BillQuick

Time Billing and Business Management Software

Built With ***Your*** *Industry Knowledge*

BillQuick Agent 2012 Getting Started Guide

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BillQuick Agent Setup Checklist

	✓	Task	Resources & References
Pre-Installation	☐	Check our system requirements	Software Requirements Hardware Requirements
Installation	☐	Download BillQuick Agent setup	Support Downloads
	☐	Install BillQuick Agent	Installation on a PC system Installation on Network Environment
Start-Up	☐	Launch BillQuick Agent 2012	Start Up BillQuick Agent
	☐	Create or open your company file	BillQuick Database
	☐	Log into Agent	Login
	☐	Activate and license Agent	Product Activation Licensing & Registration
Troubleshooting	☐	Check for technical issues related to the installation and start-up of BillQuick Agent	Troubleshooting

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Introduction

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

BillQuick Agent is a workflow automation tool that runs BillQuick automatically in order to reduce your overhead and keep your time and expense more billable. BillQuick Agent has powerful reporting features for project managers, company administrators and executives that allow them to stay informed about the business without having to manually run reports. It accomplishes this by performing critical administrative tasks—of report scheduling, time and expense monitoring and customized alerts!

In addition to report automation, BillQuick Agent monitors employee time entries based on a set of rules. It automatically checks for incomplete time or expense entries and sends email reminders to the delinquent employees. Also, it sends business alerts when specific conditions are met or events are triggered.

The goal of this ***BillQuick Agent Getting Started Guide*** is to help you get started and become comfortable interacting with the program. It explains the concepts and procedures involved in setting up of BillQuick Agent, focusing on its installation, activation, registration, basic and main functionalities such as time card monitoring, notification, report scheduling, and custom alerts. Thus, this Guide enables you to quickly educate yourself on how to run and utilize BillQuick Agent effectively and efficiently. It also explains some troubleshooting issues at the end, highlighting your most often encountered problems or queries.

BillQuick Agent Getting Started Guide is not a complete training solution. It is a guided tour designed to set up and familiarize you with BillQuick Agent. After completing the Guide, we recommend that you explore the **BillQuick Agent Help**. In particular, check out the How Do I help items. Based on your preferred learning style and available time, you can choose self-learning or guided learning. Guided learning utilizes role-based and custom training courses. *Check out www.bqe.com/Services for more*.

System Requirements

To install BillQuick Agent and get it up and running, be sure your systems meet or exceed the requirements mentioned below.

Hardware Requirements

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

- 2.0 GHZ Intel Pentium IV-class processor or faster
- 1024 MB RAM
- 300 MB or more of hard disk space required, plus 130 MB additional hard disk space required for installation (430 MB total)
- DVD drive for installation from a DVD (BillQuick Agent can also be downloaded from www.BillQuick.com)
- 1024 x 768 screen resolution or more

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

Software Requirements

Operating System Requirements

- Microsoft Windows XP Home and Professional
- Microsoft Windows Vista (all flavors)
- Microsoft Windows 2003 Server, Windows 2008 Server
- Microsoft Windows 7 (all flavors)

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

Other System Requirements

- BillQuick (Basic, Pro or Enterprise) edition
- .NET Framework 2.0 or later (automatically installed with BillQuick)
- SQL Server 7.0 or later (BillQuick Enterprise edition)
- Microsoft Data Access Components 2.8 or later (automatically installed with BillQuick)
- Microsoft Windows Installer 3.0 or later (typically installed or updated with Windows)
- Microsoft Internet Explorer 6 or later (for accessing BillQuick Online)
- An Internet connection with a 256 KBps or faster modem, DSL, cable modem, or other broadband connection (for accessing BillQuick Online and for Automatic Updates)

Installation

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

1. Install BillQuick Agent
2. Activate and register BillQuick Agent

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

Installation on a PC System

BillQuick Agent can be installed on a single-user system or a networking environment. In a network environment, you will bring other users into the setup.

If you have a BillQuick DVD, proceed to the first step. If you prefer to download a copy of BillQuick Agent, go to www.BillQuick.com and follow the steps.

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

Follow the steps below to install BillQuick on a personal computer.

1. Insert the BillQuick DVD in your drive or extract the files from the BillQuick Agent zip archive into a folder.
2. In case of a DVD, the installation program will start automatically. In the product selection screen, select BillQuick Agent as the product to install. If it does not, click Windows Start, select Run from the menu, and type:
   X:\ BillQuickAgent2012Setup.exe
   where X is the DVD drive letter
3. If you downloaded BillQuick Agent 2012, navigate to the folder where you placed the extracted files. Double-click Setup.exe.
4. When the first BillQuick Agent Installation screen appears, read the information and follow the instructions on each window. Once the installation begins, a progress bar displays.
5. When the Finished screen appears, click Finish. The installation is complete.

On upgrading from BillQuick Agent 2011 to 2012, data is automatically converted and upgraded to 2012.

Installation in a Network Environment

BillQuick Agent operates in a network environment, both peer-to-peer networks and ones with network servers. It will be installed on the computer of each person who needs to access it. With the above steps complete on each personal computer, you will:

1. Install BillQuick Agent (*see above*).
2. Make sure the BillQuick database is in a shared folder.
3. Point the user's copy of BillQuick Agent to the database.
4. Register the computer with the BillQuick database.

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

Peer-to-Peer Network Environment

To install on a peer-to-peer network:

1. On the computer used by your primary Agent user (BillQuick Supervisor), complete the steps for installing BillQuick Agent (*see above*), creating a database (*see BillQuick Agent Database*), and activating BillQuick Agent.

   > BillQuick Agent automatically connects to the database that was last opened by BillQuick application on the computer.

2. Go to the first computer from which you want a user to access BillQuick Agent. Install the software *(follow the steps above)*.
3. Start BillQuick Agent.
4. Click the Browse button in the database info and navigate to the shared folder.
5. Select your BillQuick database. BillQuick Agent remembers the location each time the user opens BillQuick Agent.
6. With the database open, the Product Activation screen appears. Click on 'Already Purchased' and enter the license and registration key from the email you received from BQE Software. You can also cut - paste the keys, if desired.
7. Click Register. Repeat these steps for each computer from which users will access BillQuick Agent.

   > If you want to run BillQuick Agent in evaluation mode, click 'Activate Now', and follow the steps. Read more about activation options later.

Network Server Environment

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

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

   For more information, see the BillQuick Knowledgebase article, 'How to Install BillQuick on Workstations using Active Directory Services' (http://www.bqe.com/kbdetail.asp?KBID=305).

Start-Up

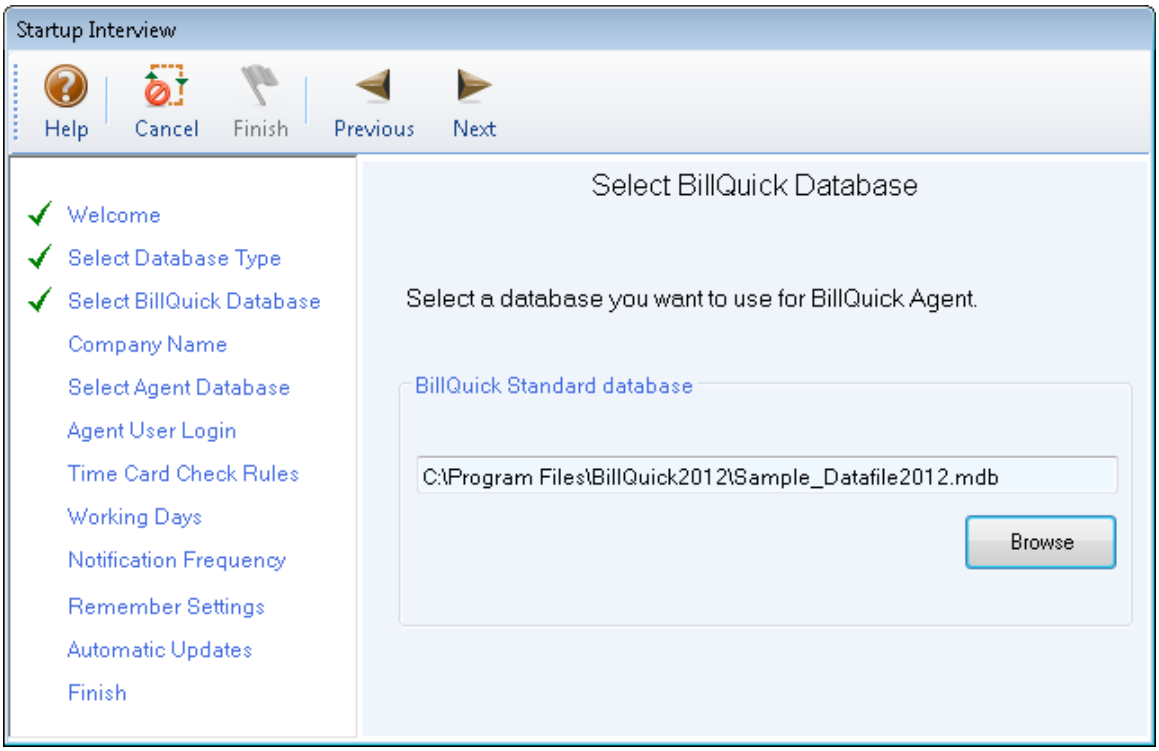
In order to get BillQuick Agent into the running mode please follow the steps below. At this point the software should already be installed on your PC.

BillQuick Database

BillQuick Agent's functionality depends on the BillQuick application database and hence you need to connect to it. When you start up BillQuick Agent for the first time, you are prompted with the BillQuick Agent Start-Up Interview.

Enter the following information:

- **Database Type**: Select the type of database, Access (Standard) or SQL Server (Enterprise), required for BillQuick Agent. If you choose the automatic detection option, it will automatically retrieve the currently used BillQuick database.



If you are using SQL database for BillQuick, you have to enter Server Name, User ID, Password, and select the database from the dropdown.

- **Select Database**: Specify the BillQuick Database for using BillQuick Agent. You have the option to 'Open an existing BillQuick Standard Database' or 'Open an existing BillQuick Enterprise Database'.

- **BillQuick Agent Database:** Agent uses a separate database to save application settings, employee details, reports scheduling information, etc. The application will automatically create this file and retrieve it. You can place this database at the desired location locally or on a shared server. You have an option to upgrade your existing Agent Database or create a new Agent Database.

Once you have created your company database, you can activate your product.

Product Activation

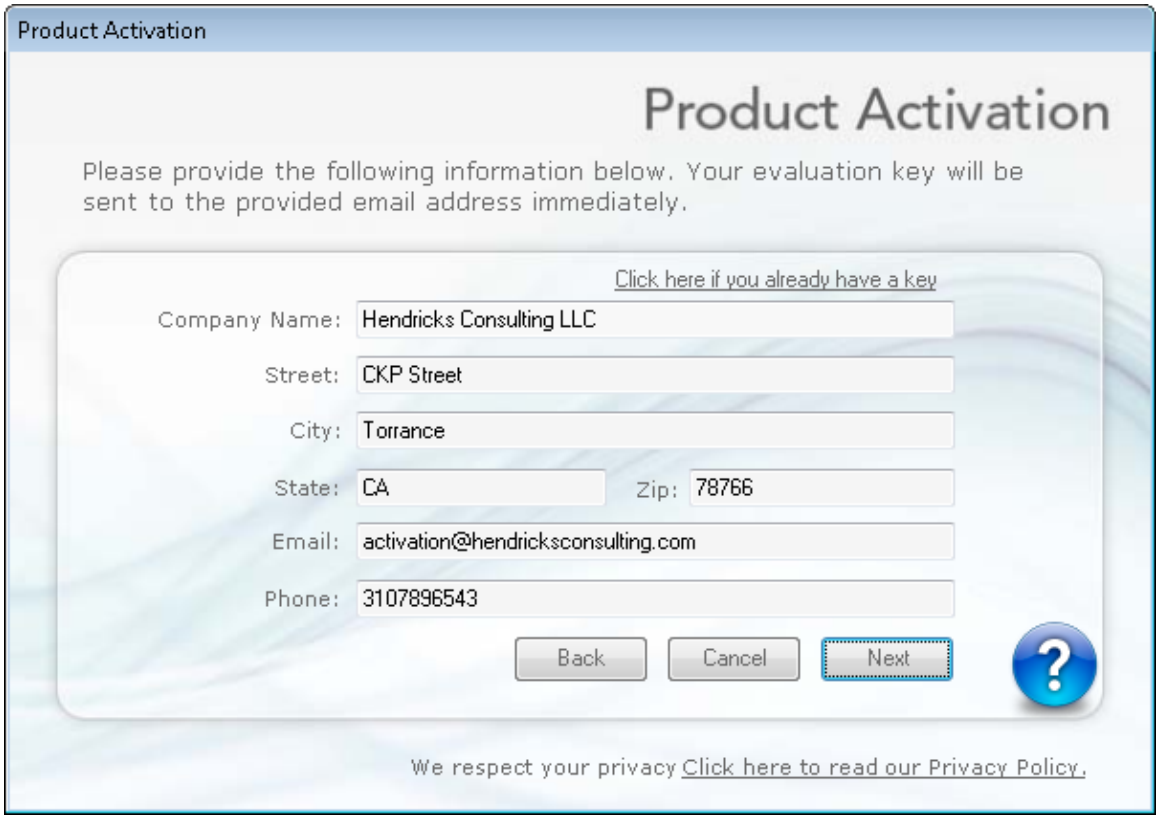
After connecting with your BillQuick Company database, you will be prompted by a Product Activation screen. The screen provides four options.

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

BillQuick Agent Evaluation

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

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



2. Within a few minutes you will receive your 30-day evaluation key via email. Alternatively, you can generate an evaluation key via the web (http://www.bqe.com/userservice/GetEvalKey2012.asp) or by calling BQE Software at (310) 602-4020.
3. Enter this Evaluation Key in the space provided. Click Activate!
4. BillQuick Agent will now open with a reminder message stating that you are using an evaluation copy and to continue beyond 30-days, you need to purchase the software.

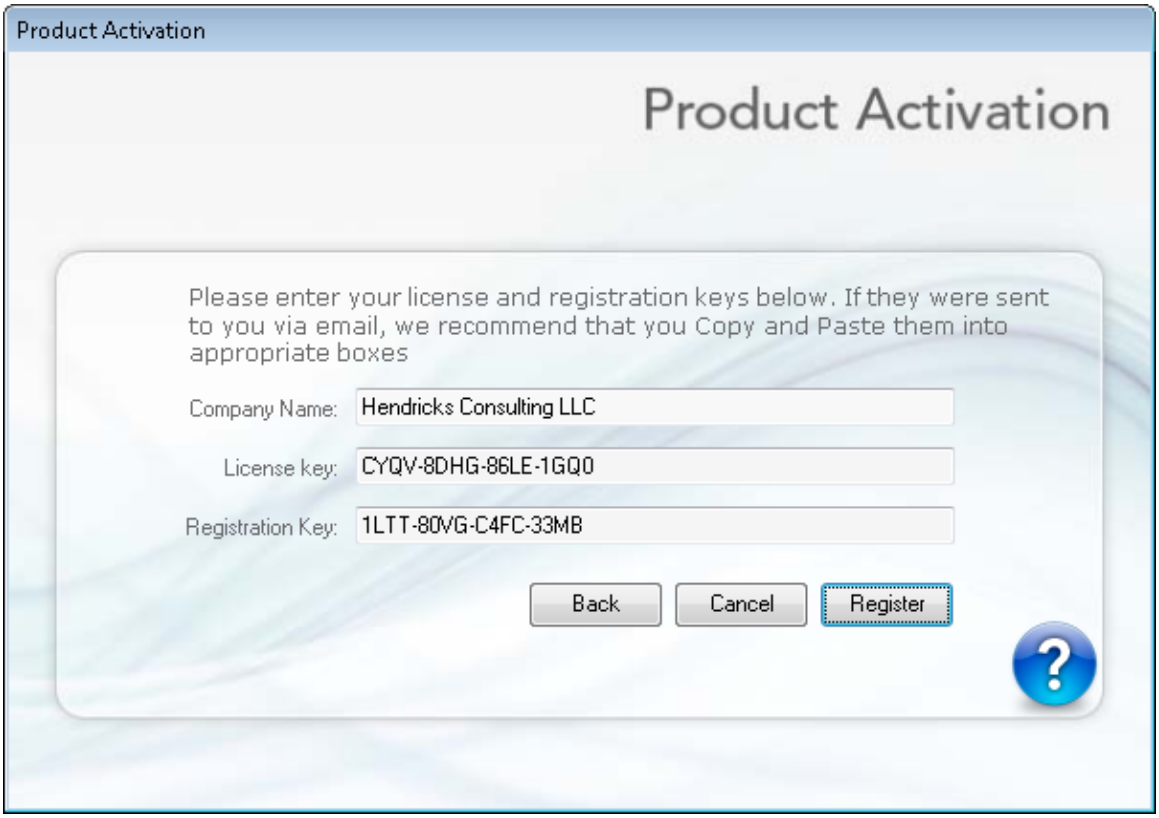
While in evaluation mode, continue to use BillQuick Agent. All of the information entered now will be saved and made available after switching from evaluation to licensed mode.

Licensing & Registration

BQE Software offers various options for licensing and registering your copy of BillQuick Agent. You can use the Product Activation screen, Startup Interview or Product Licensing & User Management console in BillQuick Agent to do so.

Follow these steps to proceed:

1. When you are ready to purchase BillQuick Agent, click 'I Am Ready to Buy' on the Product Activation screen and purchase your software license from the BillQuick website. Alternatively, you can call BQE Software at (310) 602-4020 and speak with a BillQuick Account Rep.
2. You will receive your license and registration keys via e-mail at the e-mail address that you provide.
3. Next, click the 'Already Purchased' option.



4. Enter the License Key and Registration Key exactly as printed on the email you received from BQE Software. If desired, you can cut - paste them from the email (if you want to make a change, contact your BillQuick Account Rep.).
5. In a networked environment, the Supervisor needs to repeat the same procedure on each computer.

You can run the evaluation software and licensed software together.

BillQuick Agent as a Service

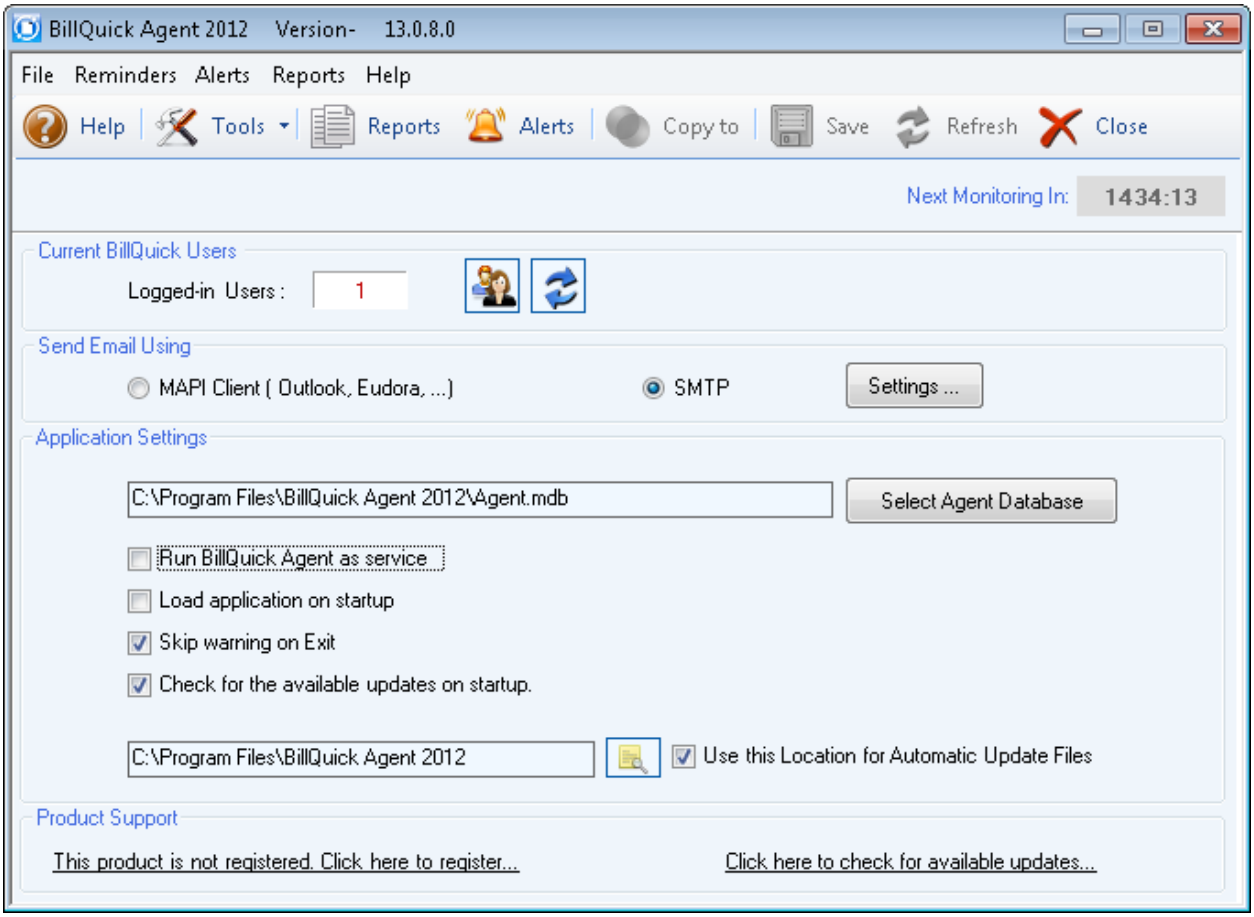
Agent can run as a service. 'Run as a service' means that Agent is installed on your network drive (server machine recommended) and runs continuously, tracking time or expense sheets, running reports and monitoring activity for a possible alert. Email is sent via SMTP or MAPI from your server. Regardless of how the information is saved in your company database – from BillQuick, Web Suite or an add-on module, the database will be monitored by Agent automatically.

This is a recommended solution for customers who:

- prefer to operate BillQuick Agent without being dependent on a user's PC to be running,
- do not want to send email notifications or reports using your desktop email
- want Agent to take up less memory on their system

After installing BillQuick Agent on your network server, do the following:

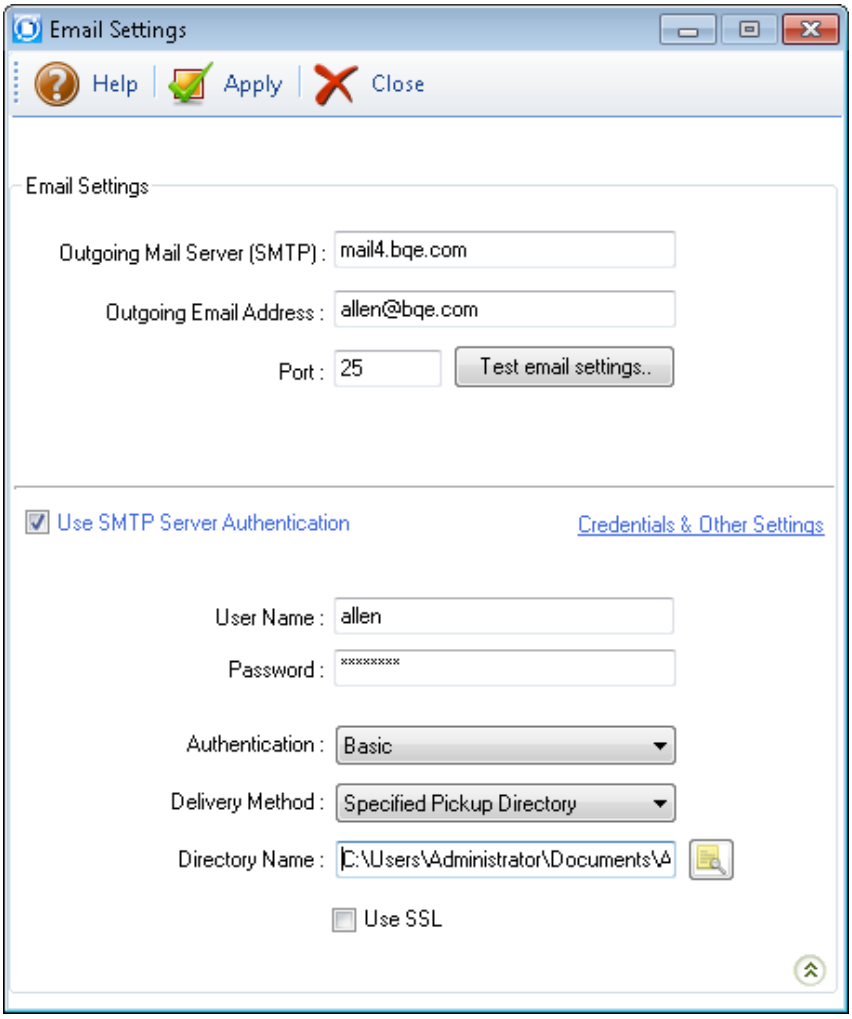
1. Open BillQuick Agent and select Application Settings from the File menu.



2. Select SMTP Email Settings option in the 'Send Email Using' section.

SMTP is more popular because you can send emails from your email account or company's email server. MAPI can be used if you are not running Agent as a service and have it installed on your PC only.

3. Click Settings. In the Email Settings screen, enter the SMPT email settings and other information. If needed, click Advanced Settings and enter additional information.



Before applying these settings, click Test Email Settings to verify the SMTP settings that you have specified for sending emails. If there is a problem, contact your IT/System Administrator for help.

4. Back on the screen, in the Application Settings section, check the option 'Run BillQuick Agent as Service'. A message box pops up informing you about the tasks performed by it.
5. Click OK and then exit from the application.

You cannot run BillQuick Agent desktop application and BillQuick Agent service at the same time. The 'Load application on startup' option is automatically unchecked when you check the 'Run Agent as Service' option.

BillQuick Agent Basics

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

- Starting-up Agent
- Logging into Agent
- Navigating Agent

Captions, field labels, field masks and tool tips can be customized to your Company's preference. Changes made in BillQuick's Custom Labels screen get reflected in this application as well.

Start-Up

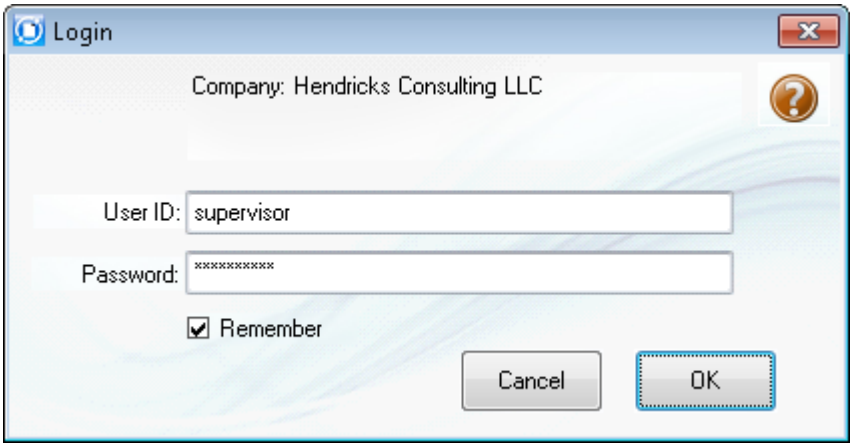
BillQuick Agent's functionality depends on the BillQuick application database. If you have previously worked with BillQuick Agent on your computer, it will remember the previous settings. You can skip to ***Log-in*** below.

Else, you will be prompted by the BillQuick Agent Start-Up Interview to connect to the BillQuick database. Once you have successfully established connection and security is turned on, you will be prompted for a login.

Login

To use BillQuick Agent, you need to log in with a User ID and Password. Your manager or supervisor will provide you with an ID and password. For now, use these defaults

User ID: supervisor
Password: supervisor



Navigation

After logging in to BillQuick Agent, you can access important sections and functions of the application using any of the two navigation options provided.

- Menu
- Toolbar

Menu

BillQuick Agent organizes functions into menus.

Toolbar

Various options are available on the main toolbar.

Time and Expense

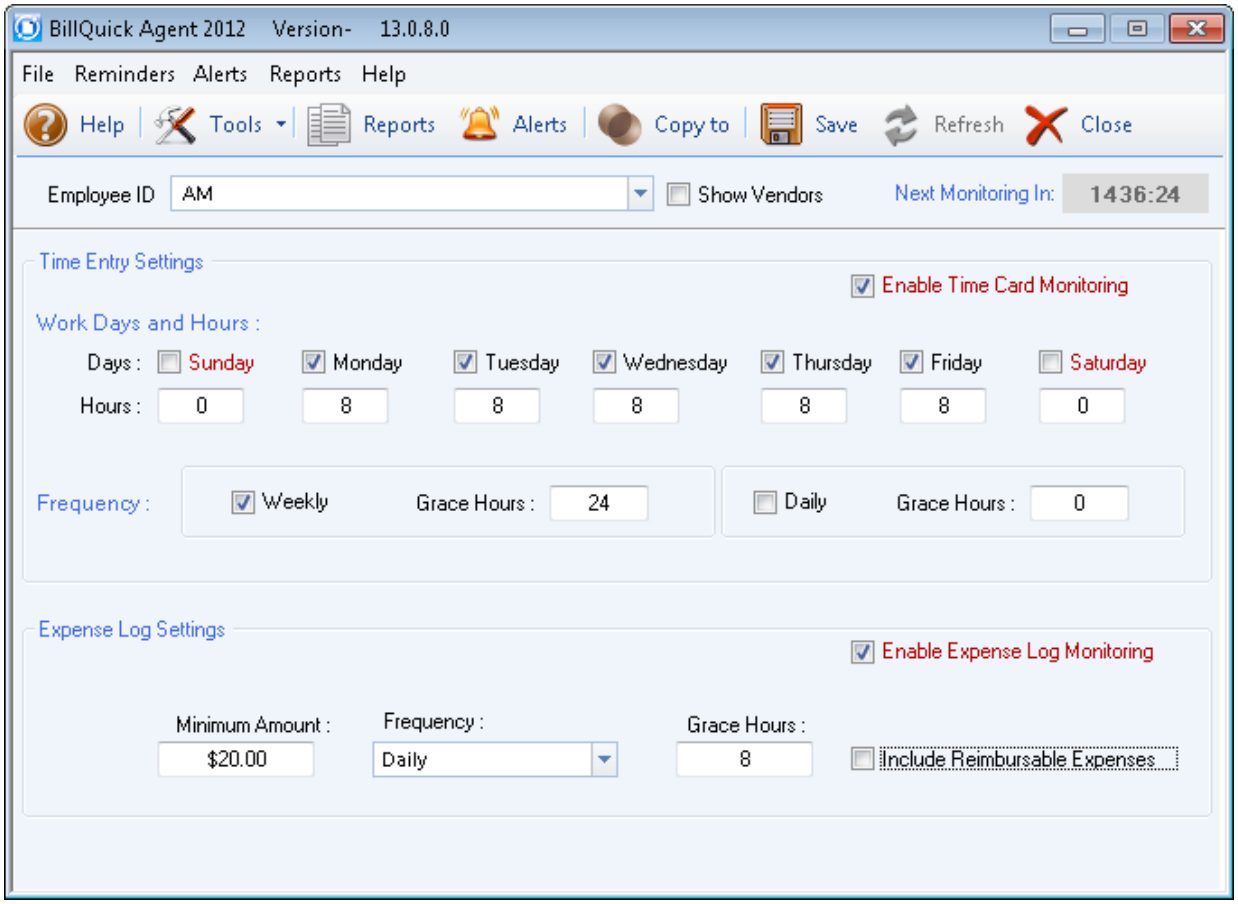
BillQuick Agent is a robust and powerful add-on for BillQuick. Its time card monitoring feature tracks employee attendance in an effective and easy-to-manage way. All you need to do is load your employee's relevant information and the standard hours he/she typically works. Agent will then send automatic reminder emails to an employee who has not completed his/her time card. Bill Quick Agent automatically generates an on-screen report that delineates which employees are short of the required time that they should meet and then sends email reminders to those employees.

Bill Quick Agent also has an expense monitoring system which tracks the expense sheets of employees. Its expense calculator works in the same manner as its time card calculator.

Time and Expense Monitoring

Time cards or expense sheets of various employees can be monitored in the following way:

1. Select the Time and Expense Settings option from the Reminders menu.



2. Select the Employee ID of the person whose time and expense sheets are to be monitored.
3. Check the 'Enable Time Card Monitoring' option for monitoring the employee's time entry.
4. Next, check Work Days and Hours for which the time monitoring is to be done and enter the standard number of Hours for which an employee has to work per day.
5. In the Frequency section, select the frequency at which you want to monitor time. Also, enter the number of Grace Hours in case of delay in submitting time entries.
6. Similarly, check the 'Enable Expense Log Monitoring' option for monitoring your employee's expense sheet against the minimum expense amount set here.
7. Enter the minimum expense amount in the Minimum Amount field that an employee should incur for the time interval set by you
8. Select the desired frequency – Daily, Weekly, Biweekly and/or Monthly.
9. Enter the Grace Hours, if needed.
10. Select 'Include Reimbursable Expense' checkbox if the Minimum Amount should include the reimbursable expenses as well.

> Grace period starts *after the midnight* of the day time sheets or expense sheets are completed and expected to be submitted. E.g., 9 hours grace means an employee can complete and submit his/her time/expense sheet till 9 a.m. of the next day.

11. In Global Settings screen, Enter the frequency (number of minutes) at which you want Agent to monitor your Company data file. E.g. If you want it to check your company database for incomplete time or expense sheets after every hour, enter 60 minutes.
12. When done, click Save.

> You can assign the same settings to other employees by clicking the Copy To button from the toolbar.

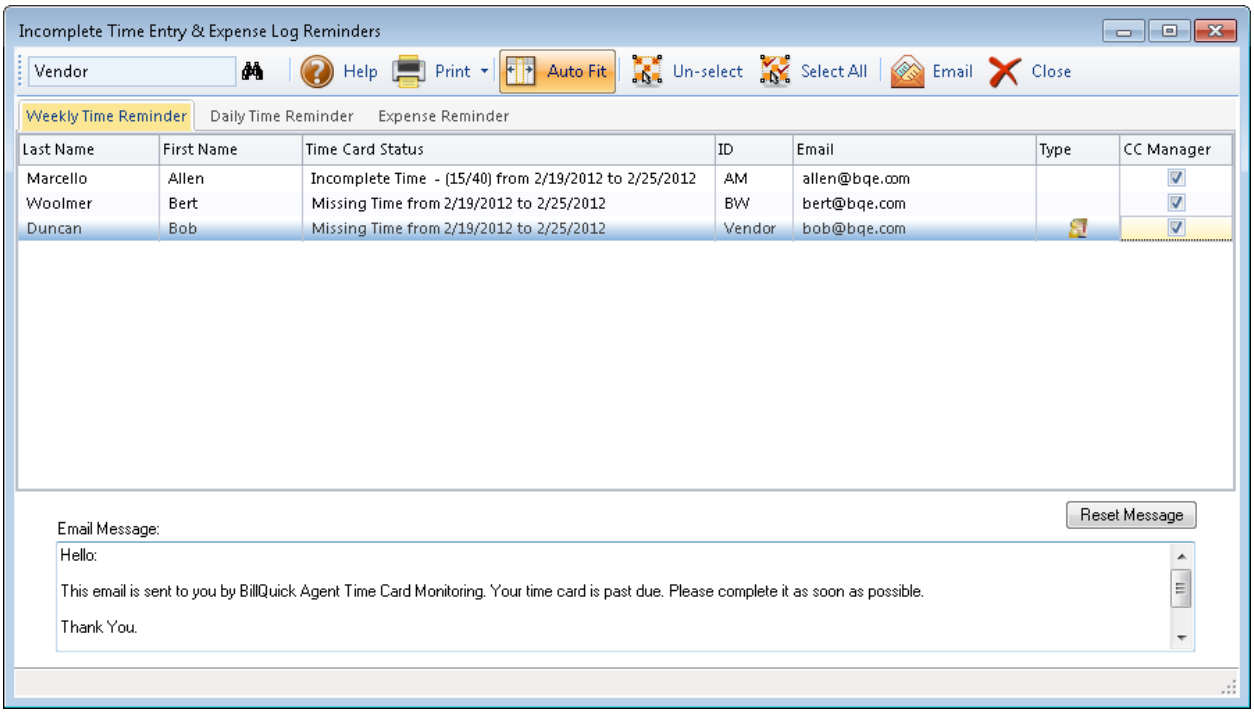
Incomplete Time & Expense Reminders

BillQuick Agent monitors the time or expense sheets of active employees and sends notification to those with incomplete time or expense sheets.

1. Select Time and Expense Settings option from the Reminders menu.
2. Specify settings for time or expense entry monitoring (*as explained above*).
3. From the Global Settings screen, check the 'Send past due notifications via email' option.

> Email addresses are specified in the BillQuick Employee screen. If none exist there, then you will be prompted to enter the email addresses of the employees.

4. When done, click Save.
5. You can manually force a query or notification by clicking Tools and selecting Notify on the toolbar. Incomplete Time Entry and Expense Log Reminders screen displays.



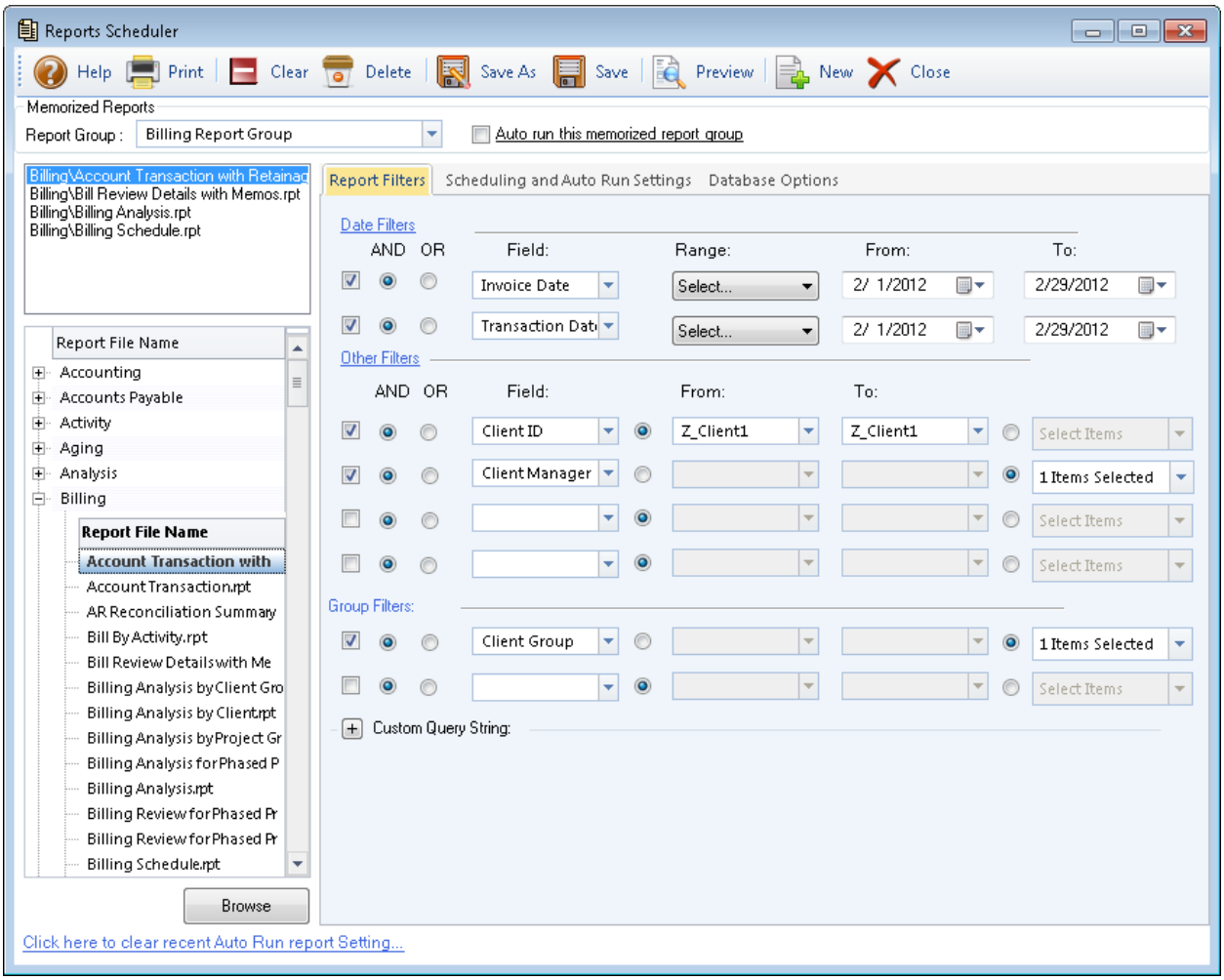
6. BillQuick Agent will automatically generate an onscreen report that delineates which employees are short of the required time. With the click of your mouse, each negligent employee is sent an Email reminder.

BillQuick Agent allows you to send a copy of the time entry notification to the employee manager via email. This helps in proper time and/or expense entry monitoring.

Reports Scheduling

BillQuick Agent comes with a complete library of standard BillQuick reports. You can assign commonly used filters to the reports (standard or custom) and produce it on demand or schedule it for automatic generation and delivery. BillQuick Agent also allows you to stop or suspend the scheduling of any report.

1. Open the Reports Scheduler screen from the menu bar, toolbar or navigator.
2. You can create a new report, select an existing report from the list of reports displayed on the left, Browse for a template or load a Report Group from the dropdown list.
3. On the Report Filters tab, apply the desired filters.
4. Move to the Scheduling and Auto Run Settings tab.



5. Check 'Auto run this memorized report group' option at the top.
6. Next, select the date to process the report on and specify how often to repeat it—Frequency (Daily, Weekly, etc.).
7. Specify the report delivery settings- Preview, Print or Email.

8. On the Monitor Time Entry screen, you can specify the time before which you do not want to run the scheduled reports. You can also check the option to 'Append time stamp to the scheduled report name'.
9. You can save all these settings under a new name by clicking Save As. Whenever a new report is created, the name is added to the existing list.

Mark the Inactive option to stop the automatic generation of your scheduled report.

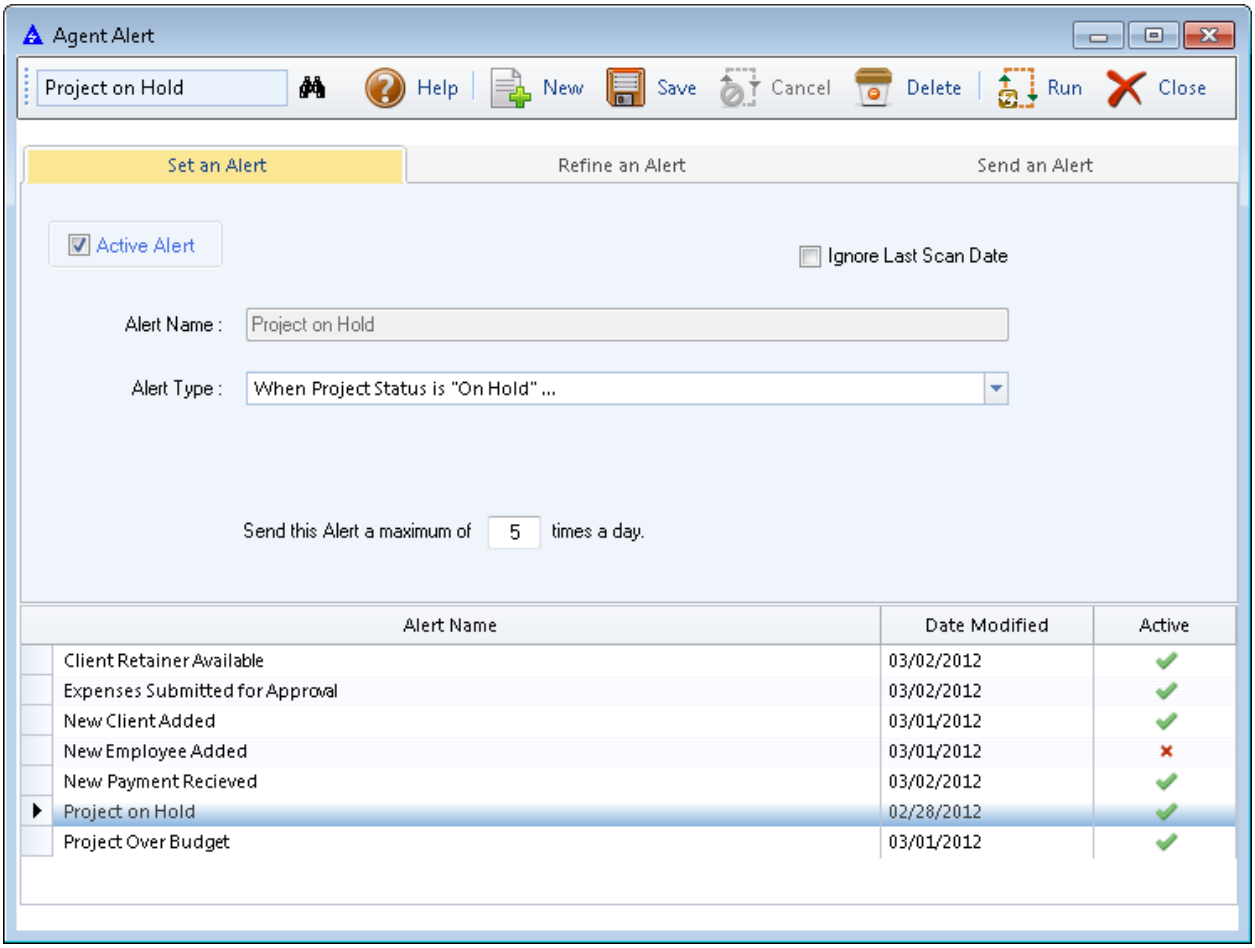
Custom Alerts

Alert is the intelligent monitoring utility in BillQuick Agent that automatically monitors company database and triggers alerts based on some predefined conditions. When triggered, it instantly delivers messages and alerts on-screen, via email or on cell phone. You can choose from more than 40 pre-defined alerts! Some alerts have predefined thresholds, such as 75% service amount spent in a contract. In others, you can define them to trigger an alert. E.g., when budget spent on project has exceeded a threshold or when a project has excessive work-in-progress.

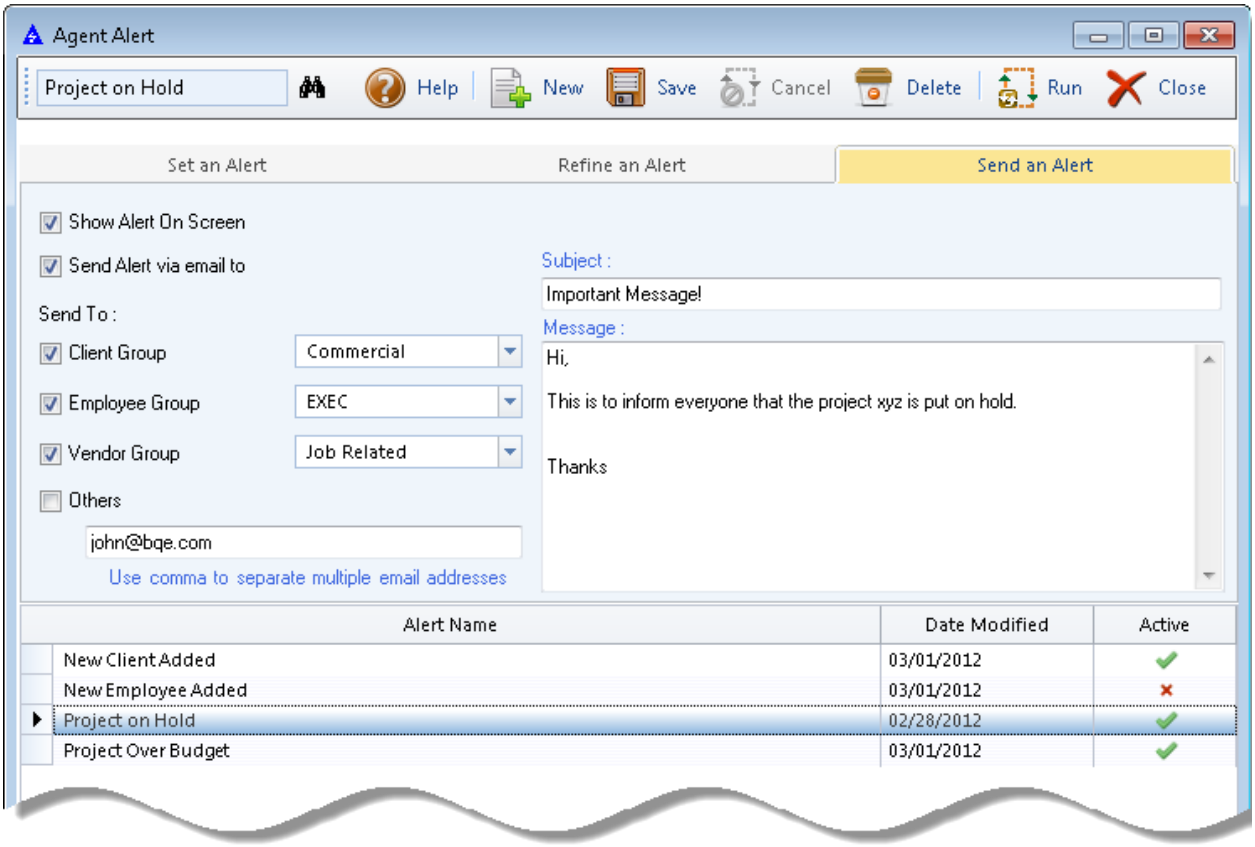
BillQuick Agent also enables you to set the time duration for on-screen alerts.

To set alerts:

1. Open your BillQuick Agent application and click Alerts on the main toolbar.
2. In the Agent Alert screen, select the 'Set an Alert' tab.



3. Click New. Select the desired Alert Type, say 'When Project Status is "On Hold"…'
4. Enter the maximum number of times the alert should be sent in a day. Click Save.
5. Now move to the 'Send an Alert' tab to determine how to deliver the alert and to whom.



6. You can define the text for the body of the email sent for alerts
7. Click Save and then Close to exit. You will receive alerts as per your settings!
8. On the Global Settings screen, you can specify the time before which you do not want to run the scheduled alerts. You can also specify time after which the alert dialog should close automatically.

It is recommended to send alerts by email because this gives you a record of the alert and the email can be turned into a Task in Outlook.

9. On the appropriate day, you will receive the due date alert. Click on the More Info link to open the lower portion of the window

Troubleshooting

Various technical issues related to the installation and start-up of BillQuick Agent are discussed here.

Error with SQL Database
User gets an error when opening SQL database.
If BillQuick Agent is not connecting to the database, delete your registry and re-connect via the Startup Interview wizard. Select the correct BillQuick SQL database to connect to. In case you have changed the location of your database, clear the registry for BillQuick Agent and re-select the BillQuick database.

There could be a problem with the SQL Login security or BillQuick SQL might not be configured in the right way. Enter the right User ID and Password (*sa* or *admin*).

Issue with Scheduled Reports
User has issues with running scheduled reports.
Your SMTP settings must be off and hence the server is unable to connect to it. Your IT Administrator can check the SMTP settings and also confirm whether the firewall is blocking BillQuick Agent's connection to SMTP Server.

Congratulations! You have now successfully installed BillQuick Agent and understood its basic functionality. To learn more about this program, check the **BillQuick Agent Help** or visit www.bqe.com/ProductOverview .

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