

1 ACCESSING YOUR QCDOCS CORPORATE PORTAL

Your company's QCDOCS Corporate Portal is available to you from any computer with access to the Internet. You can access your corporate portal at www.qcdocs.com or through a direct link provided by your QCDOCS Administrator.

Login Information

To access your company's Corporate Portal you require a username and password. This can be obtained from your company's QCDOCS Administrator. To log in, simply enter your Username, Password and the Company name provided by your administrator. These are not case sensitive.

2 SETTINGS - ENTERING YOUR PROFILE

The Settings page contains your user profile information and photograph. The information entered will be published in the Corporate Directory.

The Email work field is your primary email address and all QCDOCS Alerts will be sent to this address. Select 'My Tasks', and then 'Settings' in the menu.

Personal Photo

You can upload a picture to your Corporate Portal by clicking the [Browse](#) button, then selecting the photo you want to use. You can remove your photo by clicking the [Remove](#) link.

Password Change

You can change your password by clicking the [Change Password](#) button.

3 ENTERING YOUR TIME INTO THE TIME TRACKER

The Time Tracker allows you and your employer to keep track of your work hours. Select 'Accounting Forms', and then 'Time Tracker' in the menu.

- Select the date you are entering time for by clicking the Forward or Back arrows, or by clicking the Calendar icon in the top bar.
- Enter your Hours worked and a Description of your work in the appropriate fields. Click [Keep Description](#) if you would like your description to be saved for the next entry.
- Select any corresponding Tags for the period entered (such as a project or account). Please see your Company Policy for more information about using Tags.
- Click the [Log Time](#) button.
- If you would like to copy the information from a previous entry, click [Recall](#) and the data will be automatically copied into the fields. Do not forget to change the date as the date from the original entry will also be copied.

Date	Tags	Hour	Description
07-Nov-07 Wed	(Project) Harrison Silver Mine (Project) Training	8.00	Anthracite Conference
06-Nov-07 Tue	(Project) Harrison Silver Mine	8.00	Client Consultations

4 SUBMITTING AN EXPENSE REPORT

Expense Reports are used when employees purchase goods or services on their own, and then require reimbursement from the company. Select 'Accounting Forms', and then 'Expense Report' in the menu.

- Refer to Company Policy to see what is eligible for an Expense Report.
- Select any corresponding Tags for the Expense Report (such as a project or account). Please see your Company Policy for more information about using Tags.
- Enter the Date, Description, Type, Amount and GST for the item(s) and click the Add button to add them to your Expense Report.
- Select the correct approver for your Expense Report from the Approver drop down box.
- Click [Preview](#) to see your Expense Report.
- Once you have confirmed that the information entered is correct, click the [Submit](#) button at the bottom of the preview screen to send it for approval.
- If you are configured to receive alerts, you will receive an email notification when the approval is made.
- You can view submitted Expense Reports and see their status by selecting 'Accounting Forms', and then 'History' in the menu.

Expense Report form details:

- Date: 07-Nov-07
- Description: Lunch with Mario
- Type: meals
- Amount: \$53.00
- GST: \$0.00
- Total Amount: 53.00
- Total GST: 0.00
- Approver: Jahaal Masner (Jahaal) All

5 SUBMITTING TIME OFF REQUESTS

Time Off requests allows employees to track and schedule vacation, sick and other time off. Select 'Accounting Forms', and then 'Time Off' in the menu.

- Please check your Company Policies for Time Off requests by pressing the policy button on the Time Off Request form.
- Select the Category in the drop down list: Vacation, Sick Day, Bereavement or Jury Duty.
- Determine how many working days you are requesting off, and enter this number into the Number of working days field.
- Enter a Reason in the appropriate field if necessary.
- Select the appropriate approver and click [Preview](#) to view then submit your request form.
- To view the status of your request, please see the Accounting Document History by selecting 'Accounting Forms', and then 'History' in the menu.

Time Off Request form details:

- Category: Vacation
- Date From: 11/27/2007
- Date To: 12/14/2007
- Number of working days: 15
- Reason: Visiting my brother in Italy
- Approver: -- none --

6 UPLOADING TO FILES IN PROGRESS

The Files in Progress System allows employees a secure, online method of storing and accessing important files. Select 'Company', and then 'Files In Progress' in the menu.

Click through folders to find files. Once a folder is selected, files appear on the right side. Users can view files or upload additional files to each folder. Creation and management of folders is done through QCDocs Desktop.

ID	File Name	File Size	Modified	Modified By
4220	Bank statement-Royal Ban	132 Kb	09-Oct-07	(Sean)
4189	Bank statement-TD Bank-	189 Kb	02-Oct-07	(Sean)
4218	Check-Check Run-200710X	539 Kb	09-Oct-07	(Sean)
4230	Contract-Impark-20030721	964 Kb	09-Oct-07	(Sean)
4229	Credit Memo-Qiagen Inc.-	303 Kb	09-Oct-07	(Sean)
4227	HR Document-Offer Letter-	34 Kb	09-Oct-07	(Sean)
4226	Legal Doc-Incorporation C	128 Kb	09-Oct-07	(Sean)
4225	Legal Doc-Name Change-2	136 Kb	09-Oct-07	(Sean)
4228	Legal Doc-NDA-20070828	194 Kb	09-Oct-07	(Sean)
4221	Receipt-Dell Canada Inc.-	124 Kb	09-Oct-07	(Sean)
4222	Receipt-McAfee-20070605	237 Kb	09-Oct-07	(Sean)
4217	Reconciliation-Coast Capri	898 Kb	09-Oct-07	(Sean)
4284	Reference-Workers Comp	408 Kb	28-Oct-07	(Sean)
4223	Tax Document-Assessmen	843 Kb	09-Oct-07	(Sean)
4224	Tax Document-Payroll Wit	140 Kb	09-Oct-07	(Sean)
4231	Time Off Request-Sabeen I	0 Kb	09-Oct-07	(Sean)

7 USING THE TASK MANAGEMENT

The task management tool allows employees and managers to manage, delegate and track the tasks in small projects. Select 'Resource Management', and then 'Task Management' in the menu.

The task list consists of 3 major areas:

- The Folder List. This includes all of the folders you have access to, and the number of tasks you can see (based on your selected filters).
- The Task List. This is a list of all tasks, limited as per your filter options.
- The filter controls. Use these to manage your viewing options. Remember to press the [Refresh](#) button after changing options.

Viewing Sorting and Filtering the Task List

By default, incomplete tasks that are assigned to you will be displayed. You can change this by changing the filtering options. Across the top of the task list are a number of filters that can be applied to the list.

Folders (or Task Lists)

Tasks can be organized into folders (or Task Lists). Folders are created through QCDocs Desktop.

Creating Tasks

Select the folder that you would like to create a task in and click the [New Task](#) button. When creating a task, fill out the appropriate fields. Subject and Notes are required, as they describe the task. You can select Tags to associate the task to Clients, Projects, Accounts or other entries in QCDocs. Tasks can be assigned to a person or team of people using the Assignee fields. Private tasks will only show up to those they are assigned to.

Editing Tasks

Tasks can be edited by selecting [Edit](#) in the Task list. After making any changes click [Update](#) to save.

Moving Tasks

Tasks can be moved to a different folder through the Edit form. Click the [Move to another folder](#) button. In the Move form, select the folder you'd like to move the task in and select [Move](#).

Task Discussions

To simplify collaboration (especially in remote teams), each task has its own discussion forum. Within this forum, team members can discuss the task and ask questions of each other. To view a discussion, click the [Discussion](#) button for a task in the task list. A summary of the task will appear on the top of the screen and the discussion items will appear below it.

When entering a discussion item, users are encouraged to select an enthusiasm icon that indicates how the user feels about their comment. For example, choose the Question icon if you are confused or have a question about the task.

ID	P	Subject	Status	Start Date	Due Date	Assigned To
55	1	Desktop - Acquire	Submitted	09-Oct-06		Kirill Tchomert Jahzel Mianer
396	1	Task Management Improvements	Submitted	07-Sep-07		Kirill Tchomert Jahzel Mianer
81	1	Portal - Accounting Form- Change Request: Please form to deal with employee/consulting change documentation	Submitted	20-Oct-06		Kirill Tchomert Jahzel Mianer
541	1	tick-ER Website	Submitted	29-Oct-07		Jahzel Mianer
545	1	Add Microsoft partner logo to website	Submitted	29-Oct-07		Jahzel Mianer
402	1	Flash Dial for Website	In Progress	12-Sep-07		Jahzel Mianer
402	1	1 pager poster	In Progress	12-Sep-07		Jahzel Mianer
54	1	Develop Process for Clients to report Bug Fixes and Improvement requests	Submitted	09-Oct-06		Hike Knapp Jahzel Mianer
540	1	Action Icons	Submitted	29-Oct-07		Jahzel Mianer
503	1	Implement new style for old Portal Screens	Submitted	05-Oct-07		Jahzel Mianer Kirill Tchomert Jahzel Mianer
68	1	Desktop - Notes - New Feature	Submitted	19-Oct-06		Jahzel Mianer
72	1	Desktop - E Signatures	Submitted	19-Oct-06		Jahzel Mianer
74	1	Portal - Theme option	Submitted	19-Oct-06		Jahzel Mianer
		Initial Developer Network				Harv Nagra & Jahzel Mianer

Start Date: 11/7/2007
Due Date:
Status: Submitted
Priority: Low
Complete: 0 %
Selected Tags:
Assignee 1: < select >
Assignee 2: < select >
Assignee 3: < select >
Assignee 4: < select >
Assignee 5: < select >
Type:
 Private Task
Subject:
Notes:
Create Task Back

Start Date: 09/12/2007
Due Date: 09/14/2007
Status: In Progress
Priority: Medium
Complete: 75 %
Type: Research
Owner: Sean Hodgins (Sean)
Assignee 1: Harv Nagra (Harv)
Assignee 2: unknown
Assignee 3: unknown
Assignee 4: unknown
Assignee 5: unknown
Subject: Salesforce.com and online training/demo software solution research
Notes: Can you research what salesforce.com products we should consider for our immediate and longer term lead generation and sales close red what online training/demo software should we go after? gotomeeting... (don't bother with webex way to expensive having been through the some demos, check around on what's good and reasonably priced... Thanks!
Discussion:
Log Date Employee Notes
9/18/2007 1:54:31 PM 😊 Harv Nagra (Harv) About Gotomeeting, tried signing up for the 30 day trial, but it insists on having a credit card to req the free trial. This is the response I got from the AExec at Salesforce:
In response to your two questions:
1) If you're looking to develop an application and host it on the AppExchange will be able to help you out: https://www.salesforce.com/apexexchange/outlist
2) If you need two users to log into Salesforce.com then you'd need 2 separate and passwords. A couple reasons for this. First, it keeps you information clear inside Salesforce.com. Second, in the new world of SOX, Salesforce.com has added scrutiny and there needs to be accountability for all activities.
.....
hmmmm...do you think we should tell them that we've decided that only the one accessing the system, then? ...and go ahead with the Professional Edition?
I've emailed our Account Executive to find out whether we can use the system

Take Control of Your Business TM

Troubleshooting

QCDocs Systems Inc. delivers a comprehensive process and accounting document management solution designed specifically for small to mid-sized companies.

Our team comes from a wide range of backgrounds, including professional accounting, IT, interaction design, software and web development. We combine our different areas of expertise to build the best solution for automating and streamlining business and accounting processes.

Our web-based products work on a "software as a service" (SaaS) basis. This flexible approach makes our products easy to implement and affordable to small and medium-sized businesses, helping them quickly improve their core accounting and administrative processes so they can focus on building their businesses not their back offices.

Contact Us

Address

Harbour Center
515 West Hastings Street, Suite 7352
Vancouver, B.C.
V6B 5K3

Toll Free: 1.877.241.8444

Fascimile: 778.782.7760

Fax: 604.357.1362

Website: www.qcdocs.com

Sales Queries: sales@qcdocs.com

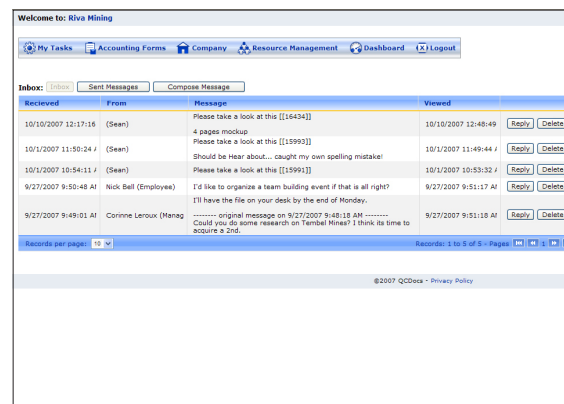
Partner Queries: partners@qcdocs.com

For Support, Contact us at
support@qcdocs.com

8 SENDING MESSAGES - MESSAGING

The messaging system allows employees to send and receive messages through QCDocs. The task list consists of 3 major areas:

- The Inbox displays the messages you have received. Sent Messages will display the messages you have sent.
- Select [Compose Message](#) to send a message. All QCDoc users of your company will be listed in the To drop down list. Enter a message and select [Send](#) to send your message. Messages sent through the Portal can be viewed through the Desktop application as well as the Portal.



9 PRIVATE FOLDER

The Private folder is a repository for secure documents, such as your Human Resources File. Documents stored in this folder are only available to you and those designated by your QCDocs Administrator (such as your Human Resources personnel). Select 'My Tasks', and then 'Private Folder' in the menu.

