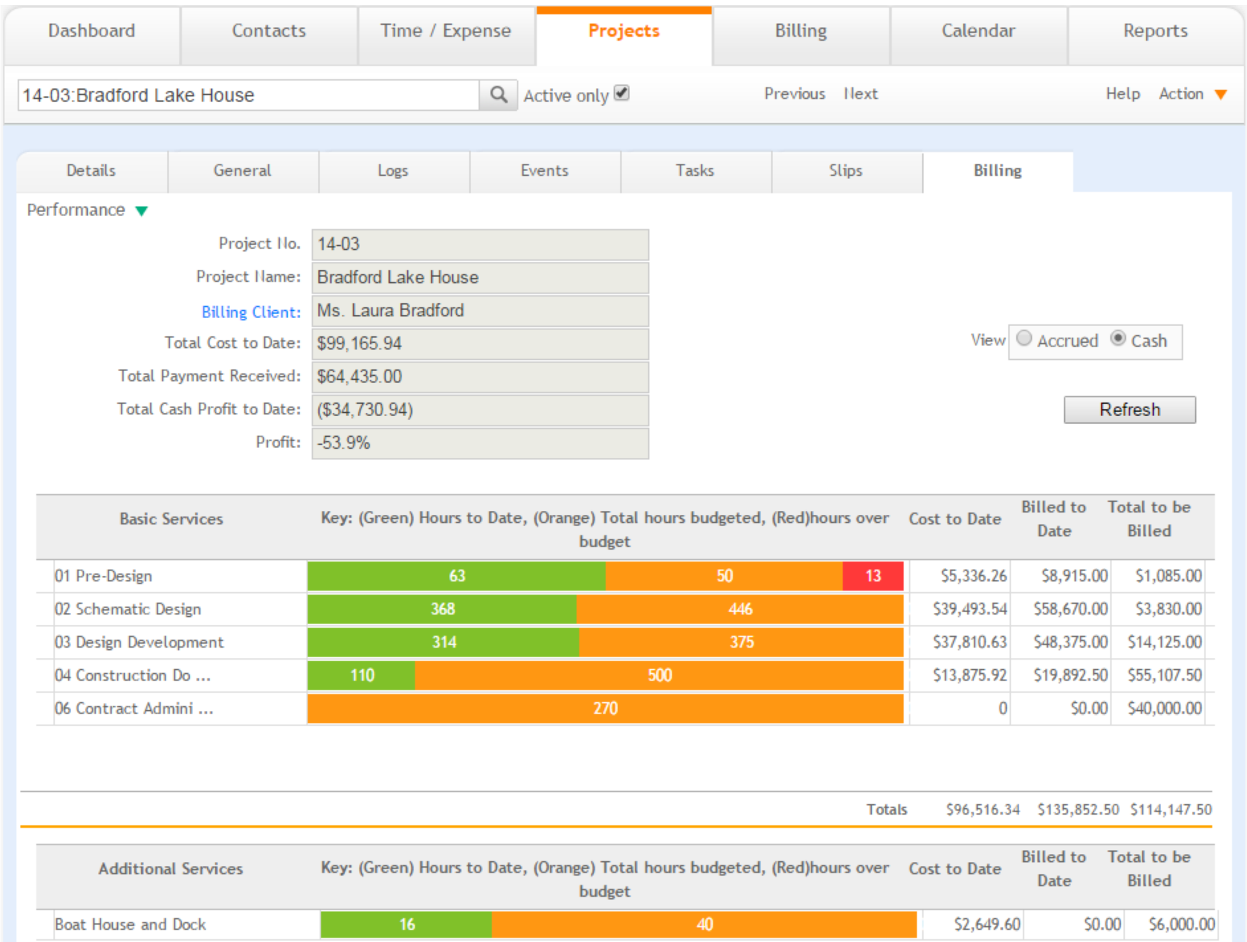


Basic Services	Budget				Actual			Invoiced			
	%	Hrs	Fee+IIR Exp	Hr Fee	%	Hrs	Fee+IIR Exp	%	Fee+IIR Exp	Hr Fee	Remain
01 Pre-Design	3 %	0	$0	$15,000	96 %	79	$14,463	96 %	0	$14,463	$538
02 Schematic Design	21 %	649	$120,000	$0	81 %	550	$96,683	70 %	$84,000	0	$36,000
03 Design Development	24 %	933	$140,000	$0	25 %	197	$34,615	25 %	$35,000	0	$105,000
04 Construction Documents	39 %	1667	$225,000	$0	0 %	0	$0	10 %	$22,500	0	$202,500
06 Contract Administration	14 %	0	$0	$80,000	0 %	0	$0	0 %	0	$0	$80,000
Totals	100 %	3249	$485,000	$95,000	25 %	826	$145,761	27 %	$141,500	$14,463	$424,038

Additional Services	Budget				Actual			Invoiced			
	%	Hrs	Fee+IIR Exp	Hr Fee	%	Hrs	Fee+IIR Exp	%	Fee+IIR Exp	Hr Fee	Remain
Construction Management		83	$12,500		0 %		$0	0 %	0		$12,500
Totals		83	$12,500		0 %	0	$0	0 %	$0		$12,500
ALL SERVICES TOTAL:	100 %	3,332	$497,500	$95,000	25%	826	$145,761	26%	$141,500	$14,463	$436,538

Project Profitability

Projects–Billing–Performance screen: This view displays the most pertinent information relating to your project's profitability. Here you will see the Total Cost to Date, Total Payment Received, and so on, 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.



Congratulations! You have now successfully set up ArchiOffice Online and understood its basic functionality. To learn more about this program, check the [ArchiOffice Online Help]() or visit [www.archiofficeonline.com]().

If you have any trouble in using ArchiOffice Online, please contact ArchiOffice Support at 310-602-4030 or [support@ArchiOfficeOnline.com](). For more technical issues, check our [Knowledge Base](). For other questions, please call us at (888) 245-5669 (US and Canada) or (310) 602-4020; or email [sales@ArchiOffice.com]().

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