ArchiOffice

Office and Project Management Solution

ArchiOffice 2012
Getting Started Guide

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ArchiOffice Setup Checklist

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☐	Decide whether to do the installation yourself or have a BQE Consultant do it for you. Contact your Account Rep for that; else proceed.	ArchiOffice Installation Preparation
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Introduction

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

ArchiOffice is a project management solution for architects. It is networkable, multi-user, device-agnostic software. 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. This solution is simple, affordable, secure, scalable and very fast.

ArchiOffice 2012 comes in three different editions. *Please see the* [Edition Comparison Chart](#) *for details*.

Being device-agnostic, your employees can run ArchiOffice (as client) from anywhere using a PC, Mac, Linux, iOS or Android platform. Local or in-house users can access it on their desktops and laptops via a local or wide area network (LAN/WAN) when properly configured. You can also make ArchiOffice instantly accessible to remote users on their laptops, smartphones and tablets via the Internet while retaining all the features and functionality that your business depends on.
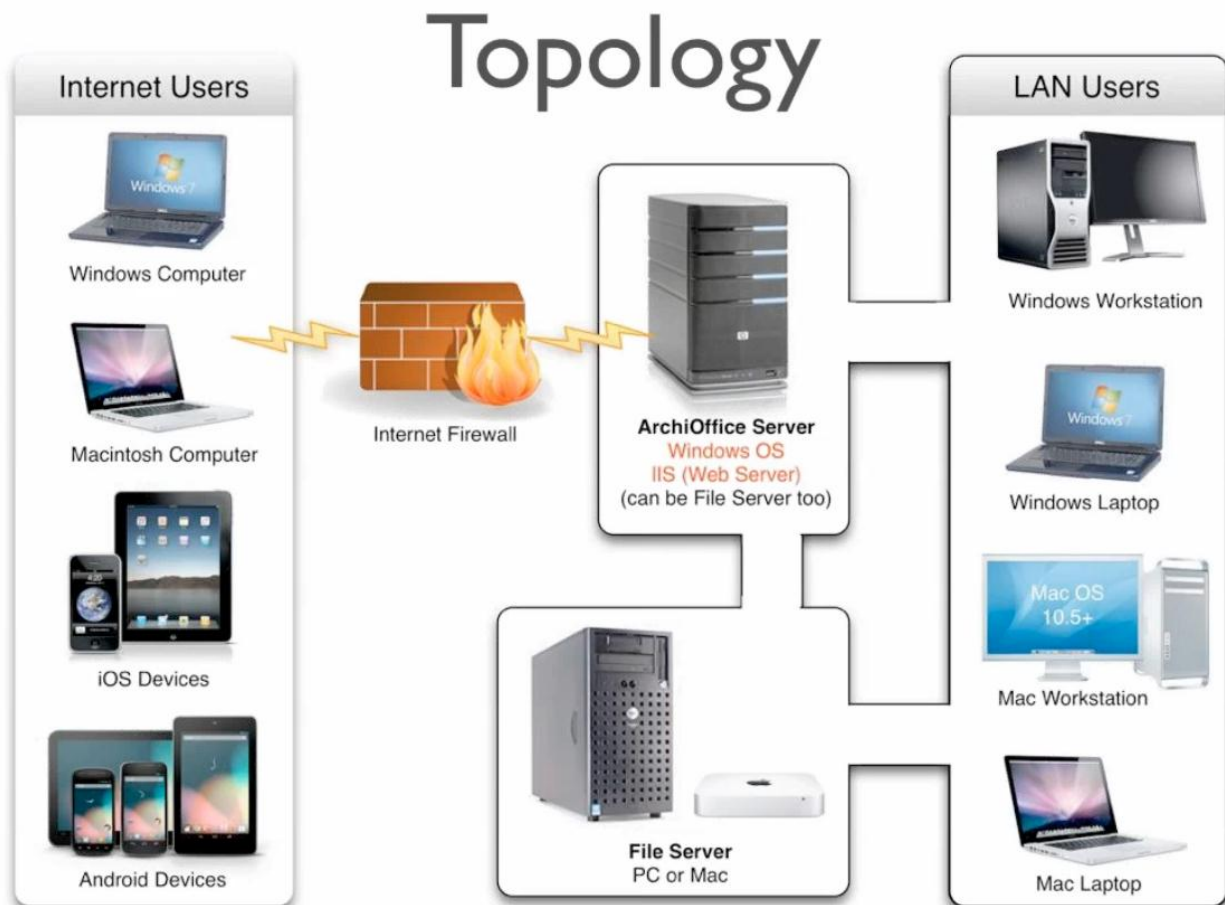
The goal of this ***ArchiOffice Getting Started Guide*** is to help you install and set up the software. It explains the concepts and procedures involved in setting up of ArchiOffice, focusing on its installation and setup. Thus, this Guide enables you to quickly educate yourself on how to run and start ArchiOffice effectively and efficiently.

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 ArchiOffice 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 custom training courses to get you up and running with ArchiOffice as quickly as possible. *Check out www.bqe.com/Services for more information*.

System Requirements

For successful installation of ArchiOffice software, be sure your computer system meets or exceeds the minimum requirements. System requirements are different for server and client machines, and depend on whether you are using a Windows or Mac operating system.

Server Requirements

Hardware Requirements

- 2.0 GHZ Intel Pentium IV or faster
- 2 GB RAM or more (4 GB recommended)
- At least 20 GB of free hard disk space required

Software Requirements

- Windows Server (2003 or 2008), Microsoft Small Business Server (2008 or 2011), Windows 7 (Professional, Enterprise or Ultimate) or Windows Vista (Business, Enterprise or Ultimate)
- Microsoft .NET Framework 4.0
- Internet Information Server (IIS) 6.0 or later
- MDAC 2.8 (or higher)
- SQL Server 2005/2008/2008 R2 Express Edition with Management Tools
- *For Mac only users:* Virtualization software like VMWare or Parallels Server and Microsoft Windows OS (See *Set Up Mac for ArchiOffice 2012 for more.*)

> It is highly recommended that firms with more than 5 users should use Windows Server 2008/2008 R2/2012 instead of Windows 7/Vista.

Client Requirements

Hardware Requirements

- 2.0 GHz Intel Pentium processor or faster
- 1 GB RAM or more (2 GB recommended)
- At least 10 GB of free disk space required
- *For Mac:* 1 GHz or higher Intel processor, 4 GB of free disk space, 6 GB or better RAM (2 GB for Mac host OS + 4 GB for Windows guest OS)

Software Requirements

- Windows XP, Vista, Windows 7
- Microsoft Internet Explorer 8.0 or later, Chrome 7.0 or later, Firefox 4.x or later, Opera 11.0
- Java 6 (32-bit) or later
- *For Mac:* Mac OS 10.5 or later, Java SE 6 (1.6) or later, Safari 5.0 or later

> 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.

Installation

ArchiOffice 2012 is a server-based application requiring one machine to function as a 'web server' and 'data server' that can host both the ArchiOffice web application and web data. (ArchiOffice can be hosted on two servers also - one dedicated for the web application and another dedicated for data.) The procedure is safe and can be set up on a secured server. Users can access ArchiOffice via the Internet or Intranet. Optionally, in-house users can access it via a local or wide area network (LAN/WAN) when properly configured. If you only have a single license and single machine for your firm, you can use it both as a server and client machine.

ArchiOffice has two main components – a *public* web application (site) and an *admin* web application (site). Both of them are installed by the ArchiOffice setup program on your IIS (Internet Information Server), i.e., web server running compatible server software.

Installation Preparation

Before installing ArchiOffice, you must ensure the following:

1. Please read the End User License Agreement (EULA).
2. Make sure your server (host) and client computers meet the system requirements (see System Requirements for details). The server machine must have a Windows operating system while the client machine can have Windows or Mac OS.

    Note: If you only have a Mac system, you can install ArchiOffice on it using a Windows virtual environment. *Check out the Set Up Mac for ArchiOffice 2012 whitepaper for details.*

3. Also, make sure you have configured Microsoft .NET Framework correctly. Using Control Panel>Programs, select the 'Turn Windows features on or off' link.
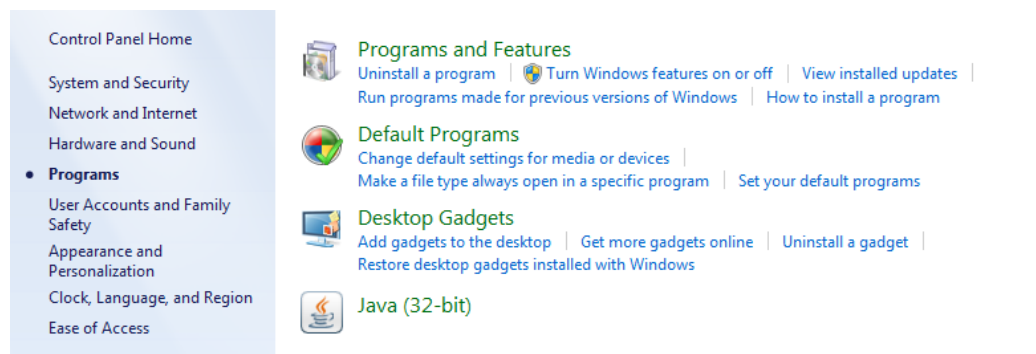
Please make sure to turn on all the relevant components on your web server as shown below.
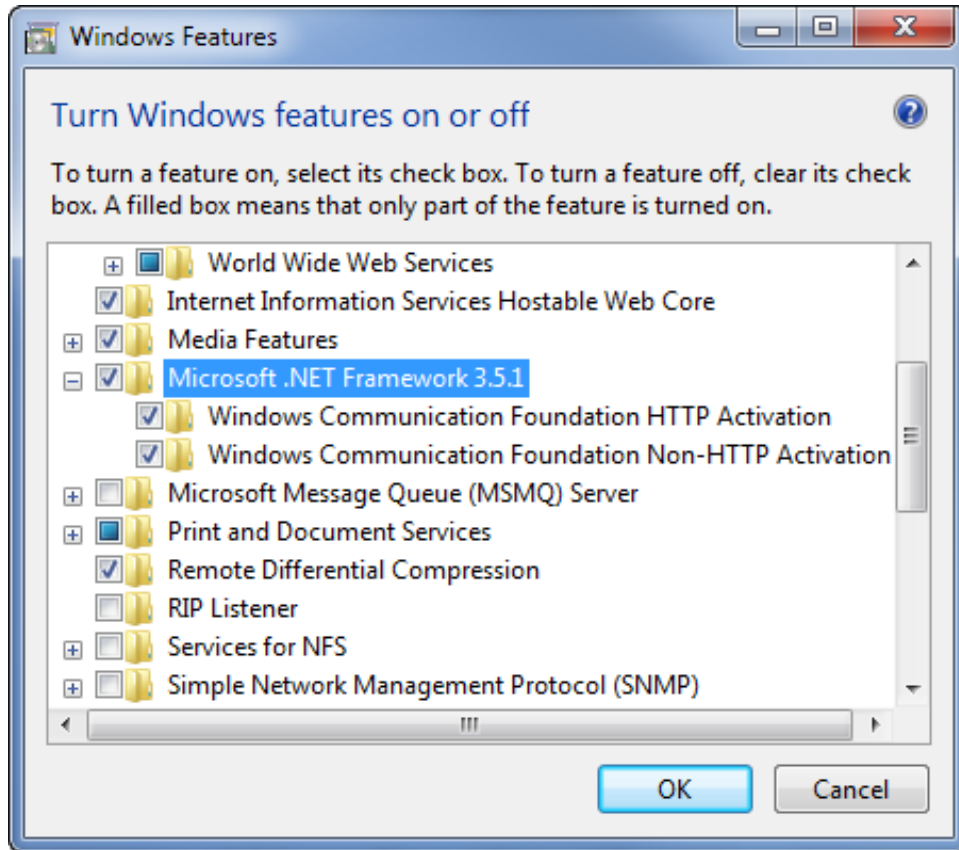
4. Because ArchiOffice 2012 is a web-based application it must run on a web server. Ensure you have installed Internet Information Server (IIS) 6.0 or later on your server. Typically, IIS comes installed with most Windows editions. If you find that IIS is not installed, download it using one of the following links:

Install IIS 7.5 on Windows 7 Professional/Enterprise/Ultimate
Install IIS on Windows 7 (video)
Install IIS 7.0 on Windows Server 2008
Install IIS 7.5 on Windows Server 2008 R2

When using Windows Server 2008, Windows Vista Business or Windows 7 with Internet Information Server 7.0, make sure to turn on all the relevant IIS components on your web server as shown below. You can access it via Control Panel>Programs-Turn Windows features on or off.
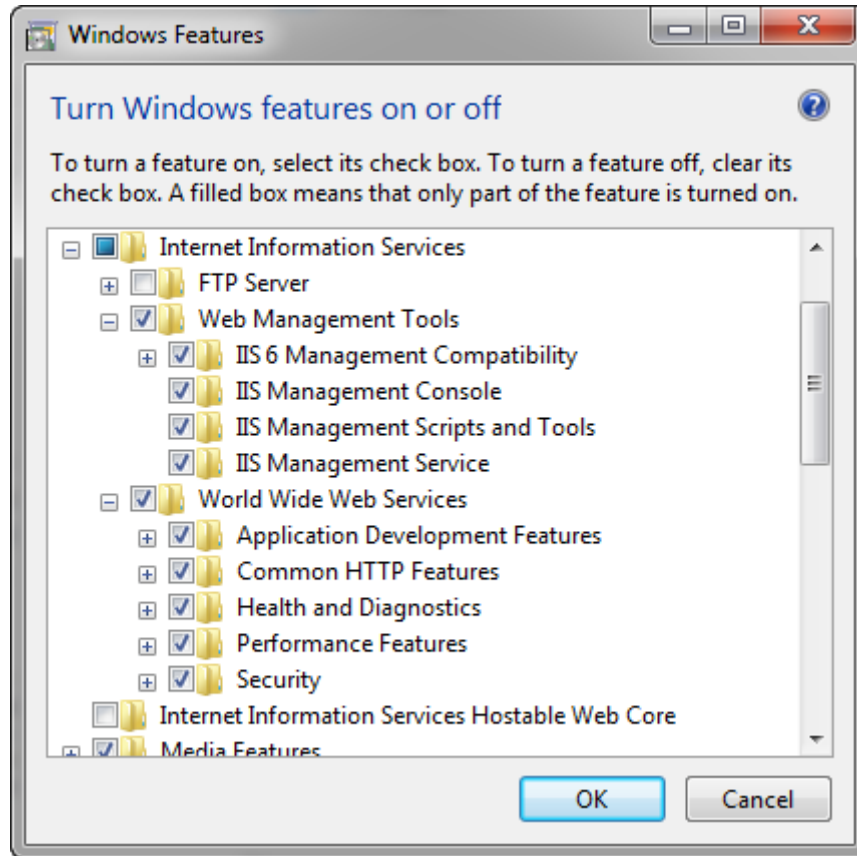
5. ArchiOffice 2012 stores your company data in an SQL database. You must have installed Microsoft SQL Server on your system (server). If not, then you may download and install a free version of it (Express Edition) from:

    Microsoft Download Center
    How to Install SQL Server 2008
    How to Install SQL Server 2008 R2 Express (video)

    > You should run the installer as an Administrator (right-click *Run as Administrator*). This video instructs you to choose Windows Authentication Mode; when prompted to select an Authentication Mode, choose Mixed Mode instead.

    > Make sure to note the location, SQL Server Name, Login ID and Password of the SQL Server you are installing. Also, it is recommended to restart your system after installing SQL Server.

6. At the time of ArchiOffice installation:

    - log in to your web server as an Administrator
    - it is recommended to disable anti-virus protection

7. If you have purchased ArchiOffice, you should have received a link via email from where you can download the installation file (setup). Otherwise, you may download the ArchiOffice installer from our Support Download web page and save it on the desktop of the server/host computer:

> The installer or setup is a zipped file. You will need a Zip archiving or extraction program. Windows Vista/7/2008 has a built-in extraction utility in Windows Explorer.
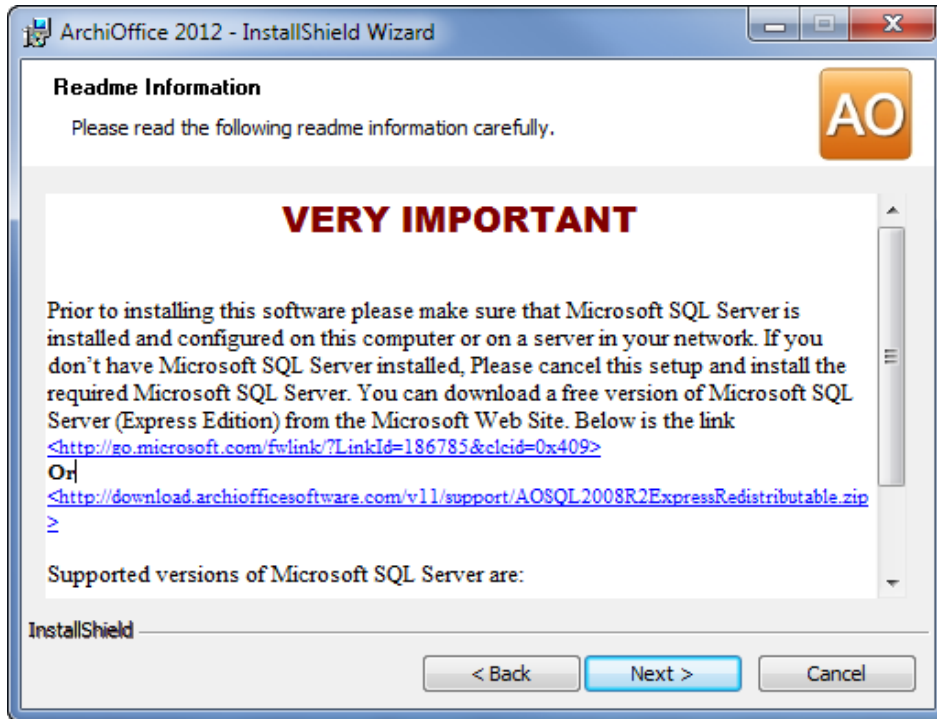
Installation

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

1. After downloading the ArchiOffice 2012 setup file, unzip the contents to your desktop.
2. Right-click on the setup icon on your desktop and select 'Run as Administrator'.
3. When the ArchiOffice 2012 InstallShield Wizard appears, read the information and follow the on-screen instructions. Click Next.


4. Read the License Agreement and select the 'I accept…' option to proceed. Click Next.
5. You will be prompted to install Microsoft SQL Server on this computer or a server in your network (see *Installation Preparation* above). Once you do, return to this setup. If you already have an SQL 2005 or 2008 version installed, then you may choose to skip this step.

6. Provide Customer Information by entering the User Name and Organization. Click Next.
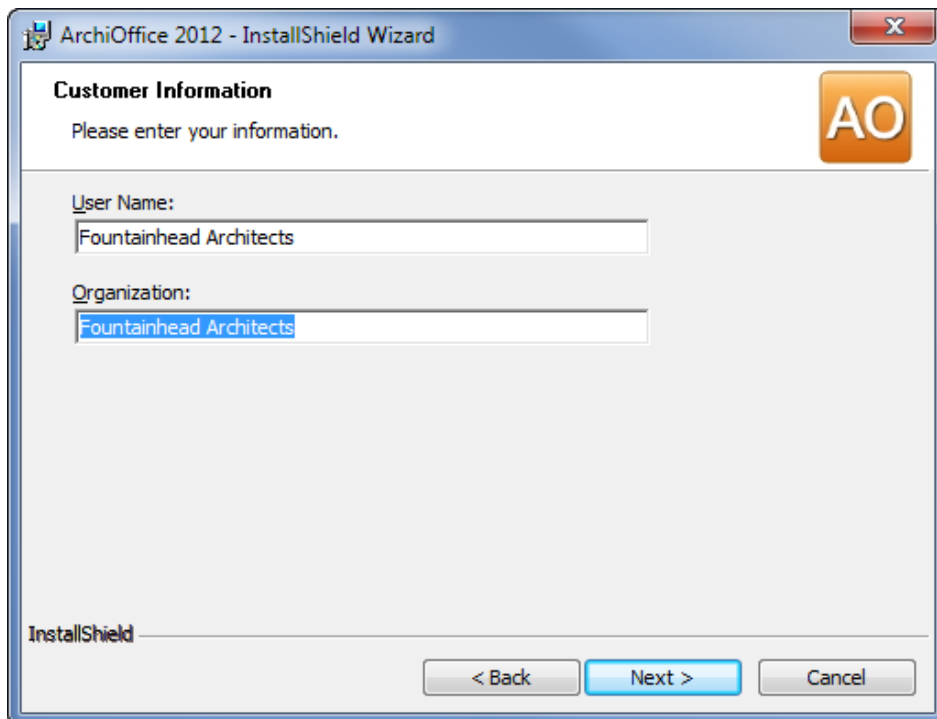
7. Accept the default Destination Folder or click Change to specify a different location. Click Next.

8. Once the installation begins, a progress bar displays. When the Finished screen appears, click Finish. Your installation is complete.

> ⚠️ 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*.

9. ArchiOffice 2012 will launch in your default browser; if not, click the desktop icon to launch it. See *Startup ArchiOffice* below.

10. On the first launch, you will be prompted to log into your system (Windows server) using the Administrator's User Name and Password. Once you enter the correct credentials you can start using ArchiOffice 2012. See *Startup ArchiOffice* below.

> ℹ️ If you want to sync with QuickBooks, MS Outlook/Entourage, Apple Mail, iCal (Apple Calendar) or Address Book (Apple Contacts), you have to download and install plugins. The ArchiOffice application will point you to the download link when you launch any of these features for the first time. However, this requires Administrative privileges and Java 6 (32-bit) installed on your computer.

Existing Users: If you are an existing ArchiOffice user, you must first install ArchiOffice 2012 (*see above*) and then convert your existing data to the new version using the ArchiOffice 2012 Conversion Tool (installed automatically with the setup). The conversion must be handled by the Administrator having full access permissions. *Please read the Upgrade Data to ArchiOffice 2012 whitepaper for conversion details.*

Advanced Installation

By default, the setup process for ArchiOffice creates the AO2012 application under Default Web Site and assigns Anonymous Authentication to it. It also creates the Admin application under AO2012 and assigns Windows Authentication to it. You can choose to manually configure these settings in the Internet Information Services (IIS). See the *IIS Knowledgebase article* for details.

> ❓ If you are experiencing problems while installing ArchiOffice, please check our Knowledgebase Articles. Otherwise, contact us at (800) 371-0130 (ext#0) or support@ArchiOffice.com.

Start-Up

Start-Up ArchiOffice

In order to launch ArchiOffice, please follow the steps below. At this point ArchiOffice should already be installed on your server.

If you are launching ArchiOffice from a computer that is also the ArchiOffice server, you may click the ArchiOffice desktop icon. If you are on any other computer, launch your browser and type the URL of your ArchiOffice web server, e.g.

http://www.mydomain.com/AO2012/default.aspx

where 'mydomain.com' is your web site domain name. Alternatively, you may use the IP address (local host or computer name) of the server, for example

http://192.168.1.45/AO2012/default.aspx or
http://computername/AO2012/default.aspx or
http://localhost/AO2012/default.aspx or
http://127.0.0.1/AO2012/default.aspx

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).

When you start ArchiOffice for the first time, you need to configure it on the server machine to point to the data file. To do so, you are prompted to log into your system (Windows server) using the Administrator's User Name and Password.
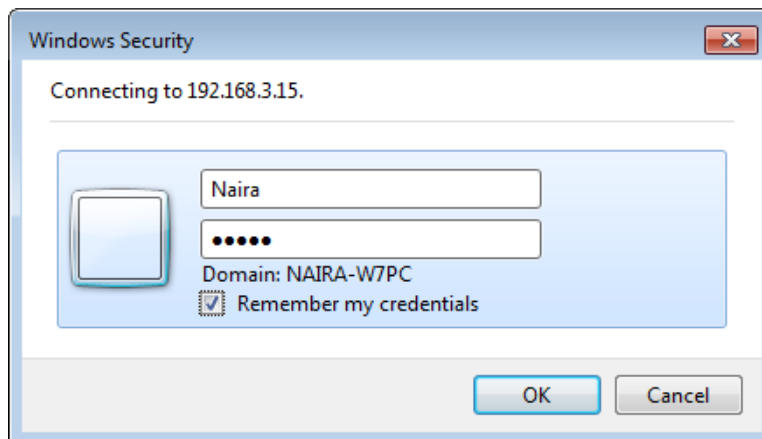
Once logged in as an Administrator, you are prompted with the company file dialog.

ArchiOffice Company File

When ArchiOffice opens for the first time, it prompts you with the 'What would you like to do?' dialog. You can:

- [Create a new company file](#)
- [Open an existing company file](#)
- [Open a sample company file](#)

You can open (existing user) or create (new user) a company database from/on the same drive as where your ArchiOffice application or IIS is installed.

Depending on which edition of ArchiOffice you purchase, you can use either Microsoft SQL Server Express Edition or Microsoft SQL Server Standard Edition to house your database. ArchiOffice Basic and Pro editions work only on SQL Server Express Edition while ArchiOffice Enterprise works on either SQL Server Express or Standard Edition. *Please see the [Edition Comparison Chart](#) for details*.

> You will find many tools and resources online to help you check and test the ODBC connectivity to your SQL Server (http://support.microsoft.com/kb/827422)

New Company File

To create a new company file:

1. When prompted, select 'Create a New Company File' option. Otherwise, do so by clicking Admin Options on the Login page.
   Make sure your web server is able to connect to your SQL Express or SQL Server database application.
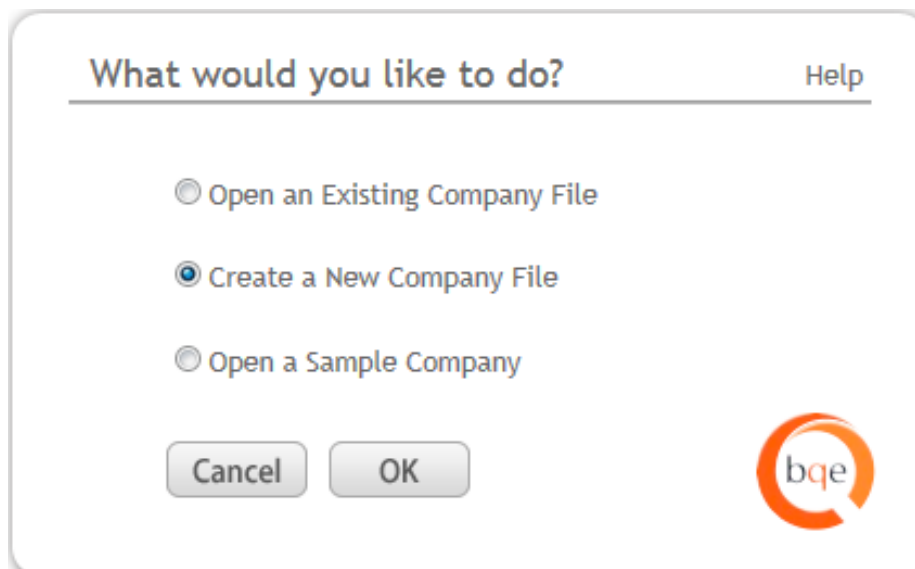
2. Enter your Company Name and ArchiOffice Data File Name (*generally same as your Company Name*).

3. Now enter the following:

- SQL Server Name: (IP address of the server or <u>Instance Name</u>)
- SQL Server User ID (System Administrator)
- SQL Server Password (System Administrator)

If you don't remember the SQL Server details, log in to your SQL Server (Start menu>SQL Server Management Studio) and then see the details (except for the password).

It is recommended to use the *SQL Server* Authentication Mode. *Windows Authentication* requires you to have an account set up on IIS with proper permissions. If SQL Server option does not work, you may use the Windows Authentication option but have your IT/System Administrator handle it for you.

4. Click Create. Please wait while the database is being created.
5. Next, you have to provide the path in the Preferences screen where your project templates and documents will be stored.

By default, the ArchiOffice installer sets the path as: X:\ ArchiOfficeData\2012\ where X: is the physical drive on which IIS is installed. However, you must enter the specific path or location of these shared folders in the UNC format (\\ServerIPAddress\sharedfolder\ or \\192.168.4.5\AO2012_Docs). Click Save.
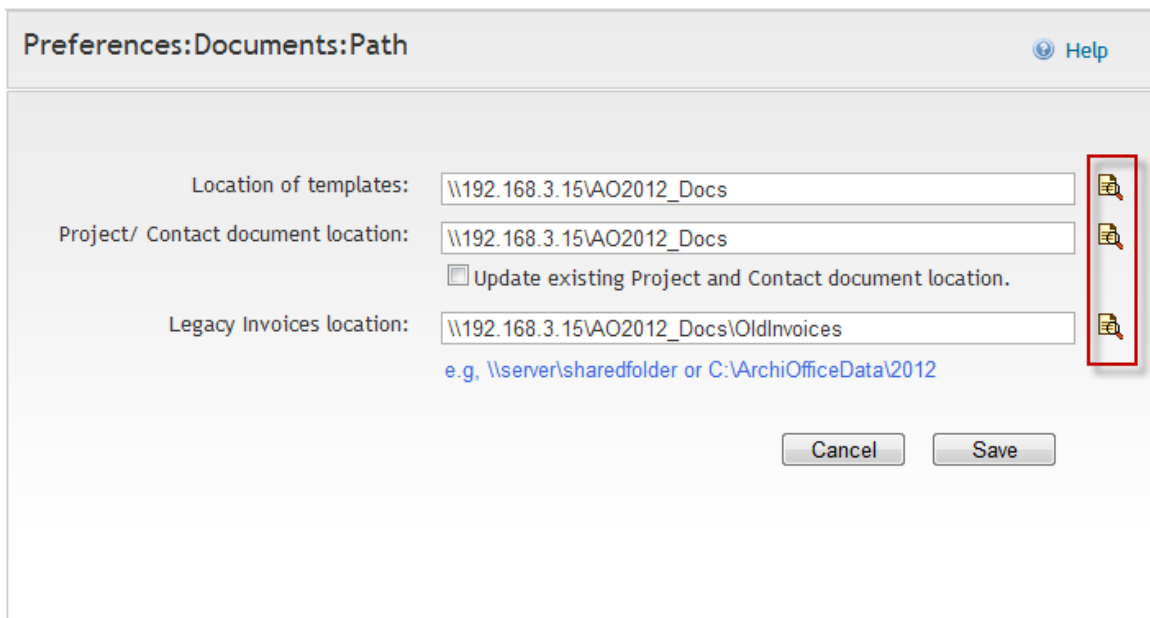
See the KB article on [How Do I Set the UNC Path for ArchiOffice](#) [Documents](#). If your documents are on a Mac file server, check the [Knowledgebase article](#) on how to handle that.

You will now be prompted to [log in](#).

Existing Company File

If you are upgrading from a previous version of ArchiOffice and have an existing data file, you are able to open it here. After installation, you must first run the ArchiOffice 2012 Conversion Tool (*See the [Upgrade](#) [Data to ArchiOffice 2012](#) whitepaper for details*) and then open your existing company file from here. During the data conversion process, your previous settings are migrated to the current version.

To open an existing company database:

1. When prompted, select 'Open an Existing Company File'. Otherwise, do so by clicking the Admin Options dialog on the Login page.
   Make sure your web server is able to connect to your SQL Express or SQL Server database application.
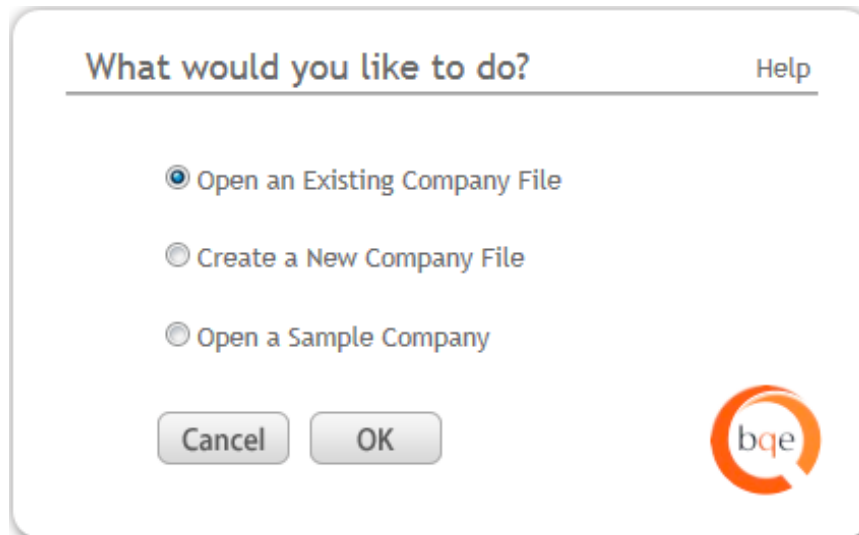
2. Enter the following:

   - Your Data File Name
   - Server Name: IP address of the server
   - SQL Server User ID (System Administrator)
   - SQL Server Password (System Administrator)

   ⚠️ It is recommended to use the *SQL Server* option. If you must use the *Windows Authentication* option, have your IT/System Administrator handle it for you.

3. Click Open.
4. Next, you have to provide the path in the Preferences screen where your project templates and documents are stored.

By default, the ArchiOffice installer sets the path as: X:\ ArchiOfficeData\2012\ where X: is the physical drive on which IIS is installed. However, you must enter the specific path or location of these shared folders in the UNC format (\\ServerIPAddress\sharedfolder\ or \\192.168.4.5\AO2012_Docs).

See the KB article on How Do I Set the UNC Path for ArchiOffice Documents. If your documents are on a Mac file server, check the Knowledgebase article on how to handle that.

You can also specify the path of your old 2010/2011 invoice folder in the Legacy Invoices field. This is used to view a converted invoice in the original PDF layout instead of rendering it in the Crystal Reports window. Click Save.
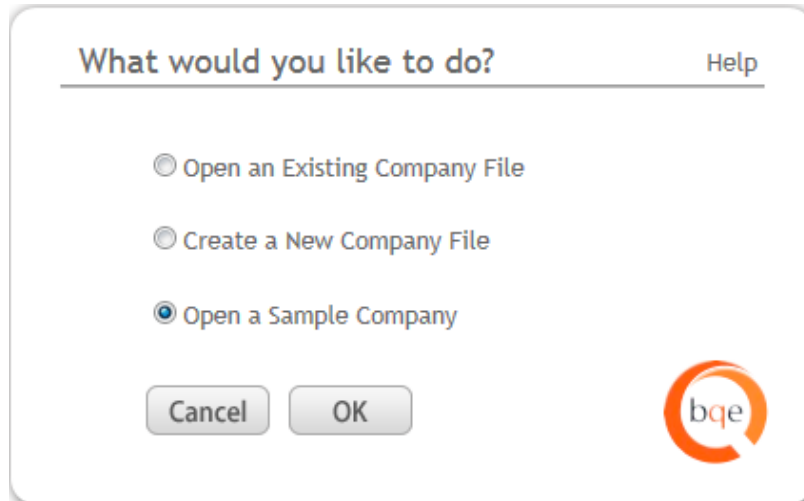
You will be prompted to log in.

Sample Company File

If you want to check out the sample data file before creating or setting up your own in ArchiOffice 2012, follow these steps:
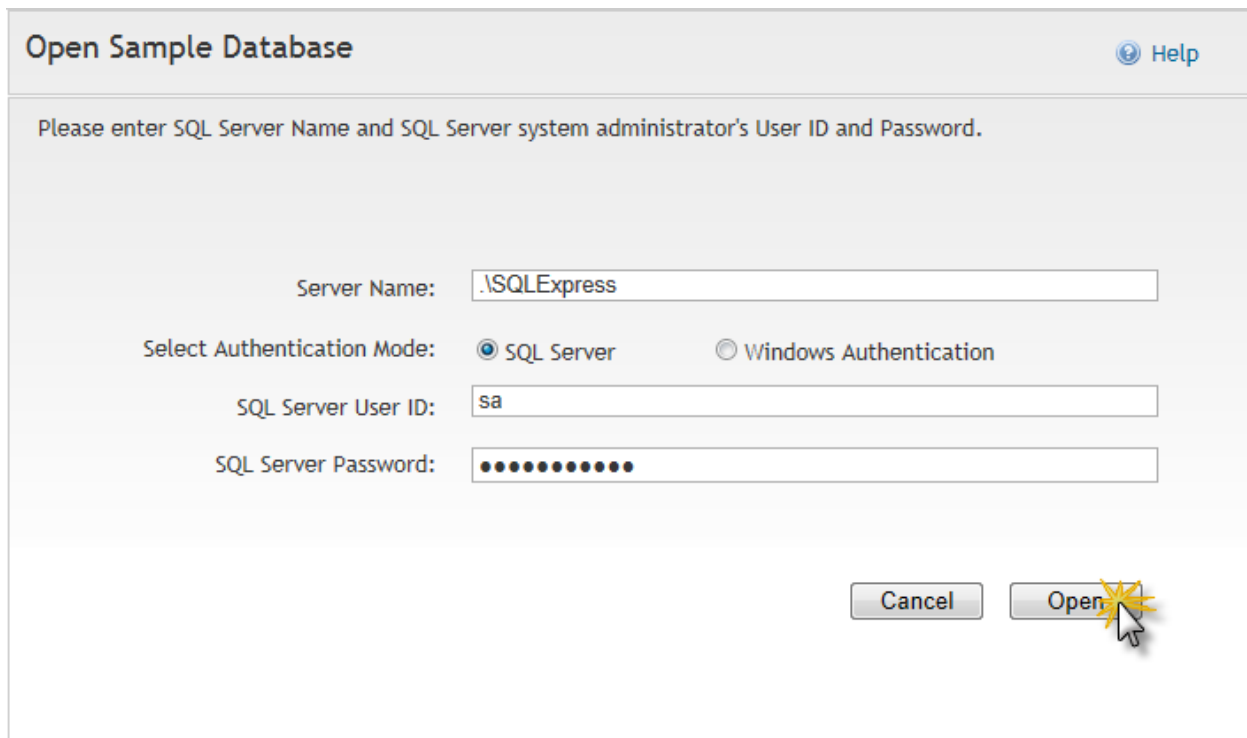
1. When prompted with the 'What would you like to do?' dialog, select 'Open a Sample Company'. Otherwise, do so by clicking the Admin Options dialog on the Login page.

2. Enter the following:

- Server Name: IP address of the server
- SQL Server User ID (System Administrator)
- SQL Server Password (System Administrator)

1. Click Open. Please wait while the database is being loaded.
2. Next, you can provide the path in the Preferences screen where your project templates and documents are or will be stored.

By default, the ArchiOffice installer sets the path as: X:\ ArchiOfficeData\2012\ where X: is the physical drive on which IIS is installed. For testing purposes, you can keep it as is but if you plan to use the documents and templates for real, enter the specific path or location of these shared folders in the UNC format (\\ServerIPAddress\sharedfolder\ or \\192.168.4.5\AO2012_Docs). Click Save.

See the KB article on How Do I Set the UNC Path for ArchiOffice Documents. If your documents are on a Mac file server, check the Knowledgebase article on how to handle that.

You can also specify the path of your old 2010/2011 invoice folder in the Legacy Invoices field. This is used to view a converted invoice in the original PDF layout instead of rendering it in the Crystal Reports window. Click Save.

3. You will be prompted to log in using any of the users in the sample database.

Log-in

ArchiOffice requires you to log into the program to access its functions and features. Your Administrator will provide you with a User Name and Password. By default, ArchiOffice creates an Admin user account.

If you have upgraded from an older version, all existing users will have the same user names and passwords. However, converted databases will have only a single Administrator available for the first login. So the Administrator knowing the old password must log in and activate the other users from the Preferences screen. Once this is done, all user names are listed in the login dropdown unless you want a secured login. You can turn this option on/off from the Preferences>System>Company screen.
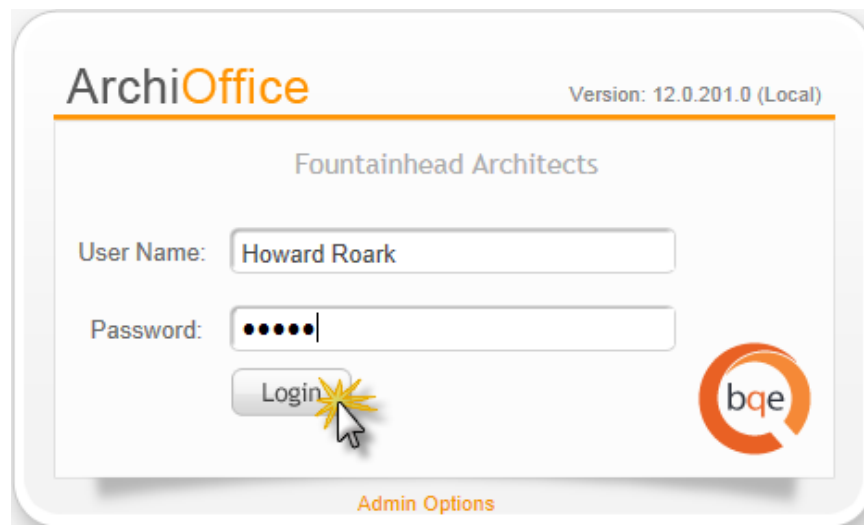
- If you have created a new company, to start with, use:

  User Name: Admin
  Password: Admin

- If you are using a sample company (say Fountainhead Architects), use:

     User Name: Howard Roark
     Password: Roark

If relevant, you will be able to check the update notifications, evaluation copy message, and links to purchase and license the product on the login page. After logging in, the ArchiOffice Dashboard (home page) displays.
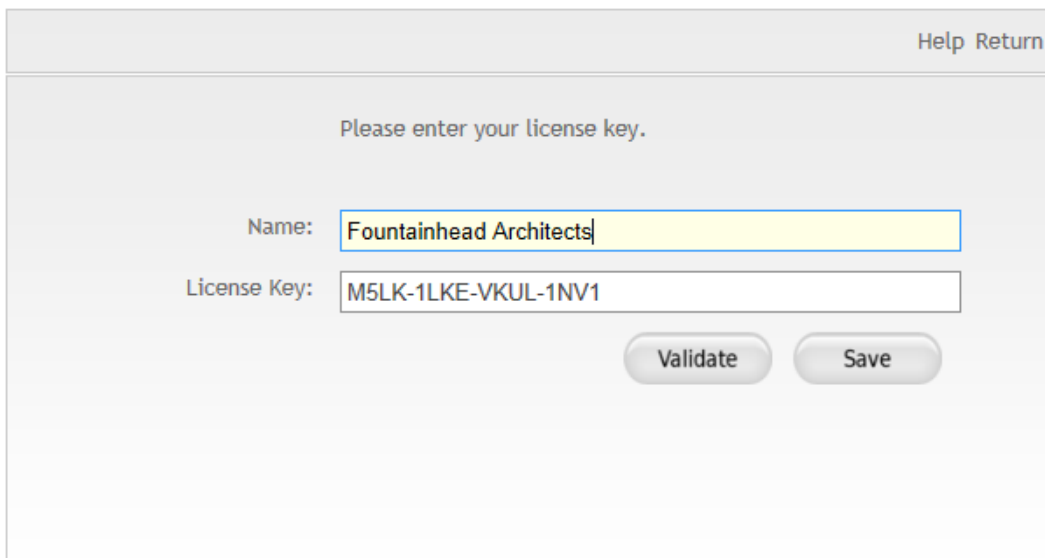
Product Activation

You can evaluate ArchiOffice for 30 days with full functionality (*no need for an evaluation key*). After the evaluation period is over, you must purchase a full software license to continue.

When logging in as an Administrator, you will be able to purchase the license key for ArchiOffice or enter it (if already purchased) using the links provided on the login page. You can also contact your ArchiOffice Account Rep at (310) 602-4020. After purchasing your product license, follow the instructions below.

Licensing

1. After purchasing ArchiOffice, open it. During and after your evaluation period, you will see the links to purchase the product or enter license key (if already purchased) on the login page. Otherwise, after logging in, select Preferences in the dropdown menu at the top right corner of the screen and click System-Company to do so.
2. Enter or verify your Company Name. It should be exactly the same (spelling, capitalization, punctuation) as the licensing email you received from BQE Software.

Help Return

Please enter your license key.

Name: Fountainhead Architects

License Key: M5LK-1LKE-VKUL-1NV1

Validate   Save

3. Enter the License Key or cut - paste it from the email.

4. Click Validate to verify the license key and number of authorized users.
5. When done, click Save and exit.

ArchiOffice is now ready to use. Work with the ArchiOffice Administrator to ensure data and company procedures are ready for the rest of the company.

Navigation

After logging in to ArchiOffice, you can access various functions and features of the application using the navigation options provided. You can navigate ArchiOffice using the following navigation options:

Navigation Bar

ArchiOffice displays a navigation bar at the top with color-coded tabs that represent a major function or module of the application. 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	Contacts	Time / Expense	Projects	Billing	Calendar	Reports
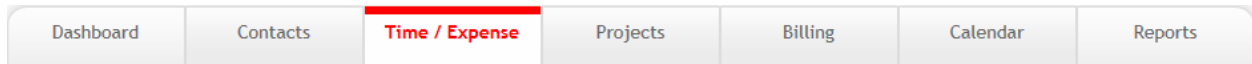
You can also access some options from the dropdown menu at the top right corner of the screen such as Accounting, Sync, Preferences, Login, etc. These options are based on the user's access privileges.

Dashboard

The home page of ArchiOffice displays a dashboard with highly useful and customized information, charts and links. You can access product related News; ArchiOffice Help; lists such as Time/Expense, Contacts, Projects, etc.; and 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 the widgets by clicking on them and apply filters to the charts.

Dashboard	Contacts	Time / Expense	Projects	Billing	Calendar	Reports

Help   Action ▼

News

ARCHIOFFICE NEWS
1. ArchiOffice 2012 Public Release on August 3, 2012!
2. Download the ArchiOffice 2012 Getting Started Guide
3. Save the Date: What is New in AO2012 Webinar August 23, 2012

BLOG ARTICLES
1. Impossible Goals and why Teams make them Possible
2. Five ArchiOffice Customers Elevated to AIA College of Fellows
3. Architect Designs Poolside

STRANGE STUFF FOR ARCHITECTS
1. If I Wore Jewelry, I'd Wear This
2. Submit your projects to 2012 Annual Design Review - Architect Magazine
3. Aussie Architects Have Humor

Contacts

Appointments / Milestones

Time / Expense

Projects

To Do List
Action ▼

Project	Description	
PHU Science Center	Staffing Schedule	☐
Fountainhead Architects	Website Review	☐
PHU Science Center	Schedule GC Interviews	☐
Fountainhead Architects	Place Ad for Office Manager	☐
PHU Science Center	Solicit Proposals from Cons ...	☐
Fountainhead Architects	Call Building Department	☐

Total : 6 To Do(s)

Invoicing
Action ▼

Profitability
Action ▼

ArchiOffice Basics

This section focuses on the basics of ArchiOffice including its initial setup and tutorial. Before proceeding, ensure all default settings have been set up properly to meet your needs.

ArchiOffice Setup

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

You can access the Preferences screen from the dropdown menu at the top right corner of the application to set up your company profile, users and specify other preferences. You can specify the following important settings from there:
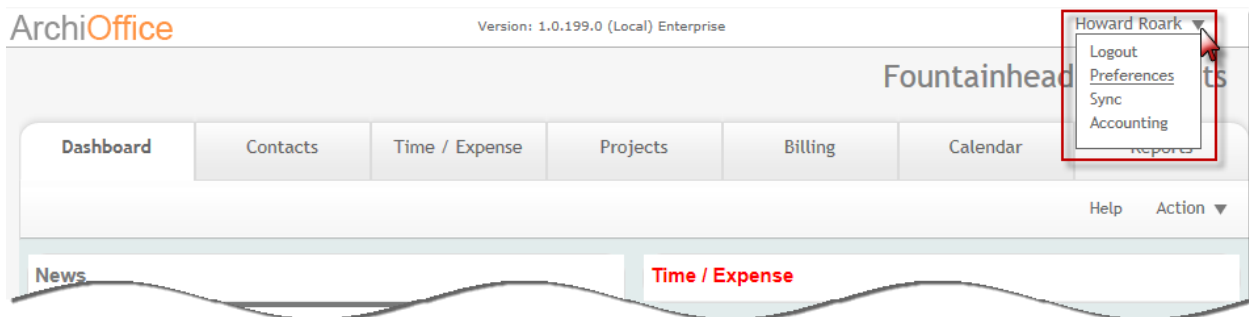

It is critical to set up preferences prior to entering any additional information in ArchiOffice. If you have converted data from an older version of ArchiOffice, much of the information will be imported for you; however, you should still review and verify its accuracy.

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

Preferences-Workgroups: Establish workgroups and their accessibility to information (security settings and privileges) in various screens as well as reports. This enables you to set and control user access to ArchiOffice on a group basis, rather than one employee at a time.

Preferences-Users: Enter ArchiOffice user profiles and other details such as default rates, addresses, HR items, time and expense options, sync privileges, 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.
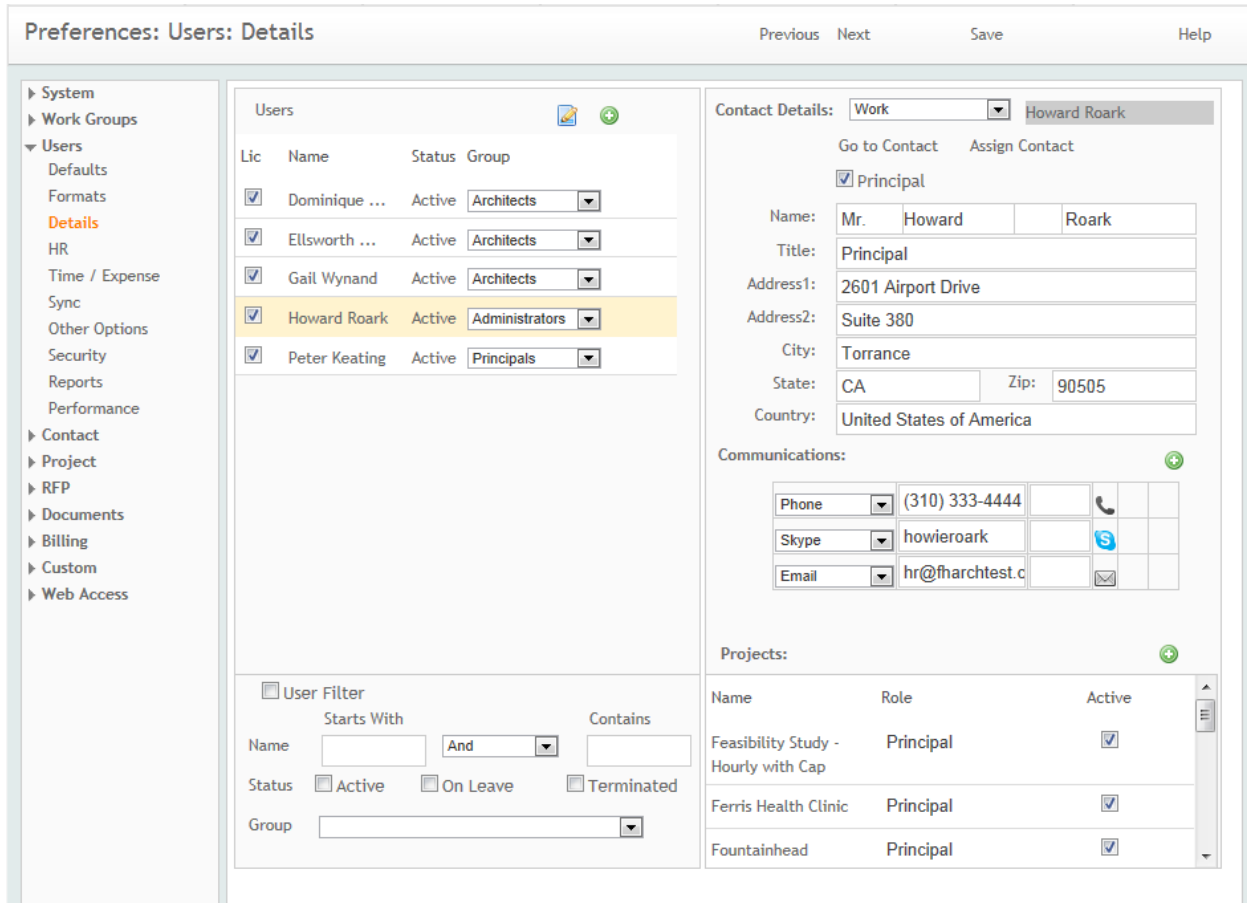
**Preferences-Contact:** Set the contact defaults and name formats for your ArchiOffice contacts.

Preferences-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 other project management information. You may set the defaults for roles, submittals, milestones, teams, associated tasks, etc. Properly setting up this information will ensure that all new projects in ArchiOffice will conform to your company policy and standards. All this must be entered in its entirety prior to setting up a project.

Preferences-Documents: ArchiOffice works with most conventional document types and comes with more than 70 templates, which can be customized to suit your needs. You should set the default document management structure to be used in ArchiOffice (*Pro and Enterprise editions only*). On the Preferences>Documents>Path screen, you may specify the default location of the project templates and documents. If you do not have the path specified properly, you will not be able to create project documents. You can have the application and file server as a single machine. However, it is recommended that file server and application server should be on separate machines.

The following scenarios are possible:

- Windows application sever & Mac file server on separate machines
- Windows application sever & Windows file server on same machine
- Windows application sever & Windows file server on separate machines

By default, the ArchiOffice installer sets the path as: X:\ ArchiOfficeData\2012\ where X: is the physical drive on which IIS is installed. This folder is used to store sample templates. However, you must enter the specific path or location of these documents and templates in the UNC format (\\ServerIPAddress\sharedfolder\ or \\192.168.4.5\AO2012_Docs). The documents should be stored in a shared folder on the network or file server so that all users can access them from ArchiOffice. This is possible when 'Read/Write' permissions are given to Everyone, IUSR and Network Service for the shared folder. Also, the share permissions itself must be set to allow 'Everyone' Full Control.
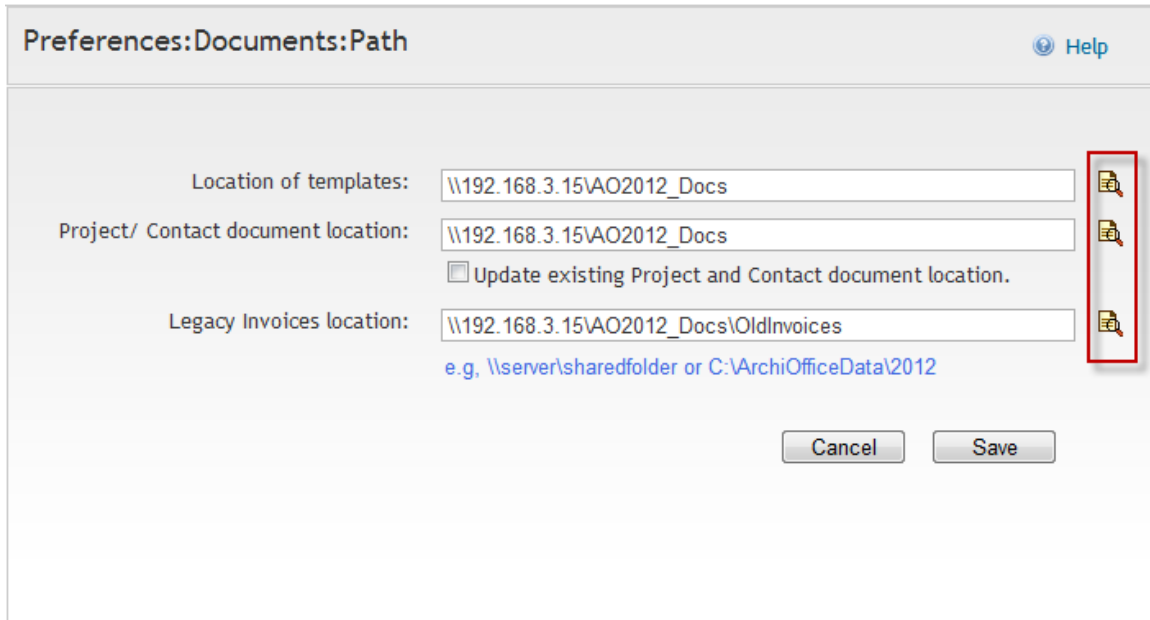
You can also specify the path of your old 2010/2011 invoice folder in the Legacy Invoices field. This is used to view a converted invoice in the original PDF layout instead of rendering it in the Crystal Reports window.

Local users (connected via LAN) can open and save the documents in the native application directly from/to the ArchiOffice server. However, in case of remote users (connected via Internet), there are two scenarios:

- If you are connected to the file server via VPN, the documents will open and save natively.
- If you don't have a direct access to the file server, ArchiOffice downloads the documents to your computer where they can be edited and saved. These documents will have to be moved or replaced to the proper server location manually when you have access to the file server.

See the KB article on How Do I Set the UNC Path for ArchiOffice Documents. If your documents are on a Mac file server, check the Knowledgebase article on how to handle that.

Preferences-Billing: The billing setup may require collaboration with your accountant or bookkeeper. Here, you can set the defaults for invoice numbering and templates, payment terms, expense markups, account codes, tax models and billing labels. You may 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 web site 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.
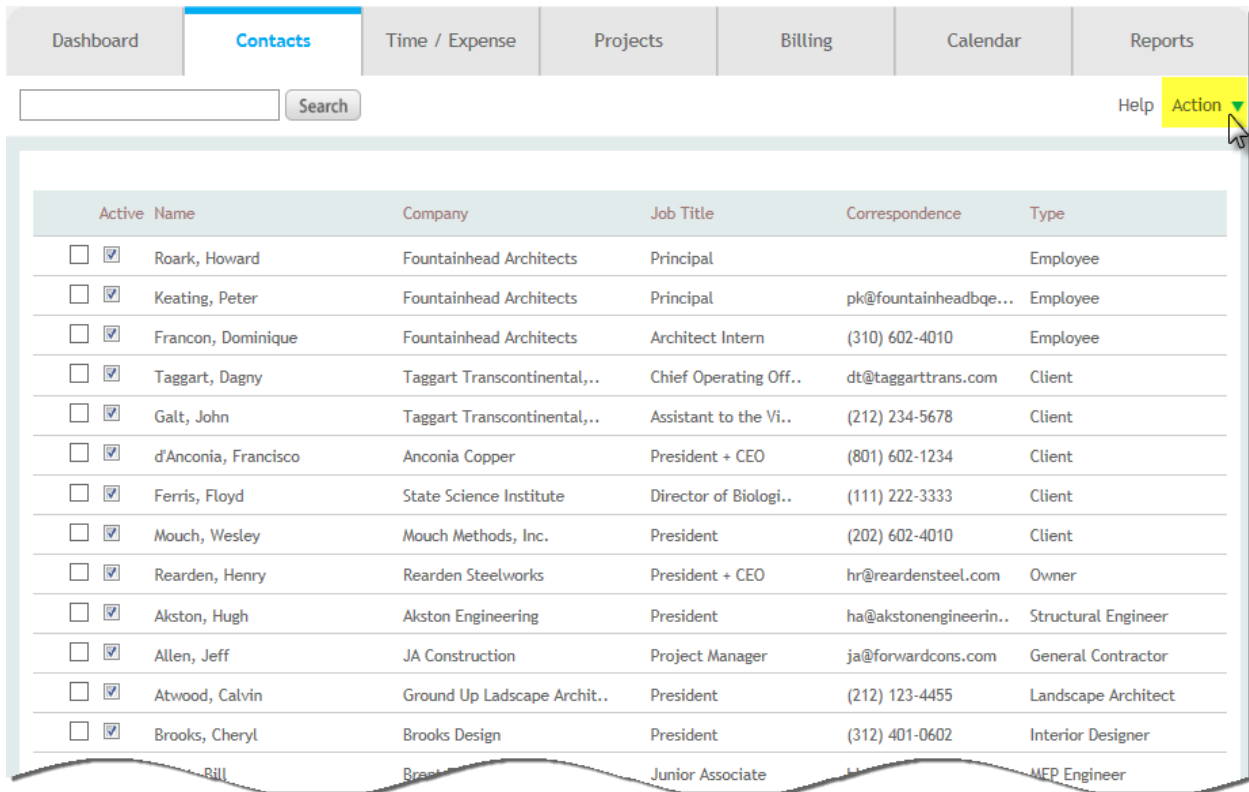
Tutorial

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 Help file.

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. Contact information can be entered manually or, if your contacts are maintained in another application, you can synchronize that data with Outlook, Entourage or Address Book (Apple Contacts).

To enter contact information:

1. Select the Contacts tab on the navigation bar.
2. It displays a list view of your contacts. Click Actions, New on the button panel to add a new contact.

Dashboard	Contacts	Time / Expense	Projects	Billing	Calendar	Reports

Search   Help   **Action** ▼

Active	Name	Company	Job Title	Correspondence	Type
☐ ☑	Roark, Howard	Fountainhead Architects	Principal		Employee
☐ ☑	Keating, Peter	Fountainhead Architects	Principal	pk@fountainheadbqe...	Employee
☐ ☑	Francon, Dominique	Fountainhead Architects	Architect Intern	(310) 602-4010	Employee
☐ ☑	Taggart, Dagny	Taggart Transcontinental,..	Chief Operating Off..	dt@taggarttrans.com	Client
☐ ☑	Galt, John	Taggart Transcontinental,..	Assistant to the Vi..	(212) 234-5678	Client
☐ ☑	d'Anconia, Francisco	Anconia Copper	President + CEO	(801) 602-1234	Client
☐ ☑	Ferris, Floyd	State Science Institute	Director of Biologi..	(111) 222-3333	Client
☐ ☑	Mouch, Wesley	Mouch Methods, Inc.	President	(202) 602-4010	Client
☐ ☑	Rearden, Henry	Rearden Steelworks	President + CEO	hr@reardensteel.com	Owner
☐ ☑	Akston, Hugh	Akston Engineering	President	ha@akstonengineerin..	Structural Engineer
☐ ☑	Allen, Jeff	JA Construction	Project Manager	ja@forwardcons.com	General Contractor
☐ ☑	Atwood, Calvin	Ground Up Landscape Archit..	President	(212) 123-4455	Landscape Architect
☐ ☑	Brooks, Cheryl	Brooks Design	President	(312) 401-0602	Interior Designer
	Bill	Brent	Junior Associate		MEP Engineer

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 + tab on the right. 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 billable or RFP project is created, default settings specified in the Preferences are automatically applied. If you create a new project from a project template, ArchiOffice ignores the Preferences and uses the template's settings. Internal projects take no settings from the Preferences.

1. From the *Contacts* screen, select the client's contact record. In the detail view, select the **Projects** tab below the contact details.
   Otherwise, select Projects on the navigation bar; in the list view, click Action.
2. Click New to create a new project.

3. 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.

4. 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 sub categories related to budgeted phases and job codes.

Dashboard	Contacts	Time / Expense	**Projects**	Billing	Calendar	Reports

2009-0143: Roark Residence   Previous   Next   Help   Action ▼

Details	General	Logs	Documents	Events	Tasks	Slips	Billing

Save

Project Number	2009-0143
Project Name	Roark Residence
Project Type	Residential New
Office	Office
Project Status	Active
Type	● Billable ○ RFP ○ Internal

Project Address
Address1	123 Main Street	Use Billing Client Address
Address2	Suite 300	
City	Torrance	
State	CA	Zip: 90505
Country		

Key People

| Billing Client | Howard Roark | Reassign | | Principal | Howard Roark |
| Originator | Howard Roark | | | Project Leader | Ellsworth Toohey |

Project Team	Phases / Codes

Help   Print   Action ▼

Employee	Role	Bill Rate	Approve T/E	Active	
↕ Gregory Peck		$100.00	☐	☑	🖫
↕ Dominique Francon	Drafter	$125.00	☐	☑	🖫
...Toohey	Archit...	$150.00		☑	🖫

5. Now, click on the *Billing tab* and select *Options* from the dropdown list on the left to set the project's Invoice Method. This is important prior to entering the project's budget.
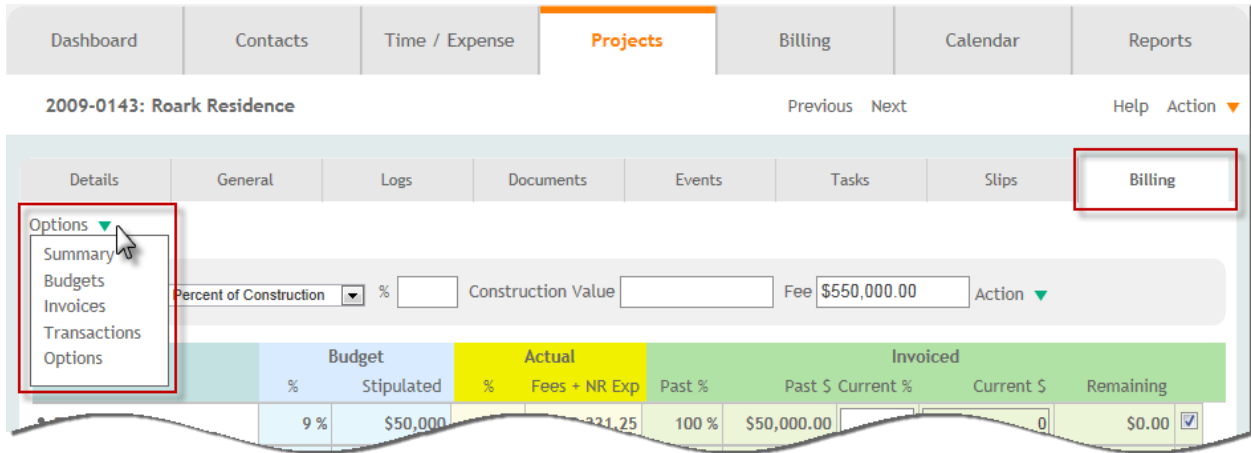
6. Next, on the same Billing tab, select *Budgets* from the dropdown list where the phases (sub phases), job codes (sub-job codes) have already been set. Enter the fees and hours budgeted for each phase. This will coincide with information stipulated in your contract.

> 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/Expense screen is the central location for all time and expenses entered in ArchiOffice. The screen displays all the existing time and expense entries in the system.

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

3. ArchiOffice auto sets the time card to the current date (highlighted in <mark>yellow</mark>). If you want to enter time for another day, simply 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/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 and/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 provides several options for generating invoices and applying payments. For each 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 an invoice for a project.

You can also perform the batch billing functions directly from the Billing screen. You can also view outstanding, draft and historical invoices from here as well as 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 Help](#) for more information.

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.

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 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.

Project Profitability

Projects–General–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, etc. 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 installed ArchiOffice and understood its basic functionality. To learn more about this program, check the ArchiOffice Help or visit www.ArchiOffice.com/ProductOverview.

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