

Getting Started Guide



# ArchiOffice Getting Started Guide

---

*Power Your Office. Empower Yourself.*

---

# Contents

---

<b>INTRODUCTION .....</b>	<b>1</b>
<i>ArchiOffice Setup Checklist .....</i>	<i>3</i>
<b>SYSTEM REQUIREMENTS .....</b>	<b>4</b>
SERVER REQUIREMENTS .....	4
CLIENT REQUIREMENTS .....	4
<b>INSTALLATION .....</b>	<b>6</b>
INSTALLATION PREPARATION .....	6
INSTALLATION .....	9
ADVANCED INSTALLATION .....	11
<b>START-UP .....</b>	<b>12</b>
START-UP ARCHIOFFICE .....	12
ARCHIOFFICE COMPANY FILE .....	13
<i>New Company File .....</i>	<i>13</i>
<i>Existing Company File .....</i>	<i>16</i>
<i>Sample Company File .....</i>	<i>16</i>
LOG-IN .....	18
PRODUCT ACTIVATION .....	19
LICENSING .....	20
NAVIGATION .....	20
<i>Navigation Bar .....</i>	<i>20</i>
<i>Dashboard .....</i>	<i>21</i>
<b>ARCHIOFFICE BASICS .....</b>	<b>22</b>
ARCHIOFFICE SETUP .....	22
TUTORIAL .....	25
<i>Contacts .....</i>	<i>25</i>
<i>Projects .....</i>	<i>27</i>
<i>Time and Expense .....</i>	<i>29</i>
<i>Billing .....</i>	<i>30</i>
<i>Reports .....</i>	<i>31</i>
PROJECT MANAGEMENT .....	32
<i>Projects Summary .....</i>	<i>32</i>
<i>Project Profitability .....</i>	<i>33</i>

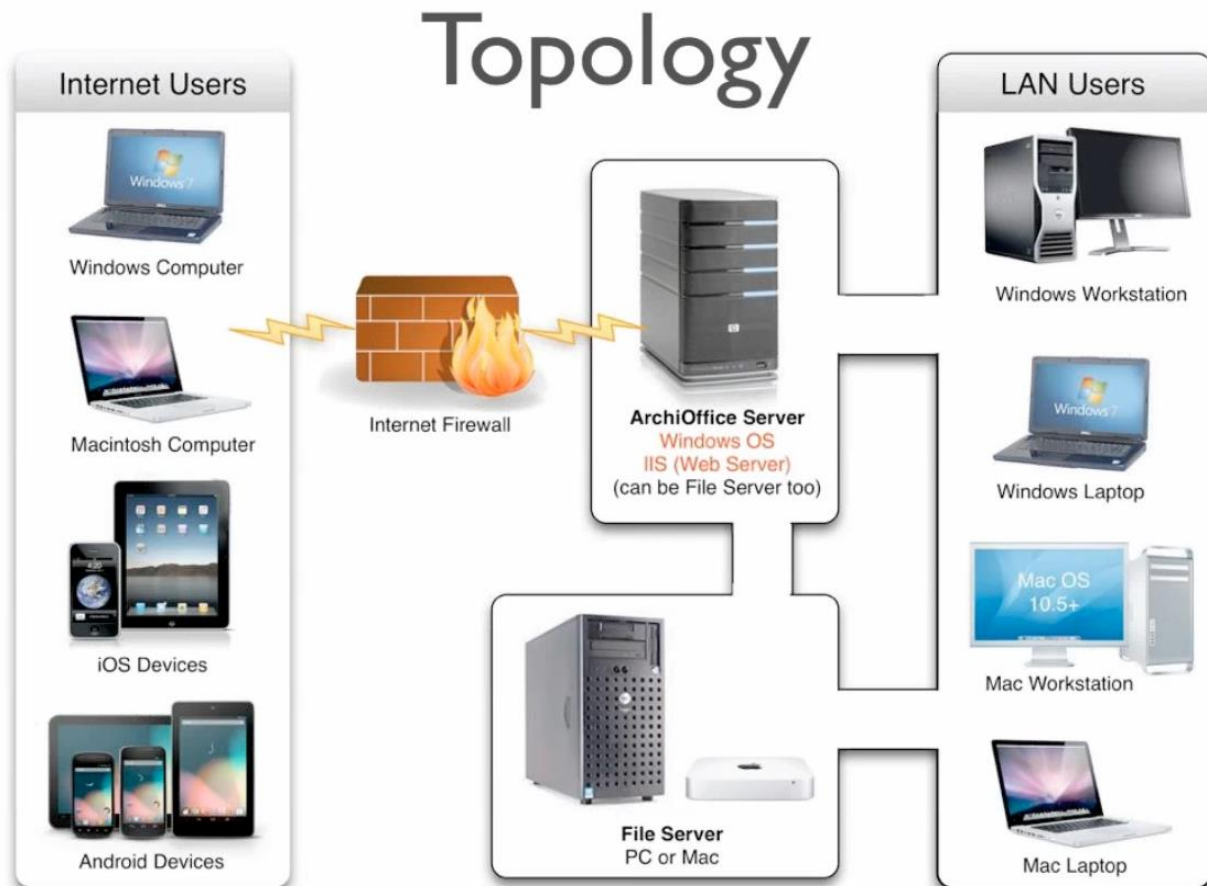
# Introduction

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 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](http://www.bqe.com/Services) for more information.

# ArchiOffice Setup Checklist

✓	Task	Resources and References
<b>Pre-Installation</b>	<input type="checkbox"/> Decide about the ArchiOffice edition/flavor you want to install	<a href="#">Edition Comparison Chart</a>
	<input type="checkbox"/> Decide whether to do the installation yourself or have a BQE Consultant do it for you. Contact your Account Rep for that; else proceed	<a href="#">ArchiOffice Installation Preparation</a>
	<input type="checkbox"/> Check our <a href="#">system requirements</a>	<a href="#">Server Requirements</a> <a href="#">Client Requirements</a>
<b><u>Installation Preparation</u></b>	<input type="checkbox"/> <i>Mac Only Users:</i> Install Windows virtual OS	<a href="#">Set Up Mac for ArchiOffice 2014</a>
	<input type="checkbox"/> Install Internet Information Services on your server	<a href="#">How Do I Install IIS on Web Server?</a> <a href="#">How Do I Add Components to IIS?</a>
	<input type="checkbox"/> Install Microsoft SQL Server on your server or have a BQE Consultant do it for you. Contact your Account Rep for that	Read <a href="#">Install SQL Server 2008</a> Watch <a href="#">How to Install SQL Server 2008</a>
<b><u>Installation</u></b>	<input type="checkbox"/> Download the ArchiOffice setup	<a href="#">ArchiOffice Support Downloads</a>
	<input type="checkbox"/> Log in as an administrator and install ArchiOffice	Read <a href="#">Installation</a>
	<input type="checkbox"/> <i>Existing Users:</i> Install ArchiOffice 2014 and then convert your existing data using ArchiOffice 2014 Convertor Or contact your Account Rep to have a BQE Consultant do it for you	<a href="#">Upgrade Data to ArchiOffice 2014</a>
<b><u>Start-Up</u></b>	<input type="checkbox"/> Open ArchiOffice on a server or client machine	<a href="#">Start Up ArchiOffice</a>
	<input type="checkbox"/> Create or open your company file	<a href="#">Create a New Company File</a> <a href="#">Open an Existing Company File</a> <a href="#">Open a Sample Company</a>
	<input type="checkbox"/> Log into your ArchiOffice company	<a href="#">Login</a>
	<input type="checkbox"/> Activate and license ArchiOffice	<a href="#">Product Activation</a> <a href="#">Licensing</a>
<b>Deployment</b>	<input type="checkbox"/> Set up ArchiOffice company file and preferences	<a href="#">Setup</a>
	<input type="checkbox"/> Add or import company data and start using ArchiOffice	<a href="#">Tutorial</a> <a href="#">ArchiOffice Help</a> <a href="#">ArchiOffice-QuickBooks Integration</a>

# 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

- Any Intel x86-compatible microprocessor (Intel i3 or later recommended)
- 2 GB RAM or more (4 GB recommended)
- At least 20 GB of free hard disk space required

### Software Requirements

- Windows Server 2012, Small Business Server 2011 or 2008, Windows Server 2008, Windows 8 Pro, Windows 7 (Professional, Enterprise or Ultimate), Windows Vista (Business, Enterprise or Ultimate), Windows 2003
- Microsoft .NET Framework 4.0 (installed automatically by our installer)
- Internet Information Server (IIS) 6.0 or later (IIS is part of Windows; needs to be installed and configured properly by a Windows administrator)
- SQL Server 2012/2008 Standard or Express Edition with Management Tools
- Internet connection
- **For Mac only users:** Virtualization software like VMWare or Parallels, and Microsoft Windows OS (See [Set Up Mac for ArchiOffice 2014](#) 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

- Any Intel x86-compatible microprocessor (Intel i3 or later recommended)
- 2 GB RAM or more (4 GB recommended)
- At least 5 GB of free disk space
- **For Mac users:** An Intel processor, 4 GB of free disk space, 2 GB or better RAM

## Software Requirements

- Windows 8/Windows 7/Windows Vista/Windows XP or Mac OS 10.7 or later
- Microsoft Internet Explorer 9.0/10.0/11.0, Chrome 7.0 to 34.0, Firefox 10.0 to 27.0, Opera 11.0

Google Chrome is the recommended browser for ArchiOffice since it is easier to configure in terms of turning off popup blocker and clearing the browser cache. However, ArchiOffice works with other browsers too as long as the pop-up blocker settings are set correctly.

- Latest version of Java 7

ArchiOffice 2014 uses Java to open project documents and for data synchronization with Microsoft Outlook and QuickBooks.



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

# Installation

ArchiOffice 2014 is a server-based program requiring one machine to function as a ‘web server’ and ‘data server’ that can host both the ArchiOffice web program and web data. (ArchiOffice can be hosted on two servers also—one dedicated for the web program 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), that is, web server running compatible server software.

## Installation Preparation

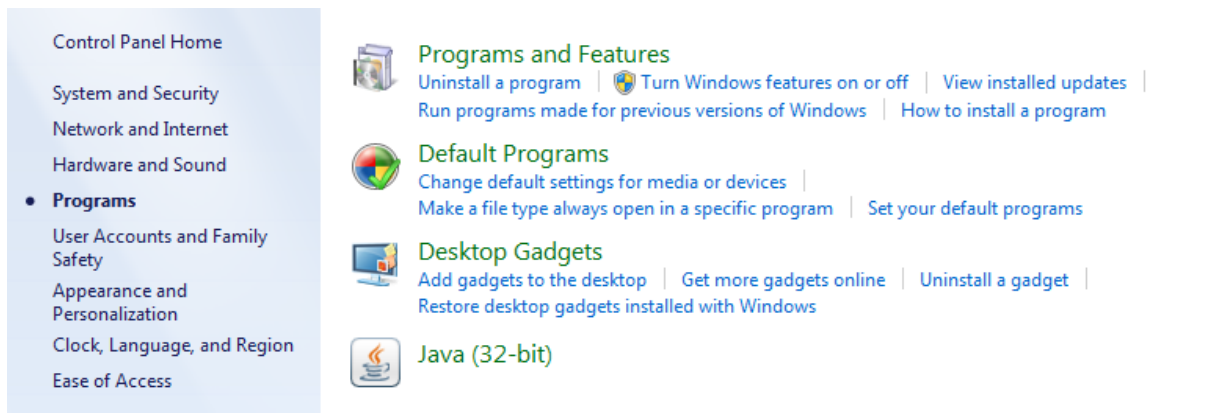
Before installing ArchiOffice, you must ensure the following:

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.



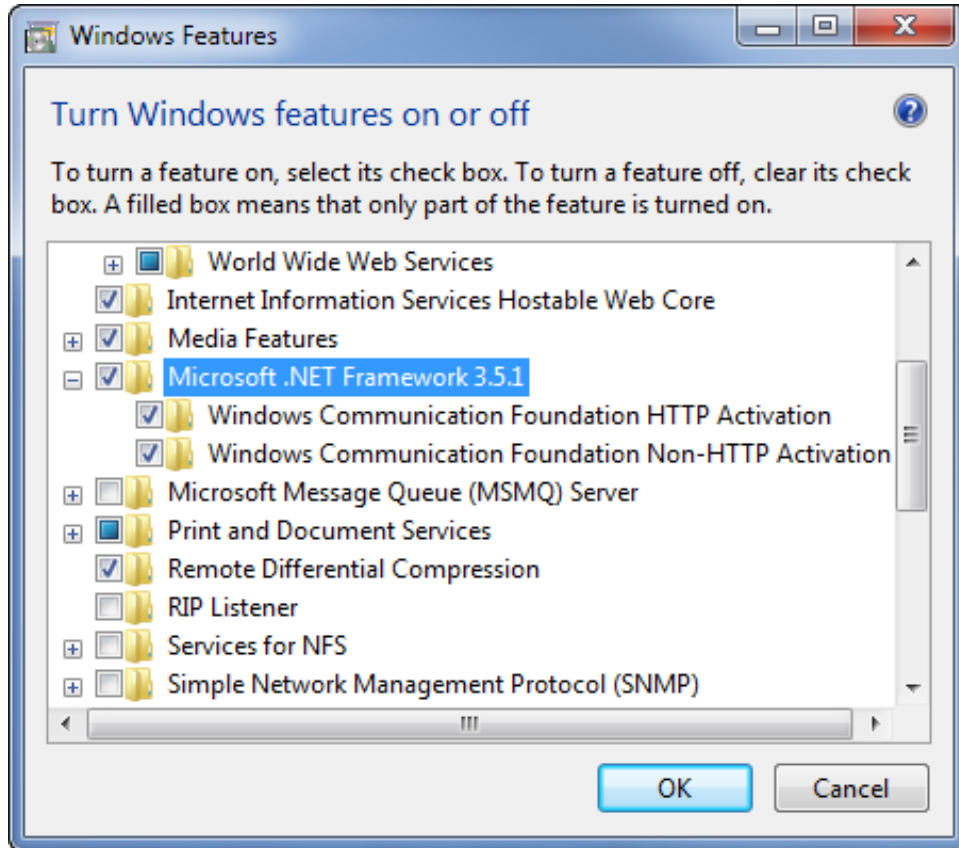
If you only have a Mac system, you can install ArchiOffice on it using a Windows virtual environment. Check out the [Set Up Mac for ArchiOffice 2014](#) whitepaper for details.

3. In addition, 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 2014 is a web-based program 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:

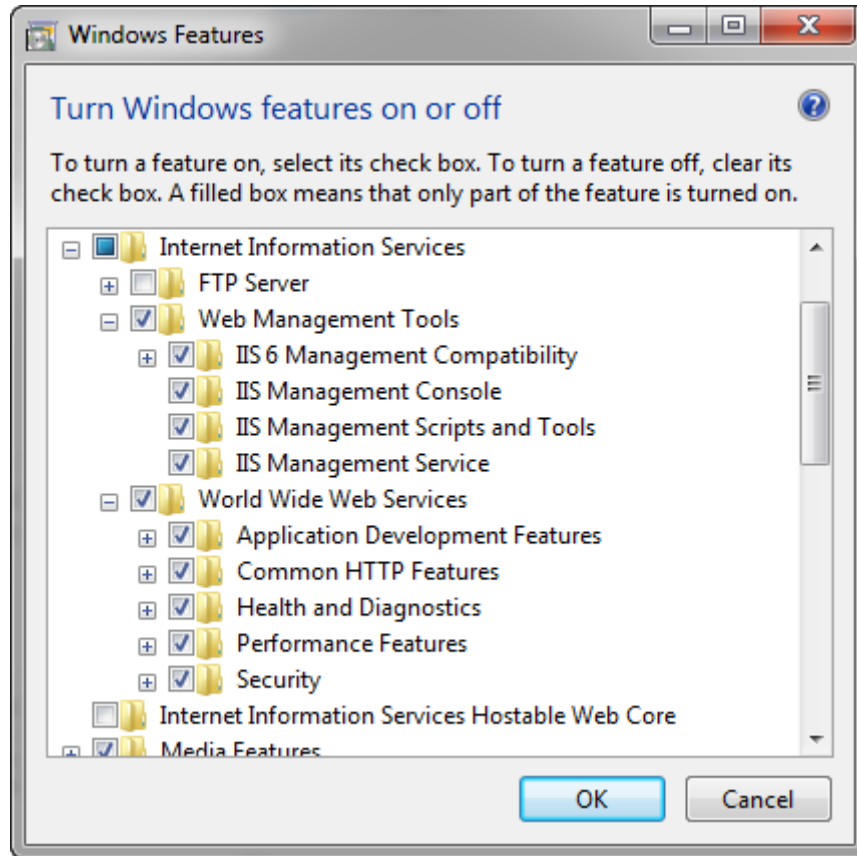
[Install IIS 7.5 on Windows 7 Professional/Enterprise/Ultimate](#)

[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 2014 stores your company data in an SQL database. You must have installed Microsoft SQL Server on your system (server). If not, then you can 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 (Run as Administrator via shortcut menu). 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. In addition, we recommend restarting your system after installing SQL Server.

6. At the time of ArchiOffice installation:
  - log in to your web server as an administrator
  - we recommend disabling 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 can download the ArchiOffice installer from our [Support Download](#) web page and save it on the desktop of the server/host computer:

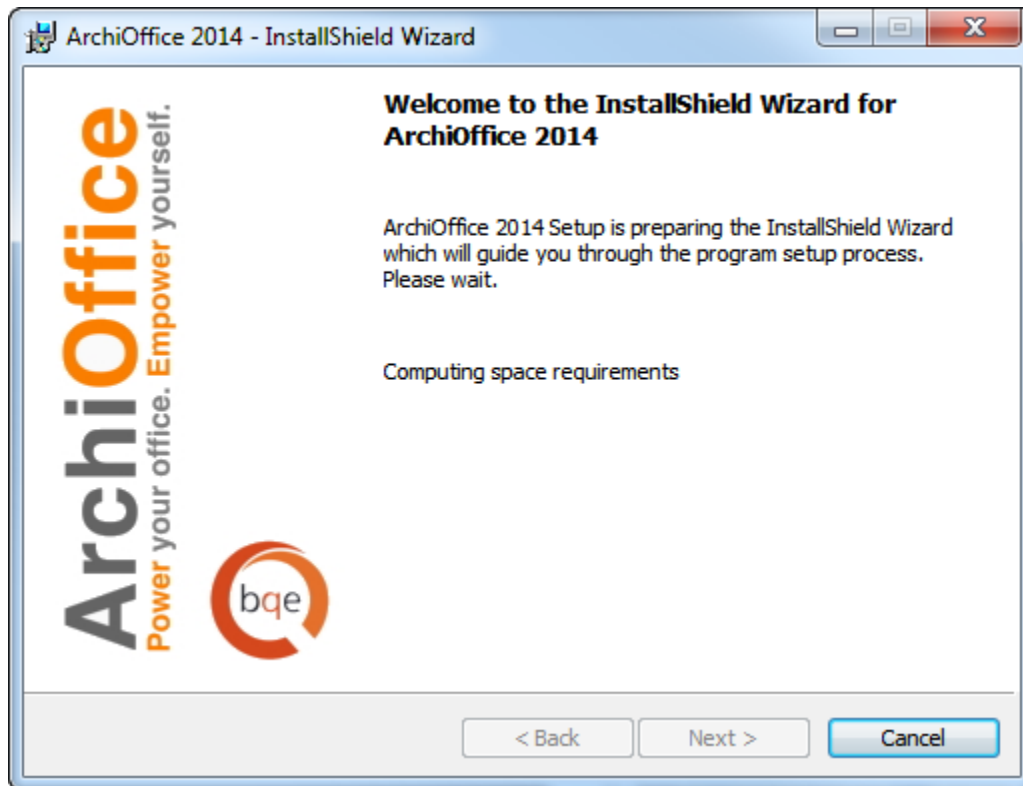


The installer or setup is a zipped file. You will need a Zip archiving or extraction program. Windows Vista/7/8/2008 has a built-in extraction tool in Windows Explorer.

## Installation

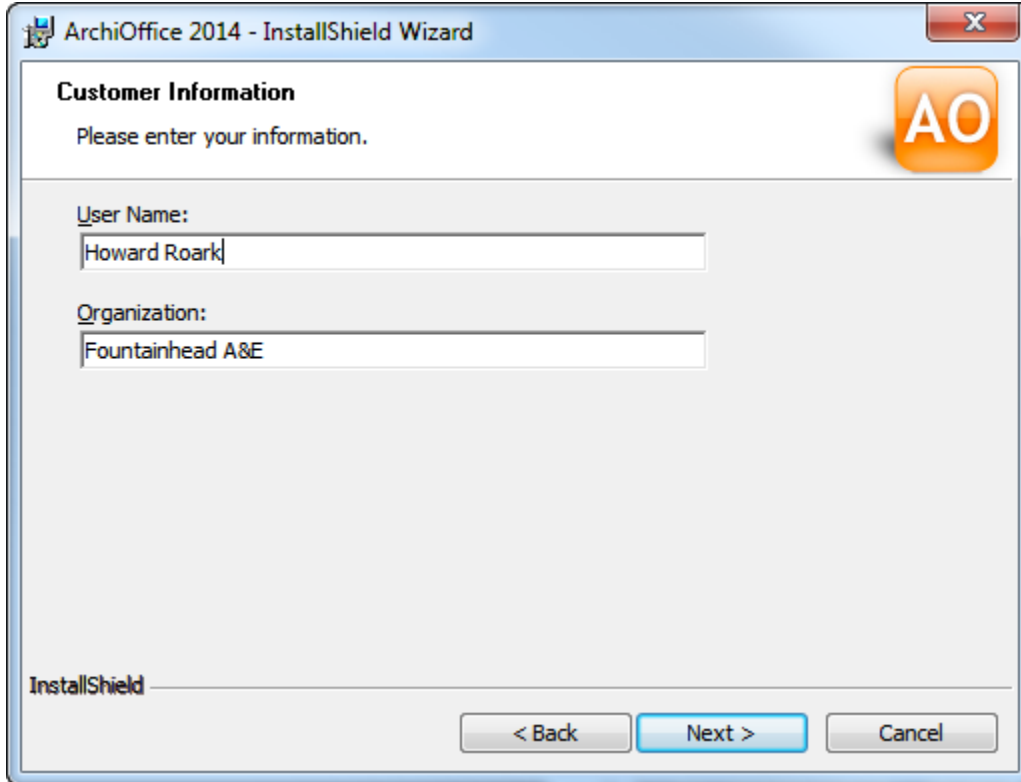
Follow the steps below to install ArchiOffice on a server machine that will be hosting the ArchiOffice data (this applies to both multi and single users).

1. After downloading the ArchiOffice 2014 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 2014 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). After you do so, return to this setup. If you already have an SQL 2008 or later version installed, then you can choose to skip this step.


- Provide Customer Information by entering the User Name and Organization. Click Next.



- Accept the default Destination Folder or click Change to specify a different location. Click Next.
- After the installation begins, a progress bar displays. When the Finished page appears, click Finish. Your installation is complete.

 Your Internet or antivirus security software might prompt you to allow program access. Please ALLOW (or Unblock) access whenever prompted. If you don't, ArchiOffice will not function properly.

- ArchiOffice will start in your default browser; if not, click the desktop icon to start it. See [Startup ArchiOffice](#) below.

 If you want to sync with QuickBooks, Microsoft Outlook/Entourage, Apple Mail (AppleMail), Apple Calendar (iCal), or Apple Contacts (Address Book), you have to download and install plug-ins. The ArchiOffice program will point you to the download link when you start any of these features for the first time. However, this requires Administrative privileges and Java installed on your computer.

**Existing Users:** If you are an existing ArchiOffice user, you must first install ArchiOffice 2014 (*see above*) and then convert your existing data to the new version using the ArchiOffice 2014 Converter (installed automatically with the setup). The conversion must be handled by the administrator having full access permissions. Please read the [Upgrade Data to ArchiOffice 2014](#) *whitepaper for conversion details*.

## Advanced Installation

By default, the setup process for ArchiOffice creates the AO2014 program under Default Web Site and assigns Anonymous Authentication to it. It also creates the Admin application under AO2014 and assigns Windows Authentication to it. You can choose to manually configure these settings in the Internet Information Services (IIS). See the [IIS Knowledge Base article](#) for details.



If you reside outside the United States, you must change the IIS local region setting for ArchiOffice to ensure it processes your data correctly. See the article in the BQE Knowledge Base on [how to set ArchiOffice cultural settings](#).



If you are experiencing problems while installing ArchiOffice, please check our [Knowledge Base Articles](#). Otherwise, contact us at (800) 371-0130 (ext#0) or [support@ArchiOffice.com](mailto:support@ArchiOffice.com).

# Start-Up

---

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

## Start-Up ArchiOffice

If you are opening ArchiOffice from a computer that is also the ArchiOffice server, you can click the ArchiOffice desktop icon. If you are on any other computer, open your browser and type the URL (Uniform Resource Locator) of your ArchiOffice web server, e.g.

<http://www.mydomain.com/AO2014/default.aspx>

Where 'mydomain.com' is your website domain name. Alternatively, you can use the IP address (local host or computer name) of the server, for example

<http://192.168.1.45/AO2014/default.aspx> or  
<http://computername/AO2014/default.aspx> or  
<http://localhost/AO2014/default.aspx> or  
<http://127.0.0.1/AO2014/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. After you log in as an administrator, you are prompted with the company file dialog box.

Authentication Required

The server [http://\[redacted\]](http://[redacted]) requires a username and password.

User Name:

Password:

# ArchiOffice Company File

When ArchiOffice opens for the first time, it prompts you with the 'What would you like to do?' dialog box. 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 or on the same drive as where your ArchiOffice program 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.*

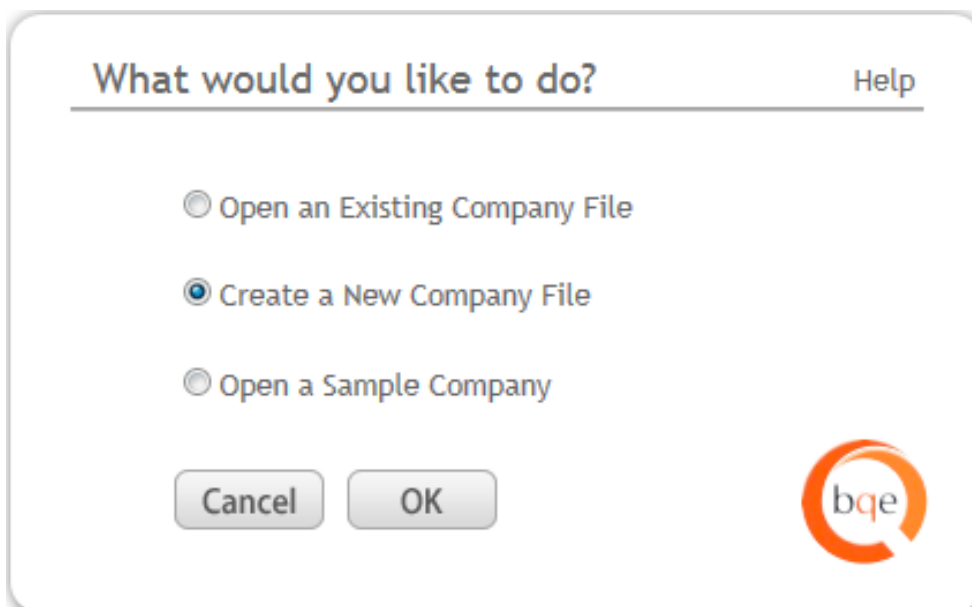


You will find many tools and resources online to help you check and test the ODBC connectivity to your SQL Server (<http://support.microsoft.com/kb/827422>)

## 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*).

### Create a new database ? Help

Please enter SQL Server Name, Database Name and SQL Server system administrator's User ID and Password.

Company Name:

Data File Name:

Server Name:

Select Authentication Mode:  SQL Server  Windows Authentication

SQL Server User ID:

SQL Server Password:

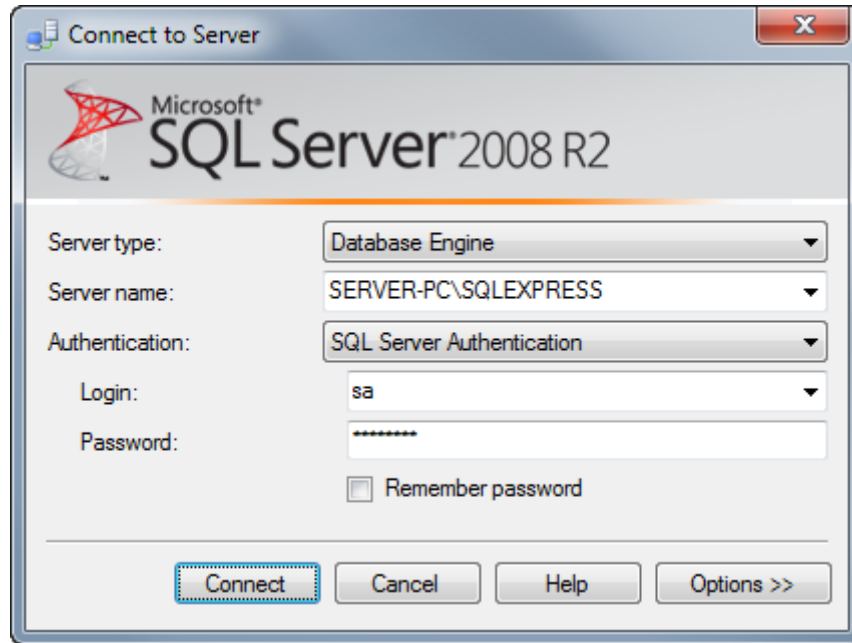
3. Now enter the following:


- SQL Server Name: (IP address of the server or [Instance Name](#))
- 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).







 We recommend using 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 can 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\2014\ 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\AO2014\_Docs). Click Save.

 Typically, a NAS device cannot be used to store your project documents because its underlying configuration and operating system does not allow setting up access or security preferences that are compatible with ArchiOffice. Please contact [BQE Technical Support](#) for details.


Preferences: Documents: Path
 Help

Location of templates:  

Project/ Contact document location:  

Update existing Project and Contact document location.

Legacy Invoices location:  

e.g. \\server\sharedfolder or C:\ArchiOfficeData\2014



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 [Knowledge Base article](#) on how to handle that.

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

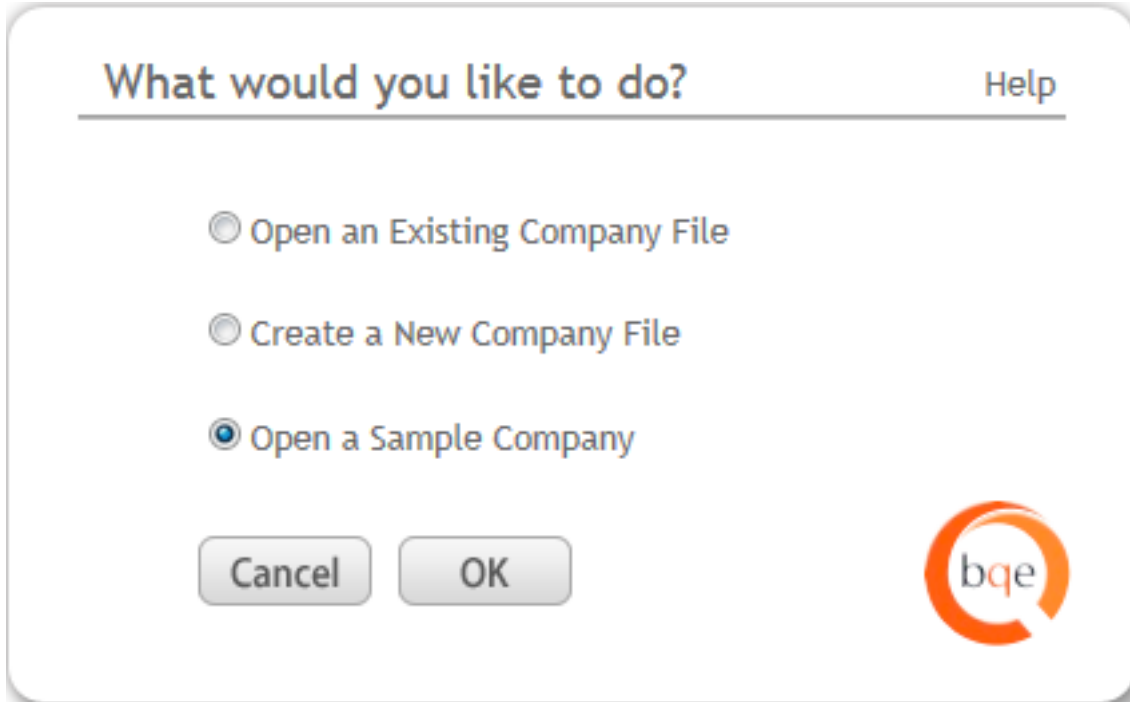
## Existing Company File

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 2014 Convertor and then open your existing company file from here. During the data conversion process, your previous settings are migrated to the current version. **Please read the [Upgrade Data to ArchiOffice 2014](#) *whitepaper for the conversion details*.**

## Sample Company File

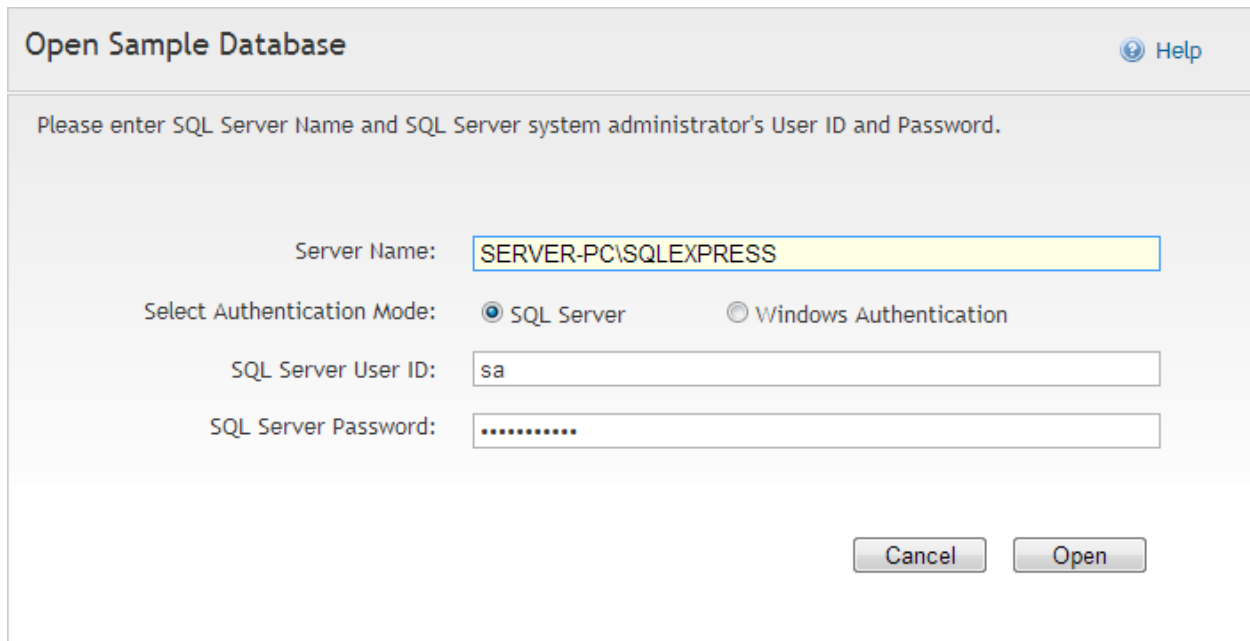
If you want to check out the sample data file before creating or setting up your own in ArchiOffice, follow these steps:

1. When prompted with the 'What would you like to do?' dialog box, select 'Open a Sample Company'. Otherwise, do so by clicking the Admin Options dialog box 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\2014\ 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\AO2014\_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 [Knowledge Base article](#) on how to handle that.

You can also specify the path of your old 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. After this is done, all user names are listed in the login drop-down unless you want a secured login. You can turn this option on or off from the Preferences > System > Company screen.

The screenshot shows the ArchiOffice login interface. At the top right, the version number (V29) is displayed. The ArchiOffice logo and the text 'Fountainhead A & E' are centered. Below the logo, there are two input fields: a user name field containing 'Howard Roark' and a password field with masked characters. At the bottom left, there is a link for 'Admin Options', and at the bottom right, there is a 'Login' button.

- 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.

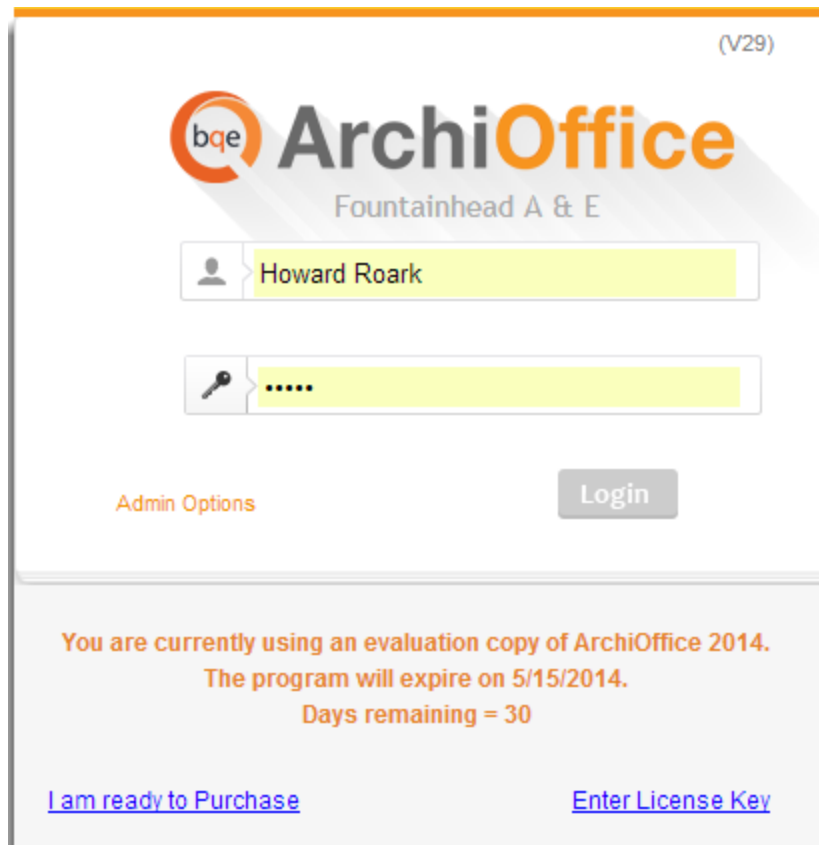


When there is no activity in ArchiOffice, you are logged out in 20 minutes. See the BQE Knowledge Base article on [how to increase the default time-out period](#).


## 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, use the following instructions.



(V29)

 **ArchiOffice**  
Fountainhead A & E

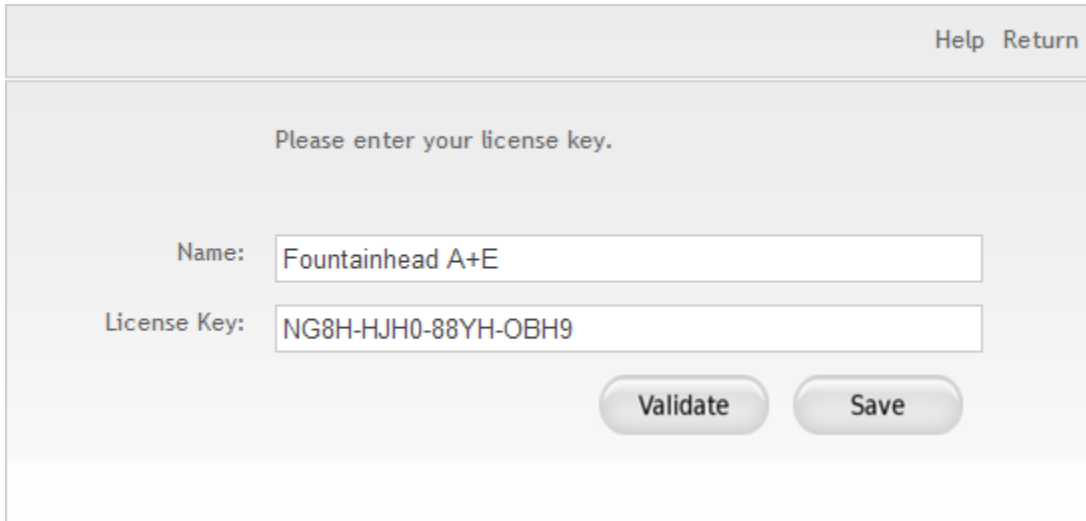
[Admin Options](#)

**You are currently using an evaluation copy of ArchiOffice 2014.  
The program will expire on 5/15/2014.  
Days remaining = 30**

[I am ready to Purchase](#) [Enter License Key](#)

## 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 drop-down 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:

License Key:

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 you have finished, click Save and then close the screen.

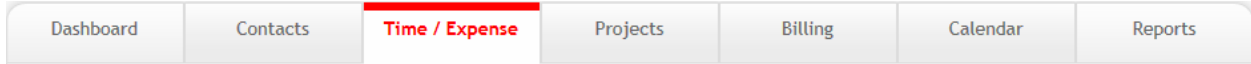
ArchiOffice is now ready to use. Work with the ArchiOffice administrator to ensure data and company procedures are ready for the rest of the company.

## Navigation

After logging in to ArchiOffice, you can access various functions and features of the program 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 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.



You can also access some options from the drop-down 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.

**Project Performance**

Name	Cost	Payment	Profit	Profit% -
PHU Science C ...	\$225,672.8	\$402,278.4	\$176,605.5	43.90 %
Galt Residence	\$193,911.7	\$344,407.5	\$150,495.7	43.70 %
Taggart Headq ...	\$335,045.8	\$561,630.0	\$226,584.2	40.34 %
Rearden - Asp ...	\$235,875.2	\$377,508.4	\$141,633.1	37.52 %
Bradford Lake ...	\$88,359.51	\$111,935.0	\$23,575.49	21.06 %
Ferris Health ...	\$274,354.8	\$325,692.7	\$51,337.84	15.76 %
Cameron Enter ...	\$148,316.5	\$55,250.00	(\$93,066.5)	-168.45

**Time / Expense** (Wed, Apr 24, 2013)

Number	Project	Hrs.	Exp.
2012-0003	PHU Science Center	3.00	
2012-0001	Galt Residence	3.00	
2012-0002	Rearden - Aspen Residence	1.00	
2013-0000	Fountainhead A+E 2013	1.00	
<b>Totals:</b>		<b>8.00</b>	<b>0</b>

**Invoicing**

**Profitability**

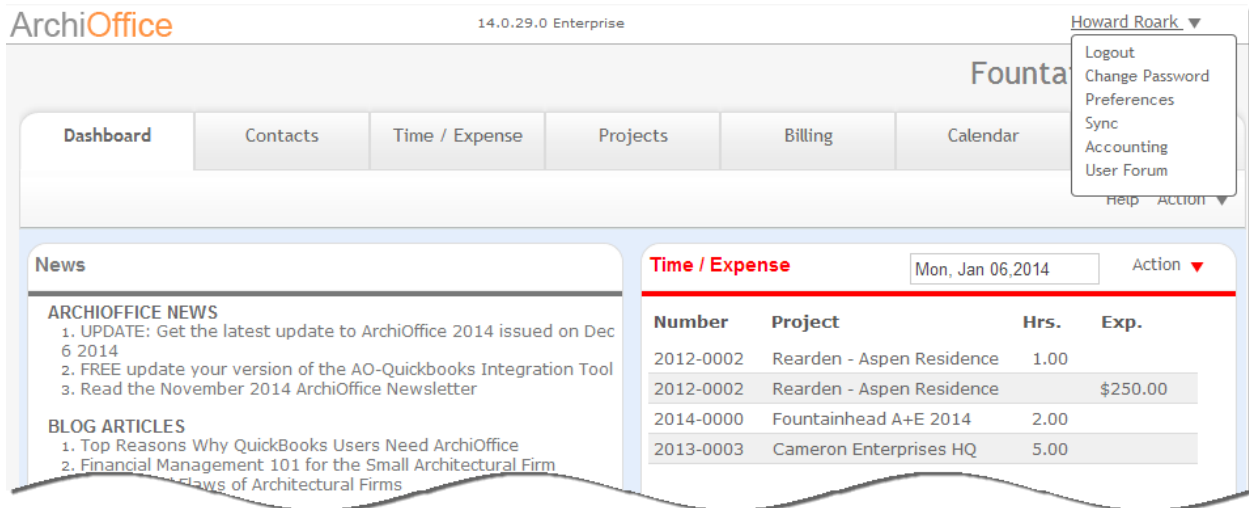
# ArchiOffice Basics


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 program.

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



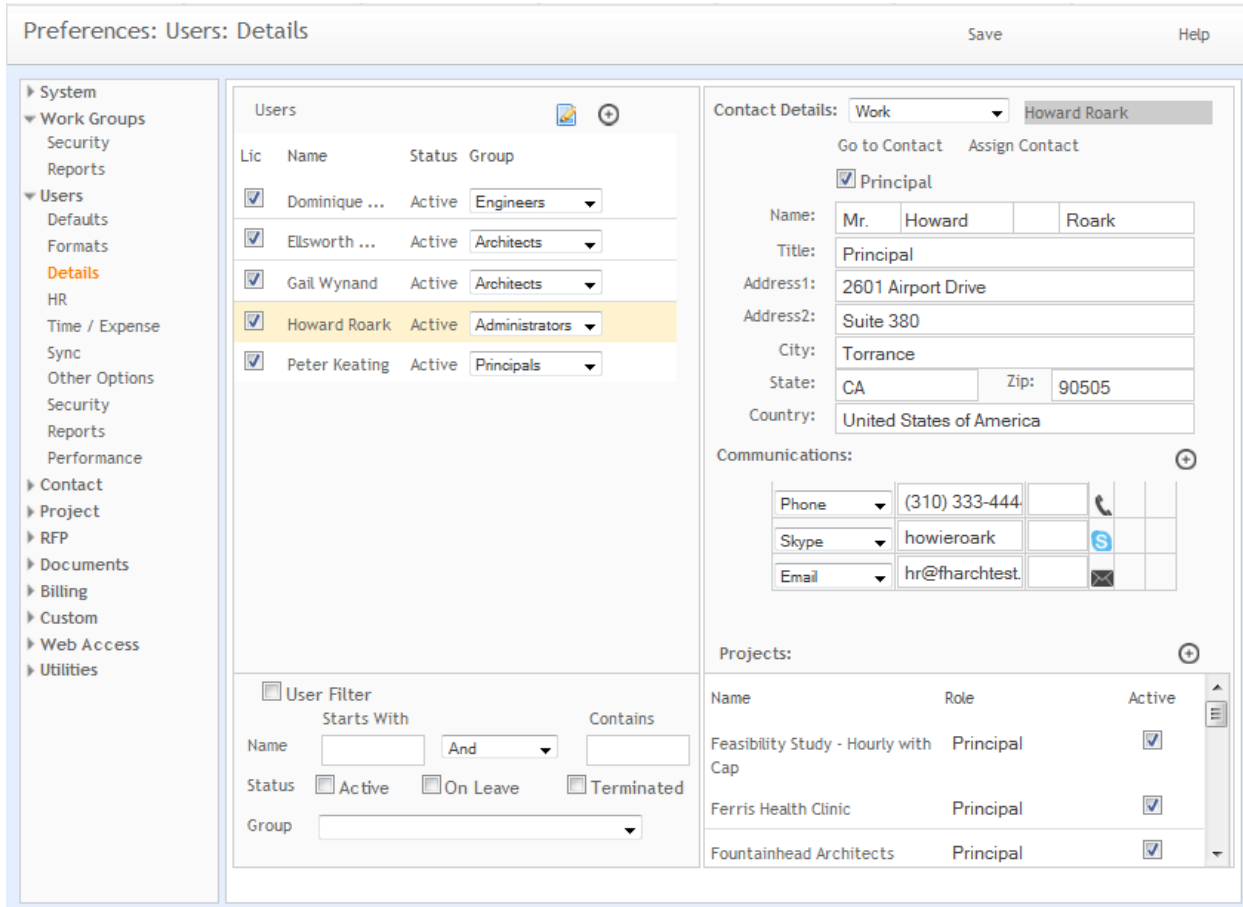
 It is critical to set up preferences prior to entering any additional information in ArchiOffice. If you have converted data from an older version of ArchiOffice, much of the information will be imported for you; however, you should still review and verify its accuracy.

**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, synchronization 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 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 will conform to your company policy and standards. All this must be entered in its entirety prior to setting up a project.

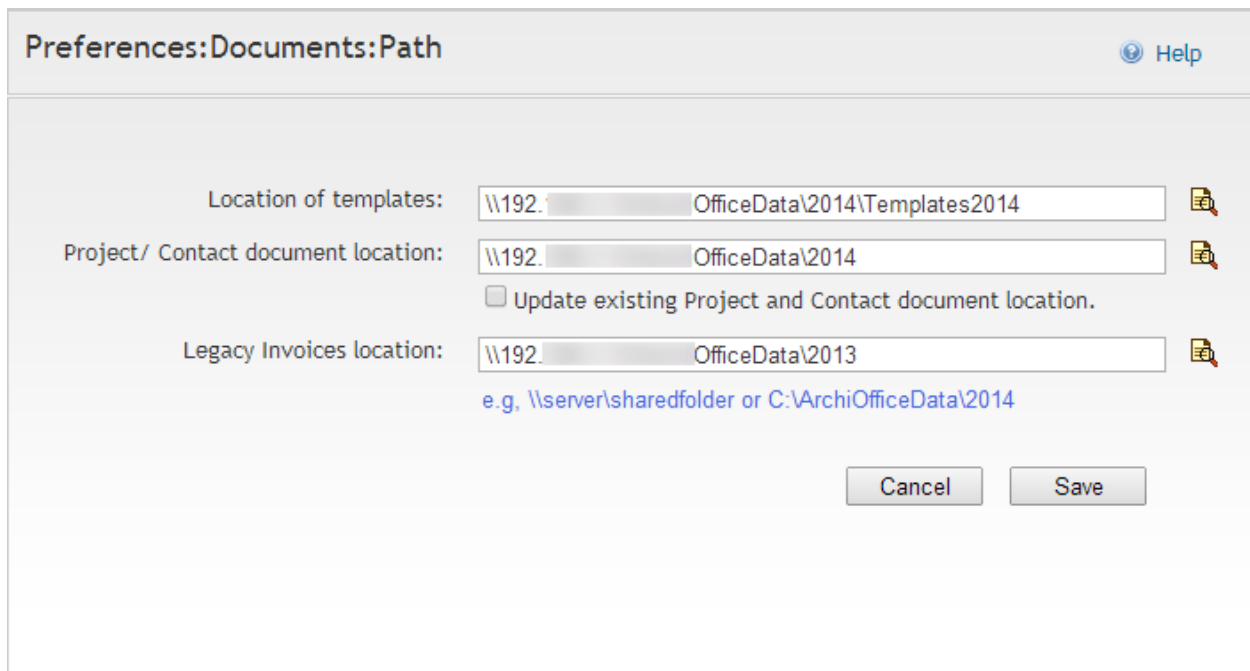
**Preferences-Documents:** ArchiOffice works with most conventional document types and comes with more than 70 templates, which can be customized to suit your needs. You should set the default document management structure to be used in ArchiOffice (*Pro and Enterprise editions only*). On the Preferences > Documents > Path screen, you can 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 program and file server as a single machine. However, we recommend that the file server and application server should be on separate machines.

The following scenarios are possible:

- Windows application server and Mac file server on separate machines
- Windows application server and Windows file server on same machine
- Windows application server and Windows file server on separate machines

By default, the ArchiOffice installer sets the path as: X:\ArchiOfficeData\2014\ 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\AO2014\_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. In addition, the share permissions itself must be set to allow 'Everyone' Full Control.



You can also specify the path of your old 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 program directly from and 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 can be downloaded to your computer.

- 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 [Knowledge Base article](#) on how to handle that.

**Preferences-Billing:** The billing setup might 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 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

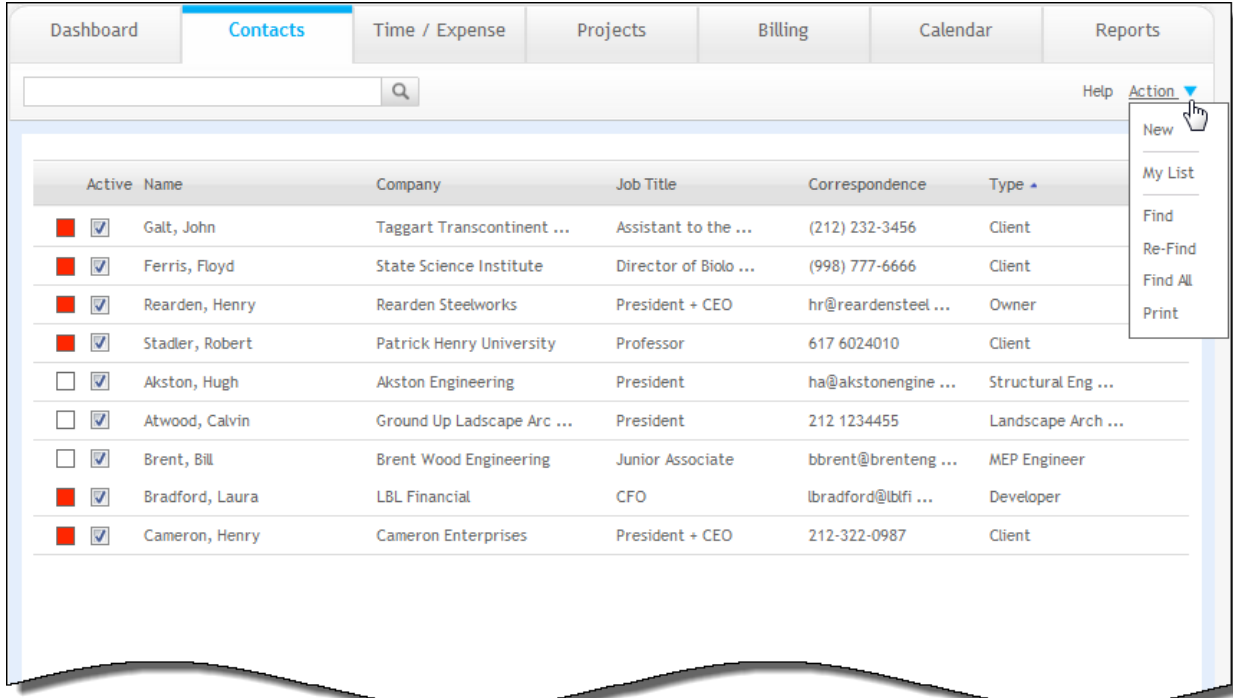
This tutorial covers the basic procedures involved in project setup, time tracking, billing, payment, project management and reporting. For details, please refer to the ArchiOffice Help file.

## Contacts

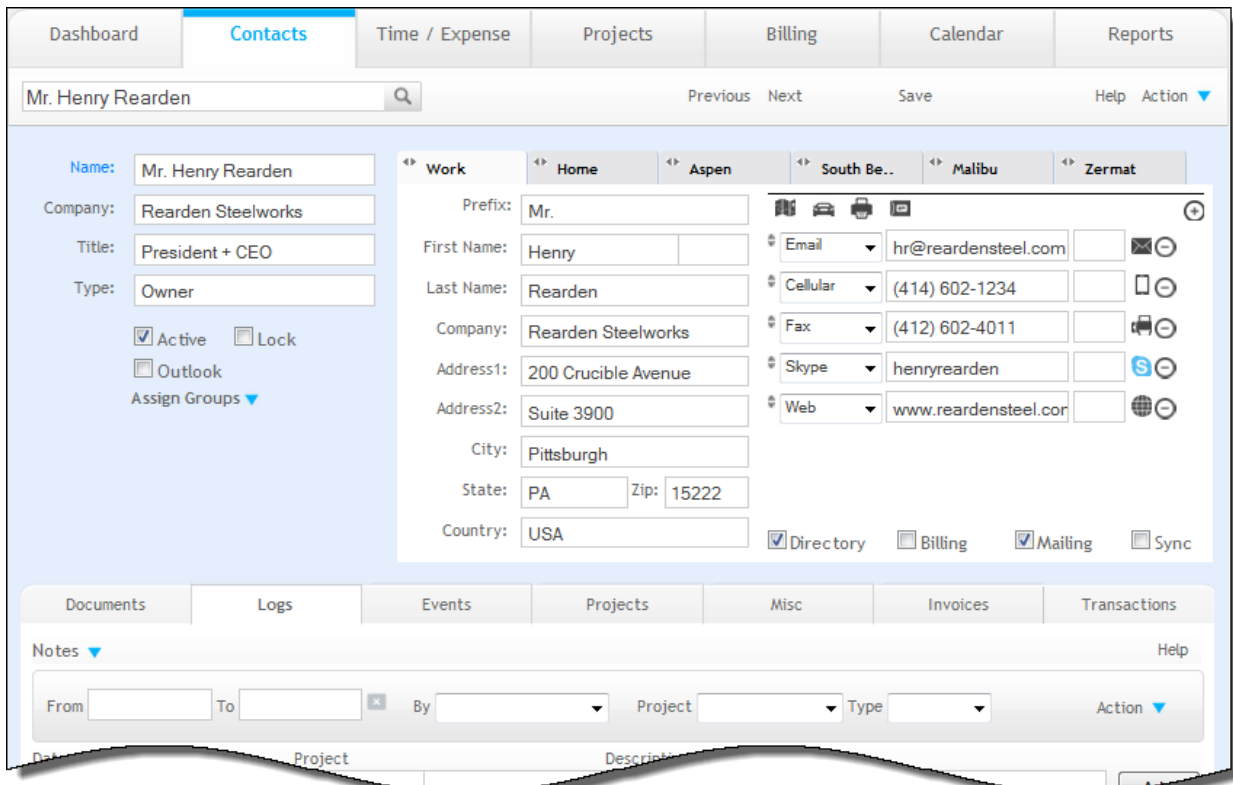
The Contacts screen allows you to create and maintain a profile of your contacts including employees, clients, contractors, consultants, and anyone related to your projects. Contact information can be entered manually or, if your contacts are maintained in another program, you can sync that data with Microsoft Outlook, Entourage, or 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 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 + tab 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 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 and select Action > New. You can also select Projects 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 sub categories related to budgeted phases and job codes. Click Save.

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

2012-0002:Rearden - Aspen Residence  Previous Next Save Help Action ▼

Details | General | Logs | Documents | Events | Tasks | Slips | **Billing**

Project Number: 2012-0002  
 Project Name: Rearden - Aspen Residence  
 Project Type: Residential New  
 Business Unit: Denver  
 Project Status: Active  
 Type:  Billable  RFP  Internal

Project Address  
 Address1: 165 Durant Avenue  
 Address2:   
 City: Aspen  
 State: CO Zip: 81611  
 Country:

Key People  
 Billing Client: Mr. Henry Rearden  Principal: Howard Roark  
 Originator: Howard Roark Project Leader: Ellsworth Toohy

Project Team | Phases / Codes

Action ▼

Employee	Role	Bill Rate	Approve T/E	Active
Howard Roark	Principal	\$250.00	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Peter Keating	Project Architect	\$185.00	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Gail Wynand	Architect Intern	\$185.00	<input type="checkbox"/>	<input checked="" type="checkbox"/>
	Architect			<input checked="" type="checkbox"/>

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.

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

2012-0002:Rearden - Aspen Residence  Previous Next Help Action ▼

Details | General | Logs | Documents | Events | Tasks | Slips | **Billing**

Options  
 Summary  
 Budgets  
 Invoices  
 Transactions  
 Options

Stipulated Sum  Amount \$375,000.00 Action ▼

	Budget		Actual		Invoiced			Remaining	
	%	Stipulated	%	Fees + NR Exp	Past %	Past \$	Current %		Current \$
02 Schematic Design	20.00 %	\$75,000.00	102.84 %	77,126.25	100.00 %	\$75,000.00	0.00 %	\$0.00	\$0.00 <input checked="" type="checkbox"/>
		\$93,750.00	97.50 %	91,400.00				\$0.00	\$0.00 <input checked="" type="checkbox"/>

- Next, on the same Billing tab, select *Budgets* from the drop-down 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 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 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.



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

The screenshot displays the ArchiOffice Time/Expense interface. At the top, there is a navigation bar with tabs for Dashboard, Contacts, **Time / Expense**, Projects, Billing, Calendar, and Reports. Below the navigation bar, there are options for Print, Help, and Action. The main content area is divided into sections for Time, Expense, Detail, and Filter. The Time section shows the selected Employee as Howard Roark and the Week Beginning as Sun, 28 Apr, 2013. A summary table follows, showing hours for various categories across the week. Below this, a detailed task log for Howard Roark on Monday, April 29, 2013, is shown, listing tasks such as Paid Time Off, Diagrams of each Scheme, and Accounting with their respective hours and status.

	TOTALS	SUNDAY 04/28/2013	MONDAY 04/29/2013	TUESDAY 04/30/2013	WEDNESDAY 05/01/2013	THURSDAY 05/02/2013	FRIDAY 05/03/2013	SATURDAY 05/04/2013
Hours Chargeable	32	-	4	8	4	8	8	-
Hours Non-Chargeable	-	-	-	-	-	-	-	-
Hours Internal	10	-	4	-	4	-	2	-
Hours Entered	42	-	8	8	8	8	10	-
Hours Required	40	-	8	8	8	8	8	-
Hours Remaining	(2)	-	-	-	-	-	(2)	-
Slip Efficiency	80%	0.00%	50%	100%	50%	100%	100%	0.00%

Date	Project	Phase (0.00 %)	Job Code	Task/Description	Chg	Hours
04/29/2013	2013-0000 : Fountainhead A	Paid Time Off	Vacation		<input checked="" type="checkbox"/>	
04/29/2013	Ferris Health Clinic	01 Pre-Design	Basic Services	Diagrams of each Scheme	<input checked="" type="checkbox"/>	4
04/29/2013	Fountainhead A+E 2013	Accounting	Accounts Payable		<input checked="" type="checkbox"/>	1
	Accounting				<input checked="" type="checkbox"/>	3

3. ArchiOffice 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 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.



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

Help    Action ▼

---

Projects    Outstanding    Drafts    History

Invoice Method:     Client:

Project Status:     Project Leader:

Slip Status:     Principal:

Time + Expense Slips within Date Range

From:  To:

Rows:     Action ▼

Project No.	Project Name	Client	Date	Last Inv Amount	Inv To Date	Paid To Date	Balance Due	Method	All <input type="checkbox"/>
2012-0004	Taggart Head ...	Dagny Tag ...	12/31/2013	\$3,900.00	\$565,530.05	\$561,630.05	\$3,900.00	Stipula ...	<input type="checkbox"/>
2013-0001	Ferris Healt ...	Dr. Floyd ...	12/31/2013	\$1,177.80	\$326,870.52	\$325,692.72	\$1,177.80	Stipula ...	<input checked="" type="checkbox"/>
2012-0003	PHU Science ...	Dr. Rober ...	12/31/2013	\$2,030.00	\$411,808.44	\$409,778.44	\$2,030.00	Stipula ...	<input type="checkbox"/>
2013-0003	Cameron Ente ...	Henry Cam ...	12/31/2013	\$100,712.50	\$155,962.50	\$55,250.00	\$100,712.50	Stipula ...	<input type="checkbox"/>
2012-0001	Galt Residence	John Galt	04/21/2014	\$0.00	\$347,407.50	\$331,882.50	\$15,525.00	Stipula ...	<input checked="" type="checkbox"/>
2012-0002	Rearden - As ...	Mr. Henry ...	12/31/2013	\$16,004.00	\$393,512.40	\$377,508.40	\$16,004.00	Stipula ...	<input type="checkbox"/>
2013-0002	Bradford Lak ...	Ms. Laura ...	12/31/2013	\$23,917.50	\$135,852.50	\$111,935.00	\$23,917.50	Hourly ...	<input type="checkbox"/>

Totals :    \$147,741.80    \$2,336,943.91    \$2,173,677.11    \$163,266.80

---

Number of Projects :     Grand Totals :    \$147,741.80    \$2,336,943.91    \$2,173,677.11    \$163,266.80

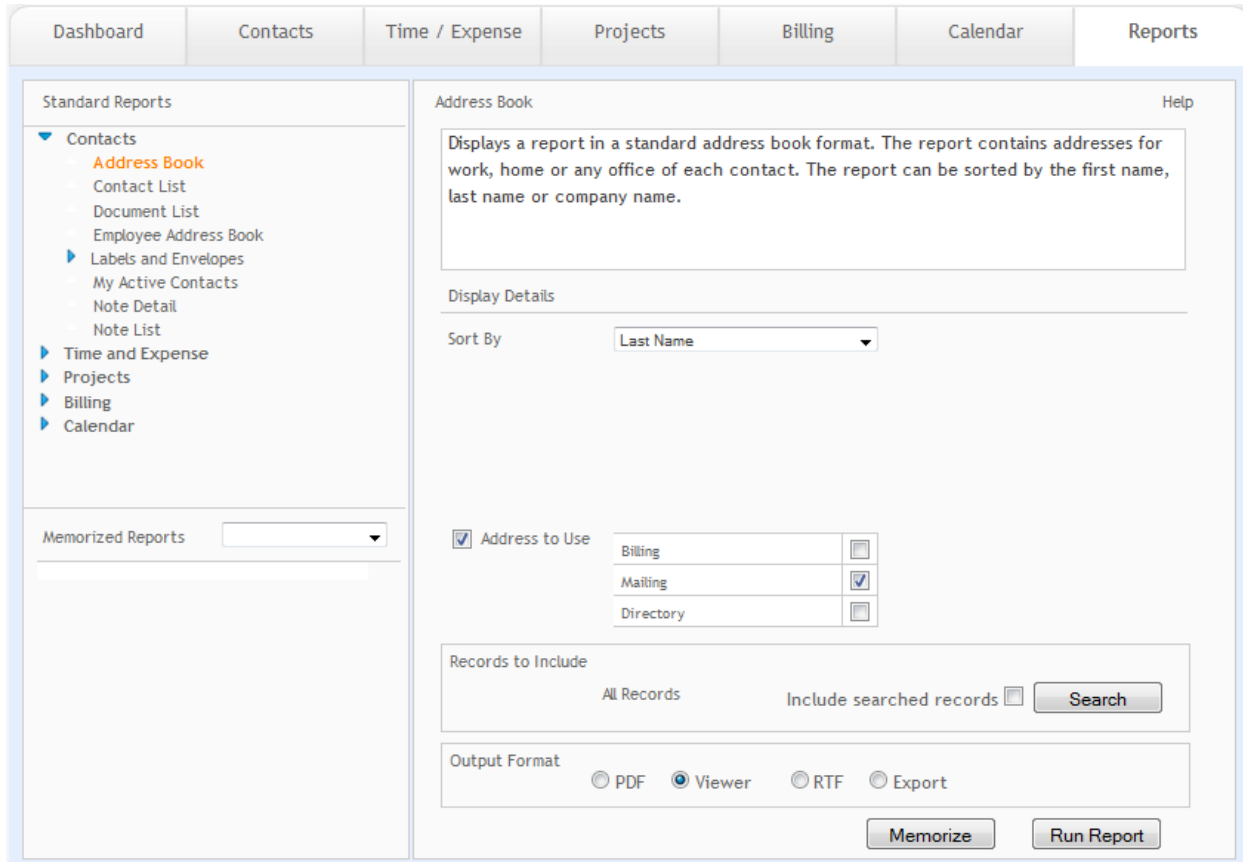
Payments can be recorded for the individual projects using the Projects screen. If you prefer to enter the payment in a batch mode, you can do so from the Billing screen.

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. We recommend that you should check each category and run the reports included and see how each would best represent your data. After you have set the report filters and criteria 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.

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

2012-0002:Rearden - Aspen Residence  Previous Next Help Action ▼

Details | General | Logs | Documents | Events | Tasks | Slips | **Billing**

Summary ▼

Billing Client:   Hours  \$/Hours Action ▼

Basic Services	Budget				Actual			Invoiced			
	%	Hrs	Fee+NR Exp	Hr Fee	%	Hrs	Fee+NR Exp	%	Fee+NR Exp	Hr Fee	Remain
01 Pre-Design	0 %	50	\$0	\$10,000	102 %	50	\$10,245	0 %	0	\$10,245	(\$245)
02 Schematic Design	20 %	400	\$75,000	\$0	103 %	395	\$77,126	100 %	\$75,000	0	\$0
03 Design Development	25 %	500	\$93,750	\$0	98 %	482	\$91,405	100 %	\$93,750	0	\$0
04 Construction Documents	40 %	800	\$150,000	\$0	98 %	790	\$147,535	100 %	\$150,000	0	\$0
05 Construction Procurement	5 %	100	\$18,750	\$0	62 %	66	\$11,715	100 %	\$18,750	0	\$0
06 Contract Administration	0 %	300	\$0	\$50,000	14 %	41	\$7,195	0 %	0	\$7,195	\$42,805
▶ 07 Consultants	10 %	0	\$37,500	\$0	60 %	0	\$22,500	75 %	\$28,125	0	\$9,375
<b>Totals</b>	<b>100 %</b>	<b>2150</b>	<b>\$375,000</b>	<b>\$60,000</b>	<b>85 %</b>	<b>1,824</b>	<b>\$367,721</b>	<b>4 %</b>	<b>\$365,625</b>	<b>\$17,440</b>	<b>\$51,935</b>

Hours  \$/Hours

Additional Services	Budget				Actual			Invoiced			
	%	Hrs	Fee+NR Exp	Hr Fee	%	Hrs	Fee+NR Exp	%	Fee+NR Exp	Hr Fee	Remain
<b>Totals</b>		<b>0</b>	<b>\$0</b>		<b>0 %</b>	<b>0</b>	<b>\$0</b>	<b>0 %</b>	<b>\$0</b>		<b>\$0</b>
<b>ALL SERVICES TOTAL:</b>	<b>100 %</b>	<b>2,150</b>	<b>\$375,000</b>	<b>\$60,000</b>	<b>85 %</b>	<b>1,824</b>	<b>\$367,721</b>		<b>\$365,625</b>	<b>\$17,440</b>	<b>\$51,935</b>

## 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.

Dashboard
Contacts
Time / Expense
Projects
Billing
Calendar
Reports

Previous Next
Help Action ▼

Details
General
Logs
Documents
Events
Tasks
Slips
Billing

Performance ▼ Help

Project No.	2012-0002	View <input checked="" type="radio"/> Accrued <input type="radio"/> Cash
Project Name:	Rearden - Aspen Residence	
Billing Client:	Mr. Henry Rearden	
Total Cost to Date:	\$235,875.26	
Total Net Billing + Markup To Date	\$393,512.40	
Total Accrued Profit To Date	\$157,637.14	
Profit:	40.06%	

Basic Services	Key: (Green) Hours to Date, (Orange) Total hours budgeted, (Red)hours over budget		Cost to Date	Billed to Date	
Total to be Billed					
01 Pre-Design	50	50	\$7,196	\$10,245	(\$245)
02 Schematic Design	395	400	\$59,251	\$75,000	\$0
03 Design Development	482	500	\$65,326	\$93,750	\$0
04 Construction Do ...	790	800	\$82,646	\$150,000	\$0
05 Construction Pr ...	66	100	\$6,320	\$18,750	\$0
06 Contract Admini ...	41	300	\$3,872	\$7,195	\$42,805
▶ 07 Consultants	5	5	\$894	\$28,125	\$9,375

*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](http://www.ArchiOffice.com/ProductOverview).*

*For more information, visit us at [www.ArchiOffice.com](http://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](mailto:support@ArchiOffice.com). For more technical issues, check our ArchiOffice [Knowledge Base](#). For other questions, please call us at (888) 245-5669 (US and Canada) or (310) 602-4020; or email [sales@ArchiOffice.com](mailto:sales@ArchiOffice.com).*



**BQE Software, Inc.**

## **World Headquarters**

### **NORTH & SOUTH AMERICA**

3825 Del Amo Blvd.

Torrance, CA 90503

USA

Tel: (866) 945-1595 (toll-free) | +1 (310) 602-4010

Email: [sales@bqe.com](mailto:sales@bqe.com) | [support@bqe.com](mailto:support@bqe.com)

### **AUSTRALIA, NEW ZEALAND & ASIA**

Suite 7 255 Broadway

Glebe, New South Wales 2037

Australia

Tel: 1300 245 566 (toll-free) | +61 (02) 9249 7327

Email: [aus-sales@bqe.com](mailto:aus-sales@bqe.com)

### **EUROPE, MIDDLE EAST & AFRICA**

Crosshaven Co. Cork

Ireland

Tel: +44 2034119852

Email: [uk-sales@bqe.com](mailto:uk-sales@bqe.com)

For more information, visit: [www.bqe.com](http://www.bqe.com)