Getting Started Guide

BillQuick

BillQuick HR Getting Started Guide

*Built With **Your** Industry Knowledge*

BQE Software, Inc. 2601 Airport Drive Suite 380
Torrance CA 90505
Support: (310) 602- 4030
Sales: (888) 245-5669
Fax: (310) 784-8482

Table of Contents

Introduction

*Welcome to BillQuick® HR from **BQE Software, Inc**!*

BillQuick HR is a powerful human resource management application that enables you to manage your employees in a simple and effortless manner. With functionalities specifically designed for small businesses, BillQuick HR software adapts to your company's workflow, making it more efficient and effective. It merges with the standard human resource practices, giving you the flexibility to customize the features to your specific company needs. It is a standalone application, and hence does not require BillQuick (though it is preferable to have it).

BillQuick HR allows you to proactively track and monitor all your employee information and their activities. It is a resource management program enriched with features like employee benefits, payroll, salary administration, benefits and personal time off tracking, etc.

The goal of this **BillQuick HR Getting Started Guide** is to help you get started and become comfortable interacting with the BillQuick HR program. It explains the concepts and procedures involved in setting up of BillQuick HR, focusing on its installation, activation, registration, basic and main functionalities such as master information, assigning benefits, managing payroll and other human resource practices. Thus, this Guide enables you to quickly educate yourself on how to run and utilize BillQuick HR effectively and efficiently. It also explains some troubleshooting issues at the end, highlighting your most often encountered problems or queries.

BillQuick HR Getting Started Guide is not a complete training solution. It is a guided tour designed to set up and familiarize you with BillQuick HR. After completing the Guide, we recommend that you explore the **BillQuick HR 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 utilizes role-based and custom training courses. *Check out BQE Services for more*.

BillQuick HR Setup Checklist

	✓	Task	Resources & References
Pre-Installation	☐	Check our system requirements	Software Requirements Hardware Requirements
Installation	☐	Download BillQuick HR setup	Support Downloads
	☐	Install BillQuick HR	Installation on a PC system Installation on Network Environment
Start-Up	☐	Launch BillQuick HR 2013	Start Up BillQuick HR
	☐	Create or open your company file	BillQuick HR Database
	☐	Log into BillQuick HR	Login
	☐	Activate and license BillQuick HR	Product Activation Licensing & Registration
Deployment	☐	Add or import company data and start using BillQuick HR	BillQuick Help BillQuick HR Help Manual
	☐	Search the Knowledgebase for troubleshooting and other technical issues.	Knowledgebase

System Requirements

For successful installation and implementation of your BillQuick HR software, be sure your computer systems meet or exceed the requirements mentioned below.

Hardware Requirements

Each personal computer on which BillQuick HR will be installed should meet or exceed the following requirements:

- 2.0 GHZ Intel Pentium IV-class processor or faster
- 1024 MB RAM (1 GB recommended)
- 300 MB or more of hard disk space required, plus 100 MB additional hard disk space required for installation
- 1024 x 768 screen resolution or more

Be sure your network server contains sufficient memory and other resources for efficient, high speed operation.

Software Requirements

Operating System Requirements

- NT 4.0 Server/Workstation with Service Pack 6.0a or later
- Windows 2003
- Microsoft Windows 2000 Professional, Server, Advanced Server, 2003 Server Microsoft Windows XP Professional/Home Edition
- Windows XP sp3
- Microsoft Windows Vista
- Microsoft Windows 2008
- Microsoft Windows 7 (All Flavors)
- Windows 8
- Small Business Server 2008, Small Business Server 2011, Windows 2012 Server
- 32-bit or 64-bit operating system (dual compatibility)

Be sure to install the latest Windows service packs and critical updates. Check the Microsoft web site for the latest updates to Windows, .Net Framework, and Data Access Components. Some versions of Windows include an automatic update option.

Other System Requirements

- BillQuick 2013 (Basic, Pro or Enterprise) edition (if data is to be imported)
- Microsoft Internet Explorer 6 or later (for accessing BillQuick Online)
- An Internet connection with a 256 KBps or faster modem, DSL, cable modem, or other broadband connection (for accessing BillQuick Online and for Automatic Updates)

Installation

Basic start-up procedures for BillQuick HR involve a few quick steps:

1. Install BillQuick HR.
2. Create a BillQuick HR database.
3. Activate and register BillQuick HR.

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

Installation on a PC System

BillQuick HR can be installed on a single-user system or a networking environment. It operates in a network environment, both peer-to-peer networks and ones with network servers. In either scenario the BillQuick HR database will be located in a folder on a personal computer or shared drive.

If you prefer to download a copy of BillQuick HR, go to www.BillQuick.com and follow the steps.

> The downloaded copy of BillQuick HR is in a Zip archive. You will need a Zip archiving or extraction program such as WinZip. If you do not have such a Zip program, please obtain one from a shareware web site or a software store.

Follow the steps below to install eTools on a personal computer:

1. If you have downloaded BillQuick HR 2013, navigate to the folder where you placed the extracted files. Double-click Setup.exe.
2. When the first BillQuick HR Installation screen appears, read the information and follow the instructions on each window. Once the installation begins, a progress bar displays.
3. When the Finished screen appears, click Finish. The installation is complete.
4. When prompted, restart your computer to complete the installation.

Installation in a Network Environment

In a network environment, you will bring other users into the setup. BillQuick HR software will be installed on the computer of each person who needs to access it. With the above steps complete on each personal computer, you will:

1. Install BillQuick HR (*see above*).

2. Make sure the BillQuick HR database is in a shared folder.
3. Point the user's copy of BillQuick HR to the database.
4. Register the computer with the BillQuick HR database.

BillQuick HR also works in other network scenarios. Contact BillQuick Support for more information (310-602-4030).

Peer-to-Peer Network Environment

To install BillQuick HR on a peer-to-peer network:

1. On the computer used by your primary BillQuick HR user (Supervisor), complete the steps for installing BillQuick HR (*as mentioned above*), creating a database (*see BillQuick HR Database*), and activating BillQuick HR (*see Product Activation below*).
2. Install BillQuick HR on the first computer from which you want a user to access the application (*follow the steps above).*
3. Start BillQuick HR.
4. Select File menu, Open Company and navigate to the shared folder. Select your BillQuick HR database. BillQuick HR remembers the location each time the user opens the application.
5. With the database open, select File menu, Register.
6. Enter the Registration Key from the email you received from BQE Software. You can also cut - paste the key, if desired. Click OK.
7. Repeat these steps for each computer from which users will access BillQuick HR.

If you want to run BillQuick HR in evaluation mode, click 'Activate Now', on the product Activation screen. Read more about activation options later.

Network Server Environment

To install BillQuick HR in a network server environment, you can:

1. Install BillQuick HR, point to its database, and register the computer (*follow the same steps as for a peer-to-peer network above*).
2. Utilize Active Directory Services on a domain network. With this capability, you can 'push' BillQuick HR to the workstations.
   For more information, see the knowledgebase article.

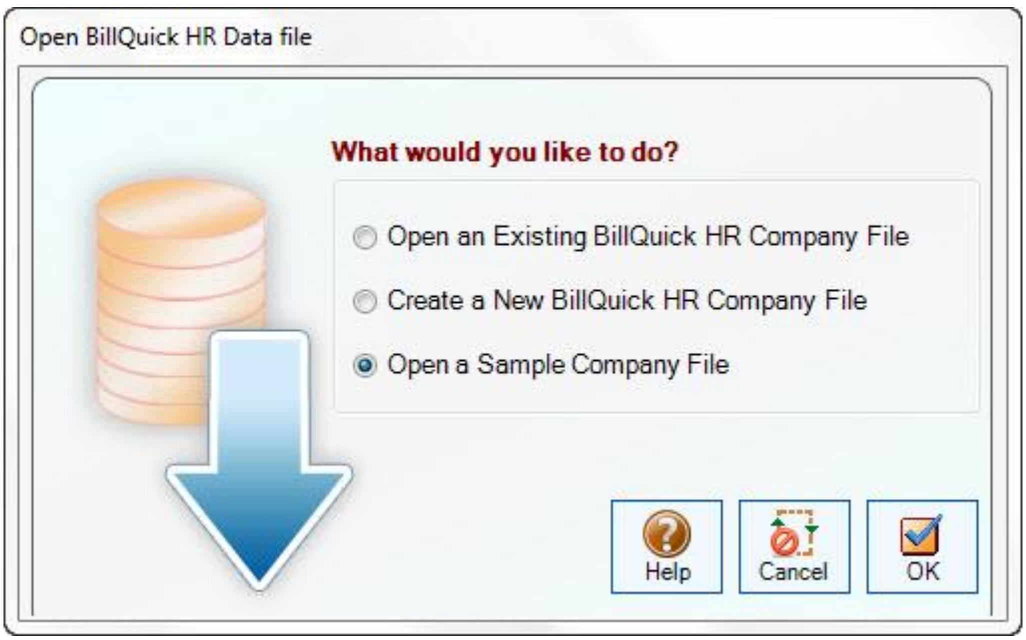
Start-Up

In order to get BillQuick HR into the running mode please follow the steps below. At this point BillQuick HR should already be installed on your PC.

BillQuick HR Database

When you start BillQuick HR for the first time, it prompts you with some database options. To create a new database:

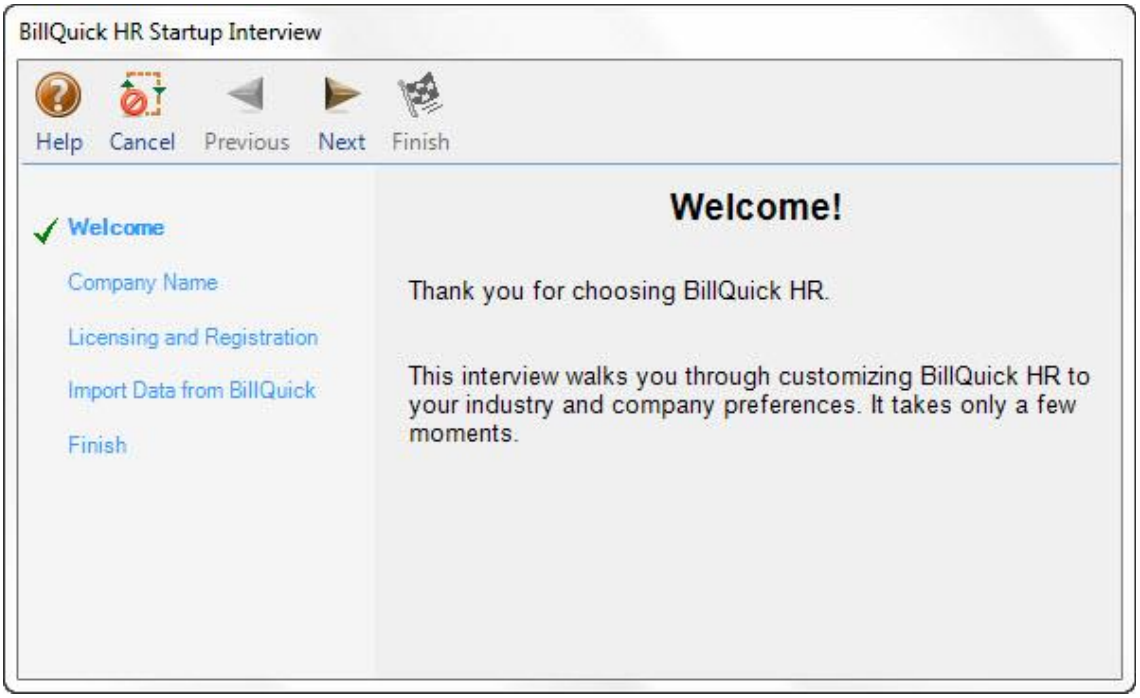
1. Select 'Create a New BillQuick HR Company File' option from the opening dialog.



2. Navigate to the folder where you want to store your company database. *If you are in a network environment, this should be a shared folder.*
3. Enter a name for the file (e.g. your company name) and click Open.
4. You will receive a confirmation message letting you know that your database was created successfully. Clicking OK will launch the BillQuick HR Startup Interview wizard.

Once you have created your company database, you are prompted with the BillQuick HR Startup Interview. Please follow these steps:

1. In the Company Name field, please enter your company name ***exactly*** as provided by BQE Software when purchasing your license.



2. Enter the rest of the information to the best of your ability.
3. Click Next to move on.

> You do not require License and Registration keys in order to complete the Interview. Simply click Next when you get to this step.

4. You can import employees from BillQuick by choosing 'Yes'.

5. Click Finish and then exit.

Do not worry about your selections. You can edit this information later.

Once you have successfully created your company database, you can activate and register your software..

Product Activation

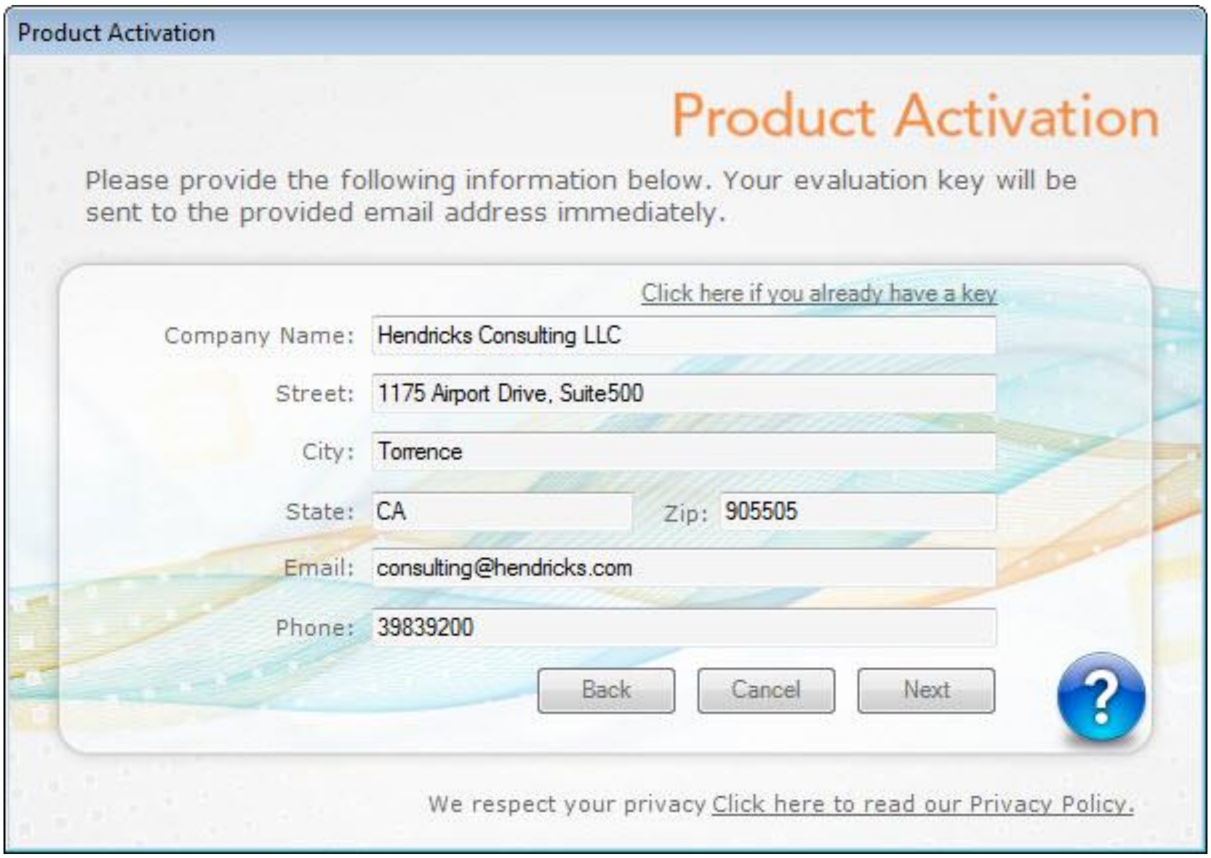
When BillQuick HR is in the evaluation mode or yet to be licensed, the Product Activation screen displays. The screen provides four options.

- **Activate Now** – Enter a key to continue your free 30-day trial.
- **Activate Later** – Continue your free 7-day period of review.
- **Ready to Buy** – Go to www.BillQuick.com to purchase the software license.
- **Already Purchased** – Enter your license and registration keys to fully activate BillQuick HR.

BillQuick HR Evaluation

If you are evaluating BillQuick HR, you may choose Activate Now or Activate Later. Click Activate Now to provide your details to BQE Software and obtain evaluation key. Activate Later allows you to continue working with BillQuick HR during a 7-day free trial. After this period you must obtain an evaluation key or a full software license.

1. Please enter valid information in the screen. This is how BQE Software will contact you with your evaluation, license and registration keys. When all the information is entered, click Next to continue.



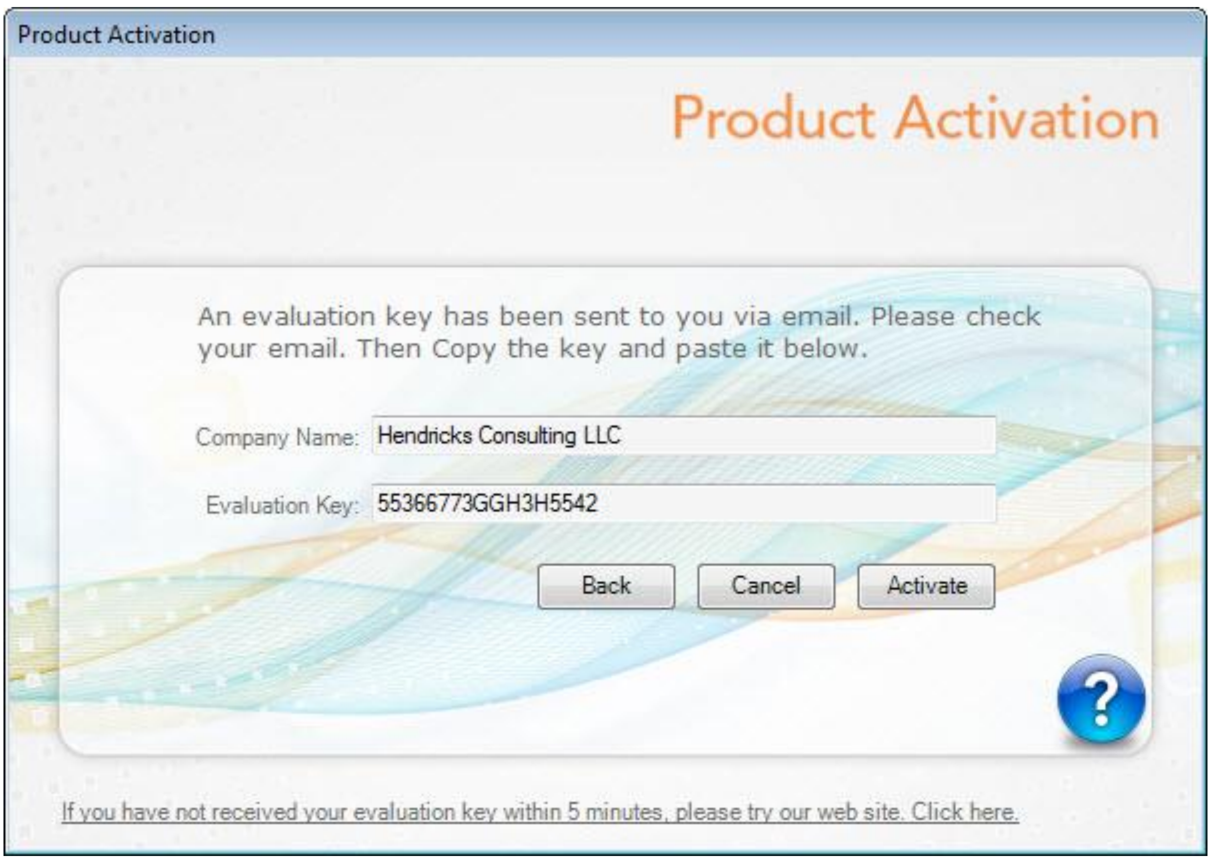
2. Within a few minutes you will receive your 30-day evaluation key via email. Alternatively, you can generate an evaluation key via the web or by calling BQE Software at (310) 602-4020.
3. Enter this Evaluation Key in the space provided. Click Activate!
4. BillQuick HR will now open with a reminder message stating that you are using an evaluation copy and to continue beyond 30-days, you need to purchase the software.

While in evaluation mode, continue to use BillQuick HR. All of the information entered now will be saved and made available after switching from evaluation to licensed mode.

Licensing and Registration

BillQuick HR offers various options for licensing and registering your copy of the software. You can use the Product Activation screen or the Company screen in BillQuick HR. Follow these steps to proceed:

1. When you are ready to purchase and license BillQuick HR, click 'I Am Ready to Buy' option on the Product Activation screen. Purchase your license from the BillQuick website or call BQE Software at (310) 602-4020 to speak with a BillQuick Account Rep.
2. You will receive your license and registration keys via e-mail at the e-mail address that you provide.
3. After purchasing a full software license, click 'Already Purchased' on the Product Activation screen. It asks for your company name, license and registration keys.
4. Using the email you received, enter or cut-paste the information. It should be exactly the same as you see in the email (if you want to make a change, contact your BillQuick Account Rep.).



5. Click Register. BillQuick HR is now licensed for unlimited use.
6. In a networked environment, the Supervisor needs to repeat the same procedure on each computer.

Alternatively, you can do the same thing using the Company screen.

BillQuick HR Basics

This section focuses on the basics of the BillQuick HR environment. It covers:

- Starting-up BillQuick HR
- Logging into BillQuick HR
- Navigating BillQuick HR

Start-Up

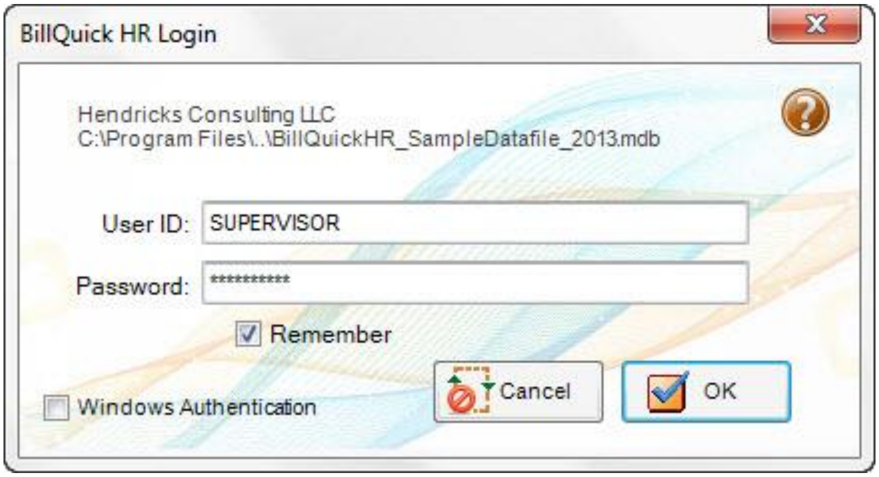
If you have previously worked with BillQuick HR on your computer, BillQuick HR will automatically open the database that you were in the last time you used the software. *Skip to Log-in below*.

If you have not created a company database, you will be prompted to do so. Once you have successfully created it and security is turned on, you will be prompted for a login.

Log-in

When security is turned on, BillQuick HR requires a User ID and Password. Your BillQuick HR manager or supervisor will provide you with an ID and password. For now, use these defaults:

User ID: supervisor
Password: supervisor



Navigation

After logging in to BillQuick HR, you can access important sections and functions of the application using any of the several navigation options provided by BillQuick HR. There are actually four ways to navigate and use the application:

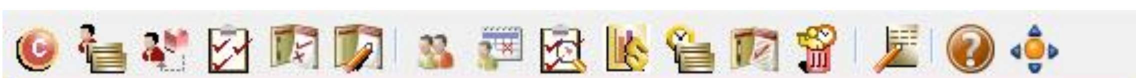
- Menu Bar
- Toolbar
- Navigator
- Quick Launch

Menu Bar

BillQuick HR organizes functions and reports into menus.

Toolbar

The toolbar allows you to quickly access BillQuick HR functions and features. You can set the Standard BillQuick HR Toolbar, Add/Remove Buttons or Reset Toolbar to the default setting. You can also customize the commands, keyboard shortcuts and other options using the Customize option.

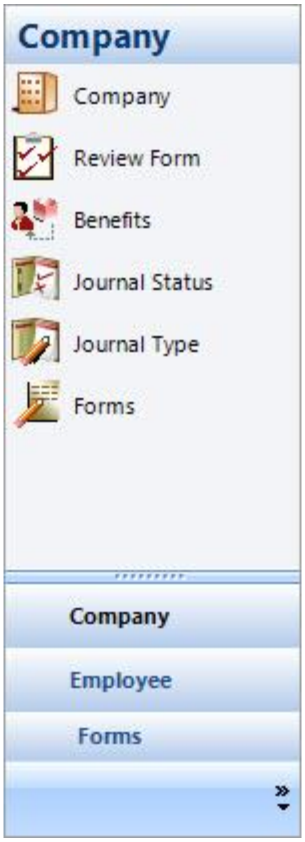


Navigator

BillQuick HR has a main Company navigator. The navigator allows you to perform most of the tasks required in BillQuick HR without having to locate commands in the menus or the toolbar. It is an easy alternative way of locating and accessing various BillQuick HR functions and screens.

Quick Launch

On the left side of the BillQuick HR desktop, you can conveniently access major functions and screens from the Quick Launch. This sidebar is divided into 3 panels, grouping the common functions together under each. These include:



Company

- Company
- Review Form
- Benefits
- Journal Status
- Journal Type
- Forms

Forms

- Recruiting
- Hiring
- Payroll Withholding
- Employee Relations
- Termination
- Compensation
- Employee Benefits

Employee

- Employee
- Contacts
- Payroll
- Reviews
- Incidents
- Journal
- Salary History
- Benefit Usage
- Assign Benefits

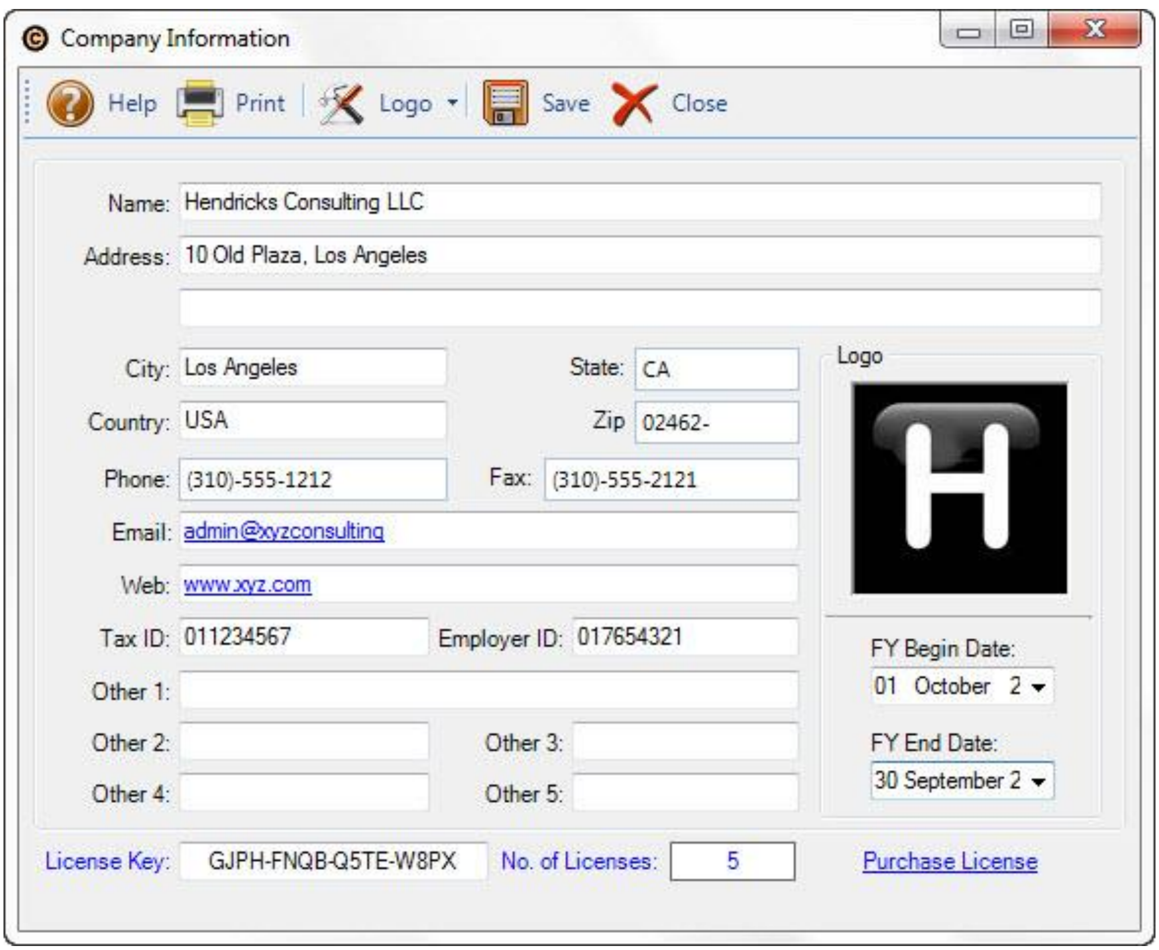
Master Information

Master information is the foundation of any system. This section covers the basics of master information maintained in BillQuick HR that is used for effective human resource management.

BillQuick HR includes a built-in function to import data from BillQuick using the 'Get from BillQuick' screen. You can even specify filters for selective data transfer. You can also directly import data (BillQuick employees, sick hours and vacation hours) using the BillQuick HR screens.

Company Information

1. Open the Company screen from the Company menu.
2. Type your full company Name exactly as you specified to BQE Software (spelling, punctuation and spacing are all important).



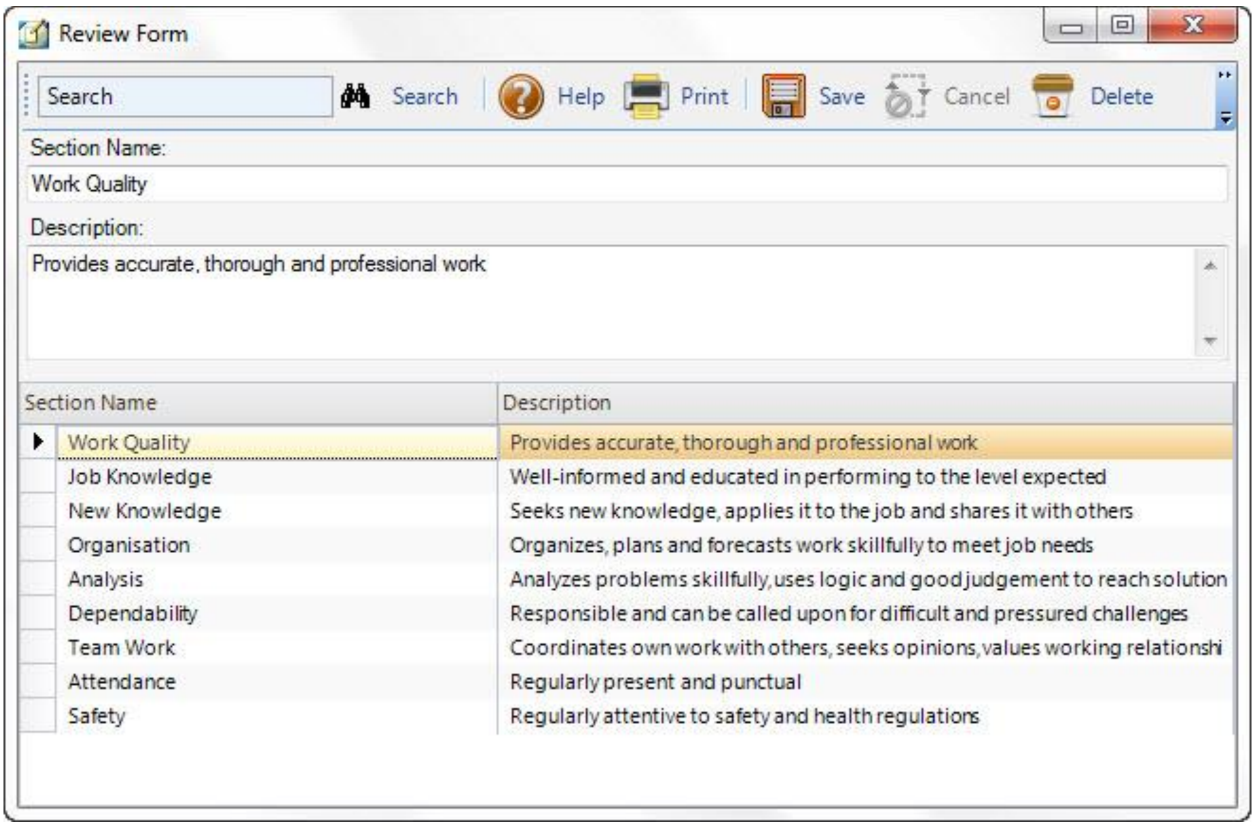
3. Enter other company-related information, such as address, telephone numbers, etc.
4. Click Save to save your company information. Then click Close to exit.

Your company information is now saved in the database.

Review Form

Review Form is a list of criteria by which you review your employees. To create a review list:

1. From the Company menu, select Master Review Form or press Ctrl+2.



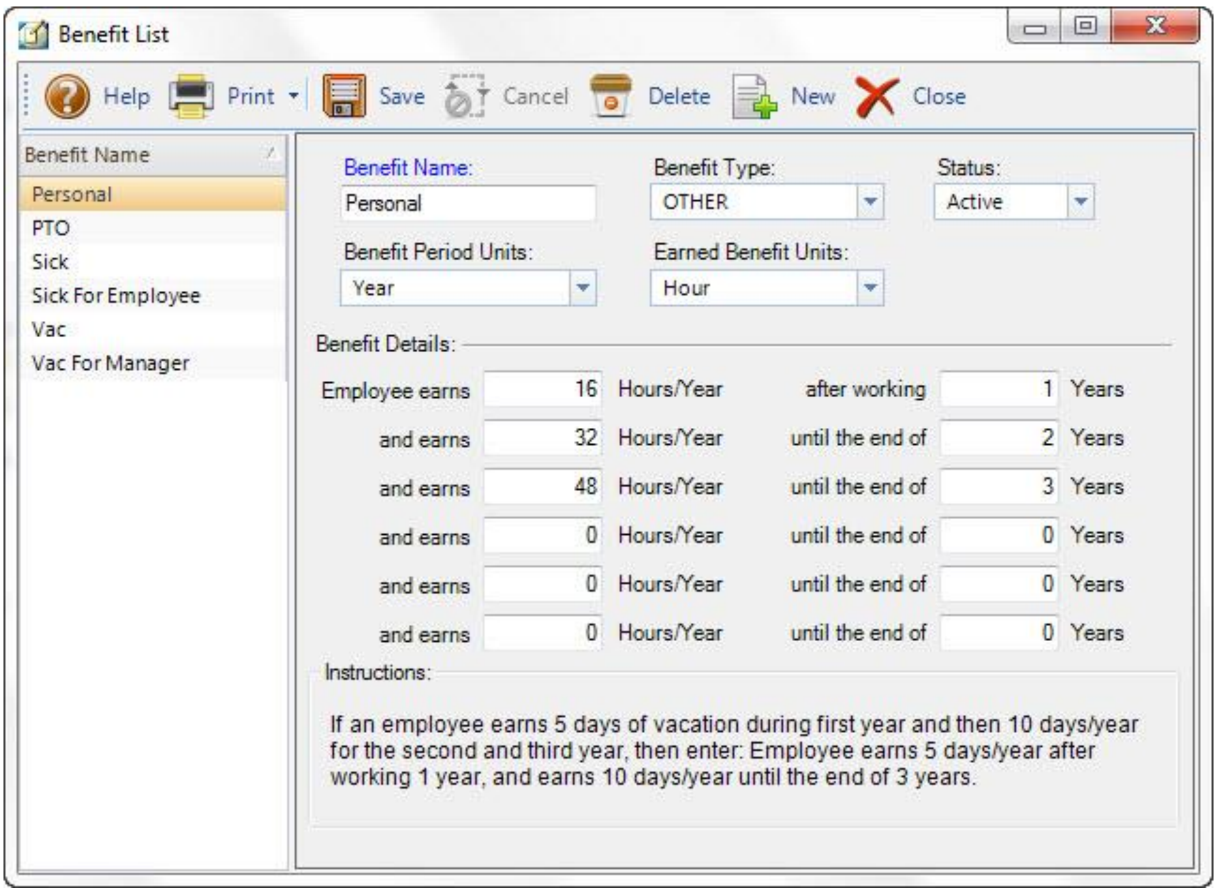
2. Click on the New button to add a new review item.
3. Enter the attribute name in the Section Name field. This helps in identifying what type of appraisal is scheduled.
4. Type in any additional information about the review type in the Description field.
5. Click on the Save button and then exit.

Benefit List

Creating a Benefit List allows you to specify what benefits (e.g. vacation, sick time, etc.) your company provides for its employees. This would be based on your company policies.

To create a benefit list:

1. From the Company menu, select Benefit List.
2. Click on the New button to create a new benefit.



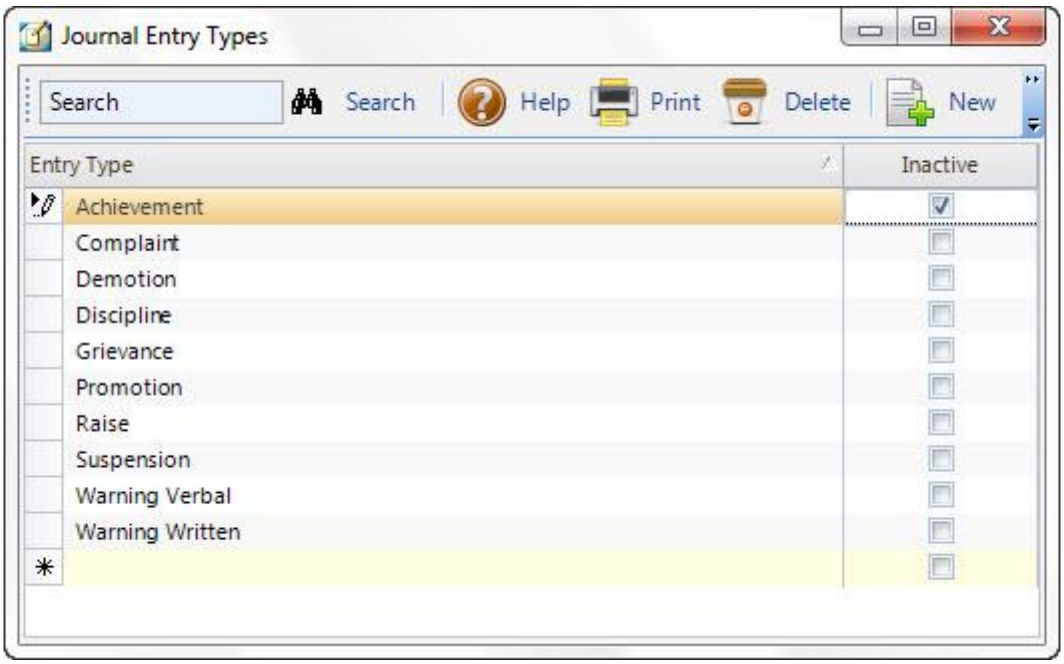
3. In the Benefit Period Units field, enter the standard units (time) that an employee must work in the company to earn a particular benefit. E.g., for a personal vacation, it would be a Year.
4. In the Earned Benefits Units, enter the standard units (time) that an employee earns after completing the specified term in the company.
5. Select ‘Active’ Status for the benefit.
6. Click Save to save the benefit.
7. In the Benefit Details, enter values to regulate your benefit. E.g., if an employee earns two sick days in first year, enter: Employee earns 16 Hours/Year after working 1 Year.

BillQuick HR comes with two default benefits (vacation and sick).

Journal Entry

The Journal Entry Types screen allows you to create and maintain a standard list of employee related items, such as degrees, achievements, warnings etc. To do so:

1. From the Company menu, select Journal Type List.
2. Click on the New button to create a new journal entry.

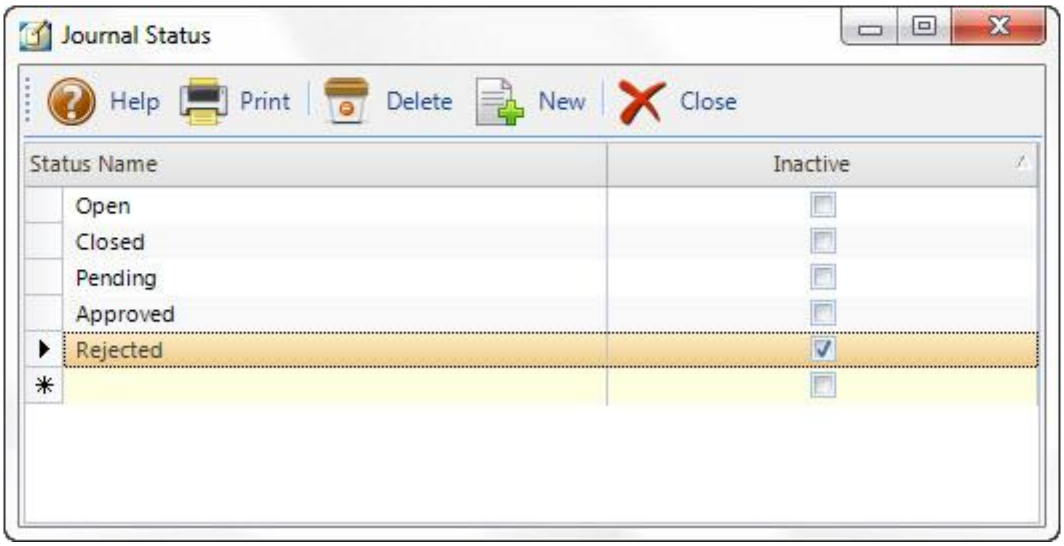


3. Type the name of the journal entry to be made in the Entry Type field.
4. When you are done, tab to the next row to automatically save the new journal.

Journal Status

The Journal Status allows you to create and view the status of a journal. This could be in terms of whether there is a need to take any action, whether the suggestion was rejected /accepted, etc.

1. Choose Journal Status List from the Company menu.

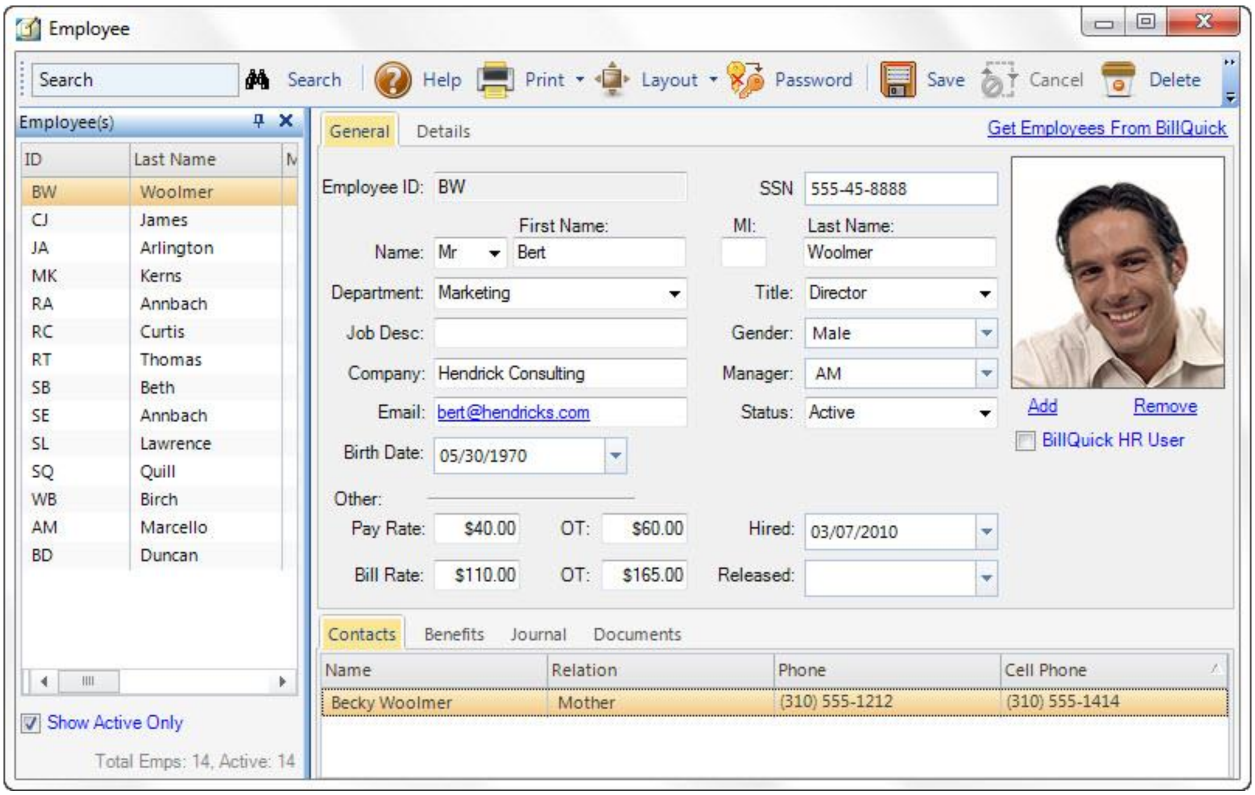


2. Click on the New button to create a new journal status.
3. Mention the status type in the Status Name field. E.g. open, closed, pending, etc.
4. When you are done, tab to the next row to automatically save the new status.

Employee

Employees are the backbone of your organization. Employee screen allows you to create and maintain a profile of employees. You can also add documents such as resumes, agreements, etc to the profile. To create employees:

1. From the Employee menu or the navigator, select Master Info.
2. If this is your first employee, the cursor will default to the Employee ID field. If not, click New.



3. Enter the Employee ID on the General tab. The field is alphanumeric, allowing both letters and numbers.
4. Enter First Name, Last Name and other relevant data. Move from field to field using the Tab key.
5. Mark the employee as a user by checking the BillQuick HR User option.
6. Once done, click the Save button and then Close.

You can also import employee profiles from BillQuick. Click on the 'Get Employees from BillQuick' option at the top. You can even specify filters for selective data transfer.

HR Management

Once the master information has been set up in BillQuick HR, you can start managing your human resources.

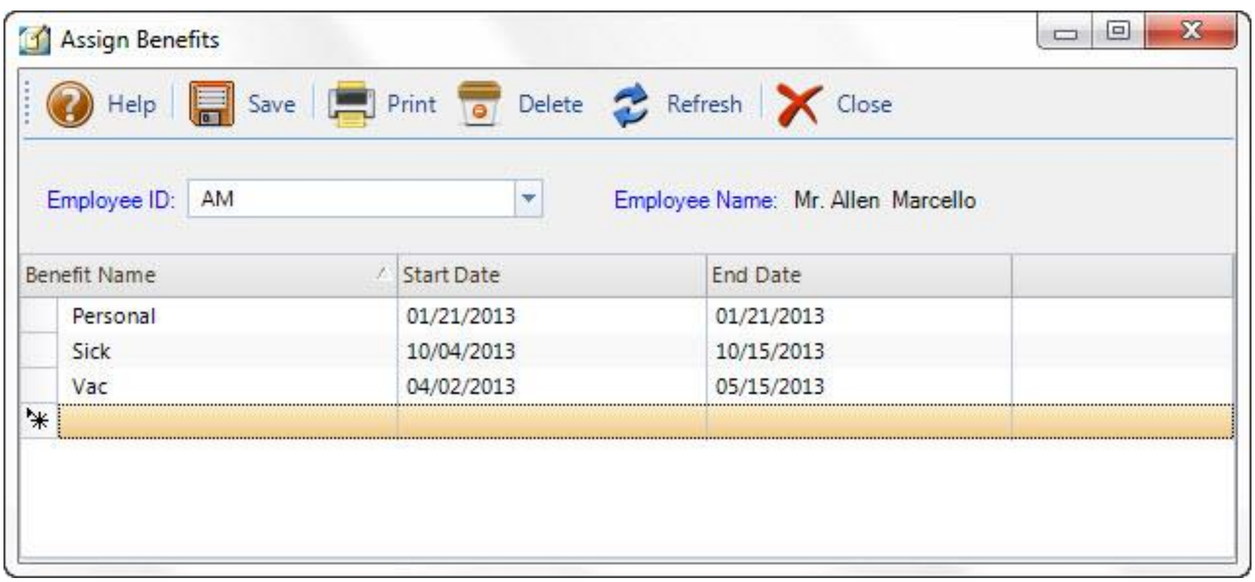
BillQuick HR provides you with the Security function whereby you can limit access to specific screens for BillQuick HR users. Based on the assigned security permissions to users, access can be restricted to selected functions of BillQuick HR.

You can perform various general human resource management functions like assigning benefits to the employees and managing their payroll. You may record various employee-related incidents and reviews; record journals for milestones, promotions, etc; access forms for company policy, agreements, recruitment, performance review, etc; track benefit usage, reporting and so on.

Assign Benefits

Once you have created the Benefit List and set up a list of employees, you would need to assign the benefits to those employees. You can do this by:

1. From the Employee menu, select Assign Benefits.
2. In the Employee ID field, select the employee that you wish to assign benefits to.



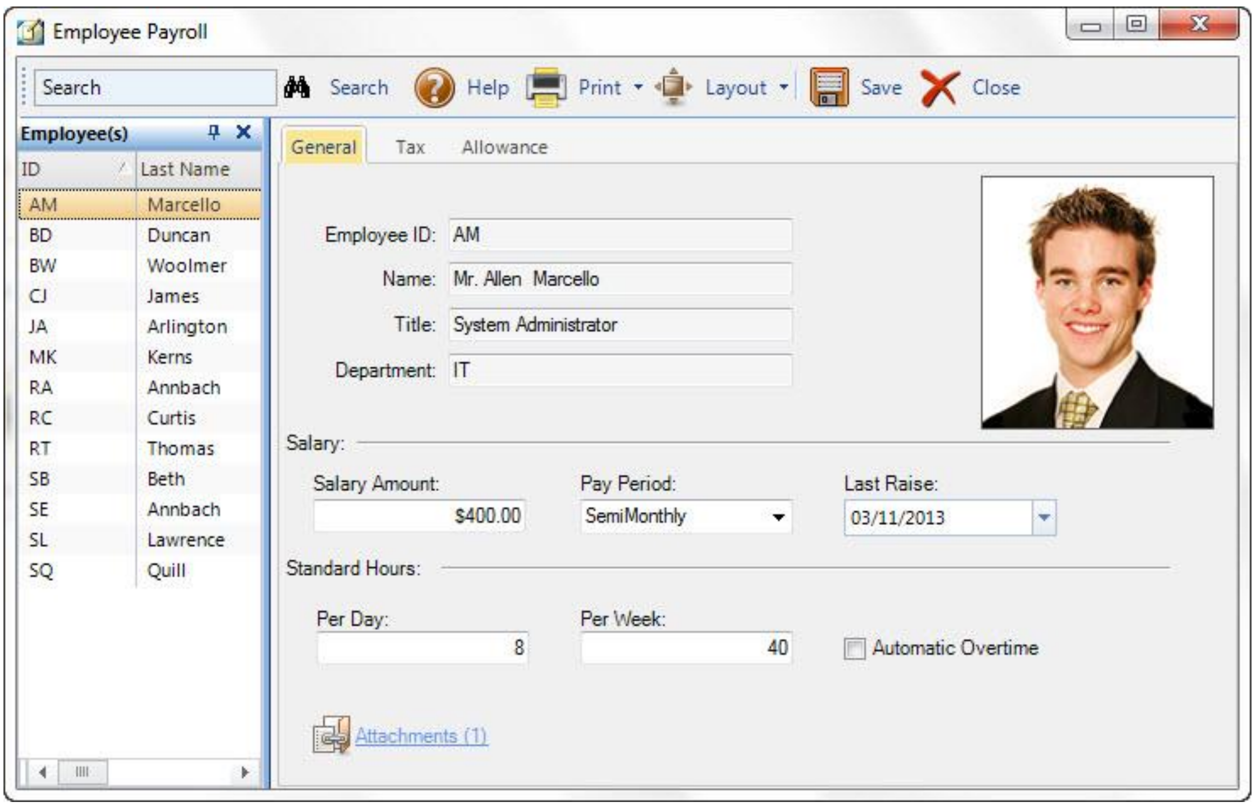
3. In the grid, choose the Benefit Name that you wish to assign to this employee, such as Personal.
4. Enter Start Date and End Date (if so) for this benefit.

5. To assign more benefits to this employee, go to the next row and add the next benefit. When you are done, tab to the next row to automatically save the benefits.

Employee Payroll

You can maintain a financial record of an employee's salary, net pay, raises and other associated data. For this purpose BillQuick HR provides a comprehensive and effective solution for you, Employee Payroll.

1. From the Employee menu, select Payroll.
2. Select the employee whose payroll is being set up.

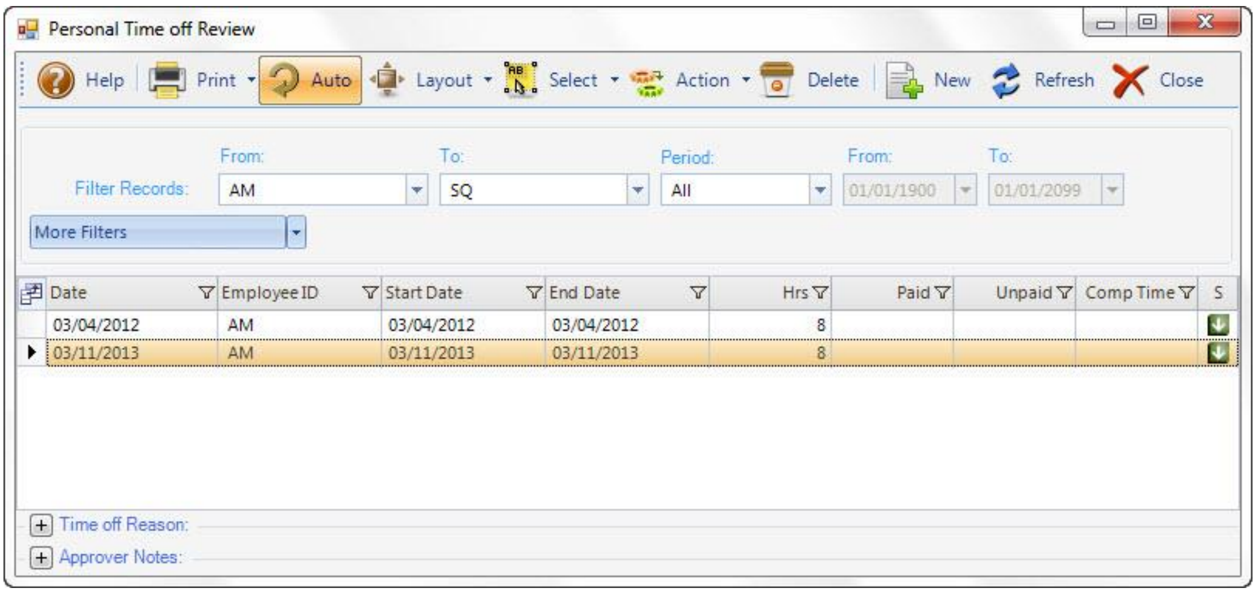


3. Enter the employee's Salary Amount.
4. Enter the frequency of the employee's Pay Period.
5. Enter other information. Once done, click Save and then Close to exit.

Personal Time Off

BillQuick HR provides you the ability to request and manage Personal Time Off according to your company policy. PTO must be requested in advance and then reviewed and approved by the HR Supervisor.
To review PTO requests submitted by employees:

1. From the Employee menu, select Personal Time Off Review.
2. Select the desired employee range in the From-To fields.



3. Select the date for which you want to view the PTO requests in the Period field, such as All or This Month.
4. Review the information and the reason for PTO request. Make changes to hours or dates, if required.
5. Click Action to take the desired action on the request, say Approve.
6. Once done, click Close to exit.

Congratulations! You have now successfully installed BillQuick HR and understood its basic functionality. To learn more about this program, check the ***BillQuick HR Help*** *or visit [Product Overview](). *

For more information, visit us at www.bqe.com.If you have any trouble in using BillQuick HR, please contact BillQuick Support at (310) 602-4030 or Support@bqe.com. For other questions, please call us at (888) 245-5669 (US and Canada) or (310) 602-4020; or email Sales@bqe.com.