

ArchiOffice Getting Started Guide 2015

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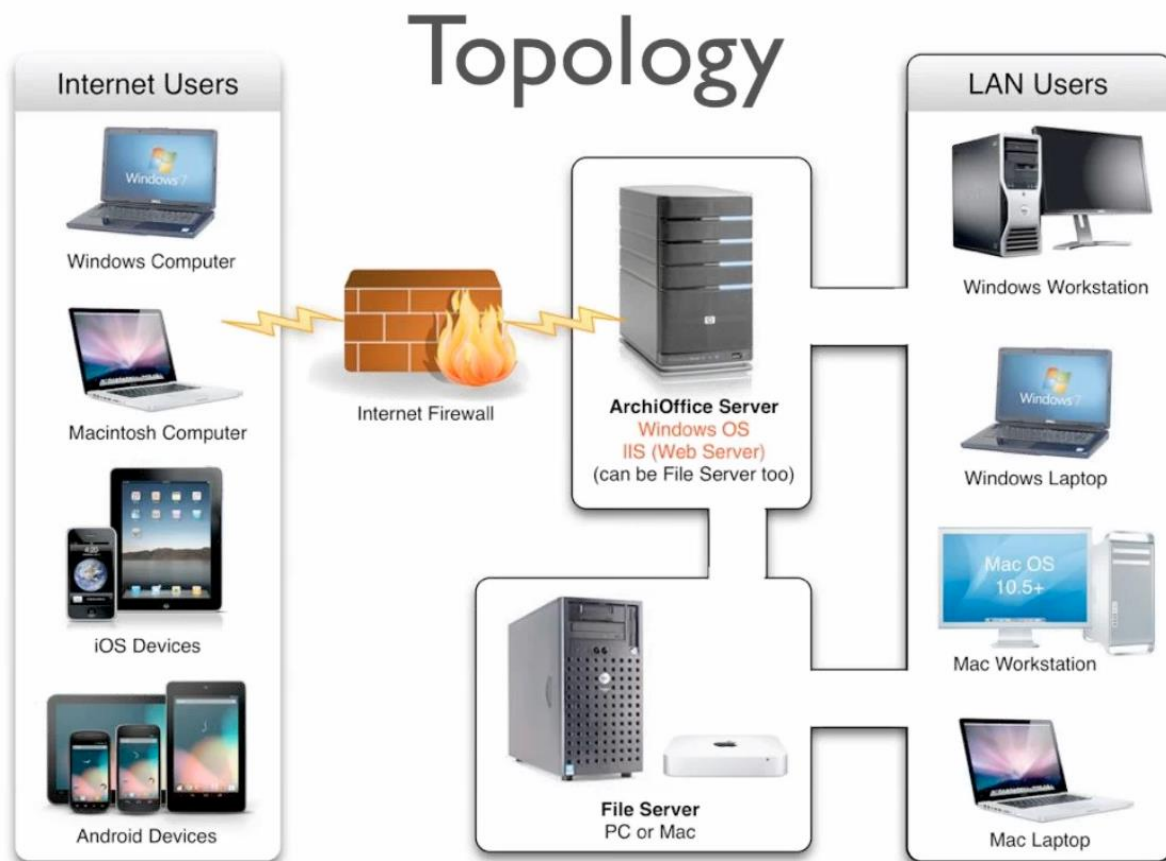
INTRODUCTION

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 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 an expert trainer who helps you get up and running with ArchiOffice as quickly as possible. Check out www.bqe.com/Services for more information.

ArchiOffice Setup Checklist

	Task	Resources and References
Pre-Installation	Decide about the ArchiOffice edition/flavor you want to install	Edition Comparison Chart
	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
	Check our system requirements	Server Requirements Client Requirements
Installation Preparation	<i>Mac Only Users:</i> Install Windows virtual OS	Set Up Mac for ArchiOffice 2015
	Install Internet Information Services on your server	How Do I Install IIS on Web Server? How Do I Add Components to IIS?
	Install Microsoft SQL Server on your server or have a BQE Consultant do it for you. Contact your Account Rep for that	Read Install SQL Server 2008 Watch How to Install SQL Server 2008
Installation	Download the ArchiOffice setup	ArchiOffice Support Downloads
	Log in as an administrator and install ArchiOffice	Read Installation

	<p><i>Existing Users:</i> Install ArchiOffice 2015 and then convert your existing data using ArchiOffice 2015 Converter Upgrade Data to ArchiOffice 2015</p> <p>Or contact your Account Rep to have a BQE Consultant do it for you</p>
Start-Up	<p>Open ArchiOffice on a server or client machine Start Up ArchiOffice</p>
	<p>Create or open your company file</p> <p>Create a New Company File</p> <p>Open an Existing Company File</p> <p>Open a Sample Company</p>
	<p>Log into your ArchiOffice company Login</p>
	<p>Activate and license ArchiOffice</p> <p>Product Activation</p> <p>Licensing</p>
Deployment	<p>Set up ArchiOffice company file and preferences Setup</p>
	<p>Add or import company data and start using ArchiOffice</p> <p>Tutorial</p> <p>ArchiOffice Help</p> <p>ArchiOffice-QuickBooks Integration</p>

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 10, Windows 8 Pro, Windows 7 (Professional, Enterprise or Ultimate) , Windows Vista (Business, Enterprise or Ultimate), Windows 2003



ArchiOffice 2015 is a full 64-bit application and must be hosted from a server running a 64-bit version of Windows.

- 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 2014/2012/2008 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 2015](#) 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 10/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, Safari 7.0 or later

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 8

ArchiOffice 2015 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.

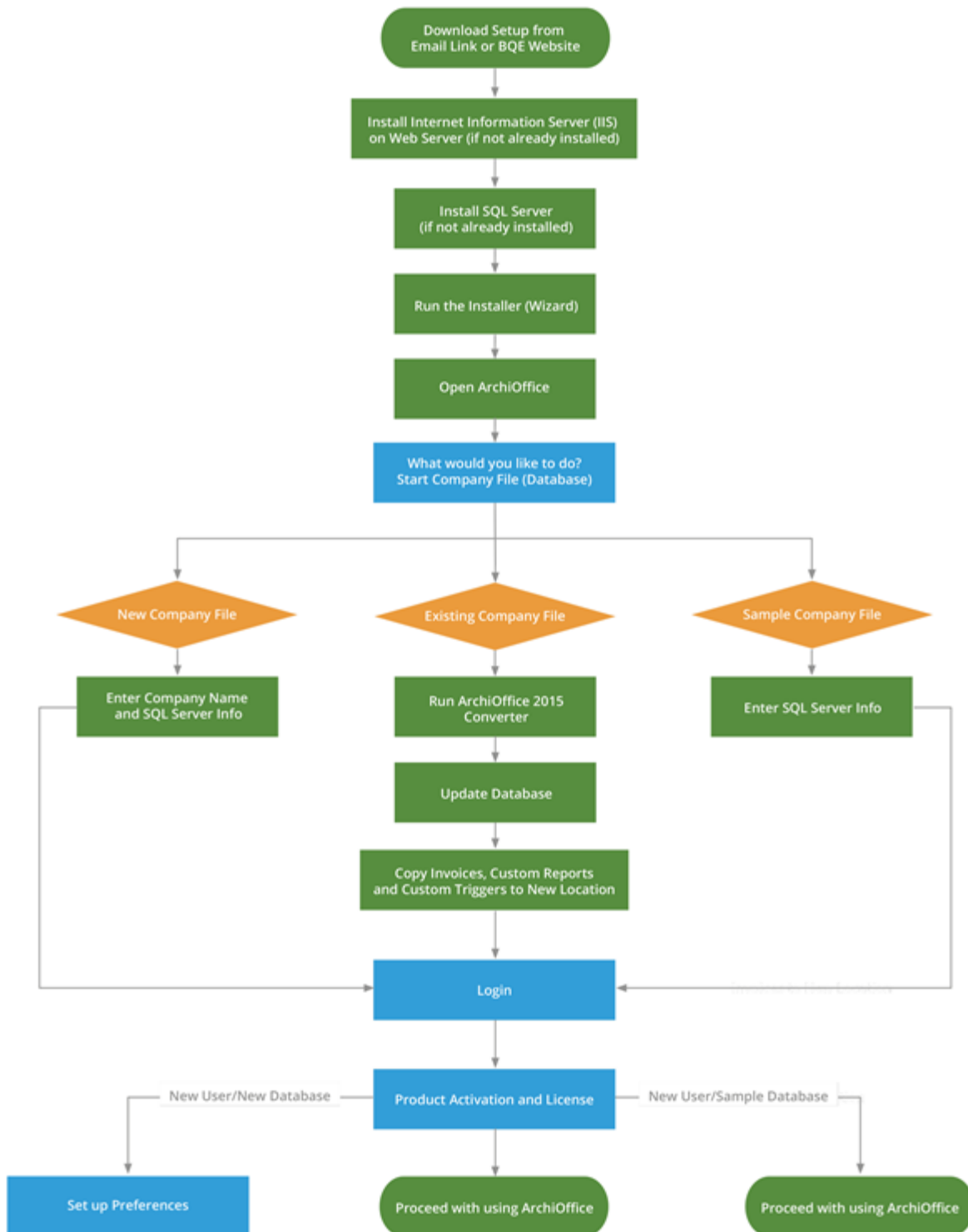
INSTALLATION

ArchiOffice 2015 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.

The installation process also requires that you set up your database, as shown in the flowchart below:

ArchiOffice Startup



Installation Preparation

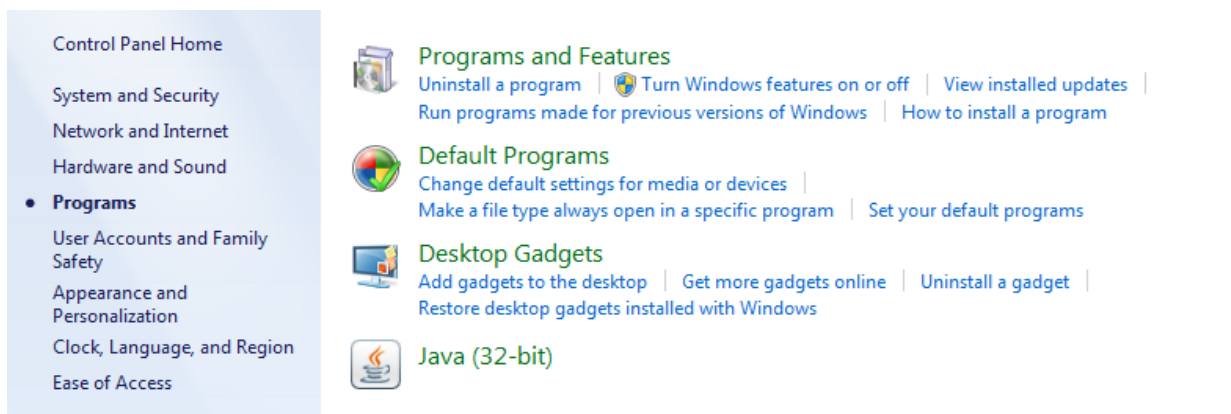
Before installing ArchiOffice, you must ensure the following:

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.

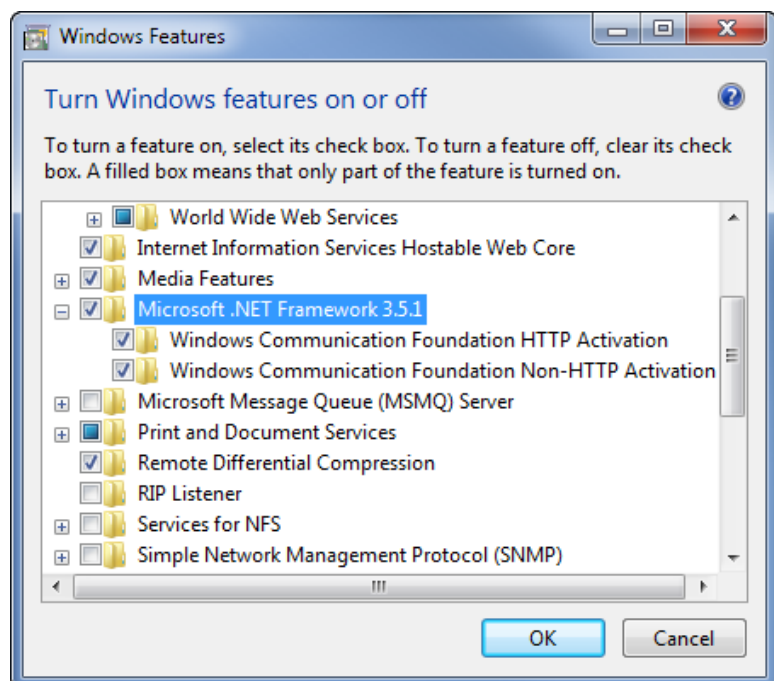


If you only have a Mac system, you can install ArchiOffice on it using a Windows virtual environment. Check out the [Set up Mac for ArchiOffice 2015](#) whitepaper for details.

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 2015 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:

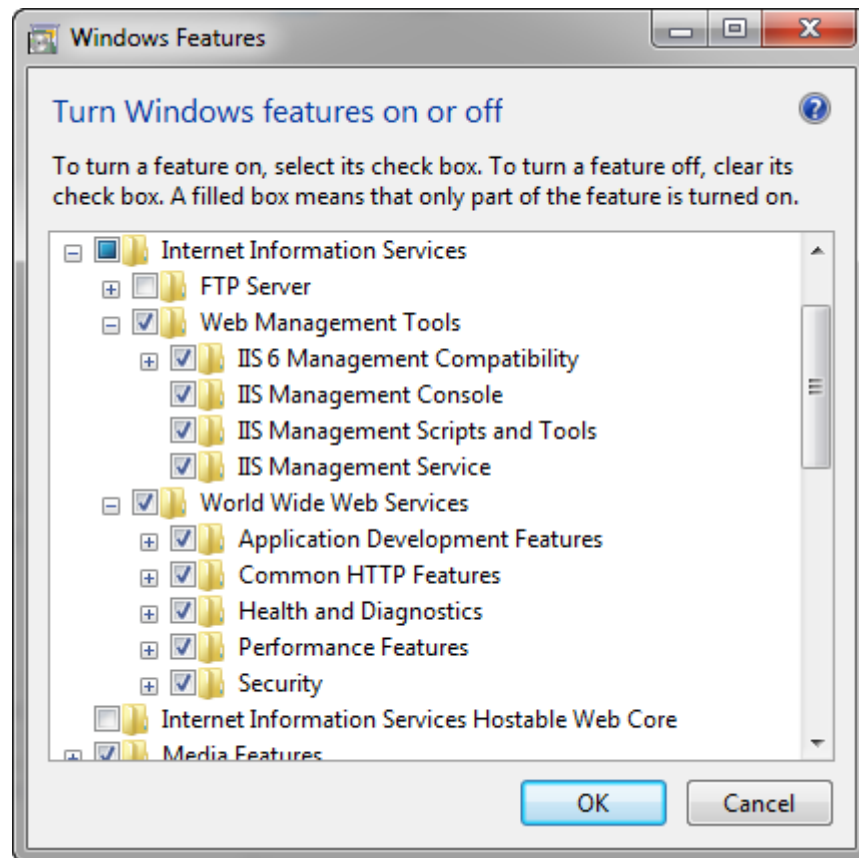
[Install IIS 7.5 on Windows 7 Professional/Enterprise/Ultimate](#)

[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 2015 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:
 - o log in to your web server as an administrator
 - o 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:

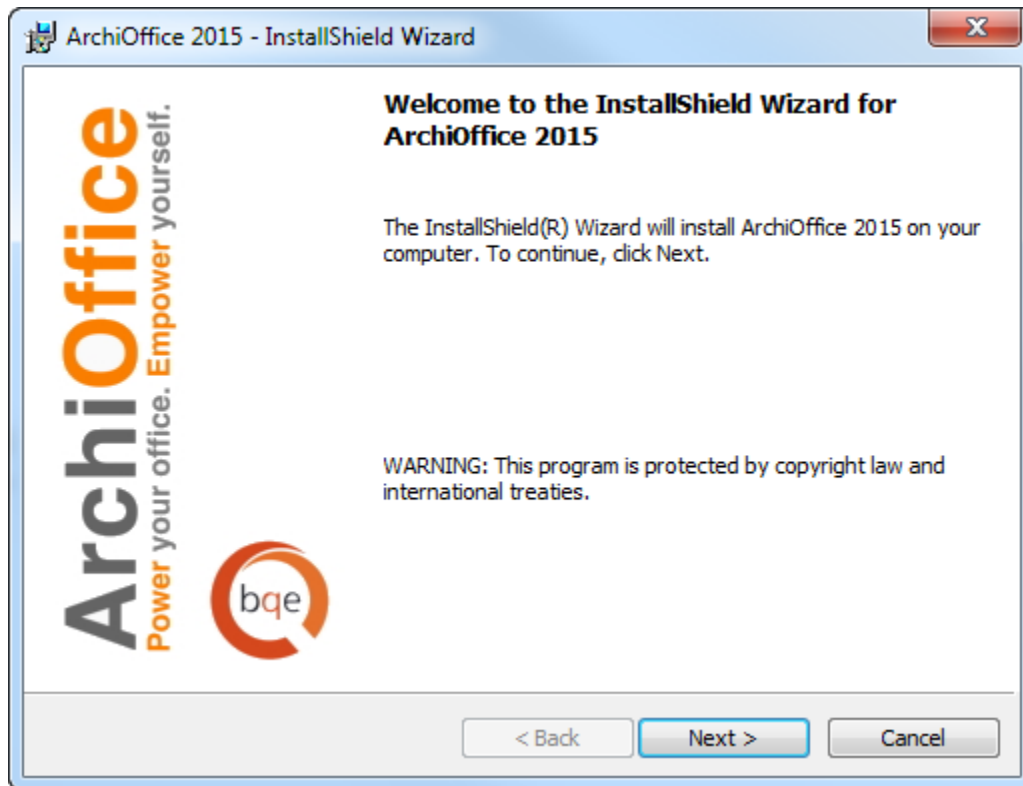


The installer or setup is a zipped file. You will need a Zip archiving or extraction program. Windows Vista/7/8/2008 has a built-in extraction tool in Windows Explorer.

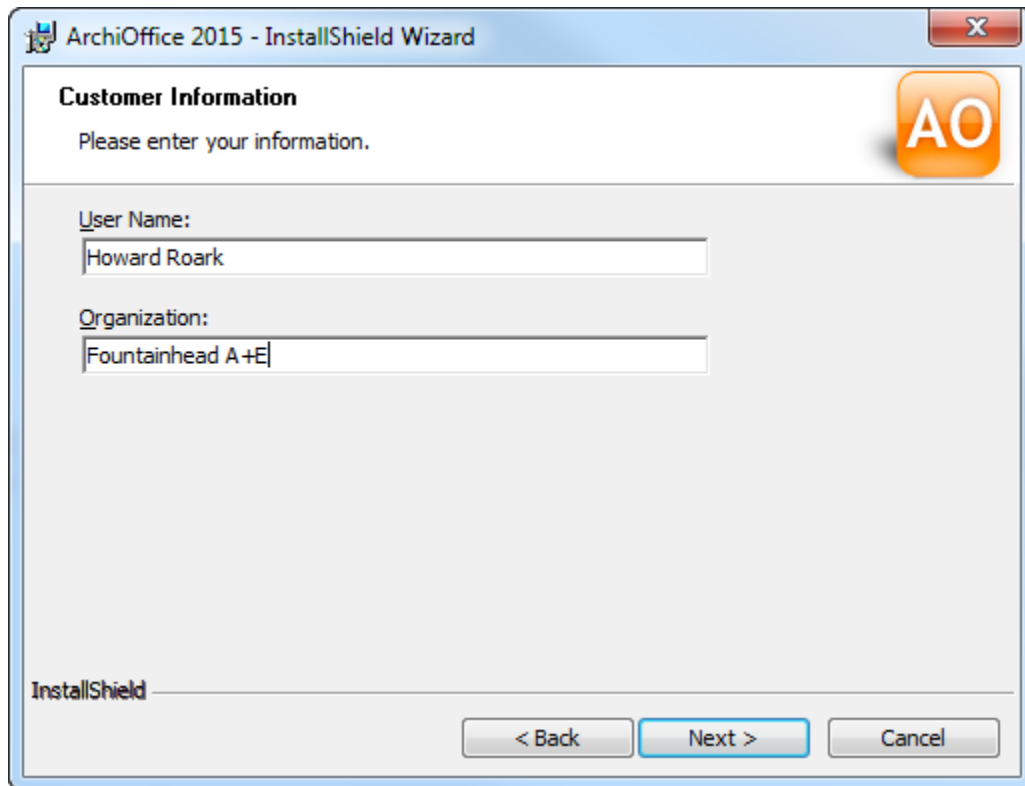
Installation

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).

8. After downloading the ArchiOffice 2015 setup file, unzip the contents to your desktop.
9. Right-click on the setup icon on your desktop and select 'Run as Administrator'.
10. When the ArchiOffice 2015 InstallShield Wizard appears, read the information and follow the on-screen instructions. Click Next.



11. Read the License Agreement and select the 'I accept...' option to proceed. Click Next.
12. 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.
13. Provide Customer Information by entering the User Name and Organization. Click Next.



14. Accept the default Destination Folder or click Change to specify a different location. Click Next.
15. After the installation begins, a progress bar displays. When the Finished page appears, click Finish.
16. You will be prompted to reboot your system. Click Yes as this reboot is required for the proper installation of the software.



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.

17. After reboot, ArchiOffice will start in your default browser; if not, click the desktop icon to start it (the program will automatically install the Microsoft ACE redistributable and Crystal Reports engine). See [Start up 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 2015 (see above) and then convert your existing data to the new version using the ArchiOffice 2015 Convertor (installed

automatically with the setup). The conversion must be handled by the administrator having full access permissions. *Please read the [Upgrade Data to ArchiOffice 2015](#) whitepaper for conversion details.*

Advanced Installation

By default, the setup process for ArchiOffice creates the AO2015 program under Default Web Site and assigns Anonymous Authentication to it. It also creates the Admin application under AO2015 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 310-602-4030 or 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/AO2015/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/AO2015/default.aspx` or

`http://computername/AO2015/default.aspx` or

`http://localhost/AO2015/default.aspx` or

`http://127.0.0.1/AO2015/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.


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.

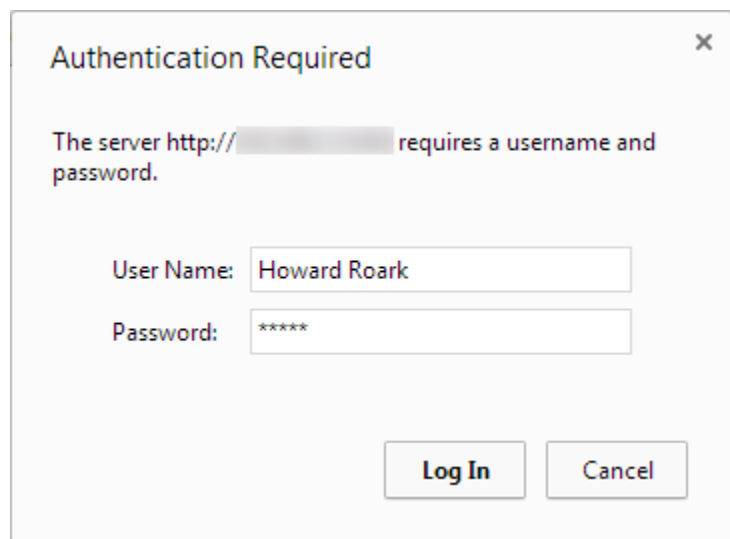
Depending on which edition of ArchiOffice you purchase, you can use either Microsoft SQL Server Express Edition or Microsoft SQL Server Standard Edition to house your database. ArchiOffice Basic and Pro editions work only on SQL Server Express Edition while ArchiOffice Enterprise works on either SQL 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

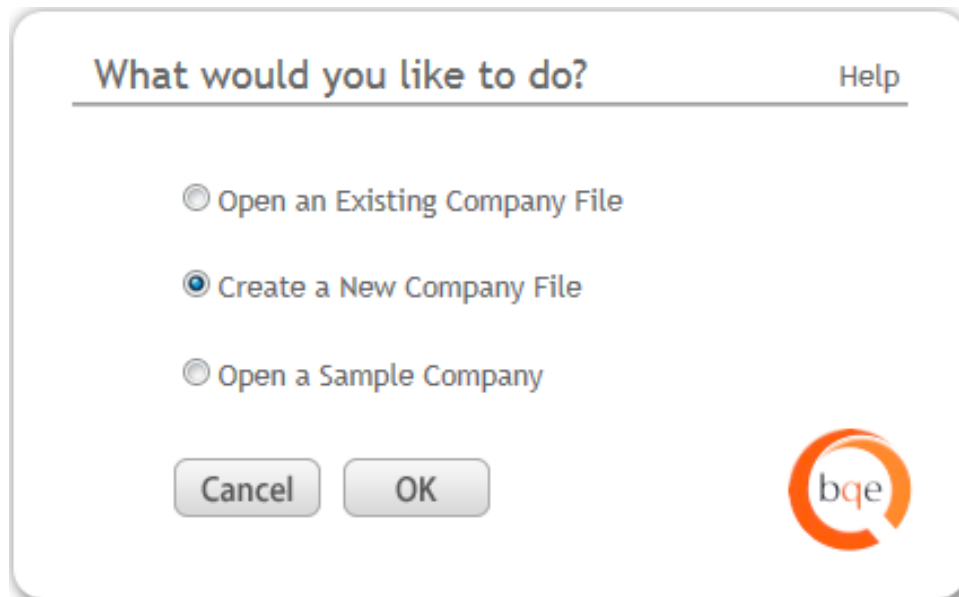
To create a new company file:

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*

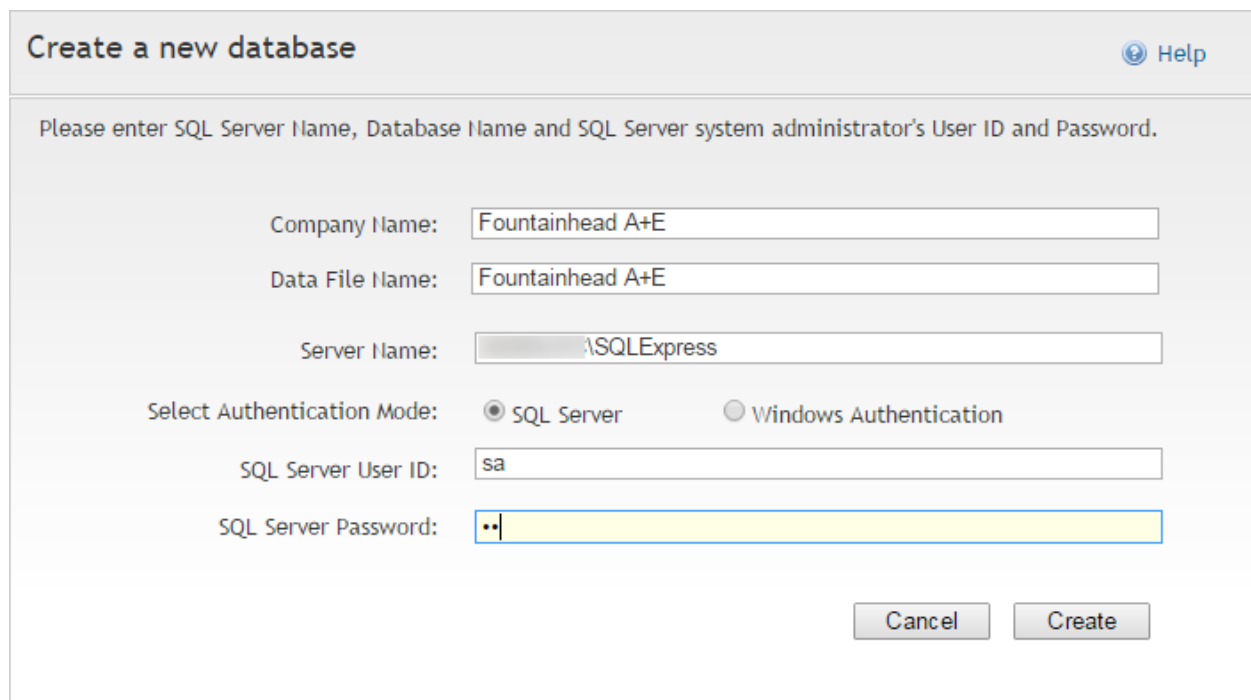


The dialog box titled "Authentication Required" with a close button (X) in the top right corner. The text inside reads: "The server http://[redacted] requires a username and password." Below this text are two input fields: "User Name:" with the text "Howard Roark" and "Password:" with masked characters "*****". At the bottom right are two buttons: "Log In" and "Cancel".

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:

You can purchase your licenses from BQE Software. To obtain your license key, contact BQE at 888-245-5669 or email Sales@bqe.com.

If you have purchased an ArchiOffice license, you must enter the licensed company name in this field as it appears on the licensing and registration instructions provided upon your purchase. The exact spelling, spacing and punctuation are required, although it is not case sensitive. If the company name is changed after the database is licensed, it will result in the cancelation of the license. Please consult ArchiOffice Technical Support, support@bqe.com, if you must change the company name.

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\2015\ 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 (\\Server\IPAddress\sharedfolder\ or \\192.168.4.5\AO2015_Docs).

6. 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 [BOE Technical Support](#) for details.



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 2015 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 2015](#) whitepaper for the conversion details.*

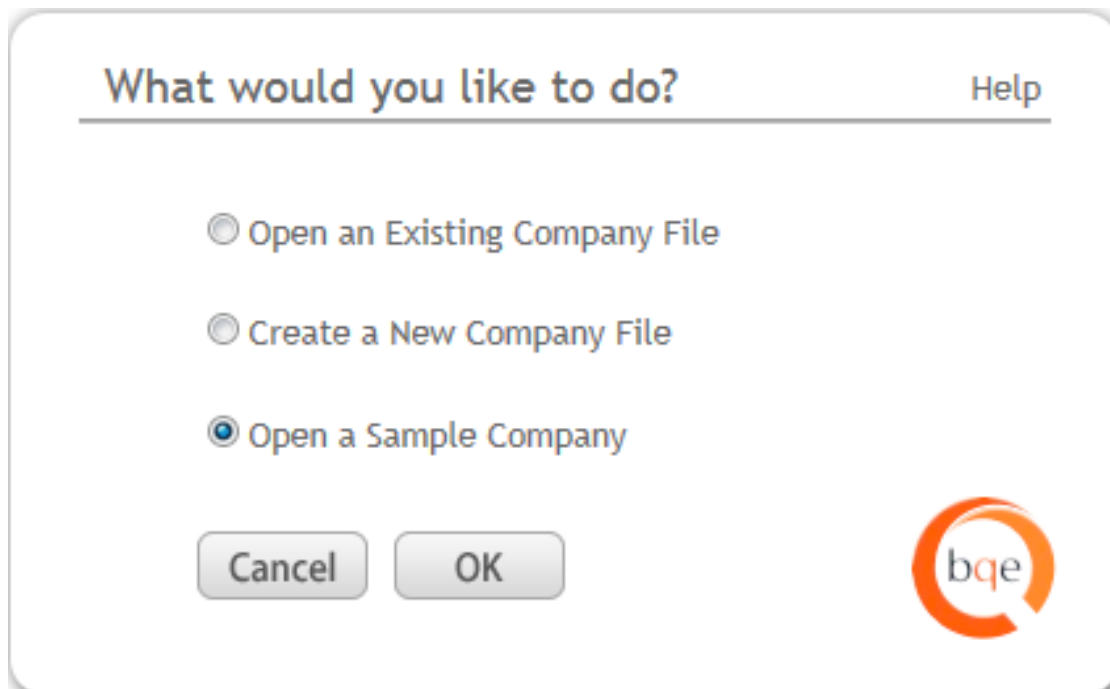


Your ArchiOffice data is stored in an SQL database using either Microsoft SQL Server or SQL Express. We highly recommend you to back up your database regularly and store multiple backup files on appropriate storage devices. You can back up the database using either Microsoft SQL Server Management Studio or a third-party program.

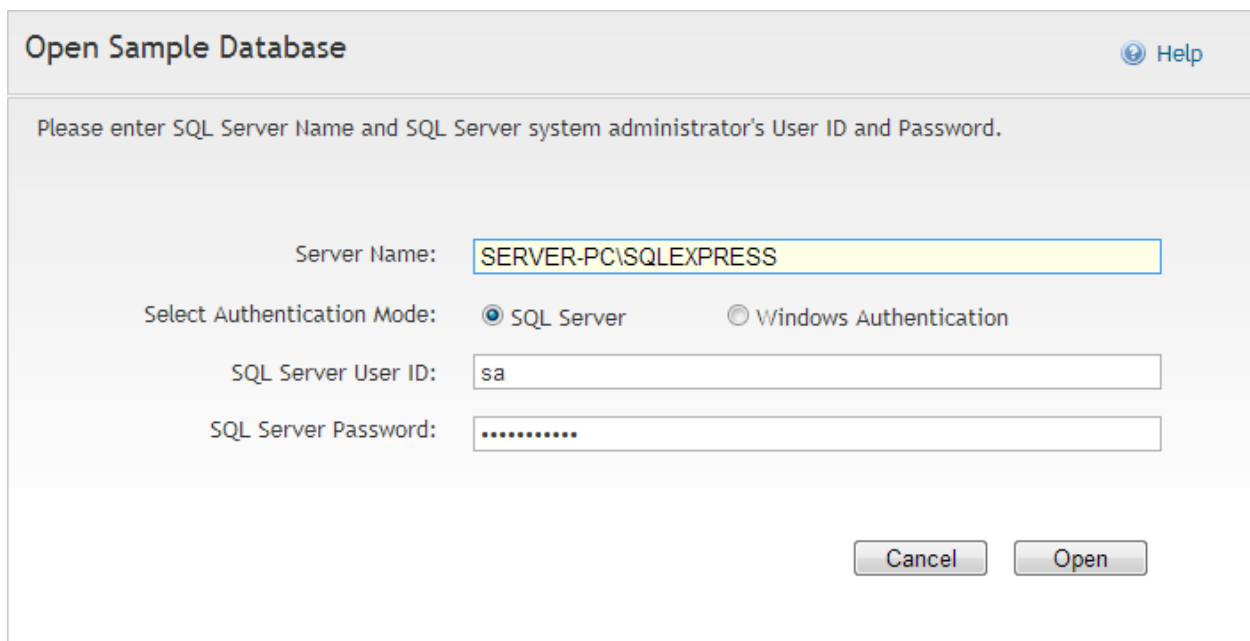
Sample Company File

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)



3. Click Open. Please wait while the database is being loaded.
4. 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\2015\ 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\AO2015_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.

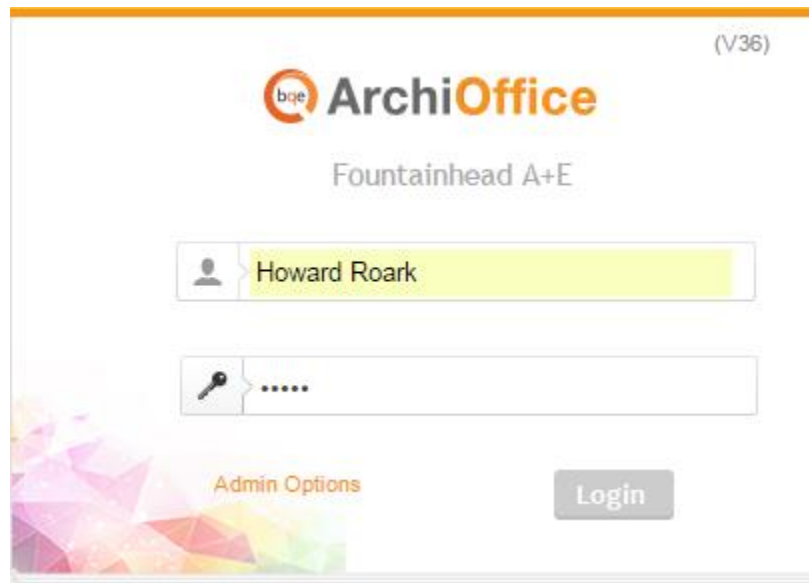
You can also specify the path of your old invoice folder in the Legacy Invoices field. This is used to view a converted invoice in the original PDF layout instead of rendering it in the Crystal Reports window. Click Save.

5. 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.



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.

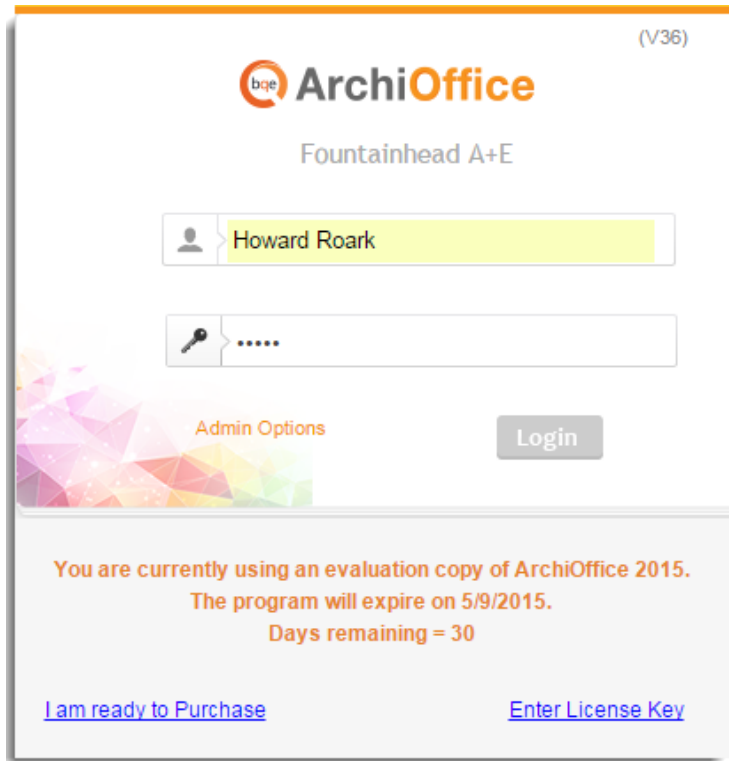


When there is no activity in ArchiOffice, you are logged out in 20 minutes. See the BQE Knowledge Base article on [how to increase the default time-out](#) period.

Product Activation

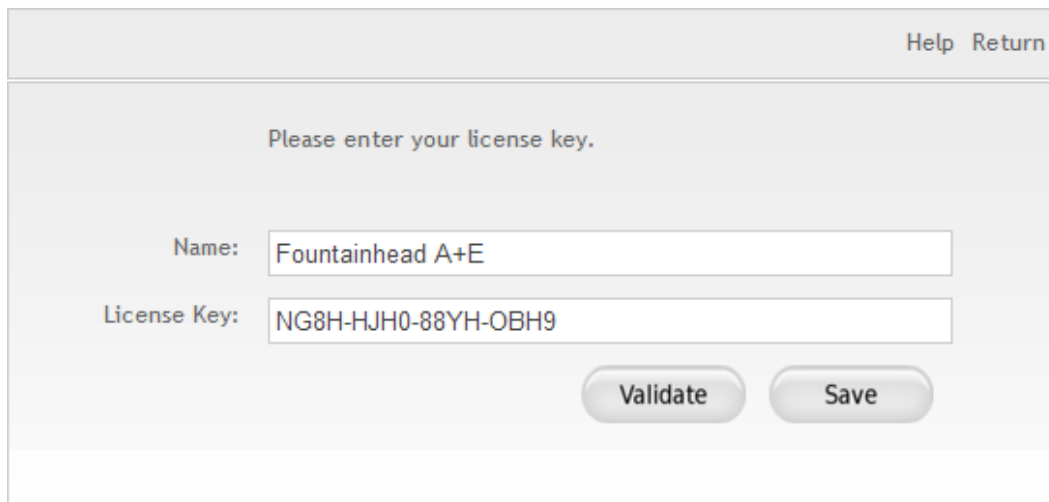
You can evaluate ArchiOffice for 15 days with full functionality (*no need for an evaluation key*). After the evaluation period is over, you must purchase a full software license to continue.

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.



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.
2. 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.
3. Enter or verify your Company Name. It should be exactly the same (spelling, capitalization, punctuation) as the licensing email you received from BQE Software.



4. Enter the License Key or cut-paste it from the email.
5. Click Validate to verify the license key and number of authorized users.
6. When you have finished, click Save and then close the screen.

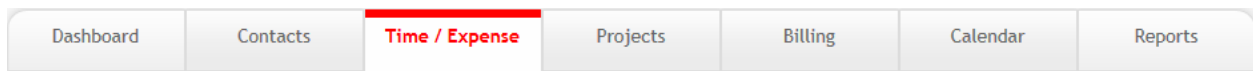
ArchiOffice is now ready to use. Work with the ArchiOffice administrator to ensure data and company procedures are ready for the rest of the company.

Navigation

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

Navigation Bar

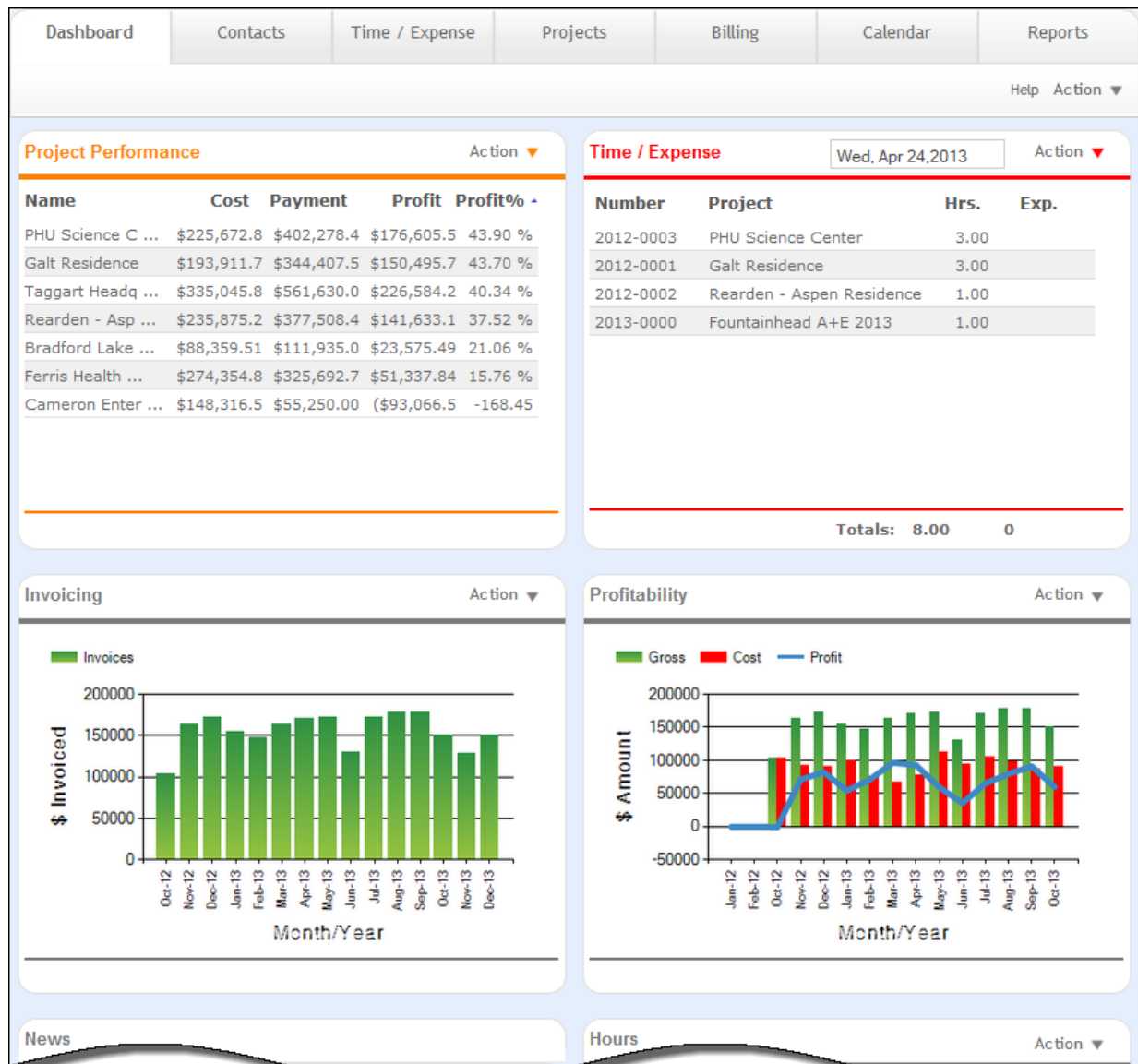
ArchiOffice displays a navigation bar at the top with color-coded tabs that represent a major function or module of the program. Clicking each tab on the navigation bar displays the respective screens. E.g., Clicking Time/Expense on the navigation bar displays a group of tabbed screens like Time, Expense, 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 panels by clicking on them and apply filters to the charts.



ARCHIOFFICE BASICS

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

ArchiOffice Setup

At least one person (administrator) should set up the ArchiOffice Company. The administrator must review

and update the Preferences (*explained below*). This establishes the default settings for the program.

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



It is critical to set up preferences prior to entering any additional information in ArchiOffice. 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 access permissions (security settings and privileges) for various screens and reports. This saves time by setting permissions on a group basis, rather than for each employee.

Preferences-Users: Enter ArchiOffice 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.*

Users

Lic	Name	Status	Group
<input type="checkbox"/>	Catherine ...	Active	Administrators
<input type="checkbox"/>	Dominique ...	Active	Architects
<input type="checkbox"/>	Ellsworth ...	Active	Architects
<input type="checkbox"/>	Gail Wynand	Active	Architects
<input checked="" type="checkbox"/>	Howard Roark	Active	Administrators
<input type="checkbox"/>	Peter Keating	Active	Principals

☐ User Filter

Starts With

And

Contains

Status
 ☐ Active
 ☐ On Leave
 ☐ Terminated

Group

Contact Details:

Work
Howard Roark

Go to Contact
Assign Contact

☒ Principal

Name:

Howard
Roark

Title:
Principal

Address1:
2601 Airport Drive

Address2:
Suite 380

City:
Torrance

State:
CA
Zip:
90505

Country:
United States of America

Communications:

Phone
(310) 333-4444

Skype
howieroark

Email
hr@fharchtest.c

Projects:

Name	Project No	Active
Alberto	2014-0002	<input checked="" type="checkbox"/>
Bradford Lake House	2013-0002	<input checked="" type="checkbox"/>
Cameron Enterprises HQ	2013-0003	<input checked="" type="checkbox"/>
Commercial Fixed Fee	T-002	<input checked="" type="checkbox"/>

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.

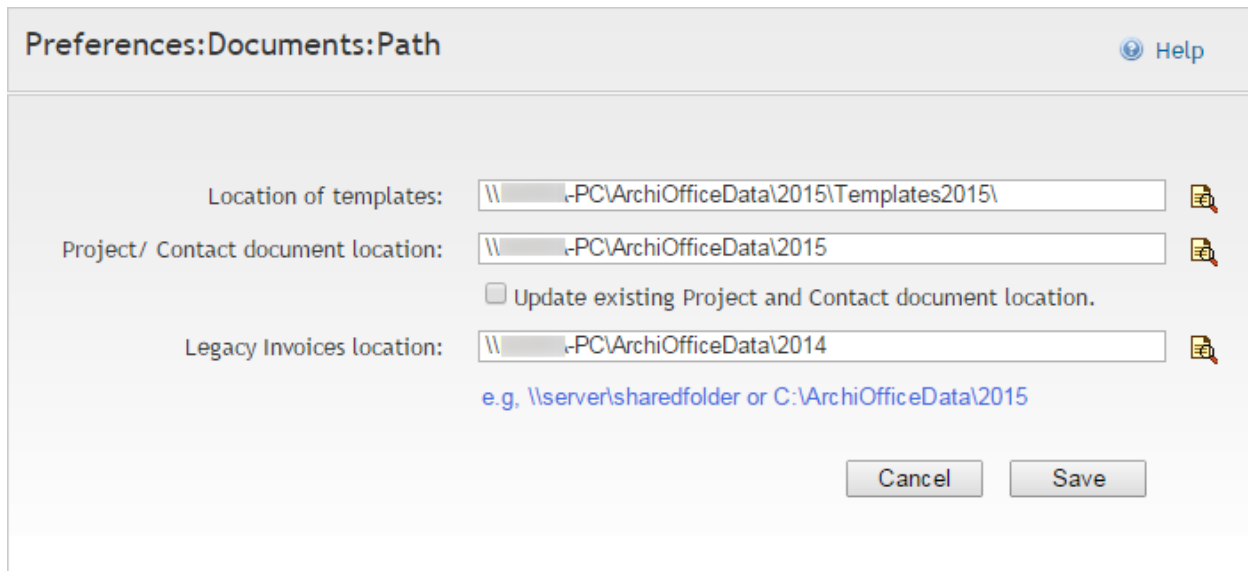
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The following scenarios are possible:

- 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\2015\ 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\AO2015_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.



The image shows the 'Preferences: Documents: Path' dialog box in ArchiOffice. It has a title bar with 'Preferences: Documents: Path' and a 'Help' button. The dialog contains three text input fields, each with a folder icon button to its right. The first field is 'Location of templates:' with the value '\\.PC\ArchiOfficeData\2015\Templates2015\'. The second field is 'Project/ Contact document location:' with the value '\\.PC\ArchiOfficeData\2015'. Below this field is a checkbox labeled 'Update existing Project and Contact document location.' which is currently unchecked. The third field is 'Legacy Invoices location:' with the value '\\.PC\ArchiOfficeData\2014'. Below this field is a blue text example: 'e.g. \\server\sharedfolder or C:\ArchiOfficeData\2015'. At the bottom right are 'Cancel' and 'Save' buttons.

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 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

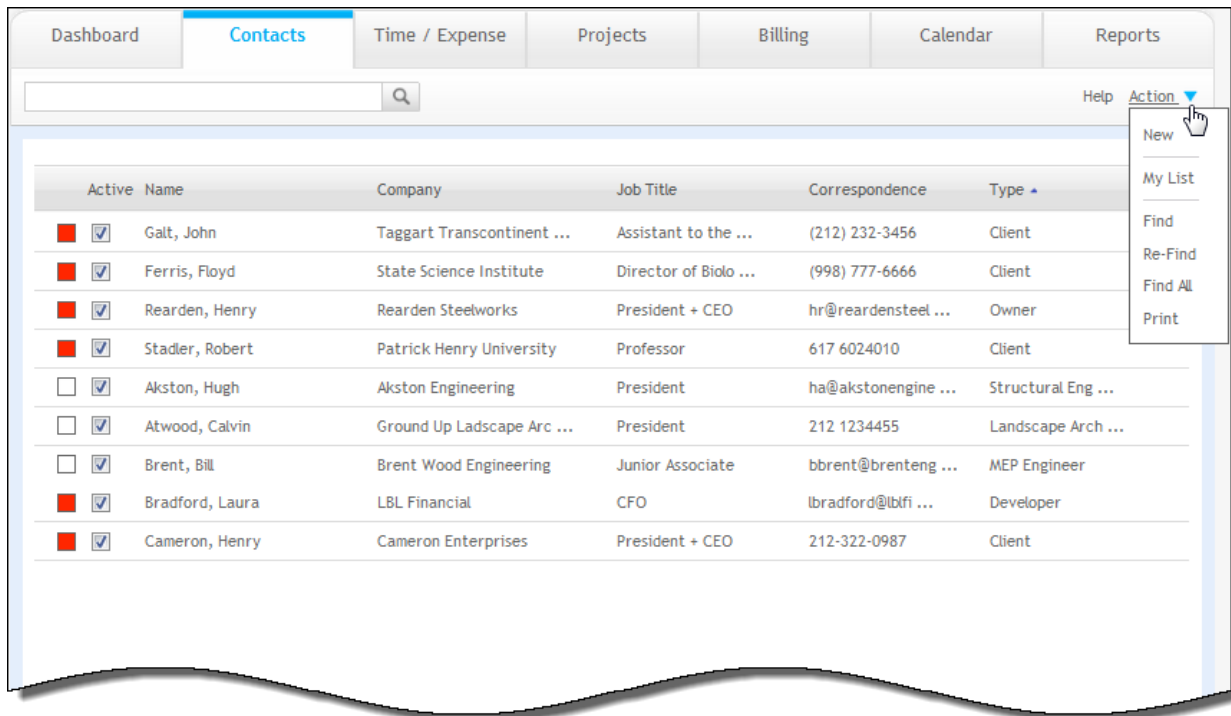
This tutorial covers the basic procedures involved in project setup, time tracking, billing, payment, project management and reporting. For details, please refer to the ArchiOffice Help file.

Contacts

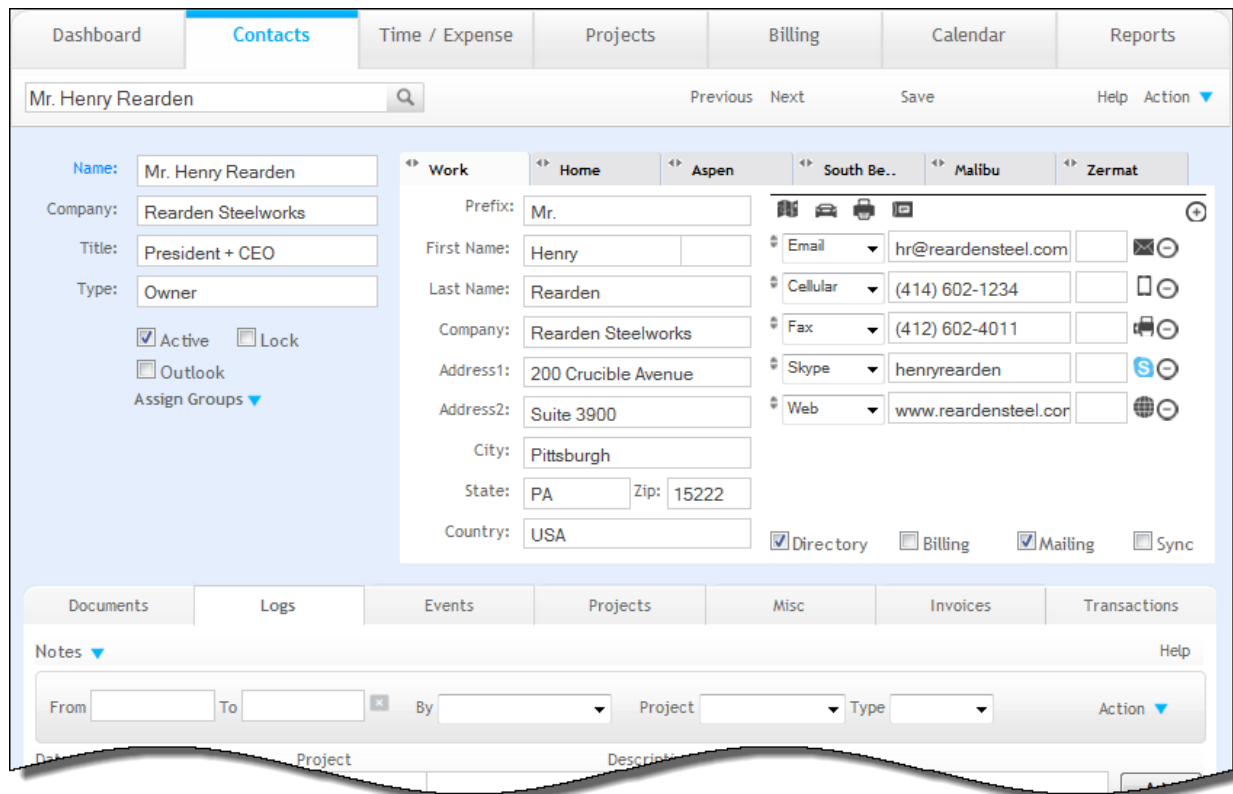
The Contacts screen allows you to create and maintain a profile of your contacts including employees, clients, contractors, consultants, and anyone related to your projects. Contact information can be entered manually or, if your contacts are maintained in another program, you can sync that data with Microsoft Outlook, Entourage, or Apple Contacts.


To enter contact information:

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



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



 You can add more address tabs to this screen by clicking + 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 enter the client's contact details (address and phone) first. All projects are built based on the client's contact information.

Projects

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

- 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.

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2015-0001:Fountainhead A+E 2015
Active only
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Slips
Billing

Project Number: 2015-0001
Project Name: Fountainhead A+E 2015
Project Type:
Business Unit:
Project Status: Active
Type: Billable RFP Internal

Project Address:
Address1: 555 Park Avenue
Address2: Suite 325
City: New York
State: NY
Zip: 10022
Country:

Key People:
Billing Client: Dagny Taggart
Originator: Howard Roark
Reassign
Principal:
Project Leader:

Project Team
Phases / Codes

Employee
Role
Bill Rate
Approve T/E
Active

Dominique Francon	Drafter	\$125.00		
Ellsworth Toohey	Architect	\$150.00		
Gail Wynand	Architect Intern	\$180.00		
Peter Keating	Project Architect	\$200.00		
Howard Roark	Principal	\$250.00		

- Now, click on its *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.*

Details
General
Logs
Documents
Events
Tasks
Slips
Billing

Options ▾

Invoice Method Stipulated Sum ▾
Amount \$650,000.00
Action ▾

Phase	Budget		Actual		Invoiced					
	%	Stipulated	%	Fees + IIR Exp	Past %	Past \$	Current %	Current \$	Remaining	
01 Pre-Design	5.00 %	\$32,500.00	55.50 %	\$18,037.50	100.00 %	\$32,500.00	0.00 %	\$0.00	\$0.00	✓
02 Schematic Design	20.00 %	\$130,000.00	60.43 %	\$78,562.65	100.00 %	\$130,000.00	0.00 %	\$0.00	\$0.00	✓
03 Design Development	30.00 %	\$195,000.00	81.42 %	\$158,771.25	100.00 %	\$195,000.00	0.00 %	\$0.00	\$0.00	✓
04 Construction Do ...	30.00 %	\$195,000.00	93.78 %	\$182,863.75	97.00 %	\$189,150.00	0.00 %	\$0.00	\$5,850.00	✓
05 Construction Pr ...	5.00 %	\$32,500.00	57.23 %	\$18,600.00	25.00 %	\$8,125.00	0.00 %	\$0.00	\$24,375.00	✓
06 Contract Admini ...	10.00 %	\$65,000.00	12.00 %	\$7,800.00	0.00 %	\$0.00	0.00 %	\$0.00	\$65,000.00	✓
Totals:	100.00 %	\$650,000.00	71.48 %	\$464,635.15	85.35 %	\$554,775.00	0.00 %	\$0.00	\$95,225.00	

- Next, on the same Billing tab, select *Budget* 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 used for entering time and expenses slips in ArchiOffice. The screen also displays the existing time and expenses 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).
- 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.

Dashboard
Contacts
Time / Expense
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Print
Help
Action ▼



Time
Expense
Detail
Filter


Employee: Howard Roark Me
Week Beginning: Sun, 28 Apr, 2013

	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%

Howard Roark - Monday, April 29, 2013

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

- Specify whether the time entry is chargeable or not by checking or un-checking the Charge option. By default, all time is chargeable.
- Click  to add and save the time entry.
- Similarly, on the *Expense* tab, pick a date on the grid and then enter the required information such as Project, Expense Type, Description, etc.
- Specify whether the expense entry is non-reimbursable (NR) by the client or reimbursable (ER) to the employee by checking the relevant option.
- Enter the Quantity and Cost of the expense.
- Click  to add and save the expense entry.

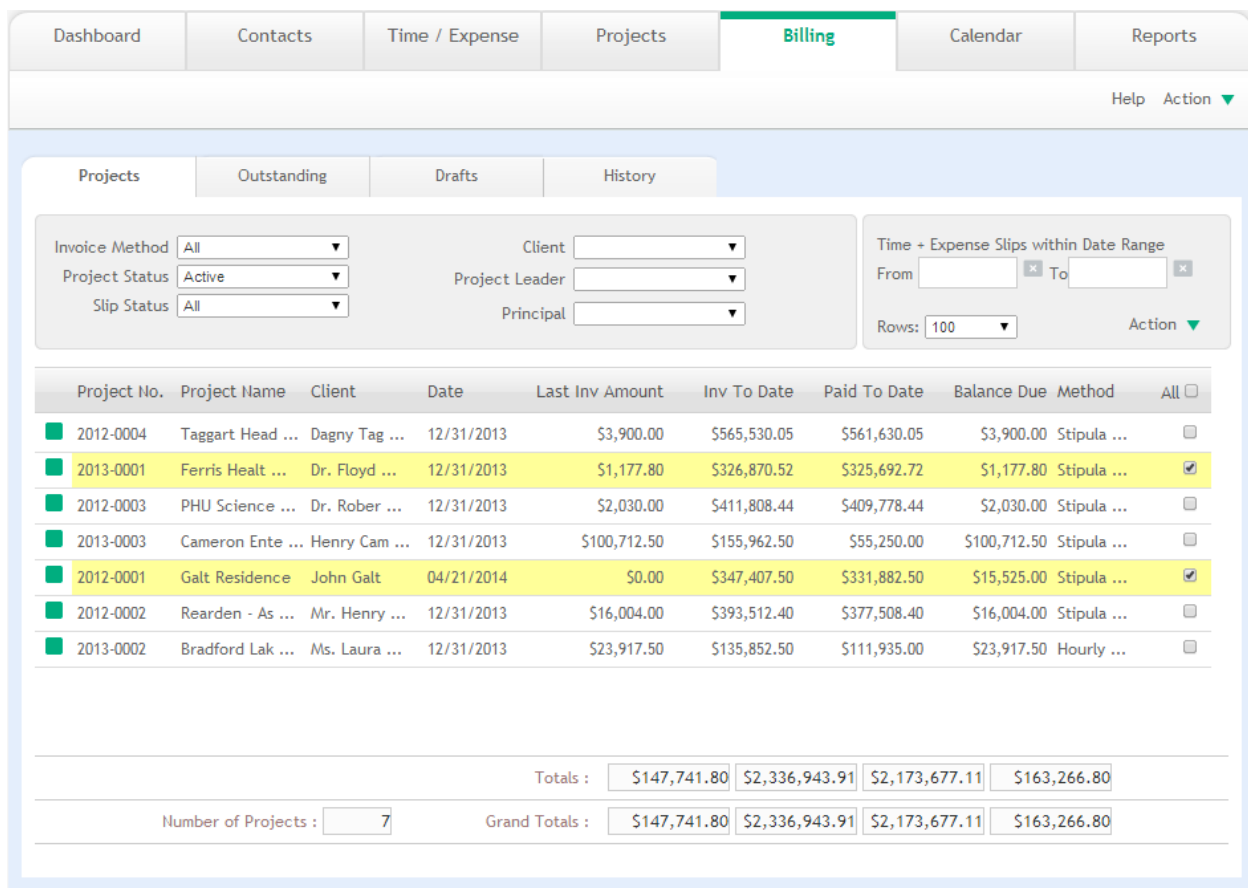
 If you prefer, both time and expenses can be entered on the Detail tab. Here, you have the option of using a timer to track your time, place a slip on hold, enter notes, and so on.

Billing

ArchiOffice provides several options for generating invoices and applying payments. For a selected project,

you can generate invoices using the Projects > Billing > Invoices and Projects > Billing > Options screen. The Options screen also allows you to set the billing defaults and options used for generating an invoice for a project.

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



Project No.	Project Name	Client	Date	Last Inv Amount	Inv To Date	Paid To Date	Balance Due	Method	All
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"/>

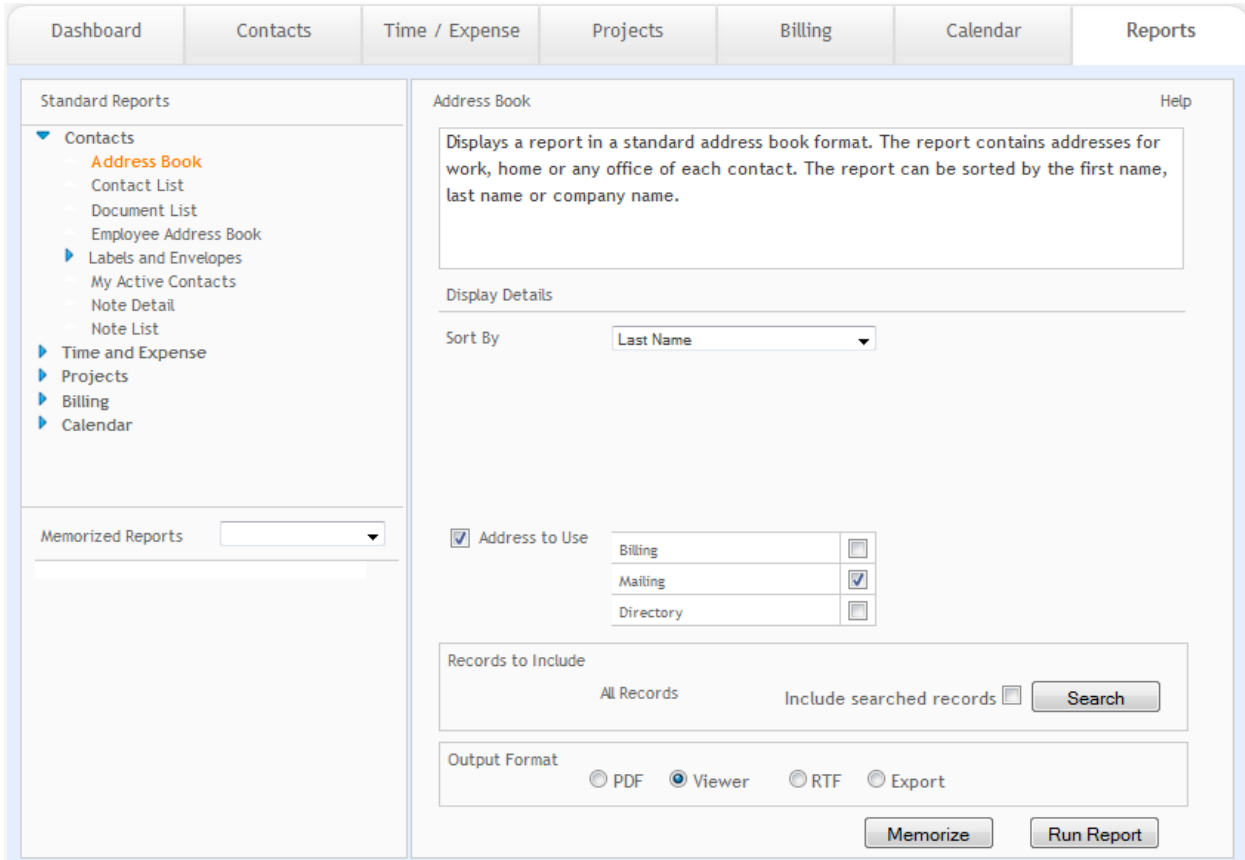
Totals :		\$147,741.80	\$2,336,943.91	\$2,173,677.11	\$163,266.80
Number of Projects :		7	Grand Totals :		\$147,741.80 \$2,336,943.91 \$2,173,677.11 \$163,266.80

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

1. Select the Reports tab from the navigation bar.



The screenshot shows the ArchiOffice Reports interface. The top navigation bar includes Dashboard, Contacts, Time / Expense, Projects, Billing, Calendar, and Reports. The left sidebar shows a tree view of Standard Reports, with 'Address Book' selected under the 'Contacts' category. The main area displays the 'Address Book' report configuration. It includes a description: 'Displays a report in a standard address book format. The report contains addresses for work, home or any office of each contact. The report can be sorted by the first name, last name or company name.' Below this is the 'Display Details' section with a 'Sort By' dropdown set to 'Last Name'. There is a section for 'Address to Use' with checkboxes for 'Billing', 'Mailing' (checked), and 'Directory'. The 'Records to Include' section has radio buttons for 'All Records' and 'Include searched records' (unchecked), with a 'Search' button. The 'Output Format' section has radio buttons for 'PDF', 'Viewer' (selected), 'RTF', and 'Export'. At the bottom are 'Memorize' and 'Run Report' buttons.

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
-----------	----------	----------------	----------	---------	----------	---------

2013-0003:Cameron Enterprises HQ
☐ Active only
Previous
Next
Help
Action ▼

Details	General	Logs	Documents	Events	Tasks	Slips	Billing
---------	---------	------	-----------	--------	-------	-------	---------

Summary ▼

Billing Client Henry Cameron
☒ Hours ☐ \$/Hours
Action ▼

Basic Services	Budget				Actual			Invoiced			
	%	Hrs	Fee+HIR Exp	Hr Fee	%	Hrs	Fee+HIR Exp	%	Fee+HIR Exp	Hr Fee	Remain
01 Pre-Design	0 %	0	\$0	\$0	0 %	79	\$14,463	0 %	0	\$14,463	(\$14,463)
02 Schematic Design	22 %	649	\$120,000	\$0	88 %	606	\$105,078	70 %	\$84,000	0	\$36,000
03 Design Development	25 %	933	\$140,000	\$0	79 %	617	\$110,720	25 %	\$35,000	0	\$105,000
04 Construction Documents	41 %	1667	\$225,000	\$0	4 %	38	\$7,900	10 %	\$22,500	0	\$202,500
06 Contract Administration	0 %	0	\$0	\$0	0 %	0	\$0	0 %	0	\$0	\$0
Totals	88 %	3249	\$485,000	\$0	49 %	1,340	\$238,161	32 %	\$141,500	\$14,463	\$329,038

☒ Hours ☐ \$/Hours

Additional Services	Budget				Actual			Invoiced			
	%	Hrs	Fee+HIR Exp	Hr Fee	%	Hrs	Fee+HIR Exp	%	Fee+HIR Exp	Hr Fee	Remain
Construction Management		83	\$12,500		0 %		\$0	0 %	0		\$12,500
Totals		83	\$12,500		0 %	0	\$0	0 %	\$0		\$12,500

ALL SERVICES TOTAL:	88 %	3,332	\$497,500	\$0	48%	1,340	\$238,161	31%	\$141,500	\$14,463	\$341,538
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Project Profitability

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

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Billing

Performance

Project Ilo.

2013-0002

Project IName:

Bradford Lake House

Billing Client:

Ms. Laura Bradford

Total Cost to Date:

\$88,684.01

Total Payment Received:

\$111,935.00

Total Cash Profit to Date:

\$23,250.99

Profit:

20.77%

View

☐ Accrued
☒ Cash

Refresh

Basic Services

Key: (Green) Hours to Date, (Orange) Total hours budgeted, (Red)hours over budget

01 Pre-Design	63	56	6	\$5,336.26	\$8,915.00	\$2,335.00
02 Schematic Design	359	250	109	\$38,486.93	\$58,670.00	(\$13,670 ...
03 Design Development	292	375		\$32,504.71	\$48,375.00	\$7,875.00
04 Construction Do ...	101	500		\$12,356.12	\$19,892.50	\$47,607.50
06 Contract Admini ...		360		0	\$0.00	\$45,000.00

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 310-602-4030 or 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.



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