BillQuick Agent Help Manual 2017

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WELCOME TO BILLQUICK AGENT

BillQuick® Agent is a powerful automation tool for project managers, company administrators and firm principals. It is an add-on module that helps BillQuick run itself, keeping more of your time and expense billable. It accomplishes this by performing three critical administrative tasks:

- *Reports Scheduling:* It schedules BillQuick reports for automatic printing or delivery via email.
- *Time and Expense Monitoring:* It automatically checks for incomplete time and expense entries and sends email reminders to the employees notifying them about it.
- *Alerts:* It sends alert messages to specified people based on information that the company might want to keep track of.

BillQuick Agent has a small memory footprint (the amount of memory the product needs to run), requiring approximately 16000-100000 KB to function. It uses standard Microsoft® Windows® components. You can run BillQuick Agent as Windows Service also. This feature allows you to run Agent in the background, sending emails to selected recipients according to your settings. Form captions, field labels, field masks and tool tips can be customized to your company's preferences. Changes made in the BillQuick Custom Labels screen get reflected in this program as well.

BillQuick Agent comes with a complete library of standard reports. Access to all the reports is immediately available without having to run BillQuick. With it, users can assign commonly used filters to any BillQuick report (standard or custom) and produce it on demand or schedule it to automatically generate and be delivered to computer screens, printers or through email as an attachment. BillQuick Agent can run any Crystal Reports® version 9.0 (or later) report template. Even non-BillQuick reports can be run by BillQuick Agent. It can generate them on demand or schedule them to run automatically in the same way that it does in case of BillQuick reports. The program will allow you to select any Crystal Reports template as well as the database it uses.

In addition to this, BillQuick Agent monitors employee's time and expense entry based on a set of rules. With these rules, administrators and billing staff can ensure that all the time and expense entries are recorded and submitted on time. BillQuick Agent will automatically generate an on-screen report that delineates which employees are short of the required time and expense that they should meet and then send email reminders to those employees.

BillQuick Agent comes with a powerful alert system, where the user can specify that an alert is displayed on screen or sent through email when a particular condition is met. The Alerts feature allows you to stay informed about your business without having to run reports or call the office manager.

If you are new to BillQuick Agent and want to understand this product, you can check out its Features. You might also want to go through the Getting Started Guide in depth.

Your feedback helps us plan and improve BillQuick Agent releases and associated documentation. Please email your comments, suggestions and ideas about BillQuick Agent and this Help to BQ-Ideas@bqe.com

INTRODUCTION

PRODUCT ACTIVATION

After installing BillQuick Agent, you are prompted with the Product Activation screen. *Please read the BillQuick Agent Getting Started Guide for details.*

CONTACT INFO

BQE Software, Inc. is a California based C Corporation, founded in 1995. It first introduced its flagship product, BillQuick, in May 1996 and since then BQE has developed a host of programs and solutions for your specific needs.

You can contact us for information about the latest products and services; ordering products; training and consulting; technical support; report customization or any other business query.

Corporate Office

Address:	BQE Software 3825 Del Amo Blvd. Torrance, CA 90503 USA
Telephone:	+1 (310) 602-4010
Fax:	(310) 784-8482
Office Hours:	Monday to Friday 8 AM to 5 PM Pacific Standard Time
Website:	www.bqe.com
BQE Blog:	blog.bqe.com
User Forum:	BillQuick Yahoo Group
Services:	www.bqe.com/Services

Sales

Contact our sales representative for information about the latest products and services.

Telephone:	1 (855) 237-1238 (Within USA) +1 310-602-4020 (Outside USA)
Website:	www.bqe.com
Email:	sales@bqe.com

Technical Support

For technical support, you can contact our Support Team. Before you call, email or fax us, please provide the following information for the fastest possible service:

- Product serial number (registration number)
- Your name, company name and phone number
- Exact product name and version number (To find the version of BillQuick, click Help, About BillQuick)
- Type of operating system (say, Windows XP)
- Complete description of the issue, including steps to reproduce it
- Exact wording of any messages displayed when you encountered the problem
- Steps taken to resolve the problem
- All previous email threads with BQE Software about the issue, if any

Telephone:	+1 (310) 602-4030
Knowledge Base:	kb.bqe.com
Email:	support@bqe.com
Website:	www.bqe.com/Support
Hours:	7 AM to 3 PM Pacific Standard Time

Australia Office

Address:	BQE Software 255 Broadway Suite 7 Glebe, N.S.W 2037 Australia
Telephone:	1300-245-566 +61 (02) 9249 7327 (Outside Australia)
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Sales Hours:	Monday to Friday 8:30 AM to 5:30 PM Eastern Time
Website:	www.bqe.com.au
Email:	aus-Support@bqe.com aus-sales@bqe.com
Support Hours:	Monday to Friday 8:30 AM to 5:30 PM Australian Eastern Standard Time

Europe Office

Address:	BQE Software Crosshaven Co. Cork Ireland
Telephone:	+44 20 3411 9852 +353 76 603 2047 (From Ireland) +358 92 316 3286 (From Finland)
Website:	www.bqe.co.uk
Email:	uk-support@bqe.com uk-sales@bqe.com

PRODUCT LICENSES AND USER MANAGEMENT

Home>Product Licensing and User Management

PRODUCT LICENSING & USER MANAGEMENT OVERVIEW

The Product Licensing and User Management screen allows you to manage the licensing and user authorization of BillQuick Agent. The console provides a common module to all the software products in BillQuick. You can use it to assign or un-assign users, and obtain other licensing information. The console is accessible from all the BQE programs, including BillQuick Agent.

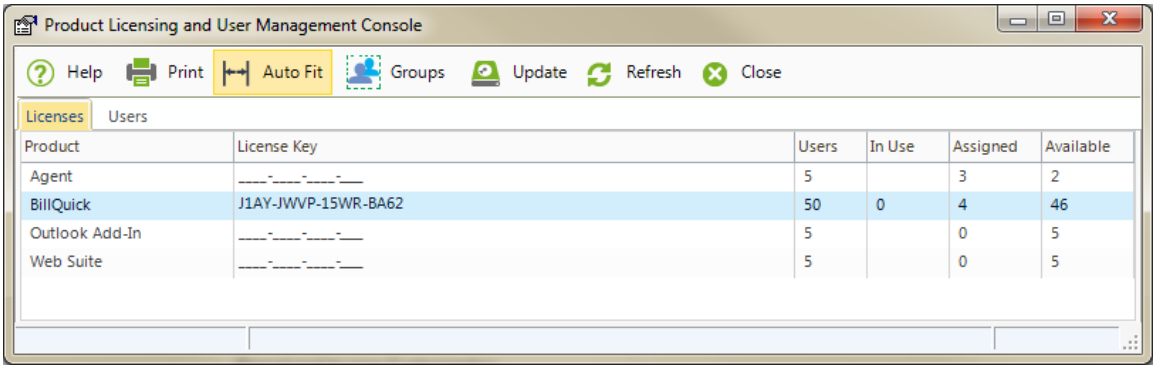
On installing BillQuick Agent, you are prompted with the Product Activation options. If BillQuick Agent subscription is not purchased, the program will run for a further 15-days trial period and after the expiry of that evaluation period, BillQuick Agent locks its program. After 15 days, the database must be licensed and BillQuick Agent must be subscribed to for further use. To view licensing information, click the Licenses tab. To assign or un-assign users, click the Users tab.

You can also read the BillQuick Agent Getting Started Guide for startup details.

Reference

PRODUCT LICENSING & USER MANAGEMENT–LICENSES TAB

The *Licenses* tab of the Product Licensing and User Management screen is used to view or edit license keys and view user license assignments. The following information provides details on the information displayed in the license grid



Product:
The column lists the various BQE software products for which the license information is displayed including BillQuick Agent.

License Key:
The encrypted sequence (that is, license key) that uniquely identifies your company and authorized user count is displayed in this column. Your BillQuick Agent license key is based

on your company name. If you have purchased a license, you need to enter the licensed company name in the program prior to entering the license key. The licensed company name must be entered as it appears on the licensing and registration instructions provided upon purchase of BillQuick Agent. The exact spelling, spacing and punctuation are required, although it is not case sensitive. License keys are stored in the data file. If the company name is changed after the database file is licensed, the result will be an unlicensed program database.

Users:
The total number of licenses purchased for BillQuick Agent displays in this column. It equals the Assigned + Available licenses. You can purchase a license directly from BQE Software or through an authorized re-seller of BillQuick Agent. The program's database must be licensed and registered for use beyond the trial or evaluation period. Additional users can be purchased at any time.

In Use:
This column displays the number of licensed users that are logged into a program simultaneously.

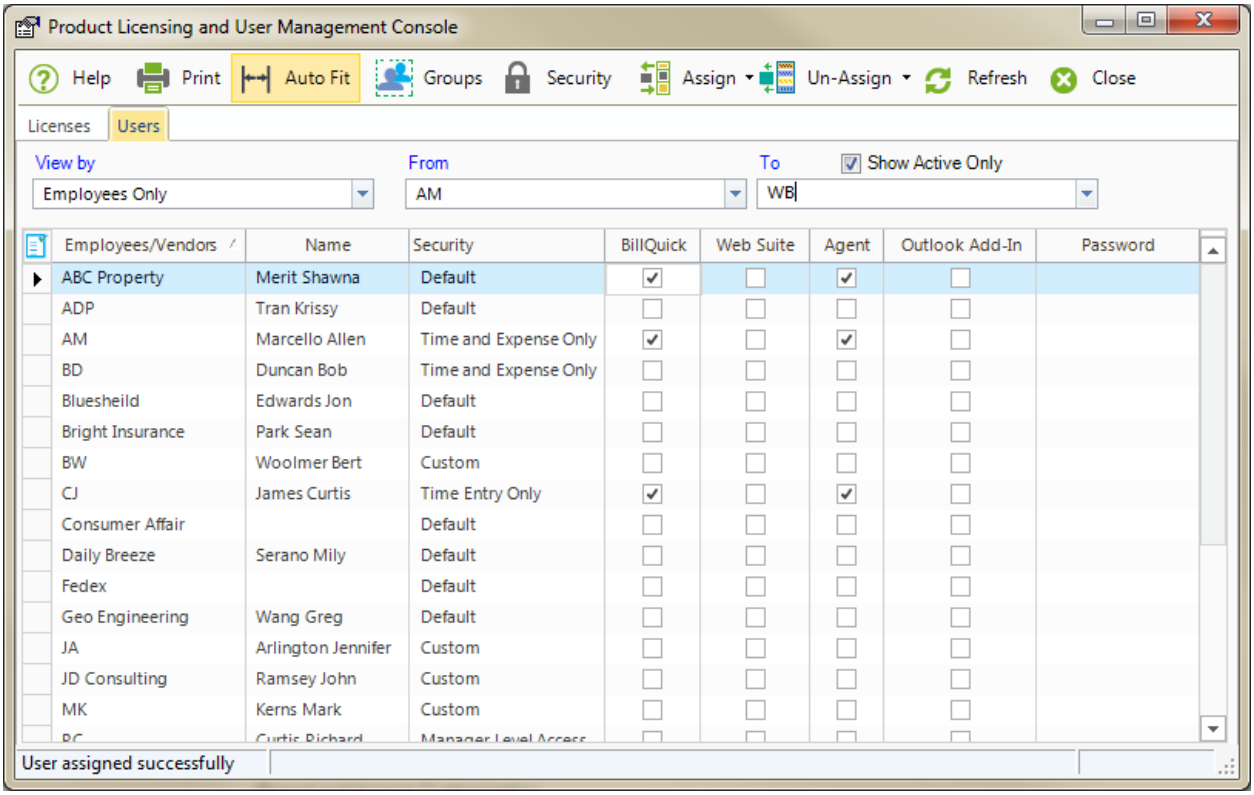
Assigned:
The number of unique login IDs and simultaneous users allowed in BillQuick Agent are displayed in this column. The BillQuick Agent users can be assigned in the Employee and Vendor screen in BillQuick as well as from the Users Tab of this screen.

Available:
This column displays the number of licenses still available for BillQuick Agent. The available number of users can be assigned to the employees and vendors. Available number equals Users - Assigned.

Please contact BQE Technical Support at Support@bqe.com if you must change the company name. To obtain your license key, contact BQE Software at 888-245-5669 or email Sales@bqe.com.

PRODUCT LICENSING & USER MANAGEMENT–USERS TAB

The Users tab of the Product Licensing and User Management console is used to authorize employees to use Agent or other licensed BillQuick products. The following information provides details on the options and information available on this tab.



View By:
Select the type of users from this drop-down list to display in the user grid (for example, employees, vendor groups, etc.).

From/To:
Use these fields to select a specific user or group by ID, or select a range of users (or their groups).

Show Active Only:
Select this check box to display users with only active status.

Click **Refresh** to update the grid with your filter selections. The grid displays a list of employees and BQE software products in the horizontal row, including BillQuick Agent. The desired employees or employee groups can be assigned as authorized users of BillQuick Agent. Only the assigned users can log into the program.

You can customize the grid according to your preference. Click the **Field Chooser** in the upper left corner of the grid to select the columns to be displayed in the grid.

Employees/Vendors:
ID of the employee or vendor to whom you can assign the license for a particular program display in this column.

Security:
This column displays the access rights given to the specific employee or vendor.

BillQuick, Web Suite, Agent or Outlook Add-In:
Select or clear the corresponding check box in the product column for the employee or vendor you want to assign or un-assign a product license. Now, click Assign or Unassign on the button panel to apply the settings.

Password:
You can set or change the password for each user (Employees or Vendors). Typically, the password of a user is its Employee or Vendor ID but can be changed into any other.

How Do I

HOW DO I ASSIGN AGENT USERS?

To assign users to BillQuick Agent:

1. From the menu bar in BillQuick, select File menu > Licensing & User Management. The Product Licensing and User Management screen displays.
2. Click the Users tab.
3. If your firm has a larger number of users, use the available filters (for example, Viewed By and From/To drop-down list).
4. In the grid, select the check box in the desired product column (for example, Agent) for the relevant users to authorize them to access the program.

HOW DO I MANAGE LICENSING?

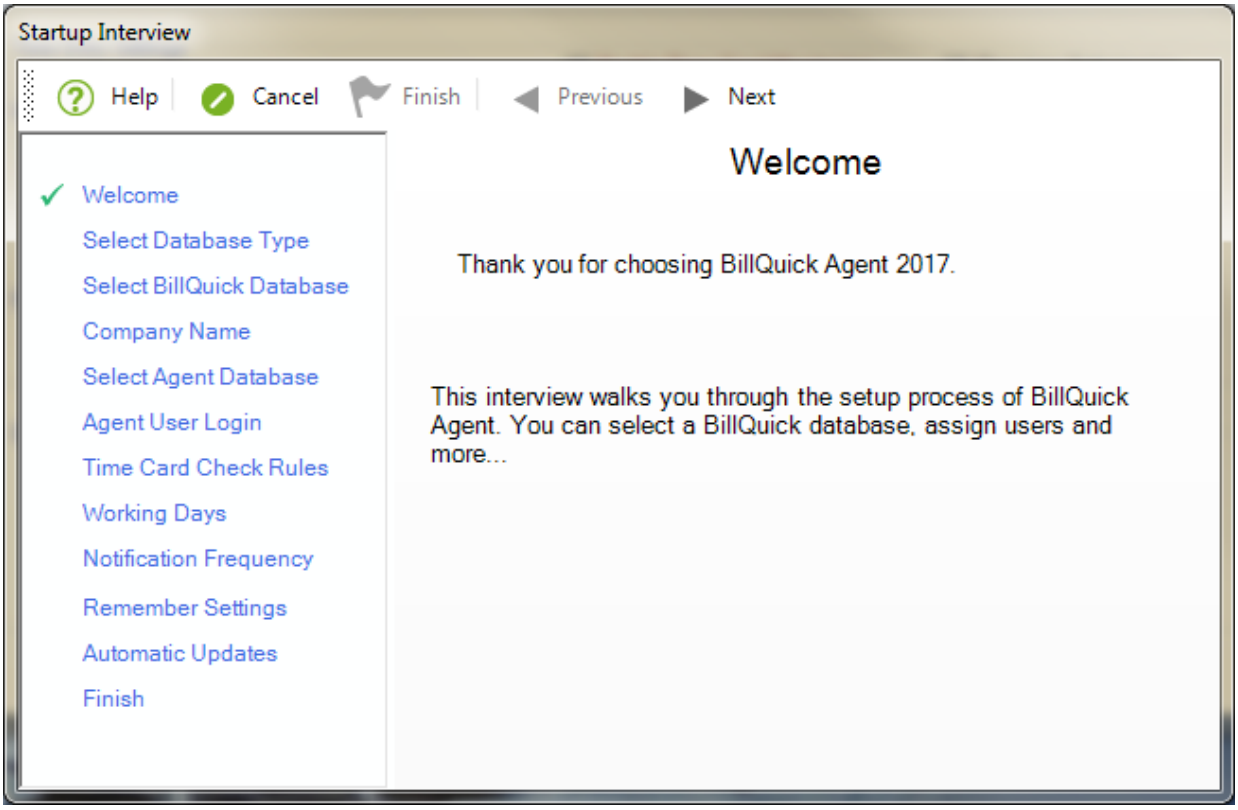
Do the following to manage your BillQuick Agent licenses:

1. In BillQuick, select File menu > Licensing & User Management. The Product Licensing and User Management screen displays.
2. Click the Licenses tab. The license keys for your currently purchased subscription display in addition to details on how the product licenses have been assigned.
3. To add or edit a BillQuick Agent license key, click in its License Key column. Enter the key exactly as specified in your license and registration email.
4. On the button panel, click Update. You are done!

START UP

STARTUP INTERVIEW

BillQuick Agent Startup Interview is a special form of user assistance that automates tasks through a dialog with the user. It is a wizard that helps you to accomplish tasks that can be complex for first time users and requires experience. It enables beginners to specify settings for the BillQuick Agent program, including assigning of users and company database. This wizard walks you through the steps of setting up basic information for the proper functioning of this program. You can later make changes from the program itself.



The Startup Interview consists of the following steps-

- ***Select Database Type***

  The functionality of BillQuick Agent depends on the BillQuick database (Microsoft Access or SQL Server). You need to specify the BillQuick database type for using BillQuick Agent. The user has the option of accessing the database as specified. You have the option to *Open an existing Access Database* or *Open an existing SQL Database*. The wizard also provides the option, *Automatically detect BillQuick database,* which will allow the program to access the currently used BillQuick database.

- ***Select BillQuick Database***

  Select the database according to the option chosen on the previous page. In case of BillQuick Standard (Access) Database, click the Browse button to select it. In case of

BillQuick Enterprise (SQL Server) Database, enter the *Server Name*, *User ID* and *Password*. Select a *Database Name* from the drop-down list.

Select **Use windows authentication**. When using Windows NT Authentication, you do not have to specify a login ID or password when you connect to SQL Server. Your access to SQL Server is controlled by your Windows NT account or group, which is authenticated when you log on to the Windows operating system on the client.

If the user has chosen the automatic detection option, BillQuick Agent will automatically retrieve the currently used BillQuick database.

- ***Enter Company Name***

  Company Name appears on all invoices and statements. Company name must be identical to the name provided to BQE Software when purchasing your BillQuick Agent product license. It is encoded into all license keys. Enter the company name exactly–spelling, spacing and punctuation–as it appears in the licensing and registration instructions. This name is automatically retrieved from the specified database.

- ***Select Agent Database***

  BillQuick Agent uses a separate database to save program settings, employee details, reports scheduling information, etc. The program will automatically create a separate database for this purpose and retrieve it. If you are using BillQuick Agent for the first time, then BillQuick Agent 2016 will ask for your confirmation that you either want to upgrade your existing Agent database or you want to create a new Agent data file.

- ***Set Agent User Login***

  The page allows you to log in. A drop-down list of user IDs that have been assigned usage of Agent appears. On choosing the ID and entering the corresponding password as assigned in the Security screen of BillQuick program, you can log in.

  Check the *Remember User ID and Password* option if you want the program to remember these settings.

  It is necessary to have at least one user assigned as BillQuick Agent user so as to log into BillQuick Agent 2017.

- ***Set Time Card/Expense Log Rules***

  Time Card–You can set the rule for BillQuick Agent to monitor the time entries on the basis of a time period. You can opt for the Daily or Weekly time card monitoring and verification. This can depend on when you want your employees to complete their time entries.

  Expense Log–BillQuick Agent can monitor your expense entries based on the expense amount entered by you in the **Minimum Amount** field. BillQuick Agent can track your expense entry made in BillQuick based on the following intervals as the need be–Daily, Weekly, Biweekly or Monthly.

- ***Enter Time Card Monitoring Hours***

  Enter the number of Hours required by your employees to work per day or week (standard hours). These hours should relate to the period opted for in the previous page-whether weekly or daily. For example, 40 hours might be required per week for the employee. Grace period is the time allowed after the query frequency for employees to check for their incomplete time entries. In the Grace Hours field enter how soon after the period is over you want to check for incomplete time entries. The grace hours begin counting from midnight of the night before the first working day of your time period.

- ***Specify Working Days***

  Select the employee's working days for which the time or expense entries have to be queried. For time entry monitoring check each day that the employee works on. In addition, assign the number of hours the employee works for each day.

- ***Set Notification Frequency***

  Set the frequency for BillQuick Agent to check the database for time or expense and then notify you. Enter the minutes you want to allow between time entry notifications. For example, to have BillQuick Agent check for and notify you of incomplete time entries or expense entries every hour, set **Check every. . .minutes** field to 60 minutes.

- ***Remember Settings***

  BillQuick Agent allows you to assign certain settings, which it can remember to apply. Here you specify how you would like to send your emails. You can choose either MAPI or SMTP mechanisms to send the emails.

  You should choose MAPI when you want Agent to use your email client for example, Microsoft Outlook or Eudora to save a copy of the sent email in its Sent folder. However, note that, even though it is easier to use and doesn't need extra setup if MAPI is configured on your machine; MAPI works differently on different email clients. In addition, if you are using Outlook Express 5.0 and above, you need to manually turn on MAPI in the settings.

  SMTP on the other hand is completely independent of the email client that you use (you can still send and receive your emails using your email client). You need to set up the mail settings once on the server, and no matter how many changes there are to the workstation email clients, your program keeps working.

  If you choose to select SMTP, click on the SMTP Email Settings to specify your server name (for example, mail.bqe.com), Username, Password and Email address from which to send the email, and click Apply button. You can also specify advanced SMTP settings, and specify SMTP authentication options.

  The **Load Application on Startup** option should be checked if you want BillQuick Agent program to load up on starting your computer system by default. *Skip Warning on Exit* option can be checked if you do not want BillQuick Agent to display warnings (like evaluation period or registration messages) upon closing the program.

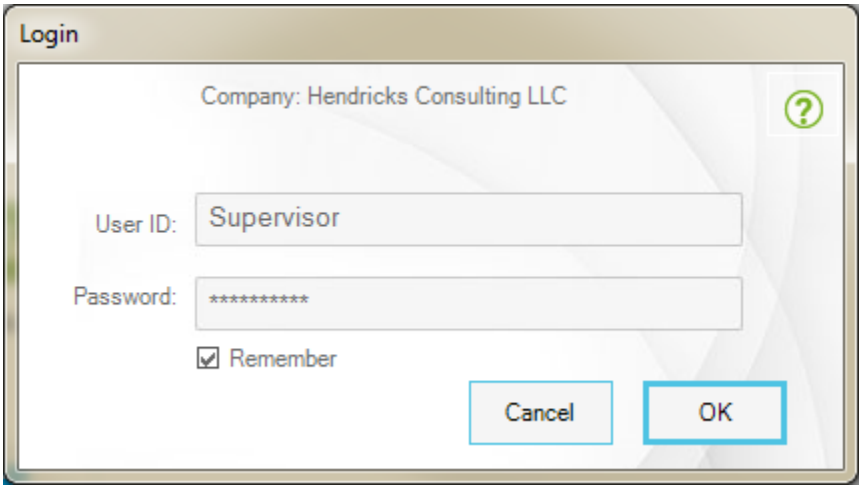
- ***Enable Automatic Updates***

  BillQuick Agent can automatically download an update and hence update your BillQuick Agent program from the web, depending upon the option you select here. Here you can also specify the location you want to save the updates to. *Use this location for Automatic Update Files* option should be checked to specify the folder where the updates should be saved and then retrieved from. Clicking the browse button prompts you with a Browse for Folder dialog box. It displays a list of all the possible locations. You can select any location and then click OK.

  You can also click on the *Make New Folder* button to add a new folder at a particular location in your computer or click Cancel to cancel the action

LOGIN

You need to log in to use the BillQuick Agent program. You can always log in with the default User ID, *supervisor*, whose default password is also *supervisor*. Check the Remember option if you want Agent to remember your User ID.



Both **User ID** and **Password** can be changed like all other login passwords in Security section of BillQuick. The number of unique login IDs and simultaneous users allowed in Agent depends on the Agent license you have purchased. If there is no license key code, Agent license defaults to one user and Agent will expire after 15 days from its installation date. A minimum of one user is licensed with the purchase of Agent. Additional users can be purchased at any time.

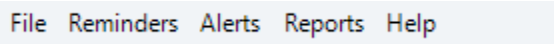
You can also read the BillQuick Agent Getting Started Guide for startup details.

NAVIGATION

After logging in to BillQuick Agent, you can access important sections and functions of the program using any of the several navigation options provided in the menu bar and the toolbar.

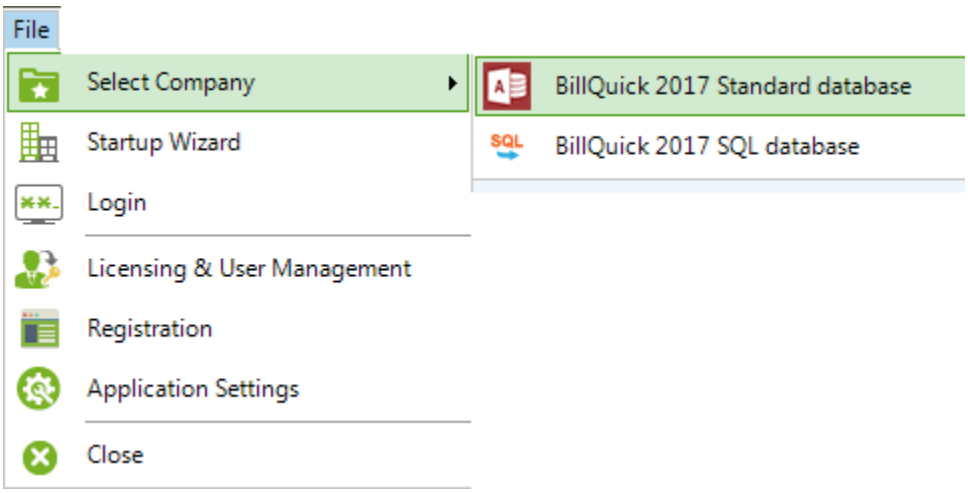
Menu Bar

BillQuick Agent offers various features and options that can be accessed from the menu bar. Each menu and related items have been explained below.



File Menu

Select Company:
Allows the user to open the BillQuick® Company Database. The user can either select a BillQuick 2017 Standard Database or a BillQuick 2017 SQL Database.



Startup Wizard:
Opens the BillQuick Agent Startup Interview screen.

Login:
Opens the BillQuick Agent Login screen from where you can log in as a different user.

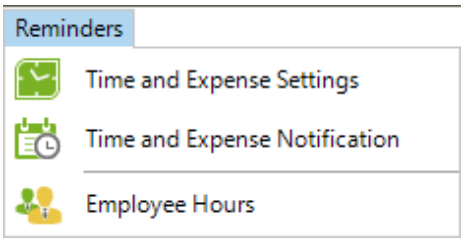
Licensing & User Management:
The supervisor can access the Product Licensing and User Management console by logging in as a supervisor. The user needs to enter BillQuick Supervisor account password. Here, the supervisor can assign users for Agent and other products.

Registration:
Opens the Registration dialog box where you enter the registration key. A free 15 days trial of the software is available, but the database must be licensed and BillQuick Agent must be registered for use beyond 15 days. Registration Key is a key provided by BQE Software (along with the license key) that registers the software. The product can only be registered if the license key has been entered in the product Licensing and User Management console.

Application Settings:
Opens the Application Settings screen.

Close:
Closes BillQuick Agent.

Reminders Menu



Time and Expense Settings
Opens the Time and Expense Settings screen.

Time and Expense Notification
You can manually force a time entry query by clicking this option. When the time or expense entry is queried, BillQuick Agent will check to see that each of the selected employees have fulfilled their time or expense entry requirements. If all have, then BillQuick Agent will not generate an on-screen report. If not, each employee that is short of his or her required hours or expenses will be displayed in the Time and Expense Notification unscrewed report.

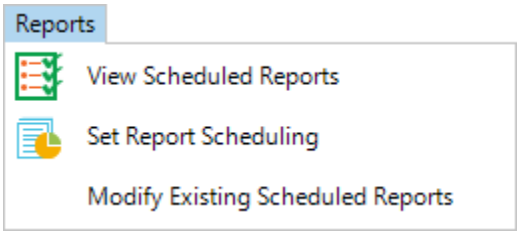
Employee Hours
Opens the Employee Hours screen.

Alerts Menu

View Alerts:
Runs the alerts and does the specified action (email or display on screen).

Set Alerts:
Opens the Agent Alert screen.

Reports Menu

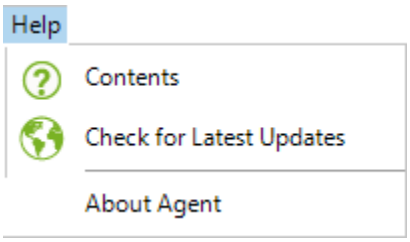


View Scheduled Reports:
Opens the scheduled report in the Report Viewer screen.

Set Report Scheduling:
Opens the Report Scheduler screen and allows you to schedule reports.

Modify Existing Scheduled Reports:
Opens the Report Scheduler screen and allows you to modify existing scheduled reports.

Help Menu



Contents:
Opens the Contents pane of the Agent 2017 Help file.

Check for Latest Updates:
Checks for the available updates for BillQuick Agent 2017.

About:
Opens the BillQuick Agent splash screen giving information about the current version and build.

Main Toolbar

The toolbar allows you to quickly access various BillQuick Agent functions and features. The following tools are available on the main toolbar:

Help:
Opens the help file of BillQuick Agent.

Tools:
The drop-down opens to give you these options:

- **Run Alerts:** Runs the alerts and does the specified action (email or display on screen).
- **Notify (Time and Expense Notification):** You can manually force a time and expense entry query by clicking this button. When the time and expense entry is queried, BillQuick Agent checks to see that each of the selected employees have fulfilled their time and expense entry requirements. If all have, then BillQuick Agent will not generate an on-screen report. If not, each employee who is short of the required hours or expenses will be displayed in the Time and Expense Notification unscrewed report.
- **Time and Expense Settings:** Takes you to the Time and Expense Settings screen.
- **Employee Hours:** Displays the screen where you can track information such as an employee's or vendor's vacation or sick hours, compensation and overtime hours. An employee's billable and non-billable hours can also be tracked.
- **Application Settings:** Application Settings is where you can configure your Agent program according to your requirements.

- **Global Settings:** Is the screen where you can configure the settings related to the monitoring of your time and expense, Agent alerts, reports scheduling, etc.
- **Turn Off Scheduled Reports:** When clicked, this toggle button turns on the scheduled reports. Un-clicking this button is a quick way to turn it off.

Reports:
Opens the Reports Scheduler screen.

Alerts:
Opens the Agent Alert screen where the user can create alerts to send reminders when a particular condition is fulfilled.

Copy To:
Opens the Copy Time Entry Monitoring Settings screen which allows in quickly assigning the same time card related settings to multiple employees. This option is only activated in the Time and Expense Settings screen.

Save:
Saves the settings assigned to an employee. Save option is only activated in the Time and Expense Settings screen.

Refresh:
Refreshes the totals in the Employee Hours screen after the date filters have been selected. Refresh option is only activated in the Employee Hours screen.

Close:
Closes the BillQuick Agent program.

Right-click and select the Toolbar check box in the toolbar pane to make it visible to you. Similarly, clear the Toolbar check box to hide it from the screen.

You can also read the BillQuick Agent Getting Started Guide for startup details.

STARTUP INTERVIEW BUTTON PANEL

The following information provides details available on the Startup Interview button panel.

Help:
Opens the BillQuick Agent Help.

Cancel:
Discards any user-selected settings, terminates the process, and closes the wizard.

Finish:
Applies user-selected information from all pages and completes the task.

Previous:
Returns to the previous page, allows you to modify any previously entered information. This button is unavailable on the first page.

Next:
Moves to the next page in the sequence and maintains information the user provided in previous page. This button is unavailable on the last page.

How Do I

HOW DO I LICENSE AGENT?

There are two ways to license the BillQuick Agent software:

Via the Startup Interview:

1. In the Agent Startup Interview, on the Company Name panel, enter your firm name exactly as it appears on the license and registration instructions you received from BQE Software. Click Next.
2. On the *License and Registration* panel, enter the license and registration keys.

Via the Product Licensing & User Management screen:

1. In Agent, select File menu > Licensing and User Management.
2. Enter your License Key for BillQuick Agent exactly as it is provided in the email instructions received from BQE.
3. Click Update. The number of authorized users and other relevant information displays.
4. When you have finished, click Close.
5. Choose File menu > Registration. Enter the registration key in the dialog box. Click OK.

A warning message displays if validation or registration fails. Re-enter the key correctly. If the problem persists, contact BillQuick Support.

HOW DO I MONITOR MY COMPANY FILE?

BillQuick Agent performs the monitoring of the company file for time and expense entry notifications and alerts when the counter in the Next Monitoring In field reads 00:00.

Do the following to schedule time entry monitoring:

1. In Agent, select Reminders menu > Time and Expense Settings.
2. Select the employee from the Employee ID drop-down list whose time card needs to be monitored.
3. Select the Enable Time Card Monitoring check box to enable time entry monitoring for the selected employee.
4. In the Work Days and Hours section, select the work days for which the time entry monitoring is to be done and enter the number of hours for which an employee needs to work each day.
5. In the Frequency section, check either the Weekly or Daily check box or both.
6. Enter the number of hours in the Weekly Grace Hours and Daily Grace Hours fields.

To set a certain recurring interval after which your company file should be monitored for incomplete time or expense entries, enter the number of minutes in *Monitor my Company File every. . .minutes* field in the Global Settings screen to achieve so.

Similarly, you can schedule expense log monitoring.

HOW DO I ENABLE AGENT AS A SERVICE?

BillQuick Agent can be setup to load when Windows starts or it can be configured to run as a Windows service. Running BillQuick Agent as a Windows service will email incomplete or missing time or expense entry notifications, alerts and scheduled reports to the intended recipients.

Do the following to set up Agent as a service:

1. On the Agent menu bar, select File > Application Settings.
2. In the Send Email Using section, click the SMTP Email Settings and fill in the required information for SMTP settings.
3. In the Application Settings section, select the 'Run BillQuick Agent as Service' check box**.** Click OK on the confirmation message.
4. Click *Close* button to quit the program.

You cannot run Agent program and Agent service at the same time. The *Load Application on Startup* option is automatically cleared when you select the *Run BillQuick Agent as Service* check box.

HOW DO I SPECIFY SMTP EMAIL SETTINGS?

Firms using an SMTP server for outgoing email can either configure the settings during the Startup Interview or after the interview. If you did not configure the SMTP email settings during the Startup Interview, do the following to specify the settings:

1. On the Agent menu bar, select File > Application Settings.
2. In the Send Email Using section, click the SMTP Email Settings button.
3. In the Email Settings screen, enter the relevant Outgoing Mail Server (SMTP) name for sending mails.
4. Also enter the Outgoing Email Address, which is used for sending mails.
5. Enter a port number for the SMTP Server.
6. If you want to apply the server authentication settings click Advanced Settings and then select the Use SMTP Server Authentication check box. If you do not need to apply authentication settings, skip to Step 10.
7. For authentication, you have to specify the relevant User Name and Password for the mail server being used.
8. Select the mode of Authentication and Delivery Method from their respective drop-downs. If you select Specified Pickup Directory as the Delivery Method, you have to specify the Directory Name.

9. Mark the Use SSL box, if you want to protect the confidentiality and security of data being transmitted between your email program and the servers. SSL stands for Secure Sockets Layer.
10. Before you apply the specified settings, click Test Email Settings button to verify the email settings for correctness.
11. Click the Apply button to apply the server settings as specified.

TIME CARD MONITORING

TIME AND EXPENSE MONITORING OVERVIEW

BillQuick Agent is a robust and powerful automation tool. Its time card calculator tracks employee attendance in an effective and easy to manage way. All you need to do is to load your employee's information and standard hours an employee typically works. This enables the time card calculator to keep track of an employee's time card. Agent will then send automatic reminder emails to employees who have not completed their time cards. BillQuick Agent automatically generates an on-screen report that delineates which employees are short of the required time and then send email reminders to those employees.

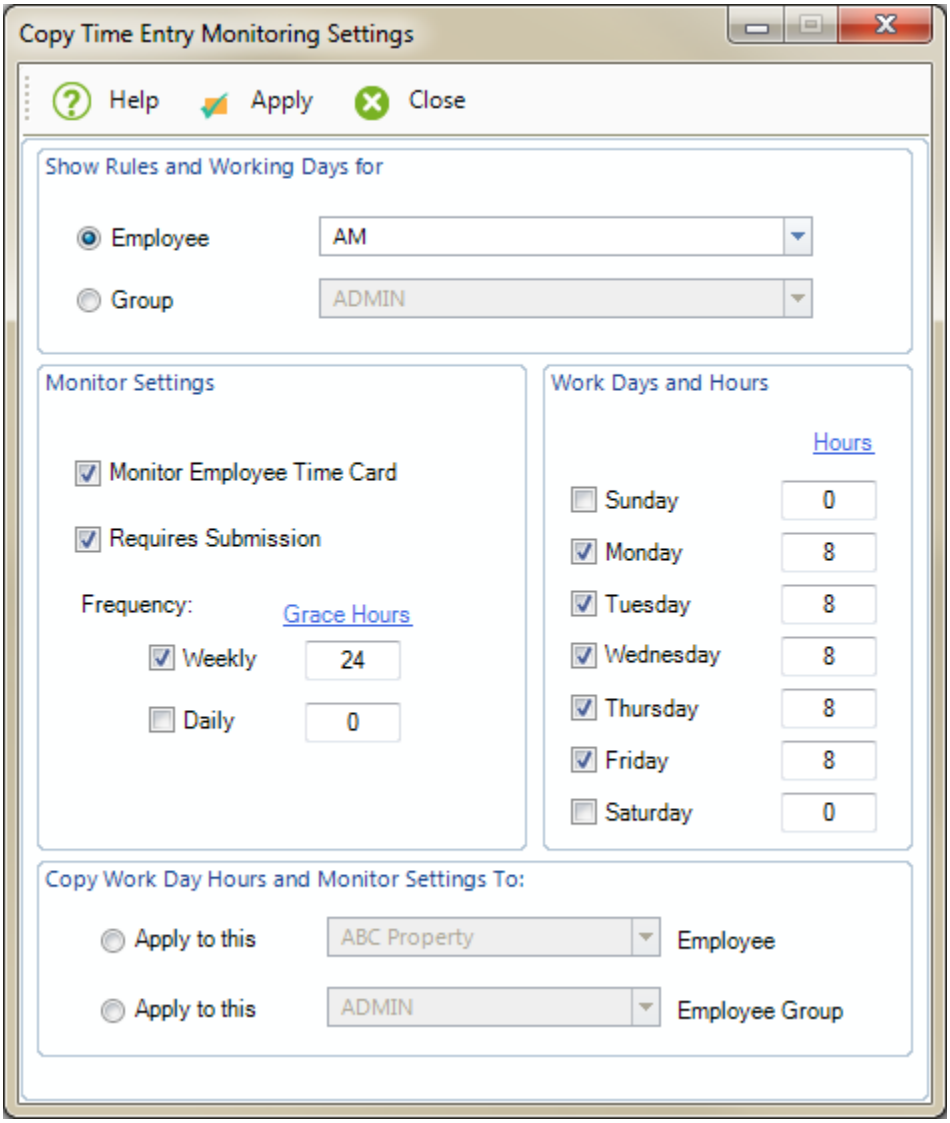
BillQuick Agent, besides having a reliable time card monitoring feature, has an expense monitoring system in place as well. Its expense calculator monitors an employee's expense details. You can simple load the relevant employee information whose expense details are to be tracked. The expense calculator can calculate if the stipulated expense has been incurred by that employee, failing which, an automatic reminder email is sent to those employees and their managers to inform them about it. BillQuick Agent automatically generates an on-screen report to show which employees are short of the required expense sheets.

You can specify the relevant settings for time and expense card monitoring in the Global Settings screen and Time and Expense Settings screen.

Reference

COPY TIME ENTRY MONITORING SETTINGS

BillQuick Agent enables you to copy assigned time entry monitoring settings from one employee to another employee or an employee group. This feature is accessed by clicking the **Copy To** button on the Time and Expense Settings button panel.



Show Rules and Working Days for

Employee:
Choose this option to copy settings from an employee selected from the drop-down list to another employee or employee group.

Group:
Choose this option to copy settings from an employee group selected from the drop-down list to another employee or employee group.

The settings for the currently chosen employee will be displayed. Only employees for which time monitoring has been enabled display in the *Employee* drop-down list.

Monitor Settings

Monitor Employee Time Card:
Select this check box to have the program check the employee time cards.

Frequency
Select the **Weekly** check box if the selected employee enters time on a weekly basis. In the adjacent Grace Hours field, you can enter the number of hours for Agent to wait before it starts querying BillQuick database for the time entries made by employees.

You can select the **Daily** check box if the selected employee enters time on a daily basis. In the adjacent Grace Hours field, you can enter the number of hours for Agent to wait before it starts querying BillQuick database for the time entries made by you.

Grace Hours:
These fields show how soon after a certain period is over you want to check for incomplete time entries. The grace hours begin counting from midnight of the night before the first working day of your time period specified in BillQuick. For example, if you are checking weekly time entries and Monday is the first working day of the week specified in BillQuick, setting the weekly grace hours to 10 will cause BillQuick Agent to perform the first time entry query for the previous week on Monday morning at 10 AM.

Work Days and Hours:
This section displays the Daily Hours for each working day. You can modify these hours to be able to apply them to the other employee. For example, employee AA works for 8 hours each working day. You can change it to 6 hours on Monday for the employee to which these settings are being applied.

Copy Work Day Hours and Monitor Settings To

After making your selection and modifying the settings, the requirements or rules assigned for that employee appear in this section. Here you choose to apply the above rules and settings to either an Employee or an Employee Group.

Apply to this (Employee):
Choose this option to apply the time entry settings to an employee selected from the adjacent drop-down list.

Apply to this (Employee Group):
Choose this option to apply the time entry settings to an employee group selected from the adjacent drop-down list.

Time entries are automatically queried after the *Next Monitoring in* counter reads 00:00. You can also manually force a time entry query by clicking the **Notify** button in the BillQuick Agent button panel.

Copy Time Entry Monitoring Settings Button Panel

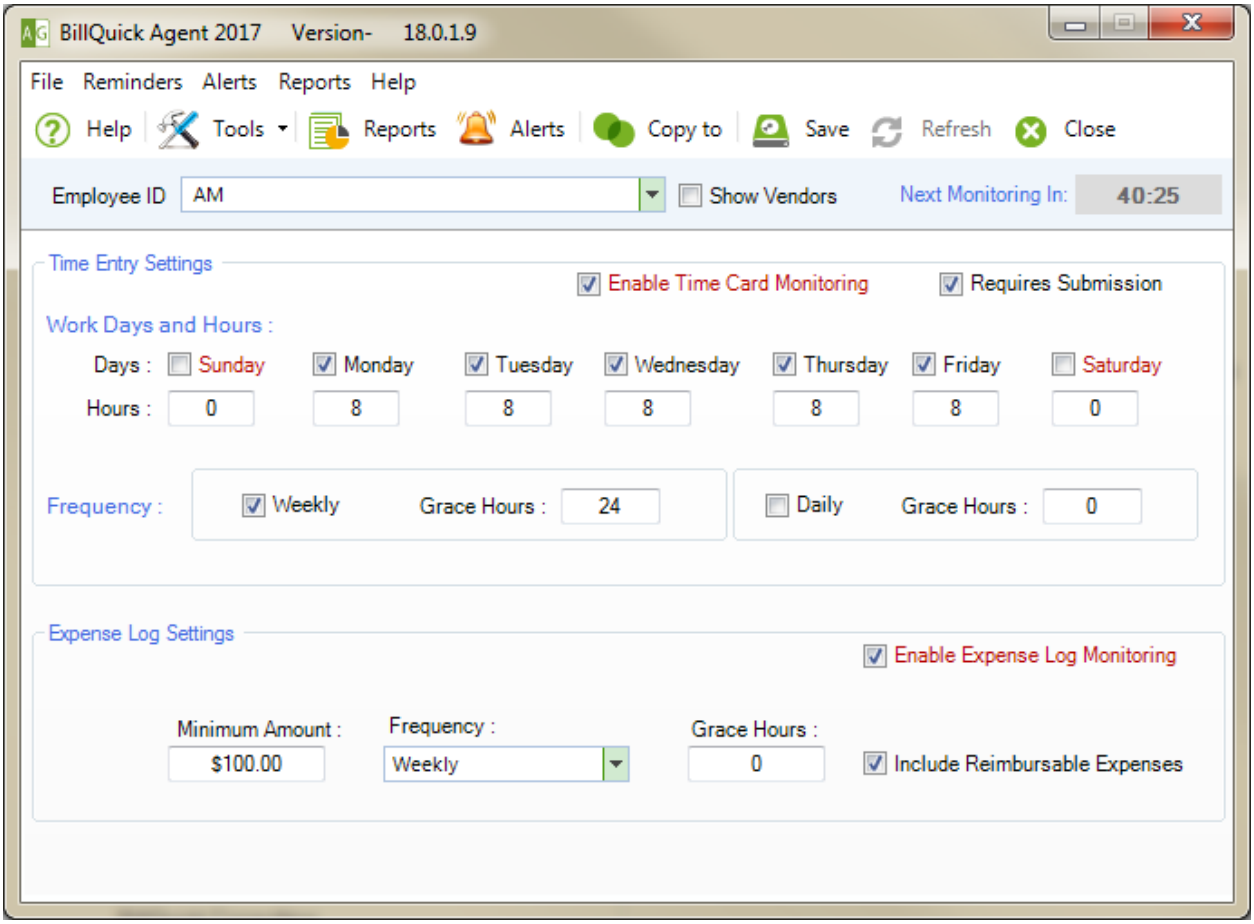
Help:
Opens the help file of BillQuick Agent.

Apply:
Click this button to apply the settings and save data successfully.

Close:
Click this button to close the BillQuick Agent rules screen to return to the main BillQuick Agent screen.

TIME AND EXPENSE SETTINGS

In the Time and Expense Settings screen, you can configure your time and expense entry settings, enabling Agent to accordingly perform the monitoring task for you. The time entry of each employee or vendor in your BillQuick database can be queried on weekly and daily basis. Expense entries, however, are queried on daily, weekly, biweekly or monthly basis. You can set the required hours or expense amount for each employee on this screen.



Employee ID:
Select the employee or vendor whose time and expense entry settings need to be modified or viewed from the drop-down list.

Show Vendors:
Select this option to include vendors in the Employee ID drop-down list. Subcontractors or vendors are designated with Type in the *Employee ID* drop-down.

Next Monitoring in:
Time and expense entries are automatically queried after this field displays 00:00. You can also manually force a time or expense entry query by clicking the **Notify** button in the BillQuick Agent button panel.

Time Entry Settings

Enable Time Card Monitoring:
Select this check box to have BillQuick Agent monitor time entry activity for the selected employee or vendor.

Requires Submission:
Select this check box to have BillQuick Agent notify the employees about their saved but un-submitted time entries. This option allows the selected employee to receive an email notification to remind that the time entry needs to be submitted. By default, this option is checked.

Work Days and Hours:
All employees are assigned with their own working days. Select the check boxes for the days the employee works. The time entry query is only performed on the selected days. Enter the number of hours of work to be done on each day. The number of hours of work set for an employee or vendor in Agent is compared against the Actual Hours (A-Hours) entered by that employee or vendor in BillQuick.

Non-working days display in red.

Frequency

Set the frequency for checking the employee's time entry here. You can select weekly, daily or both.

Weekly:
Select this check box if the selected employee enters time on a weekly basis. In the adjacent *Grace Hours* field, you enter the number of hours that Agent waits before it starts querying BillQuick database for the time entries made by you.

The *weekly grace hours* begin from midnight of the night before the first working day of your time period specified in BillQuick. For example, if you are checking weekly time entries and Monday is the first working day of the week specified in BillQuick, setting the weekly grace hours to 10 will cause BillQuick Agent to perform the first time entry query for the previous week on Monday morning at 10 AM.

Daily:
Select this check box if the selected employee enters time on a daily basis. In the adjacent *Grace Hours* field, you enter the number of hours to make the Agent wait before it starts querying BillQuick database for the time entries made by you.

The *daily grace hours* begin counting from midnight of the night before the next working day. For example, if you are checking daily time entries and today is Monday, setting the daily grace hours to 5 will cause BillQuick Agent to perform the first time entry query for the previous working day on Monday at 5 AM.

Expense Log Settings

Enable Expense Log Monitoring:
Select this check box to have BillQuick Agent monitor expense entries for the selected employee or vendor against *Minimum Amount* set for that employee or vendor.

Minimum Amount:
Here you can specify the minimum amount of expense that an employee or a vendor should incur during a particular period of time set by you.

Frequency:

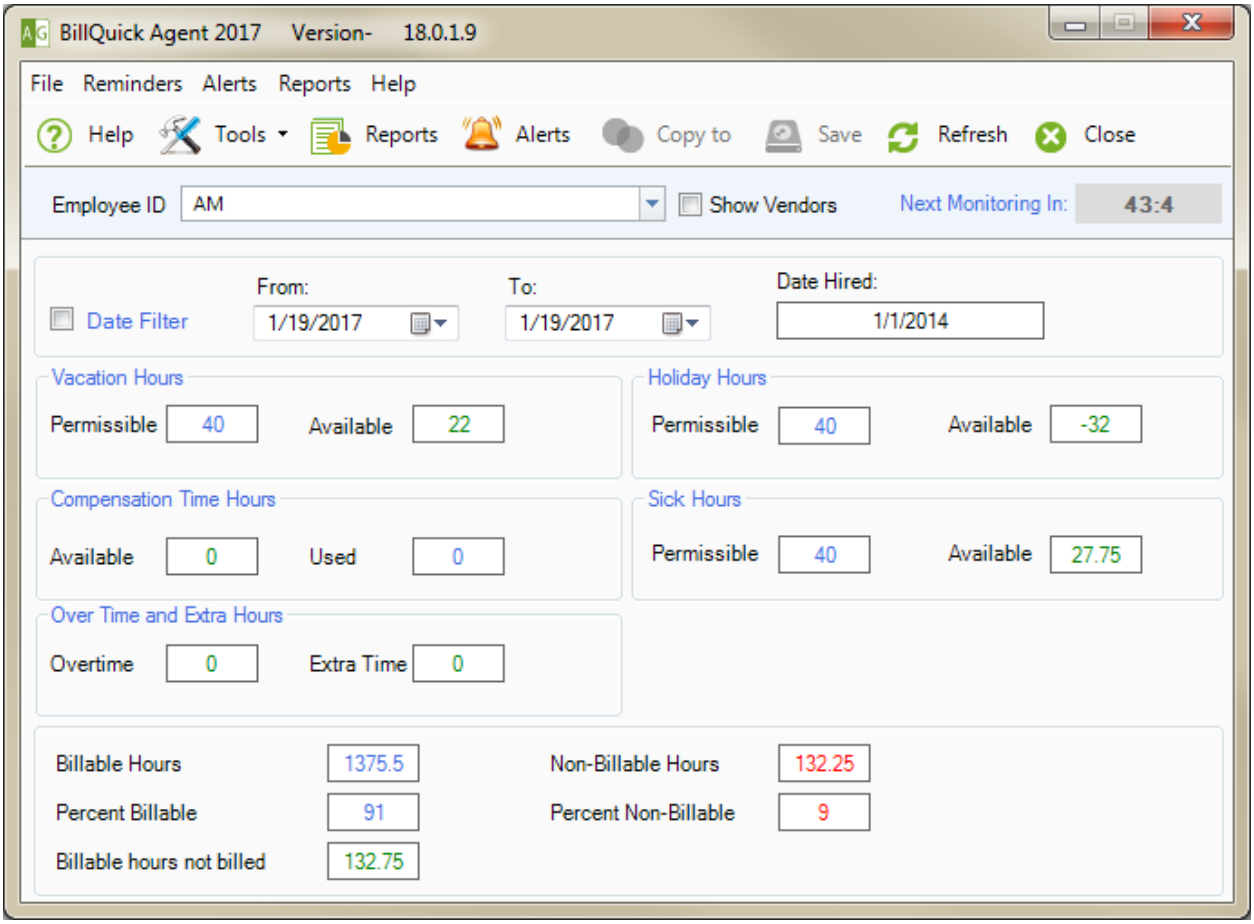
- Select *Daily* from the Frequency list if the expenses entered in BillQuick by the selected employee has to be monitored on a daily basis.
- Select *Weekly* from the Frequency list if the expenses entered in BillQuick by the selected employee has to be monitored on weekly basis.
- Select *Biweekly* option from the Frequency list if the expenses entered in BillQuick by the selected employee has to be monitored on biweekly basis.
- Select *Monthly* from the Frequency list if the expenses entered in BillQuick by the selected employee has to be monitored on monthly basis.

Grace Hours:
Grace hours begin from midnight of the night before the next working day. Employees would be alerted if their expense entries in BillQuick are falling short of the *Minimum Amount* set in Agent as soon as the grace hours are over.

Include Reimbursable Expense:
Select this check box if the minimum expense for an employee or vendor in Agent has to include the reimbursable expenses.

EMPLOYEE HOURS

The Employee Hours screen provides useful information about the employee or vendor selected from the Employee ID drop-down list for the human resource manager. You can track information such as an employee's or vendor's vacation or sick hours, compensation and overtime hours. An employee's billable and non-billable hours can also be tracked.



Date Filter (From and To):
Date Filter is used to filter the totals based on the dates selected in the *From* and *To* drop-down lists. After selecting the *Date Filter* check box and specifying the From and to dates, click **Refresh** on the Main Toolbar button to apply the date filters.

The totals displayed are restricted to the date filter only when the Date Filter check box is selected.

Date Hired:
This field displays the date when the employee was hired. This date is pulled from the Date Hired field provided in the BillQuick Employee or Vendor screen.

Vacation/Holiday/Sick Hours:
These fields display the permissible and available totals for each employee's vacation hours, holiday hours and sick hours.
The hours are color coded–Permissible in blue and Available in green. The Permissible values specified here are entered in BillQuick Employee screen. The available number of hours are computed by subtracting the total actual hours entered for vacation (Activity Code = GEN:VAC), holiday (Activity Code = GEN:HOL) and sick (Activity Code = GEN:SICK) from their respective permissible hours.

Compensation Time/Overtime and Extra Hours:
These fields display the available and used totals for compensation time and over (or extra) time. The hours are color coded-Used in **blue** and Available in **green**. These hours are computed from the time entries in BillQuick with the CT, OT, and XT check boxes selected.

Billable/Non-Billable Hours:
It displays the total billable hours, non-billable hours and billable hours that have not been billed. Billable Hours are the total hours that are marked billable. Non-Billable Hours are the total B-Hours that are marked non-billable while Billable hours that have not been billed are the total billable hours that have not yet been processed on an invoice (this is a subset of the Billable Hours defined above).

The hours are color-coded: Billable Hours in **blue**, Non-Billable Hours in **red** and Unbilled Billable hours in **green**.

Percent Billable/Non-Billable:
These fields display the billable and non-billable hours in percentage format.

Billable Hours Not Billed:
This field displays the employee's or vendor's un-billed hours.

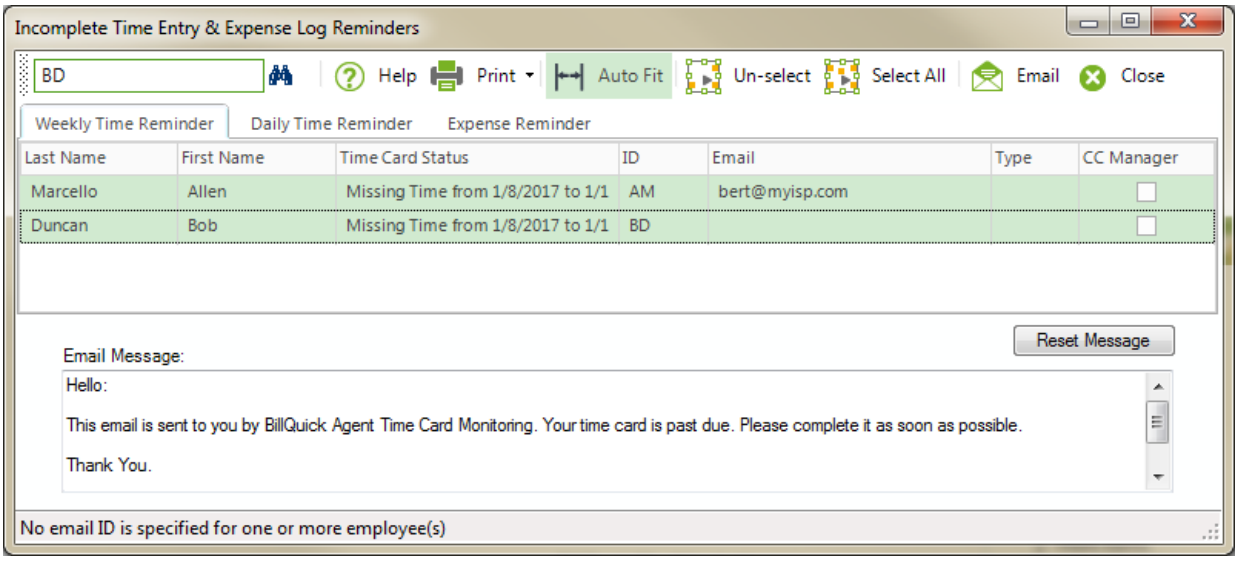
INCOMPLETE TIME ENTRY & EXPENSE LOG REMINDERS

Incomplete Time Entry & Expense Log Reminders screen displays relevant information about employees who have not made their time or expense entries according to the specified settings. When the time or expense entry is queried, BillQuick Agent checks to see that each of the selected employees and vendors have fulfilled their time and expense entry requirements. If they have, then BillQuick Agent does not generate an on screen report. If not, employees that are short of their required hours and expenses are displayed on an on-screen report. You can also easily email selected employee's time and expense entry reminders to them and to their managers.

You can manually force a time and expense entry query or notification by selecting Tools > Notify on the main toolbar of BillQuick Agent.

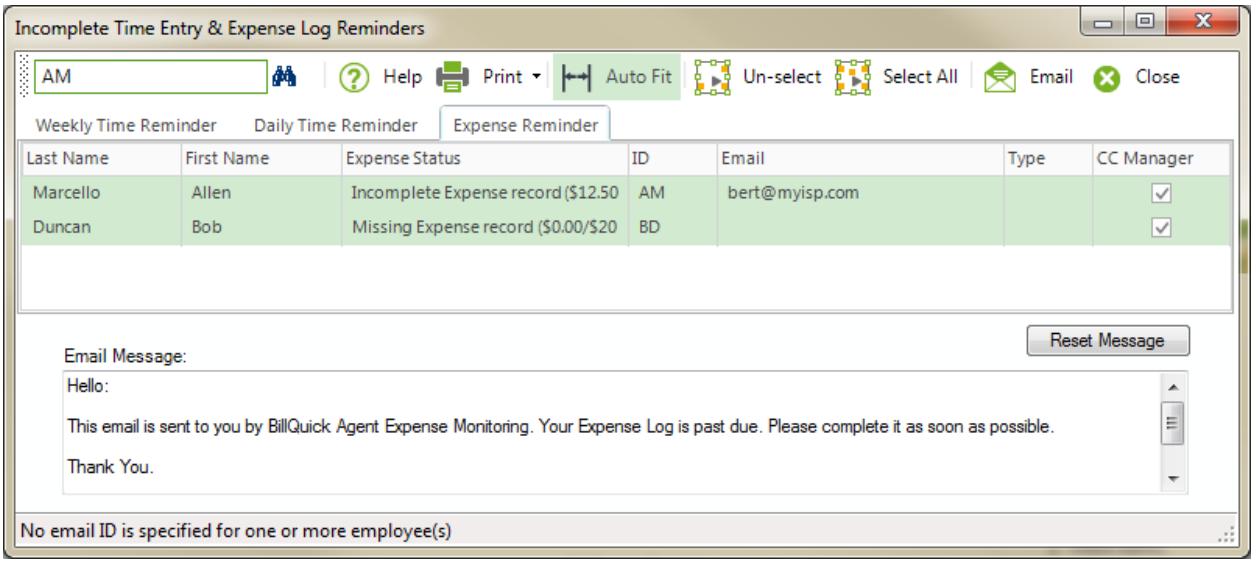
Weekly/Daily Time Reminder

This grid lists the employees who have not completed their time entries. For time entry notifications, the list of employees is put in two categories based on the frequency–weekly or daily reminders. The grid displays the employee details along with the time card status. You can scroll down to see the entire list of employees.



Expense Reminder

This *Expense Reminder* grid lists employees who have not recorded their expense entries to meet the minimum expense requirement stipulated for them in BillQuick Agent. The grid displays employee details along with the expense status. You can scroll down to see the entire list of employees.



Last Name:
Displays the employee's last name who is to be alerted of the incomplete or missing time and expense sheet.

First Name:
Displays the employee's last name who is to be alerted of the incomplete or missing time and expense sheet.

Time Card Status/Expense Status:
This is where you see the status and details about your time and expense entries. You can see whether your time and expense details are incomplete or missing based on the time interval set for you in BillQuick Agent.

ID:
Displays the employee's ID who is to be alerted about the incomplete time or expense sheet.

Email:
You can choose to send email reminders about the incomplete time or expense details to the employees as well. Email address of an employee is fetched from the Employee record in BillQuick.

Type:
This column helps you distinguish between an employee and a vendor (sub-contractor). It displays against a vendor entry.

CC Manager:
Select this check box against an employee or vendor in the grid whose manager should receive the notifications.

Email Message:
BillQuick Agent allows you to send notification emails to employees as well as their managers. This field displays the content of the notification message.

Reset Message:
Allows you to reset the message displayed in the email body. In the Global Settings screen, you can specify the ceiling for the maximum number of email notifications to be sent to an employee in a day.

Incomplete Time Entry & Expense Log Reminders Button Panel

Find:
Click this button to search for any particular employee from the list. Enter the ID or part of name of that employee and click *Find*. The particular employee will be selected in the grid at the bottom of the screen.

Help:
Click this button to open the BillQuick Agent Help.

Print:
It offers two options:

- **Email Tracking:** Opens a report from where you get an exact number of times the email notification has been sent to an employee till date.
- **Print Grid:** Opens the preview screen so that you can preview the time and expense entry notifications report. This report provides details such as the name of the employees, time card or expense status, email, etc. along with incomplete time and expense entries.

Auto Fit:
Click this button to automatically fit all the columns on the screen.

Un-Select:
Click this button to clear all the selected rows.

Select All:
To send an incomplete time or expense entry reminder to all displayed employees click this button before sending the email.

Email:
Click this button to email a time or expense entry reminder to a selected employee.

Close:
Closes the *Incomplete Time Entry and Expense Log Reminders* screen.

How Do I

HOW DO I ENABLE MONITORING?

You can enable time entry monitoring for various employees in the following way:

1. Select Reminders, Time and Expense Settings from the menu bar.
2. Select the employee or vendor whose time entry is to be monitored from the Employee ID drop-down list.
3. Select the Enable Time Card Monitoring check box to enable monitoring for the selected employee.
4. Click Save button.
5. To enable monitoring for more employees at this time, repeat steps 2 through 4.

You can also assign the same settings to other employees from the Copy Time Entry Monitoring Settings screen which can be accessed by clicking the Copy to button on the Agent main toolbar.

Enabling expense log monitoring for various employees can be achieved in the following way:

1. Select Reminders > Time and Expense Settings from the menu bar.
2. Select the employee or vendor whose expense log is to be monitored from the Employee ID drop-down list.
3. Select the Enable Expense Log Monitoring check box to enable monitoring for the selected employee.
4. Click Save button.
5. To enable monitoring for more employees, repeat steps 2 through 4.

HOW DO I CHECK WORKING DAYS & HOURS?

BillQuick Agent monitors the employee's time entries according to the working days and working hours per day specified in the Time and Expense Settings screen.

You can check the working days and hours in the following way:

1. Select Reminders > Time and Expense Settings on the menu bar.
2. Select the employee or vendor whose time entries are to be monitored from the Employee ID drop-down list.
3. Select the Enable Time Card Monitoring check box to enable monitoring for the selected employee.
4. In the Work Days and Hours section, check the work days for which the time card monitoring is to be done and enter the number of hours for which an employee needs to work each day.
5. Click Save button.
6. To check work days and hours for more employees at this time repeat steps 2 through 5.

You can also assign the same settings to other employees in the Copy Time Entry Monitoring Settings screen which can be accessed by clicking the Copy To button on the Agent main toolbar.

HOW DO I SET MONITORING FREQUENCY?

You can set the frequency that how often the employee's time card or expense log will be monitored in the following way:

1. Select Reminders, Time and Expense Settings from the menu bar.
2. Select an employee from the Employee ID drop-down list.
3. Go to the Frequency field. Check the option Weekly or Daily or both.
4. Enter the number of hours in the Weekly Grace Hours and Daily Grace Hours.
5. When you have finished, click Save.

You can also assign the same settings to other employees in the Copy Time Entry Monitoring Settings screen which can be accessed by clicking the *Copy to* button on the Main toolbar.

Follow the same procedure to set the frequency for Expense Log Monitoring as well. With Expense Log Monitoring, you can additionally opt for Biweekly and Monthly frequencies.

HOW DO I EMAIL TIME & EXPENSE ENTRY NOTIFICATIONS?

BillQuick Agent monitors the time and expense details of employees. This can be set up to send email notifications to the employees with incomplete time sheet or expense log.

Do the following to set up Agent to automatically email time entry notifications:

1. Open the Global Settings screen.

2. To set a certain recurring interval after which your company file should be monitored for incomplete time entries, enter the number of minutes in *Monitor my Company File every. . .minutes* field.
3. Select the Send Past Due Notification via email check box to send the email to the employees when their time card is incomplete.
4. Select the *Send a Copy of Email to Employee Manager as Well* check box if you want to send the email to an employee's manager for incomplete or missing time cards. When selected, it automatically marks the above check box as well.
5. Select Reminders > Time and Expense Setting*s* from the menu bar.
6. Select an employee from the Employee ID drop-down list.
7. Select the *Enable Time Card Monitoring* check box to enable monitoring for the selected employee.
8. Click *Save*.

Follow the same steps to let Agent automatically email expense entry notifications to your employees or vendors and their managers as well.

APPLICATION SETTINGS

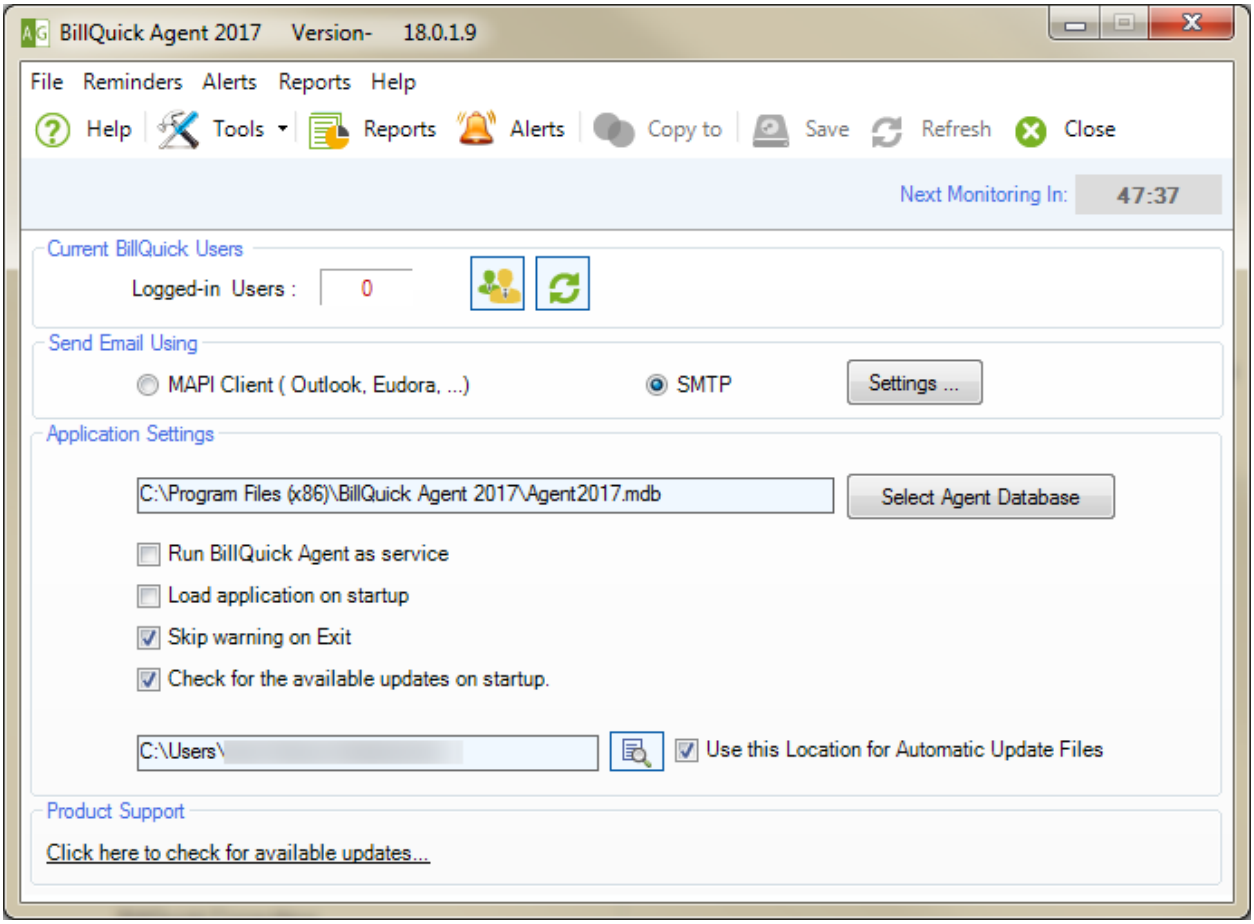
APPLICATION SETTINGS OVERVIEW

BillQuick Agent program settings are used to configure a variety of options. In the Application Settings screen, you will set up the appropriate email MAPI or SMTP settings so that you can email notifications directly from Agent. You will specify whether Agent will run as a service on your system or open upon startup. To keep the BillQuick Agent program updated, you can set it up to automatically check for updates. You can view the number of users currently logged in to BillQuick via Application Info screen. Lastly, to locate your Agent database stored locally or on a shared server, you have the *Select Agent Database option* as well.

Reference

APPLICATION SETTINGS

The following provides information on the various BillQuick Agent settings. It contains various useful links and program settings.



Current BillQuick Users

Logged-in Users:
This field displays the number of people currently logged into BillQuick.

BillQuick Users:
When at least one user is logged in to BillQuick, clicking this button displays a list, showing the IDs and names of the currently logged in users.

Select AFC (Auto Fit Columns) to fit the column to the data displayed.

Refresh:
Click this button to update the value in the *Logged-in Users* field.

Send Email Using

Here you specify how you would like to send emails through your program:

The user can specify how to receive emails from Agent, either by using MAPI or SMTP. In case SMTP is chosen, the user can specify the mail server and authentication options by clicking on the *SMTP Email Settings*.

Your choice of **SMTP** or **MAPI** will affect both your time and expense entry notifications as well as the report delivery. Therefore, when selecting this option, make sure you have carefully defined your settings (for example, given the user name and password where required).

MAPI Client:
You should choose MAPI when you want Agent to use your email client, for example, Microsoft® Outlook or Eudora® to save a copy of the sent email in its Sent Items folder. However, note that even though it is easier to use, and doesn't need extra setup if MAPI is configured on your machine; MAPI works differently on different email clients. In addition, if you are using Outlook Express 5.0 or above, you need to manually turn on MAPI in the settings.

SMTP:
SMTP on the other hand is completely independent of the email client that you use (you can still send and receive emails using your email client). You need to set up the mail settings once on the server.

Choose SMTP settings if you want to run Agent as a service.

If you choose to select SMTP, click Settings ... to specify your server name (for example, mail.bqe.com), user name, password and email address from which to send the email, and click **Apply** button. You can also specify advanced SMTP settings, and specify SMTP authentication options.

Application Settings

Here you specify the various settings for your BillQuick Agent.

Select Agent Database:
Click this to locate your Agent database, which can be stored locally or on a shared server in a network environment.

Run BillQuick Agent as Service:
Select this check box to run the BillQuick Agent as a service. This feature allows you to run Agent in the background, sending emails to selected recipients according to your settings.

You must exit Agent to be able to run it as a service. After you exit, you cannot edit or change settings for the service started, unless you run the Agent program again. You cannot run the Agent program and Agent service at the same time.

Load Application on Startup:
Select this check box to have BillQuick Agent program to load, on starting your computer system by default.

You cannot run Agent program and Agent service at the same time. In order to run BillQuick Agent on startup, clear the **Run Agent as Service** option first.

Skip Warning on Exit:
Select this option if you do not want BillQuick Agent to display warnings or confirmation prompts upon closing the program.

Check for the Available Updates on Startup:
Select this check box to have Agent check for the latest program updates on startup.

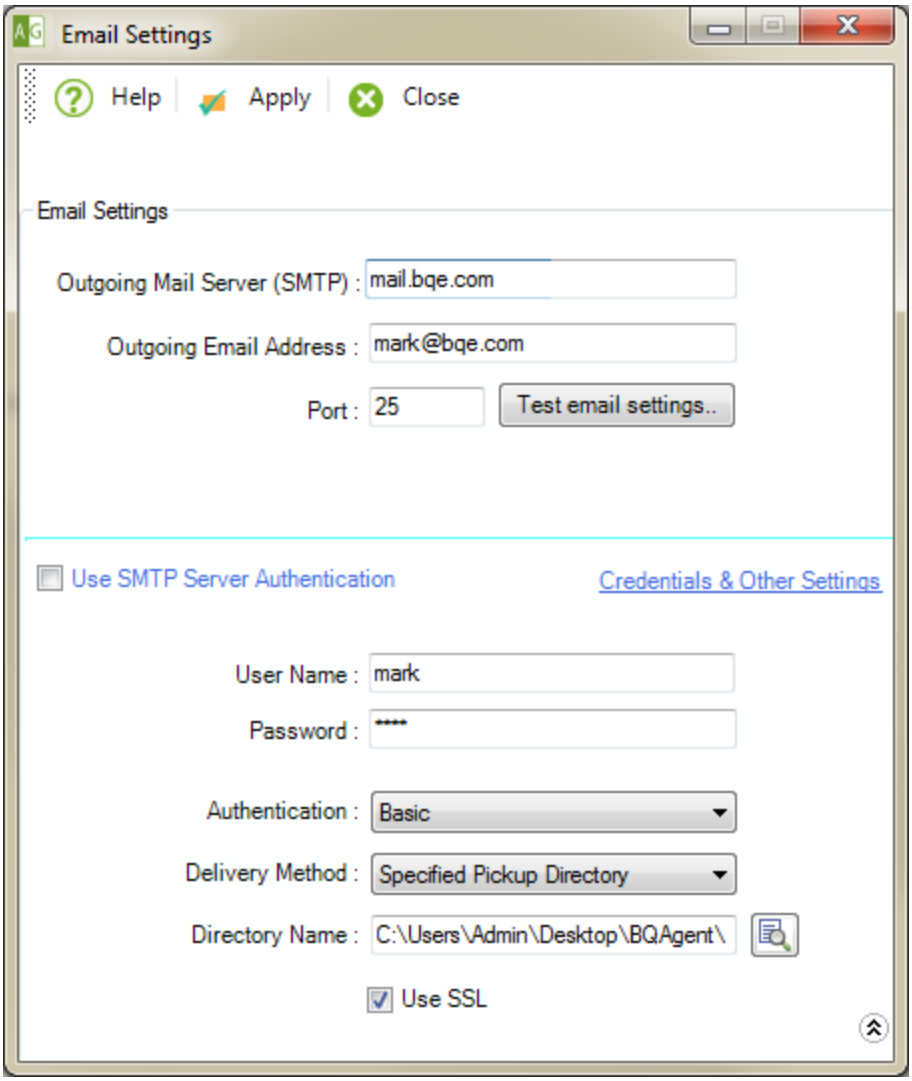
Use this Location for Automatic Update Files:
You can also specify the location to save the update files to, by clicking on the Browse button.

Product Support

Click the relevant links –to register BillQuick Agent or check for available updates.

EMAIL SETTINGS

Available from the Application Settings screen and Startup Wizard, the Email Settings screen allows you to specify the SMTP email settings.



Email Settings

Outgoing Mail Server (SMTP):
Specify the SMTP (Simple Mail Transfer Protocol) mail server name for sending emails in this field. SMTP is a relatively simple, text-based protocol, which can be used to send a message to one or more recipients specified, along with the message text (for example, for Gmail we use smtp.gmail.com).

Outgoing Email Address:
Enter the Outgoing Email Address used for sending mails.

Port:
Enter the SMTP Server Port number used for outgoing mails. The SMTP client initiates a TCP connection to the server's port 25. However, some servers can have their own configurations (for example, Gmail uses SMTP port number 465).

Test email settings:
After filling all the necessary information on this screen, click this button to test your email settings. If the information given is correct, the message will pop up on your screen and a

test email will be sent to your email account. Else, you will be prompted to enter the correct details.

Credentials & Other Settings

Use SMTP Server Authentication:
Select this check box to apply the server authentication settings which are chosen using the options available. By choosing SMTP Server Authentication, you control how and who is able to send emails.

User Name:
Specify the user name for the SMTP mail server being used in this field.

Password:
Enter the password for the SMTP mail server being used in this field. User Name and Password are used for authentication, if the authentication mode is not anonymous. This authenticates the user before sending the mail.

Authentication:
Select an authentication method from this drop-down list.

- **Anonymous** –When using this authentication method there is no way to verify the sender.
- **Basic** –This authentication method allows clear text user names and passwords for authentication.
- **NTLM** –Also known as Integrated Windows Authentication, this method only works in configurations where the client computer can contact a domain computer to validate their credentials. In most firewall configurations, it is not possible. There are also other options that the user can choose based on the requirements of the company.

Delivery Method:
Select a delivery method from this drop-down list.

- **Network** –If selected, email files are sent directly through the network.
- **Specified Pickup Directory**–If selected, email files are delivered to the specified directory location.
- **Pick from IIS**–If selected, email files are dropped in the default location where IIS looks for emails.

Directory Name:
If *Specified Pickup Directory* is selected as the Delivery Method, then the path to the Directory Name needs to be specified in this field.

Use SSL:
Select this check box to protect the confidentiality and security of data being transmitted between your email program and the servers. SSL stands for Secure Sockets Layer.

Email Settings Button Panel

Help:
Click this button to open the BillQuick Agent Help.

Apply:
Click to apply the specified sever settings.

Close:
Click to close this screen.

In order to configure Agent for Office 365, follow these steps: Configuring Office 365 to use SMTP.

How Do I

HOW DO I SPECIFY SMTP EMAIL SETTINGS?

Firms using an SMTP server for outgoing email can either configure the settings during the Startup Interview or after the interview. If you did not configure the SMTP email settings during the Startup Interview, do the following to specify the settings:

1. On the Agent menu bar, select File > Application Settings.
2. In the Send Email Using section, click the SMTP Email Settings button.
3. In the Email Settings screen, enter the relevant Outgoing Mail Server (SMTP) name for sending mails.
4. Also enter the Outgoing Email Address, which is used for sending mails.
5. Enter a port number for the SMTP Server.
6. If you want to apply the server authentication settings click Advanced Settings and then select the Use SMTP Server Authentication check box. If you do not need to apply authentication settings, skip to Step 10.
7. For authentication, you have to specify the relevant User Name and Password for the mail server being used.
8. Select the mode of Authentication and Delivery Method from their respective drop-downs. If you select Specified Pickup Directory as the Delivery Method, you have to specify the Directory Name.
9. Mark the Use SSL box, if you want to protect the confidentiality and security of data being transmitted between your email program and the servers. SSL stands for Secure Sockets Layer.
10. Before you apply the specified settings, click Test Email Settings button to verify the email settings for correctness.
11. Click the Apply button to apply the server settings as specified.

HOW DO I ENABLE AGENT AS A SERVICE?

BillQuick Agent can be setup to load when Windows starts or it can be configured to run as a Windows service. Running BillQuick Agent as a Windows service will email incomplete or missing time or expense entry notifications, alerts and scheduled reports to the intended recipients.

Do the following to set up Agent as a service:

1. On the Agent menu bar, select File > Application Settings.

2. In the Send Email Using section, click the SMTP Email Settings and fill in the required information for SMTP settings.
3. In the Application Settings section, select the 'Run BillQuick Agent as Service' check box**.** Click OK on the confirmation message.
4. Click *Close* button to quit the program.

You cannot run Agent program and Agent service at the same time. The *Load Application on Startup* option is automatically cleared when you select the *Run BillQuick Agent as Service* check box.

ALERTS

ALERTS OVERVIEW

Agent Alert is an intelligent monitoring alert tool that automatically monitors your company database and triggers alerts based on some predefined and customized conditions (for example, Project is over budget). You can create, edit and specify conditions under which alerts are generated by using Boolean operators. Alerts can also be set up to display for specific records based on criteria such as project start date, client, project and employee.

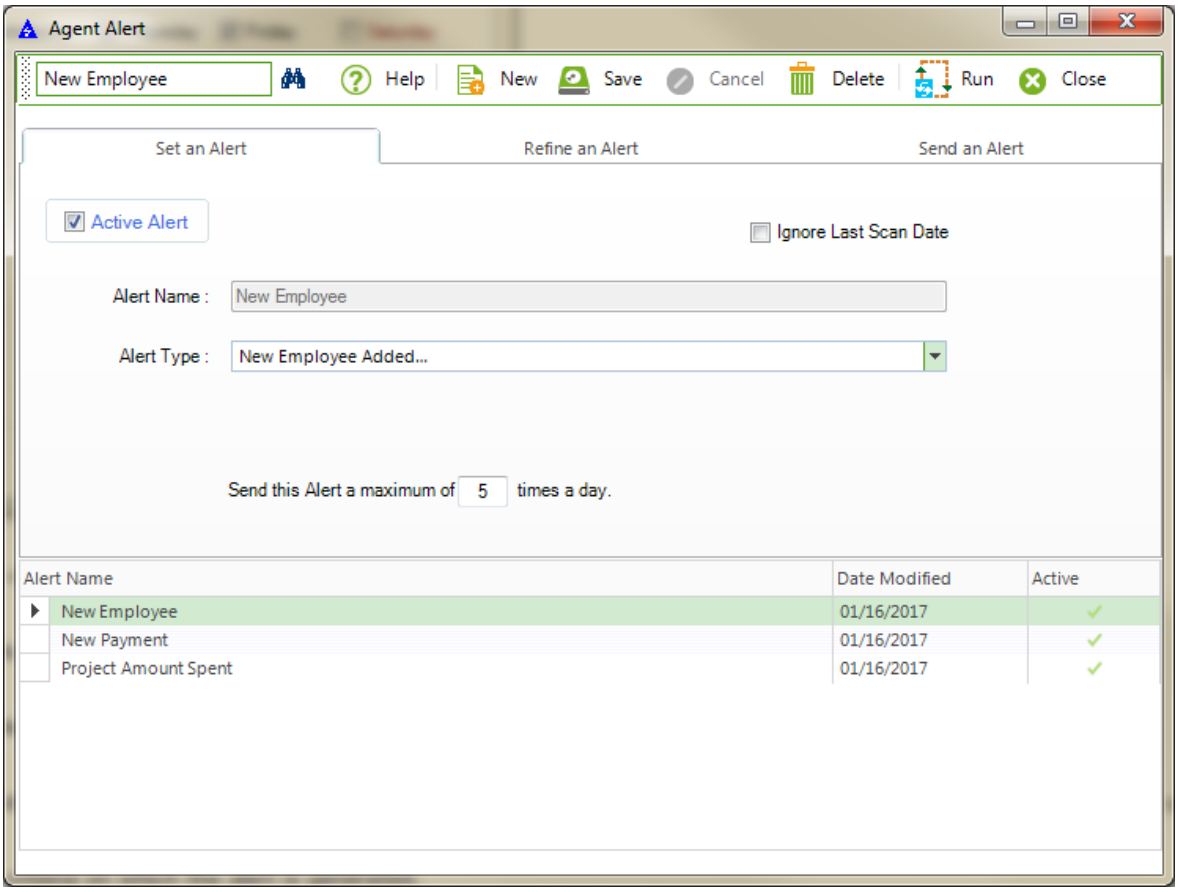
You can specify the time interval for the alerts to remain active on your screen and control the frequency of your alerts in a day. In addition, alerts can be set up to display on screen, be emailed to specified groups or individuals or both.

To access the Agent Alert screen, click the **Alerts** button on the main toolbar. This screen has three tabs: Set an Alert, Refine an Alert and Send an Alert.

Reference

SET AN ALERT TAB

The *Set an Alert* tab on the Agent Alert screen is used to create alerts, modify their condition controlling when they display, and control how often they are emailed or displayed on-screen.



Active Alert:
This check box is selected if the alert is considered active and functioning. Clear this check box to disable a selected alert.

Ignore Last Scan Date:
Select this check box to ignore the last date on which the scan has been performed thereby, sends the alert regardless of the last scan.

Alert Name:
Enter the name of your alert in this field. The name could be a title, keyword or phrase which enables you to identify the alert.

Alert Type:
Select an alert type from this drop-down list. There are several different alert types that you can define and specify to meet your needs. You cannot change the type of an existing alert and hence this field is unavailable then.

Where:
Select a Boolean condition (>, <, <=, >=, =) from this drop-down list and enter a value to set the criteria on which the alert is generated.

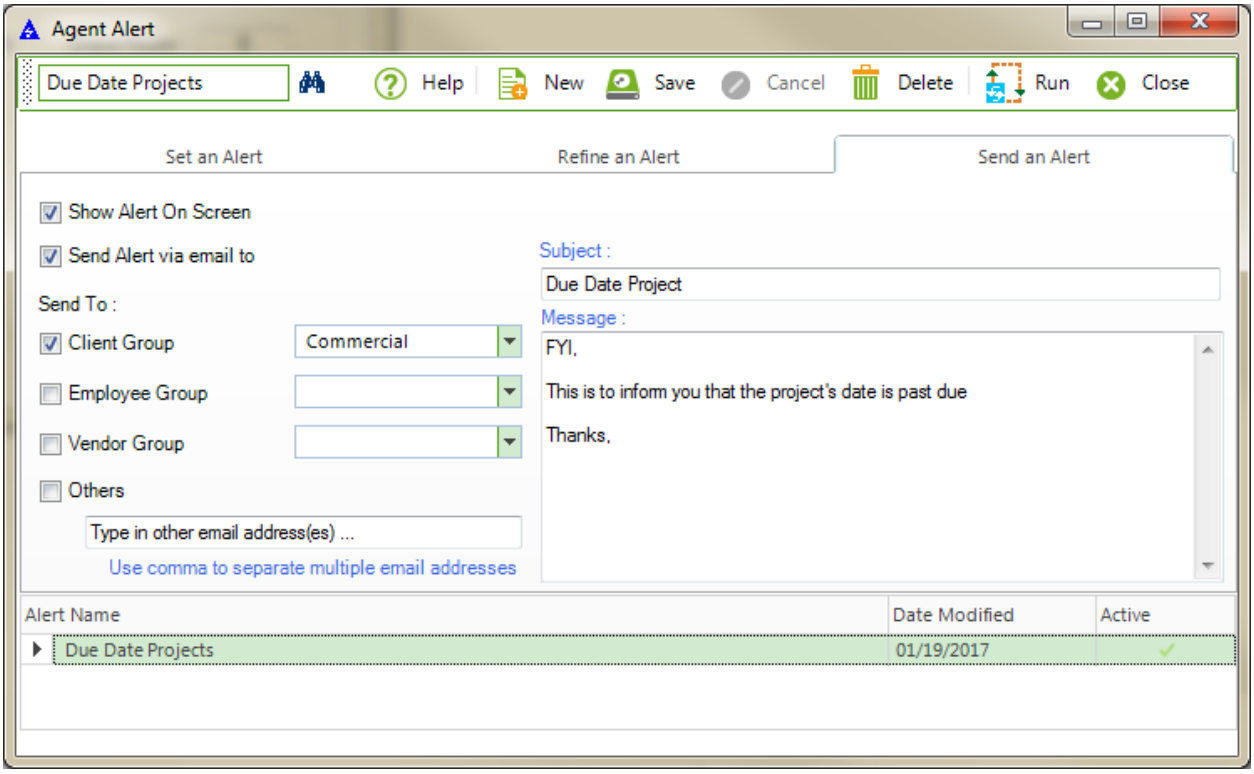
This field is visible for some alert types. For example if you choose 'When project amount spent is. . .', you can select logical operators from the *Where* drop-down list and specify a limit value (for example, When project amount spent is > 1000).

Send this Alert a maximum of. . .times a day:
Enter a value in this field to specify the number of times a day an alert will be sent.

SEND AN ALERT TAB

The following information details the options on the *Send an Alert* tab. Use the options on this tab to specify how you want alerts to be communicated. You can choose to show the alerts on the screen or send them by email. In addition, you can set the timer for your on-screen alerts.

If you choose to email an alert, you can send it to a selected group (for example, Client, Employee or Vendor), or you can send the alert to specific people by entering their individual addresses.



Show Alert on Screen:
Select this check box to have alerts displayed on-screen.

Send Alert via email to:
This check box is selected when one of the *Send To* check boxes is selected (for example, Client Group or Employee Group).

Send To:
Use the options in this section to specify groups or individuals that will be emailed alert notifications.

- **Client Group**–Select this check box to email alerts to a client group selected in the adjacent drop-down list.
- **Employee Group**–Select this check box to email alerts to an employee group selected in the adjacent drop-down list.
- **Vendor Group**–Select this check box to email alerts to a vendor group selected in the adjacent drop-down list.
- **Others**–Select this check box to email alerts to individuals. Enter their email addresses in the adjacent text-box. Separate each address with a comma.

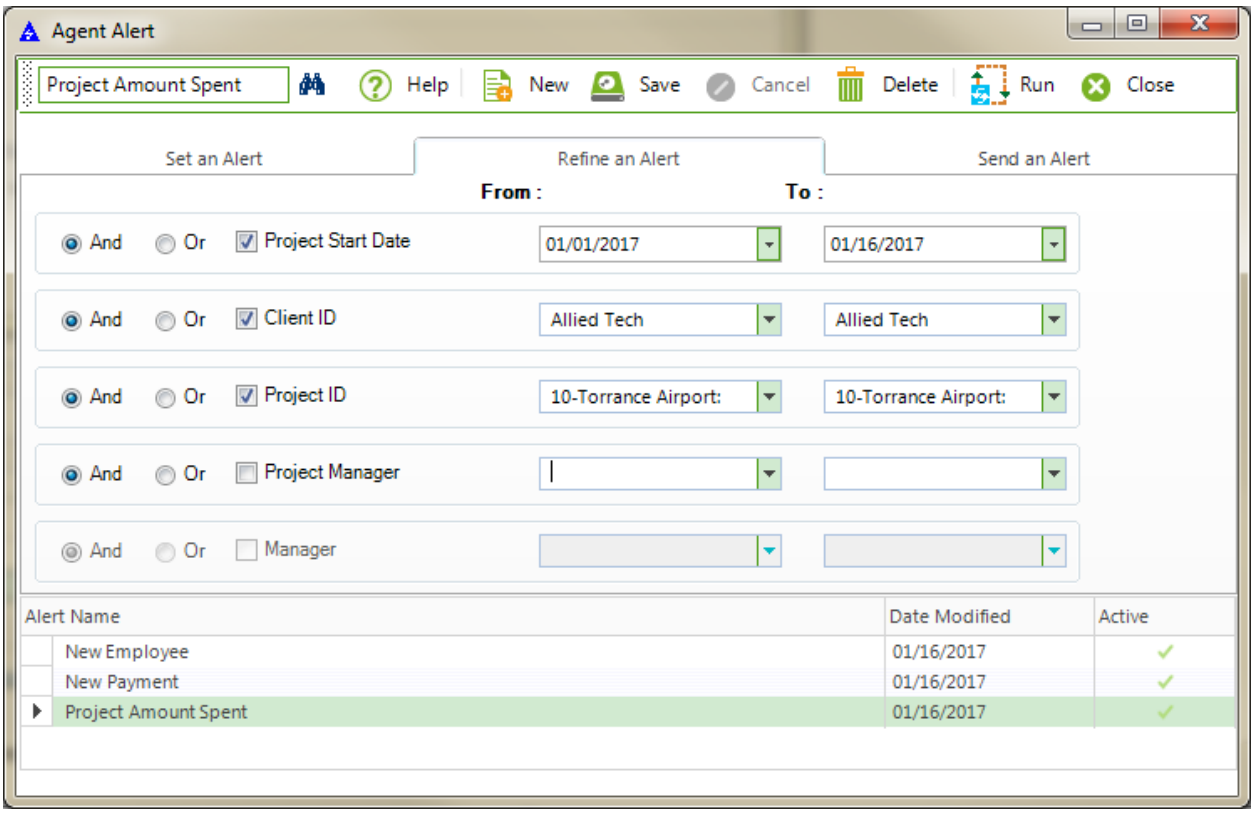
Subject:
Enter a subject line to be displayed in the email alert.

Message:
Enter a default message to be sent in the email alert.

The grid displays a list of alerts, date modified and the status (whether active or not) of the alert.

REFINE AN ALERT TAB

The *Refine an Alert* tab on the Agent Alert screen is used to establish the criteria that determine what records in your company database are used to generate alerts. It provides various filters and operators (that is, AND/OR) to narrow down the records that are checked by the alerts.



And/Or:
Select the AND and OR operators for the selected filters to narrow or broaden the data search. AND narrows the search for records that match the first filter and any filters with an AND. This is referred to as an 'intersection of data'. OR broadens the search by pulling in records that match one or more of the filters with an OR. This is referred to as 'union of data'. For example, if you search for a range of employee IDs AND a range of project IDs, only those records which match both filters are selected. As a result, few records are selected. In contrast, OR retrieves records that contains one or both filter ranges, resulting in more records being included.

Filters:
Select the desired filters (for example, Client ID, Time Entry Date, etc.) to restrict the number of records on which the alert is based. The filters vary by alert type.

From/To:
Use these drop-down lists to specify the range to use for each filter (for example, a range of dates, project, clients, etc.).

ALERT TYPES

When setting an alert, you can specify any of the following alert types:

When Project Amount Spent is. . .

Use this alert to keep track on the amount of money spent on a particular project (that is, sum of billable and non-billable time entries and non-billable expenses). For example, The Alert Type selected is "When Project Amount Spent" is ">" and the value is "1000". An alert will be generated when the project amount spent in BillQuick exceeds 1000. Using the Send Settings, you can specify whom to send the alert, and how to display the alert (via email or alert on screen). In the *Refine an Alert* tab, use the various filters to specify the alert for a particular project.

When Project % Complete is. . .

Use this alert to keep track of the progress on a project. For example, The Alert Type selected is "When Project % Complete" is ">" and the value is "20". An alert will be generated when the project's percent complete in BillQuick exceeds 20. Using the *Send an Alert* settings, you can specify whom to send the alert, and how to display the alert (via email or alert on screen). In the *Refine an Alert* tab, use the various filters to specify the alert for a particular project.

When Project WIP is. . .

Use this alert to keep track of the progress in work on a project. For example, The Alert Type selected is "When Project Work In Progress (WIP)" is ">" and the value is "20". An Alert is generated when total of unbilled billable service amount and expense amount is > 20.Using the Send an Alert settings, you can specify whom to send the alert, and how to display the alert (via email or alert on screen). In the *Refine an Alert* tab, use the various filters to specify the alert for a particular project.

When Employee Compensation Hours are. . .

Use this alert to keep track of an employee or employees compensation hours. For instance, the Alert Type selected is "When Employee Compensation Hours" are ">=" and the value is "20". An alert will be generated when the total number of compensation hours for an employee exceeds or equals 20. Using the Send an Alert settings, you can specify whom to send the alert, and how to display the alert (via email or alert on screen). In the *Refine an Alert* tab, use the various filters to specify the alert for a particular time frame, and for one or more employees, or employee managers.

When Expenses are Submitted for Approval. . .

When Expense entries are made and submitted for approval, the user might want to keep track of this. For example, The Alert Type selected is "When Expenses are submitted for Approval". An alert will be generated when expenses are submitted for approval by an employee to any other employee or manager. Using the Send an Alert settings, you can specify whom to send the alert to, and how to display the alert (via email or alert on

screen). In the *Refine an Alert* tab, use the various filters to specify the alert to be generated for a particular time frame, Client, Project, Employee or Project Manager.

When Employee Vacation Hours > Permissible Hours. . .

You might want to be notified when employee's Vacation Hours exceed the Permissible Hours (which are specified in BillQuick in the Employee screen), for a particular employee or for a particular time frame (specified using the Refine an Alert tab). For example, The Alert Type selected is "When Employee Vacation Hours > Permissible Hours". An alert will be generated when the total number of Vacation Hours of an employee exceeds the permissible hours specified in the BillQuick Employee screen in the Detail tab. Using this alert, you will be notified when this happens, depending on your settings set in the *Send an Alert* settings tab. The permissible hours can also be viewed from the Employee Hours tab of the Agent screen.

When Employee Sick Hours > Permissible Hours. . .

You might want to be notified when an employee's Sick Hours (which are specified in BillQuick in the Employee Screen) exceed the Permissible Hours, for a particular employee, or for a particular time frame (specified using the *Refine an Alert* tab). For example, The Alert Type selected is "When Employee Sick Hours > Permissible Hours". An alert will be generated when the total number of Sick Hours of an employee exceeds the permissible hours specified in the BillQuick Employee screen in the Detail tab. Using this alert, you will be notified when this happens, depending on your settings set in the *Send an Alert s*ettings tab. The permissible hours can be viewed from the Employee Hours tab of the Agent screen.

When a New Payment is Received. . .

Use this alert to be notified every time a new payment is received for a particular pay date, client or project (to be specified on *Refine an Alert* tab). For example, The Alert Type selected is "When a New Payment is received". An alert is generated when a new payment is received in BillQuick. Using this alert, you will be notified when this happens, depending on your settings set in the *Send an Alert* settings tab.

When Daily Cash Receipts are. . .

It is quite useful to be able to keep track of the cash receipts made everyday. This alert allows you to notify a user or set of users when daily cash receipts are less, more, or equal to a certain limit that you use. For example, The Alert Type selected is "When Daily Cash receipts" are "<" and the value is "500". An alert will be generated when the cash receipts are less than 500. Using the *Send an Alert* settings, you can specify whom to send the alert, and how to display the alert (via email or alert on screen).

When Credits or Write-offs are Issued. . .

By using this alert you can choose to be notified whenever Credits or Write-offs are issued by your company. This is a useful feature, and you can specify a particular way of being notified in the *Send an Alert* settings tab.

When Project Status is on Hold. . .

Checking the project status is a useful activity in most companies. This alert allows you to be notified when any project is on hold. In the *Send an Alert* settings tab, specify how you would like to be alerted.

When Project is Over Contract Amount...

Use this alert to be notified whenever a project goes over the contract amount (that is, by entering billable time entries and non-billable expenses more than the contract amount specified in the BillQuick Project screen). You can specify the projects you want to keep track of based on the client, project or manager in the *Refine an Alert* tab. For example, The Alert Type selected is "When Project is Over Contract Amount". An alert is generated when the total amount spent (that is, billable time entries and non-billable expenses) on the project exceeds the Contract Amount specified in the BillQuick Project screen. Use the *Send an Alert* settings tab to specify the details of whether to send the alert on screen or as an email and specify the users you want to notify about it.

When Invoice is Unpaid for. . . Days. . .

You might want to keep track of invoices and check if an invoice has been unpaid for a certain number of days. This alert allows you to keep track of this. For example, you can specify, When Invoice is unpaid for >=10 days. You can also specify the client or project for which you want to check the invoices. Use the *Send an Alert* settings tab to specify the details of whether to send the alert on screen or via email and specify the users you want to notify about it.

When Time Entries are Submitted for Approval to. . .

You might want to be notified whenever time entries are submitted to a particular manager, submitted for a particular project or by a particular employee. Use this alert to be notified. The *Refine an Alert* tab allows you to specify whom the time entries would be submitted to, in order to send the alert. In the *Send an Alert* settings tab, specify how would like to be alerted.

When Time Entries are Approved for. . .

Use this alert to be notified every time the time entries are approved for a particular project, employee or when they are approved by a particular manager (specified in *Refine an Alert* tab). Use the *Send an Alert* settings tab to specify the details of whether to send the alert as on screen alert or as an email and specify the users you want to notify.

When Expense Entries are Submitted for Approval to. . .

You might want to be notified whenever expense entries are submitted to a particular manager, for a particular project by a particular employee. Use this alert to be notified. The *Refine an Alert* tab allows you to specify whom the expense entries would be submitted to, in order to send the alert. In the *Send an Alert* settings tab, specify how would you like to be alerted.

When Expense Entries are Approved for. . .

Use this alert, if you want to be notified every time the expense entries are approved for a particular project, employee or when they are approved by a particular manager (specified in *Refine an Alert* tab). Use the *Send an Alert* settings tab to specify the details of whether to send the alert on screen or via email and specify the users you want to notify.

When New Projects are Added. . .

Use this alert, if you want to be notified whenever a new Project is added for a particular client. In *Send an Alert* settings tab, specify how would you like to be alerted. You can choose to get an email or an alert on the screen.

When the Project Due Date is. . .

Keeping track of time is very important when managing projects. You can configure the alert system to notify you about the due dates for projects. For example, you might want to be notified for project's due in a month's time. Use the *Send an Alert* settings tab to choose the set of people you want to be notified and how you would like them to be notified.

When 'Prevent TE/EL' is Activated on a Project. . .

This alert allows you to be notified whenever the *Prevent TE/EL* field (which ensures that no time or expense entries can be made against a project) is selected for a project in BillQuick. Use the *Send an Alert* settings tab to choose the set of people you would want to be notified and how you would like them to be notified.

When Billable Hours are. . .

It is quite useful to be able to keep track of Billable Hours. For instance, the Alert Type selected is "When Billable Hours" are ">" and the value is "8". An alert is generated when the Billable Hours (B-Hours –having the 'B' check box checked in the Time Entry screen in BillQuick) exceeds 8. Use the *Send an Alert* settings tab to specify the details of whether to send the alert on screen or via email and specify the users you want to notify.

New Project Added. . .

Using this alert you can choose to be notified whenever a new project is added for a particular client or project manager (specified in the *Refine an Alert* tab). In the *Send an Alert* settings tab, specify how you would like to be alerted.

New Employee Added. . .

Using this alert you can choose to be notified whenever a new employee is added for a particular client or project manager (specified in the *Refine an Alert* tab). In the *Send an Alert* settings tab, specify how you would like to be alerted.

New Client Added. . .

Using this alert you can choose to be notified whenever a new client is added for a particular project (specified in the *Refine an Alert* tab). In the *Send an Alert* settings tab, specify how you would like to be alerted.

When 25% Service Amount from Contract Amount has been used. . .

Use this alert to be notified whenever 25% or less than 50% of the service amount is used from the contract amount. An alert will be generated when non-extra billable or non-billable time and expense entries worth 25% or less than 50% of the contract amount will be entered in the BillQuick time and expense entry screens. You will be notified when this happens, depending on your settings in the *Send an Alert* screen.

When 50% Service Amount from Contract Amount has been used. . .

Use this alert to be notified whenever 50% or less than 75% of the service amount is used from the contract amount. An alert will be generated when non-extra billable or non-billable time and expense entries worth 50% or less than 75% of the contract amount will be entered in the BillQuick time and expense entry screens. You will be notified when this happens, depending on your settings in the *Send an Alert* screen.

When 75% Service Amount from Contract Amount has been used. . .

Use this alert to be notified whenever 75% or above service amount is used from the contract amount. An alert will be generated when non-extra billable or non-billable time and expense entries worth 75% or above of the contract amount will be entered in the BillQuick time and expense entry screens. You will be notified when this happens, depending on your settings in the *Send an Alert* screen.

When Project Investment is. . .

Use this alert to keep a track of the project investment (Project Investment = WIP + Accounts Receivable - Project Retainer). For instance, the Alert Type selected is "When Project Investment" is "=" and the value is "100". An alert will be generated when the Project Investment, that is, WIP + Account Receivable - Project Retainer will be equal to 100. In the *Send an Alert* tab, you can specify whom to send the alert, and how to display the alert (via email or an alert on screen). In the *Refine an Alert* tab, use the various filters to specify the alert for a particular project.

When Client Investment is. . .

Use this alert to keep a track of the client investment (Client Investment = WIP + Accounts Receivable - Client Retainer). For instance, the Alert Type selected is "When Client Investment" is "=" and the value is "100". An alert will be generated when the Client Investment, that is, WIP + Account Receivable - Project Retainer will be equal to 100. In the *Send an Alert* tab, you can specify whom to send the alert, and how to display the alert (via email or an alert on screen). In the *Refine an Alert* tab, use the various filters to specify the alert for a particular project.

Client Retainer Available. . .

Use this alert to keep a track of the client retainer available. For instance, the Alert Type selected is "Client Retainer Available" is "<" and the value is "100". An alert will be generated when the client retainer available in BillQuick is less than 100. In the *Send an Alert* tab, you can specify whom to send the alert, and how to display the alert (via email or an alert on screen). In the *Refine an Alert* tab, use the various filters to specify the alert for a particular project.

Project Retainer Available. . .

Use this alert to keep a track of the project retainer available. For instance, the Alert Type selected is "Project Retainer Available" is "<" and the value is "100". An alert will be generated when the project retainer available in BillQuick is less than 100. Using the *Send an Alert* Settings, you can specify whom to send the alert, and how to display the alert (via email or an alert on screen). In the *Refine an Alert* tab, use the various filters to specify the alert for a particular project.

In BillQuick, you can receive a retainer at the parent project level and then apply all or a portion of that to its phases and sub-phases.

When Recorded Hours >= Allocated Hours. . .

If you want to keep track of employee hours recorded for a specific project, choose *When Recorded hours >= Allocated hours* alert type. An alert will be generated when the recorded hours (hours entered by an employee for the project in BillQuick time entry screen) of an employee exceeds or equals the allocated hours (hours allocated to the employee for the

same project in BillQuick Project Control screen). In *Send an Alert* settings tab, specify whom to send the alert, and how to display the alert (via email or an alert on screen). On the *Refine an Alert* tab, use the filters to specify an alert for a particular project.

When Project Status of a Phase Changes to Complete. . .

If you want to track the progress of a project consisting of phases, choose *When Project status of a Phase changes to complete* alert type. An alert will be generated when the project's phase completes. The work on the next phase will start only when the preceding phase completes. Use *Send an Alert* settings to specify whom to send the alert and how to display the alert (via email or an alert on screen). In the *Refine an Alert* tab, use the various filters to specify the alert for a particular project.

Number of Days, Time/Expense Entry is not Approved. . .

If you want to track the unapproved time and expense entries of an employee, choose *Number of Days, Time/ Expense entry is not approved* alert type. An alert will be generated if there are some time or expense entries left unapproved for a specified amount of time. In *Send an Alert* setting tab specify whom to send the alert, and how to display the alert (via email or an alert on screen). In the *Refine an Alert* tab, use the various filters to specify the alert for a particular project.

When Time Entries are Rejected For. . .

You might want to be notified when the time entry of an employee is rejected. Choose *When Time Entries are Rejected For* alert type. An alert will be generated if the time entries of an employee are rejected by his project manager or any person who is authorized to do so.
Use *Send an Alert* settings to specify whom to send the alert, and how to display the alert (via email or an alert on screen). In the *Refine an Alert* tab, use the various filters to specify the alert for a particular project.

When New Retainer Invoice is Created. . .

Choose *When new Retainer Invoice is created* alert to get an alert for newly created retainer invoices. For example, the project manager creates an invoice specifying the retainer amount that the client can pay for his projects in advance. Specify the client to whom you want to send the retainer invoice. In the *Send an Alert* tab, specify the details of whether to send the alert on screen or via email and specify the users you want to notify.

When New Vendor Bill is Created. . .

You might want to be alerted each time a bill is created for the Vendor. Choose *When new Vendor Bill is created* alert type. For Example, your manager creates a bill on receiving the items against a purchase order, an alert of this type will popup.
In the *Refine an Alert* tab, specify the vendor for whom the vendor bill is created. In the *Send an Alert* tab, specify the details of whether to send the alert on screen or via email and specify the people you want to notify.

When New Purchase Order is Created. . .

You might want to be alerted each time a new purchase order is created. Choose *When new Purchase Order is created* alert type. For Example, your manager created a list of all the service and expense items to be shipped in the next month, an alert of this type will popup.
In the *Refine an Alert* tab, specify the project for which the purchase order is created. In the *Send an Alert* tab, specify the details of whether to send the alert on screen or via email and specify the people you want to notify.

When New Purchase Item is received. . .

You might want to be notified when new purchase item is received against a purchase order. Choose *When new Purchase Item is received* alert type. For example, whenever service or expense item is received from the vendor, the manager will get this type of alert. In the *Refine an Alert* tab, specify the project for which the purchased item has been received. In the *Send an Alert* tab, specify the details of whether to send the alert on screen or via email and specify the people you want to notify.

When Invoices to Date Exceed Service/Labor Contract Amount. . .

You might want to be alerted whenever the invoices that have been sent exceed the service contract amount. Choose *When Invoices to Date* alert type. For example, whenever, the service amount that has been invoiced exceeds the contract amount set for the project, the manager will get this alert. You can refine the alert to specify the projects for which BillQuick Agent should check for contract amount. You can send the alert via email or display it on the screen for specific employees set in the *Send an Alert* tab.

When Invoices to Date Exceed Expense Contract Amount. . .

You might want to be alerted whenever the invoices that have been sent exceed the expense contract amount. Choose *When Invoices to Date* alert type. For example, whenever, the expenses amount that has been invoiced exceeds the contract amount set for the project, the manager will get this alert. You can refine the alert to specify the projects for which BillQuick Agent should check for contract amount. You can send the alert via email or display it on the screen for specific employees set in the *Send an Alert* tab.

When Invoices to Date Exceed Total Contract Amount. . .

You might want to be alerted whenever the invoices that have been sent exceed the total contract amount. Choose *When Invoices to Date* alert type. For example, whenever, the total amount that has been invoiced exceeds the contract amount set for the project, the manager will get this alert. You can refine the alert to specify the projects for which BillQuick Agent should check for contract amount. You can send the alert via email or display it on the screen for specific employees set in the *Send an Alert* tab.

When Labor Amount % from Contract Amount has been used is. . .

Use this alert to be notified whenever the specified percentage of the labor amount from the contract amount is used. For example, when the Alert Type is "When Labor Amount % from Contract Amount has been used" and you select ">" with a value of "50", an alert will be generated when non-extra billable or non-billable time or expense entries worth greater than 50% of the contract amount are entered in BillQuick time or expense screen. On the *Send an Alert* screen, you can specify whom to send the alert, and how to display the alert (via email or an alert on screen).

When Project is Over Budget…

Use this alert to be notified whenever a project goes over the budget (that is, by entering billable time entries and non-billable expenses more than the budget specified in the BillQuick Project screen). You can specify the projects you want to keep track of based on the client, project or manager in the *Refine an Alert* tab. For example, The Alert Type selected is "When Project is Over Budget". An alert is generated when the total amount spent (that is, billable time entries and non-billable expenses) on the project exceeds the budget specified in the BillQuick Project screen. Use the *Send an Alert* settings tab to

specify the details of whether to send the alert on screen or as an email and specify the users you want to notify about it.

When any Budget line item reaches...%

Use this alert to keep track of budget line items for the projects and their phases. For instance, you might set an alert type "when any Budget line item reaches 50%". An alert will be generated when 50% of the budget for the line items is used. In the *Refine an Alert* tab, use the various filters to specify the alert for a particular project.

When Client Amount Billed is. . .

Use this alert to keep track of the amount billed to a client. For example, the Alert Type selected is "When Client Amount Billed" is ">" and the value is "1000". An alert is generated when the amount billed in BillQuick exceeds 1000 for a client. Using the Send Settings, you can specify the person to whom you want send the alert, and how to display the alert (via email or on screen). On the *Refine an Alert* tab, you can use the Client filter to specify the alert for a particular client.

When Project Amount Billed is. . .

Use this alert to keep track of the amount billed for a project. For example, the Alert Type selected is "When Project Amount Billed" is ">" and the value is "1000". An alert is generated when the amount billed in BillQuick exceeds 1000 for a project. Using the Send Settings, you can specify the person to whom you want to send the alert, and how to display the alert (via email or on screen). On the *Refine an Alert* tab, you can use the Project filter to specify the alert for a particular project.

How Do I

HOW DO I SET ALERTS?

BillQuick Agent automatically monitors your company database and triggers alerts–on screen and email–based on some predefined conditions (for example, Project's progress). In the Time Card Monitoring screen, you can set the timer for your on screen alerts.

Do the following to set an alert:

1. Select Alerts menu > Set Alerts.
2. Click the New button.
3. Enter the name of the alert and select the type of alert you want to set.
4. Enter additional criteria that you might want to specify.
5. In the 'Send this Alert a maximum of. . .times a day' field, enter the number of times you want this alert to be sent per day.
6. Click Save.

You can specify the time before which you do not want to run scheduled alerts on the Global Settings screen.

REPORTS SCHEDULING

REPORTS SCHEDULER OVERVIEW

In the Reports Scheduler screen, you will select reports and apply filters to them. BillQuick Agent comes with a complete library of standard reports. It can assign commonly used filters to any BillQuick report (standard or custom) and produce it on demand or schedule it to automatically generate and be delivered to computer screens, printers or through email as an attachment.

BillQuick Agent can run any Crystal Reports® version 9.0 (or later) report template. Even non-BillQuick reports can be run by BillQuick Agent. It can generate them on demand or schedule them to run automatically in the same way that it does in case of the BillQuick reports. The program will allow you to select any Crystal Reports template as well as the database it uses. The Crystal Reports templates used with BillQuick Agent must be developed with the OLE DB (ADO) provider to access either a JET (Access) database or SQL Server database. Thus, the program can be based on BillQuick Standard (Access) as well as Enterprise (SQL Server) databases.

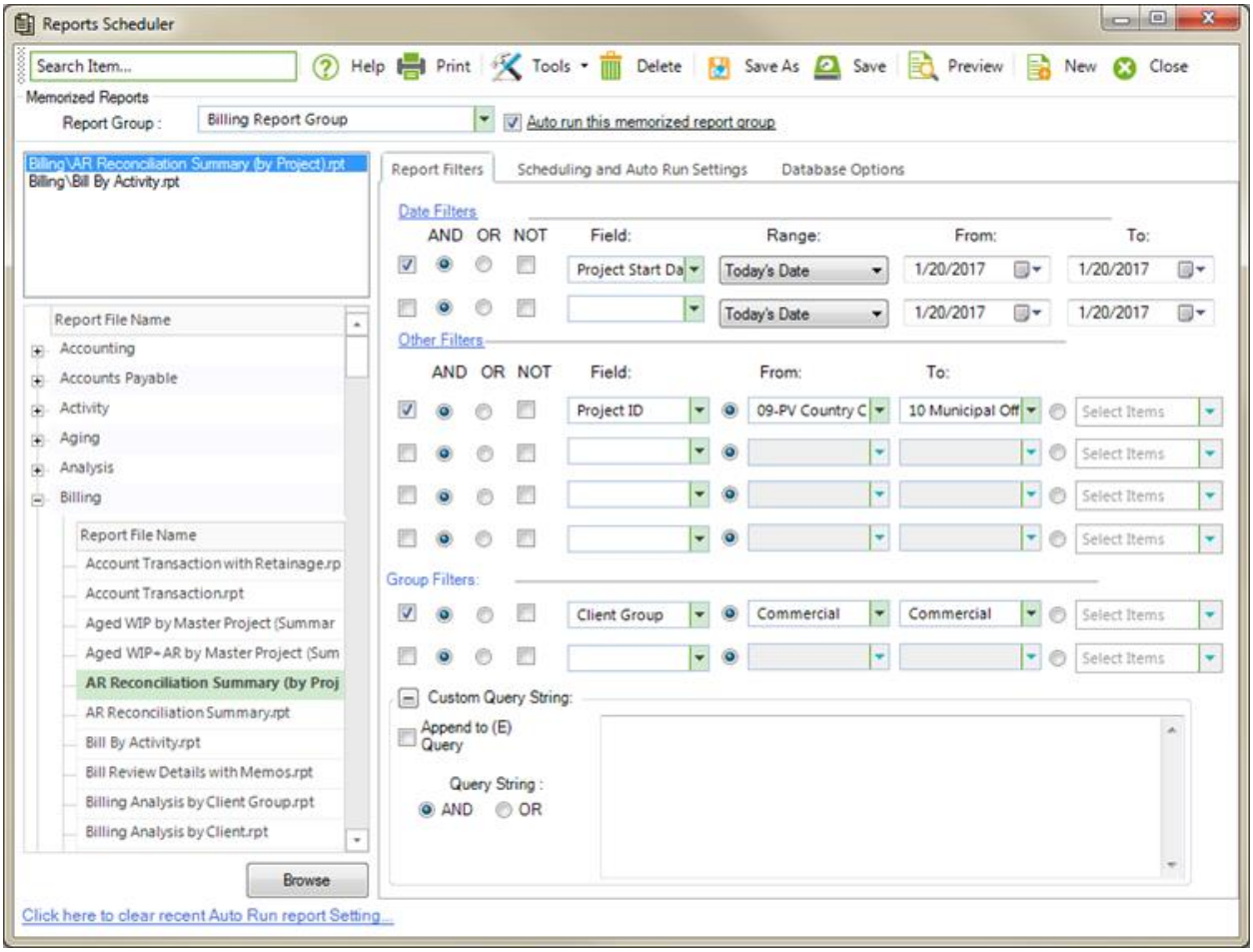
The Reports Scheduler screen has three tabs:

- Report Filters Tab
- Scheduling and Auto Run Settings Tab
- Database Options Tab

Reference

REPORTS SCHEDULER

The following are options available on the Reports Scheduler screen used for defining or scheduling reports.



Memorized Reports

You can select an existing report from the drop-down list of reports at the top. After selecting it, the various settings for that particular report will be displayed. Whenever a new report is created, the name is added to this list.

Report Group:
Select a name from this drop-down list to load a memorized report setting. It loads the saved settings of a memorized report anytime in future to preview or print the report. This name is the one under which you have saved a report, its filter settings and SQL string parameters.

Report groups feature is available in BillQuick Agent Enterprise edition only.

Auto Run this Memorized Report Group:
Select this check box to automatically generate reports using agent for the selected reports.

Report File Name:
To create a new report, you can choose a report template from existing ones, select various options and save it.
The report templates displayed in the window are all of the *.rpt files that are located in your BillQuick Reports directory. The report list is displayed as a tree-structure for user

ease. Hence, similar reports feature under a report category, with a plus (+) sign on the left. Click to expand the list and view the report sub-list under each category.

Browse:
Click this button to browse and select the saved report templates. You can load reports from the BillQuick folder or another folder where the reports to be loaded are present. All the reports in your BillQuick Reports folder (by default, C:\Program Files\BillQuick2017\Reports) can be displayed in this report section. The list can be browsed using the slide bar on the right side. Highlight any report to use.

Click here to clear recent. . .
Click this link to clear the recent Auto Run Report settings. If you want BillQuick Agent to re-process your memorized report, click this link and then specify new settings. Close the program and run it again.

The Reports Scheduler screen consists of the following three tabs:

- **Report Filters Tab:** This tab is used to control the information that displays on the reports.
- **Scheduling and Auto Run Settings Tab:** Use the options on this tab to schedule reports for automatic processing and delivery.
- **Database Options Tab:** Use the options on this tab to specify the database to be used when generating reports.

Reports Scheduler Button Panel

Search:
This enables you to search for a particular report in the grid. You can search for a report using full or partial name or other text field. Agent displays the matching reports in a drop-down list based on what *you type* in the search text box. The items displayed get narrowed down as you keep on typing. For example, you might want to search for a report which starts with letter A. As you type letter A, all reports beginning with letter A are displayed in the drop-down. As you keep on typing more letters it displays more relevant results.

Help:
Opens the BillQuick Agent Help file in the Reports Scheduler section.

Print:
Prints the selected report using the criteria specified on the screen. Print options include multiple copies and selecting a range of pages to print.

Tools:

Clear:
Clears all the data entered in the filter section.

Turn Off Scheduled Reports:
When clicked, this toggle button turns on the scheduled reports. Un-clicking this button is a quick way to turn it off.

Delete:
It deletes the currently loaded report and its settings.

Save As:
To save an existing memorized report under a new name (for example, after modifying filters or SQL strings), click this button. Be sure to give your reports descriptive names for easy identification in the future.

Save:
It saves the current report settings to a specified name. It is also used to update an existing report setting.

Preview:
Preview displays full screen representations of the printed page and gives the user a choice of printing or exporting the report. BillQuick Agent enables you to zoom in various stages to find the most desirable appearance. You can maneuver around the screen by using the horizontal and vertical slide bars at the bottom and right side of the Preview screen. Clicking on the printer icon in the Preview window prints the report.

New:
Displays a screen for creating or defining a new memorized report. To create a new memorized report on the basis of the currently specified settings, you have to click this button. Be sure to give your reports descriptive names for easy identification in the future.

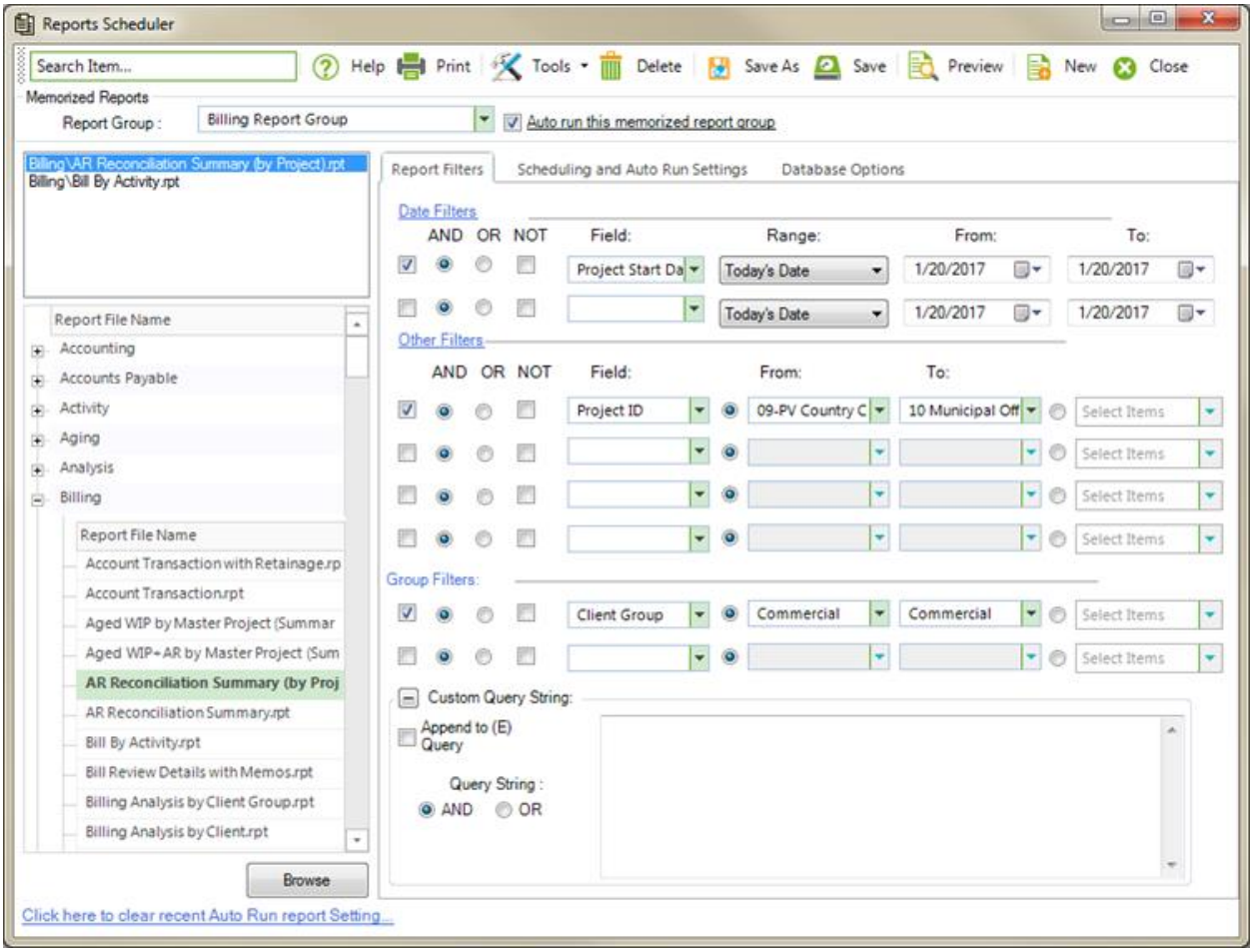
Close:
Closes the Reports Scheduler screen.

REPORTS SCHEDULER–REPORT FILTERS TAB

The information displayed on a selected report can be filtered using the search criteria specified on the *Report Filters* tab.

Multiple filters can be specified for a report. You can filter information by a project's start or due date, project specific detail (for example, client ID, status, fee schedule, etc.) and groups. You can also search for a range of records or filter records based on a specific detail (for example, Project ID). SQL strings can also be used to filter report data. Lastly, you can use AND/OR Boolean operators to narrow or expand your filter specifications.

After the filter criteria have been set, it can be saved as a memorized report and recalled anytime by specifying that report's name from the *Report Group* drop-down list.



Date Filters

AND/OR/NOT:
Choose one of these Boolean operators to either narrow or broaden your search using a selected filter.

- AND narrows the search for records that match the first filter and any filters with an AND. This is referred to as an *intersection of data*.
- OR broadens the search by pulling in records that match one or more of the filters with an OR. This is referred to as a *union of data*.
- NOT narrows the search by accepting all records except those that match one or more filters with a NOT operator. This is referred to as a *negation* of data.

For example, if you search for a range of employee IDs AND a range of project IDs, only records which match both filters are included in the report. In contrast, OR retrieves records that contains one or both filter ranges, resulting in more records being included in the report. On the other hand, NOT is an exclusion filter where you specify the items or data that should not be queried or fetched for the reports.

Field:
Select the desired filter from this drop-down list to filter the report (that is, project due date or invoice date).

Range:
Specify a *dynamic* date range from this drop-down list (for example, Last Quarter to Date, etc.) to use with the other filters. *Dynamic* date filters are very useful for memorized reports.

From/To:
Make a selection from these drop-down lists to specify a *static* date range (for example, from June 1, 2017 to August 31, 2017).

To activate the filters, select the check box on the left. Not all filters are applicable to every report.

Other Filters

AND/OR/NOT:
Choose one of these Boolean operators to either narrow or broaden your search using a selected filter.

- AND narrows the search for records that match the first filter and any filters with an AND. This is referred to as an *intersection of data*.
- OR broadens the search by pulling in records that match one or more of the filters with an OR. This is referred to as a *union of data*.
- NOT narrows the search by accepting all records except those that match one or more filters with a NOT operator. This is referred to as a *negation* of data.

Field:
Select the desired filter from this drop-down list to filter the report (for example, Project ID, Client ID, Project Status, etc.).

These filters allow the user to display reports based on user-specific criteria. For example, if you would like to see a report based only on clients with the IDs ranging from AA to MM, you must select Client ID from the *Field* drop-down list and enter that range in the *From/To* fields. In the *From* drop-down list, select the beginning of the range, in this case AA, and in the *To* field, specify the end of the range, MM. If the user wants to create a report relating to one client only, select it in both fields.

From/To:
Choose the desired range for the selected filter. Make selections from the *From/To* drop-down list to specify the range, say, of clients, projects, etc.

Select Items:
Choose this option to filter records based on discrete items (for example, specific client ID, project ID, managers, etc.). The list in the *Select Item* drop-down is dependent on the selection in the *Field* drop-down list.

To activate the filters, select the check box on the left. Not all filters are applicable to every report.

Group Filters

These options allow you to specify groups for filtering reports. Depending upon the selected report, you can choose Activity, Client, Employee or Project Groups. You can select a range of groups or discrete groups to include in your filter list.
To activate the filters, select the check box on the left. Not all filters are applicable to every report.

Custom Query String

Append to (E) Query:
Select this check box to use SQL statements entered in the *Query String* field as a filter.

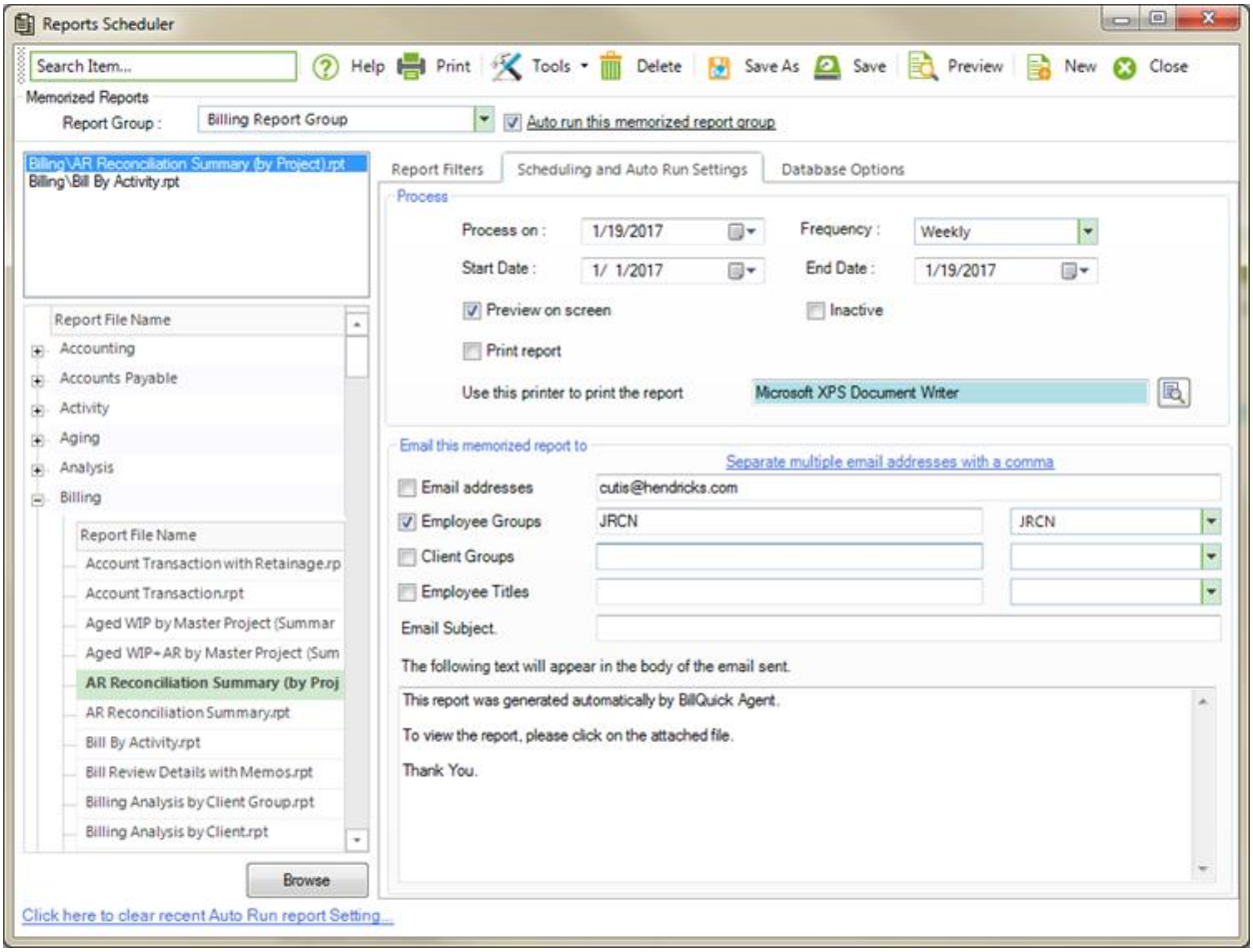
Query String:
Enter an SQL string in this field to use separately or in combination with filters. Query strings and predefined filters can both be applied to a report.

AND/OR/NOT:
Choose one of these Boolean operators to either narrow or broaden your search using the query string. AND narrows the search by requiring records to match the SQL query string in addition to any filters. OR broadens the search by including records that match any filters or the SQL query string. NOT is an exclusion filter where you specify the items or data that should not be queried or fetched for the reports.

REPORTS SCHEDULER–SCHEDULING & AUTO RUN SETTINGS TAB

Memorized reports can run manually or be scheduled to run automatically in BillQuick Agent. The following information described the options on the *Scheduling and Auto Run Settings* tab used to schedule reports for automatic processing and delivery.

In addition to scheduling reports, you can email memorized reports to individual email addresses, employee groups, client groups or employee titles. The reports are delivered as attached PDF files. The report name and filters are indicated in the body of the email along with any text.



Process

Process On:
Select the date from this drop-down list on which the report is to be generated.

Frequency:
Specify how often the report is to run during the specified period (that is, daily, weekly, quarterly, etc.).

Start Date:
Specify the start date of the period in which the report will be generated.

End Date:
Specify the end date of the period in which the report will be generated.

Inactive:
Select this check box to disable this scheduled report.

Preview on screen:
Select this check box to display a preview of the report on the screen when it is generated.

Print report:
Select this check box to print a hard copy of the report to a specified printer.

Use this printer to print the report:
Specify the printer to use when generating reports.

Email this memorized report to

Email addresses:
Select this check box to email a report to individual email addresses. Enter email addresses of individuals to receive the report. Separate each address with a comma.

Employee Groups:
Select this check box to email a report to selected employee groups. You can enter or select employee groups from the drop-down list to receive the report.

Client Groups:
Select this check box to email a report to selected client groups. You can enter or select client groups from the drop-down list to receive the report.

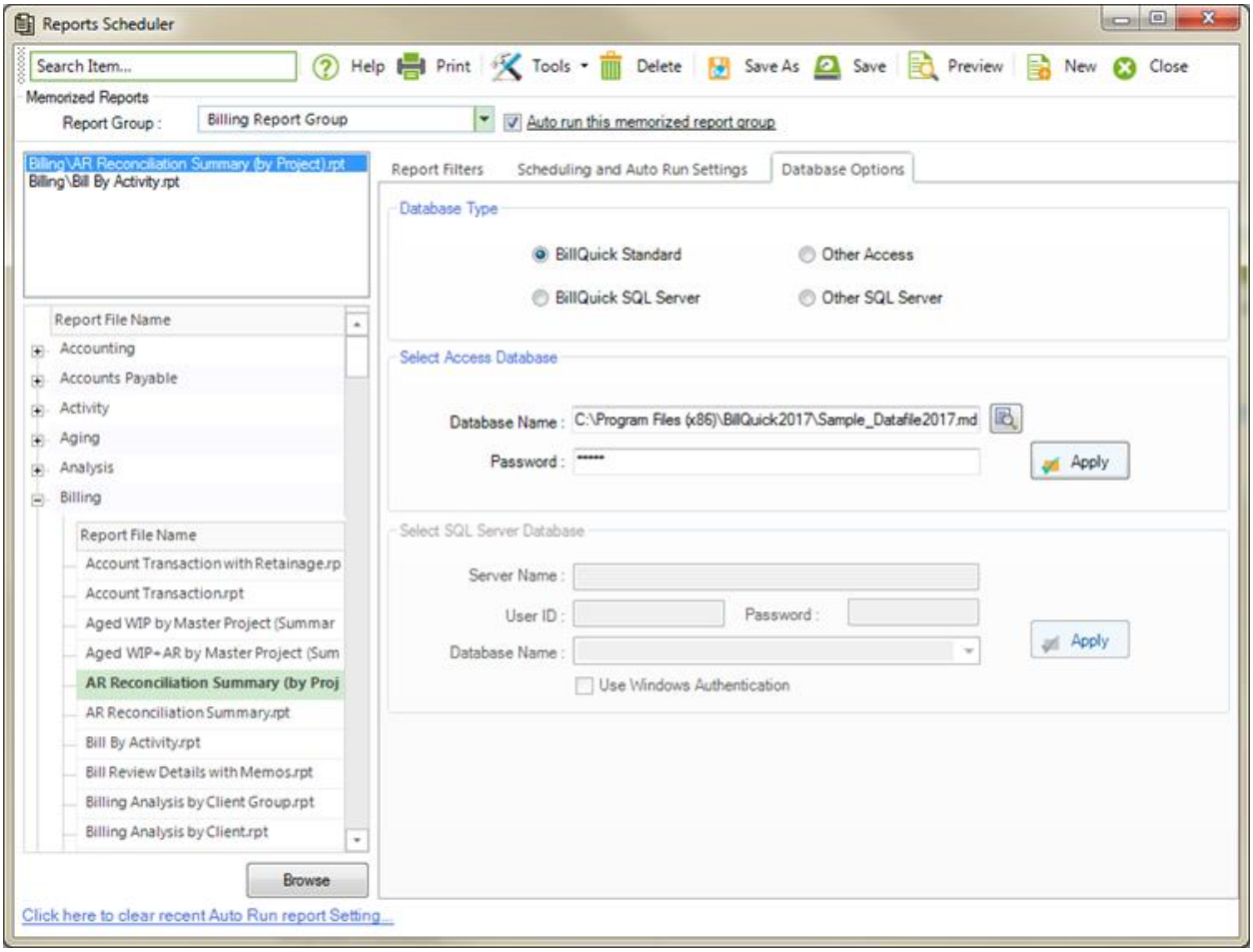
Employee Titles:
Select this check box to email a report to individuals with specific titles. You can enter or select titles from the drop-down list.

Email Subject:
You can specify the email subject in this field for the report to be emailed.

You can make modifications to the body text of the email sent by entering the desired message.

REPORTS SCHEDULER–DATABASE OPTIONS TAB

Use the *Database Options* tab to specify the database to use when generating reports. This is useful for firms with multiple databases.



Database Type:
Check any of the options to access the reports from this database–BillQuick Standard or BillQuick SQL Server. In case you want to specify any other database, choose either Other Access or Other SQL Server database.

Select Access Database

The following options need to be configured when either BillQuick Standard or Other Access database type is selected above.

Database Name:
Enter or browse to specify the BillQuick database name here.

Password:
Enter the BillQuick database password.

Apply:
Click this button to apply and save the database settings.

Select SQL Server Database

The following options need to be configured when either BillQuick SQL Server or Other SQL Server database type has been selected.

Server Name:
Enter your BillQuick SQL Server database name.

User ID:
Specify the login ID of the SQL Server.

Password:
Enter the login password of the SQL Server.

Database Name:
Select the SQL Server database name from this drop-down list.

Apply:
Click this button to apply and save the database settings.

Use Windows Authentication:
By default, the connection to SQL server is established via SQL Server Authentication mode. Select the Use Windows Authentication check box if you want Windows Operating System to help establish a connection to the SQL Server. In that case, you need not to specify the User ID and Password.

The user name and password fields become unavailable when this option is selected.

How Do I

HOW DO I SCHEDULE REPORTS?

You can schedule reports to be generated once or repeatedly for a specified period.

Do the following to schedule reports:

1. Select Reports menu > Set Report Scheduling. You can also click the *Reports* button on the toolbar.
2. Click the Scheduling and Auto Run Settings tab.
3. Select a report from the Report Group drop-down list.
4. Specify the date on which you want to start running the report in the 'Process on' field.
5. Make a selection from the Frequency drop-down list to specify how often the report is created (for example, daily, weekly, quarterly, etc.).
6. Enter the Start and End dates to specify the period during which this report will be generated.
7. Select the 'Preview on screen' check box to display a preview of the report on the scheduled process day.

If Agent is installed on a server, the preview will only display on the server. It will not display on the client computers used by BillQuick users.

8. Select the Print Report check box to print a hard copy of the report to the selected printer.
9. Specify the groups or individuals who will receive the emailed report. Separate individual emails with a comma.
10. Edit the email body text as needed.
11. Select the 'Auto Run this Memorized Report Group' check box.
12. Click Save to save the schedule settings.

By default scheduled reports are generated and emailed after 12am on the day selected to process the report. The actual time when the report runs is dependent on BillQuick Agent's countdown clock. When that clock hits zero, the report is generated. For example, if after midnight, the countdown clock has 15 minutes remaining the report will print at 12:15am. You can change the report generation and email time by using the *Do not run scheduled reports until* option on the Global Settings screen.

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