SoloManage

INSTALLATION AND QUICK START

2008

installation and quick start

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INDEX

SoloManage

INSTALLATION AND QUICK START

INSTALLATION

Welcome to SoloManage! This guide will help you to install and quickly begin using the SoloManage software. More complete and up to date guides and help can be found at http://www.solomanage.com

Check the system requirements

SoloManage software is browser-based, and can be installed on Windows Server 2003 or later, or Windows XP Professional Service Pack 2 or later. Full details of system requirements and prerequisites can be found in the online guides and in the appendices.

Download the setup file

The full version of SoloManage can be downloaded from the Solomanage.com web site. The available types of download are:

- A setup executable file, which can be run directly from the web site, or downloaded and then run
- A compressed (.zip) setup file

Choose the type of setup file you prefer. In most cases, the simplest method is to run the setup file from the web site.

Download a licence file

Every copy of SoloManage requires a licence. A time and feature limited trial licence can be downloaded from the same web site page which contains the set up files. A fully featured licence can be purchased at SoloManage.com

After downloading and unzipping the licence file, it can be installed on the SoloManage Logon page, after installation.

Prerequisites

When the setup begins, the program checks for or installs three main prerequisites on your system, all of which are standard Microsoft components:

- Internet Information Services (IIS)
- Microsoft SQL Server Express
- Microsoft .Net Framework 3.0

If any of these items are absent, they will be installed automatically from the SoloManage setup files. In the case of IIS, you will need your original Windows CD to complete the process.

Beginning the installation

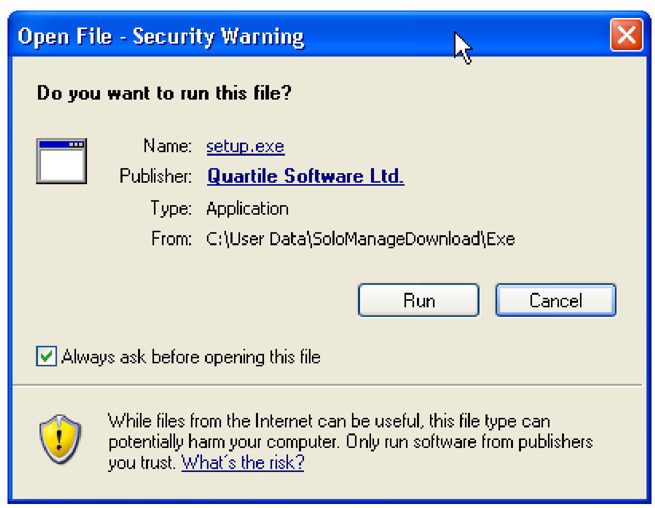
Choose any of the following methods to begin the installation:

1. Using the setup.exe file – click ‘Run’
2. Using the setup.exe file – save the file, then double click it
3. Using the setup.zip file – save the file, right click, select ‘Extract’ to unzip the file, then double click the enclosed setup file

Whichever download or file type you choose, the installation follows the same path.

If you choose to Run the setup.exe file from the web site, you will see a window similar to this.

This window confirms that the software you are downloading has been digitally signed by Quartile Software Ltd. All other SoloManage setup files are also digitally signed.

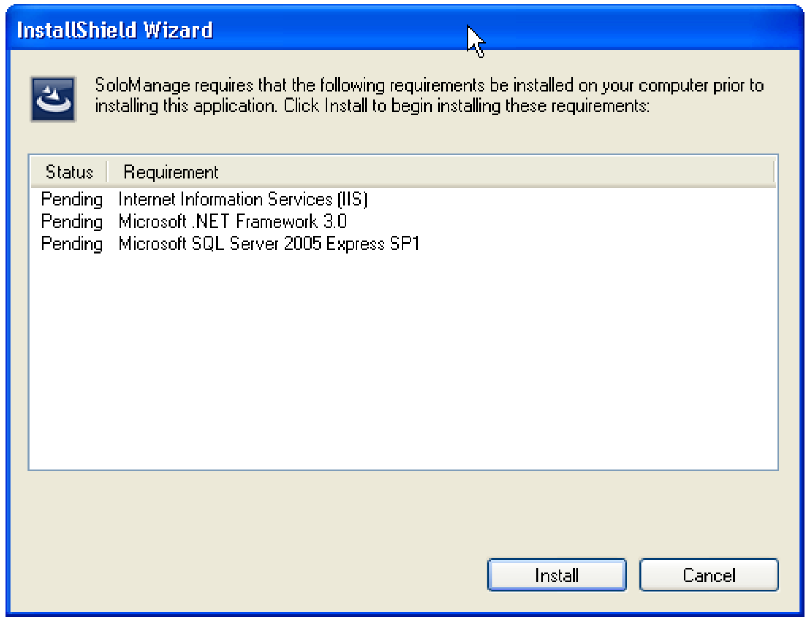


In some cases, your network may require you to adjust security settings in your browser to download content. If you are unsure of the settings to adjust, contact your network administrator or choose another method of download.

The prerequisite steps

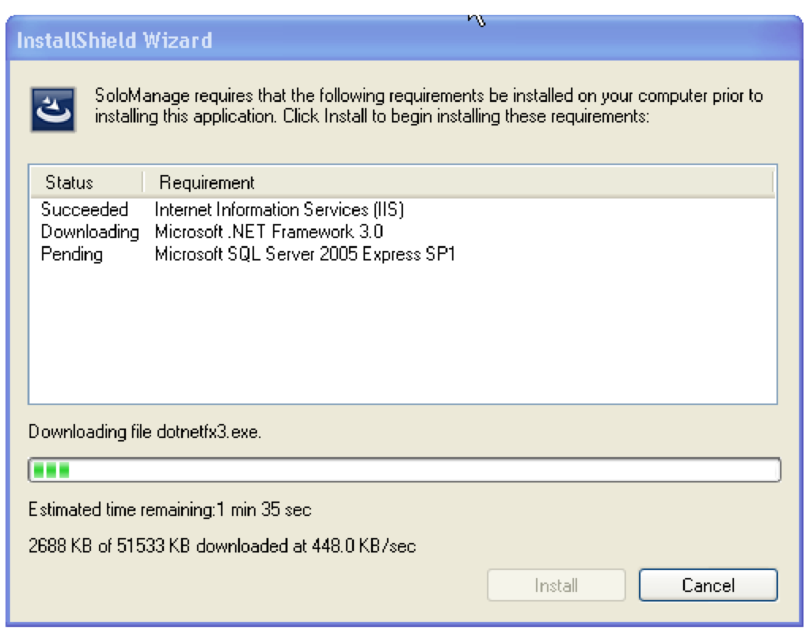
If your computer already has all of the prerequisites, skip this section and continue from the SoloManage installation section below.

If any of the prerequisites are not installed on your computer, the installation will begin with a window which is similar to this:

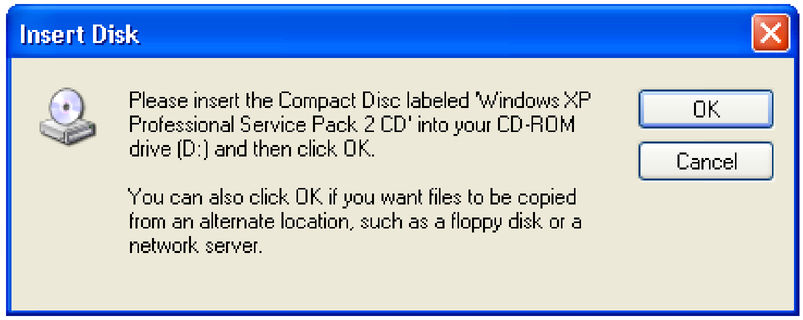


The exact contents of the prerequisite window will vary, depending on the configuration of your computer. If all of the prerequisites are already installed, you will not see this window or any related windows. Click on the install button to begin installing any prerequisites.

The prerequisite progress dialogue begins

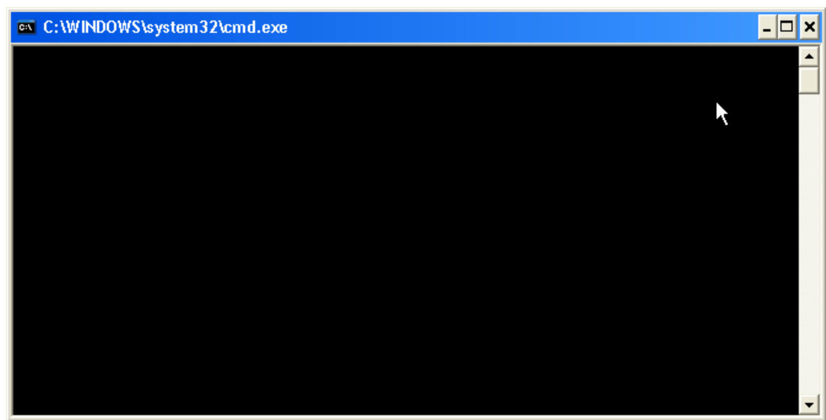


For the installation of IIS only, you will see this message. You need to insert your original Windows CD in order to install IIS.



The installation of the prerequisites may take several minutes. Do not interrupt the process.

During the process you may see an apparently blank command window, which looks like this. This is a normal part of the installation process, and the window should not be closed. When the installation is complete, any open windows will be closed automatically.



When the prerequisites installation is complete, the process automatically continues from the SoloManage setup.

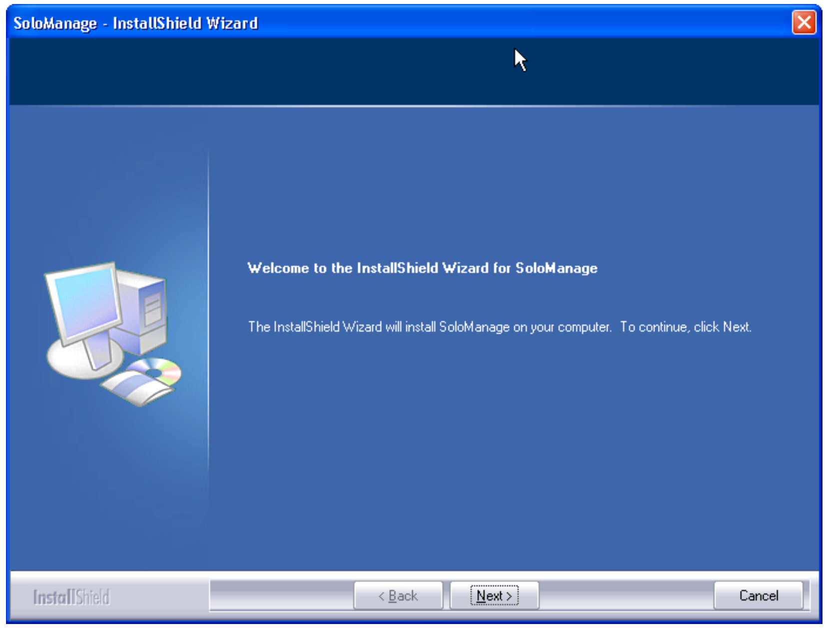
SoloManage installation

If all prerequisites are installed, the installation of SoloManage takes a few minutes, and requires only six mouse clicks.

Click one

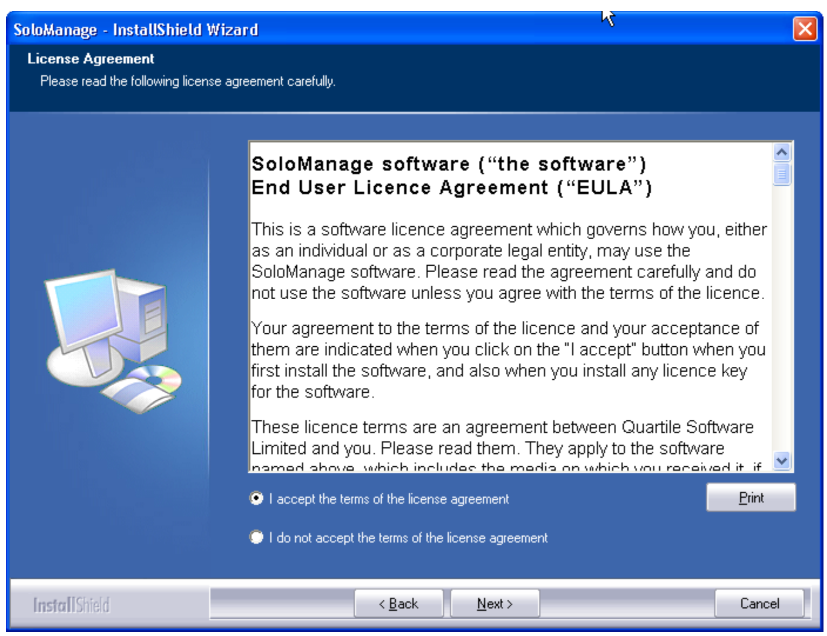
The first window in the SoloManage installation is the welcome window.

Click next to continue.



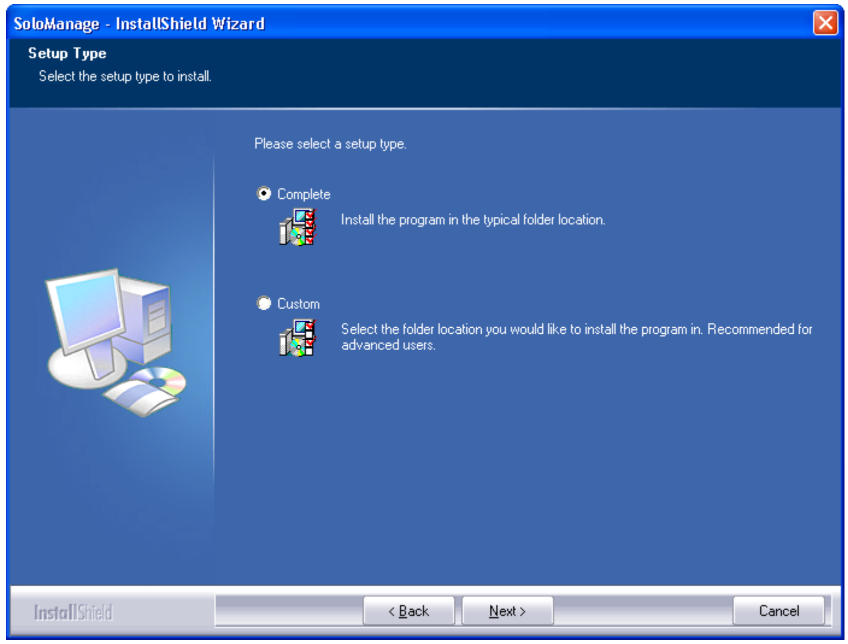
Click two

To use SoloManage you must agree to the terms of the licence. Click the ‘I accept’ button, then click next



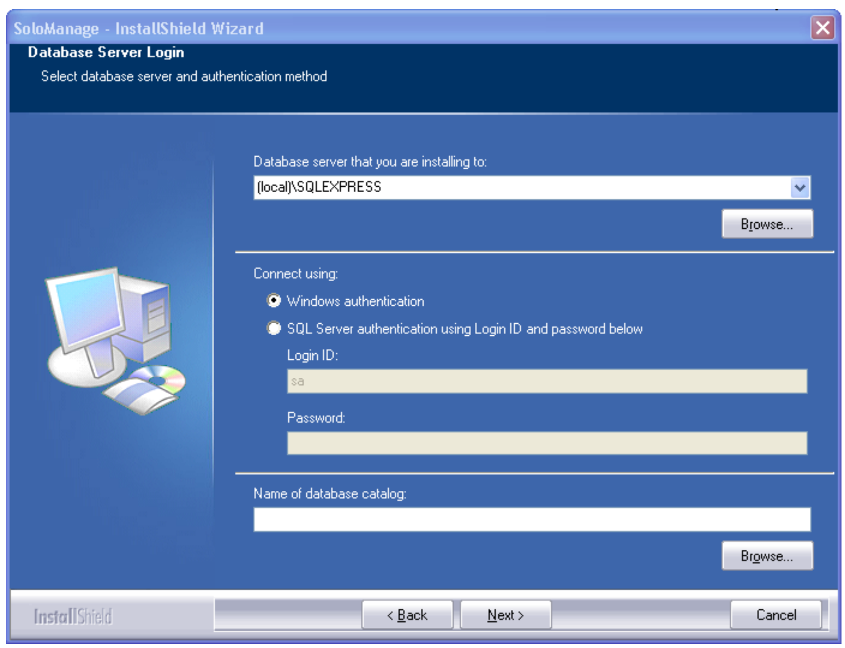
Click three

To accept the default installation location for SoloManage, click next. If you would like to install the software in a different folder, click the Custom button then click next.



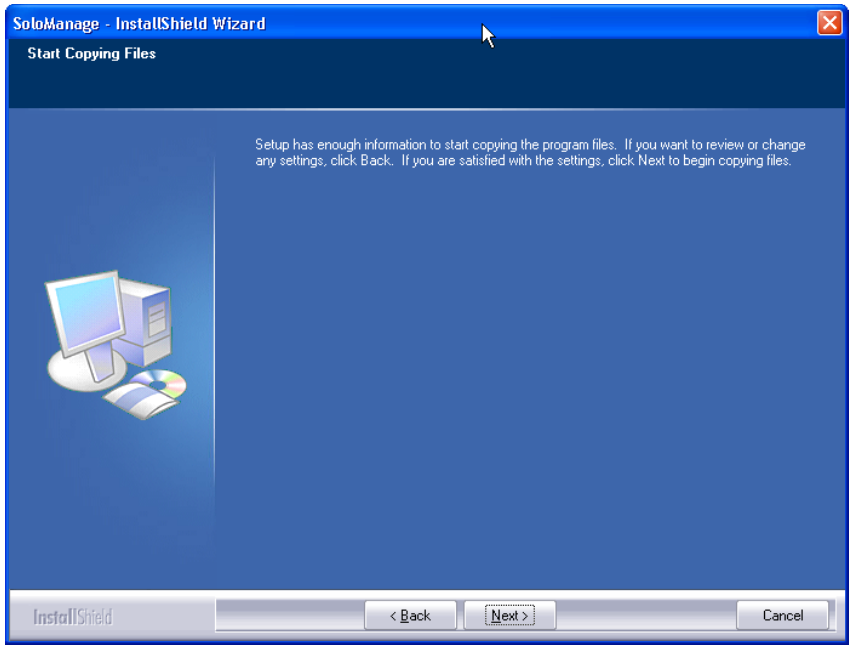
Click four

In the SQL database selection window, choose the SQL Server with the name (local)\SQLExpress, accept the other defaults settings and click Next, unless you intend to configure SoloManage for use with a different SQL Server.

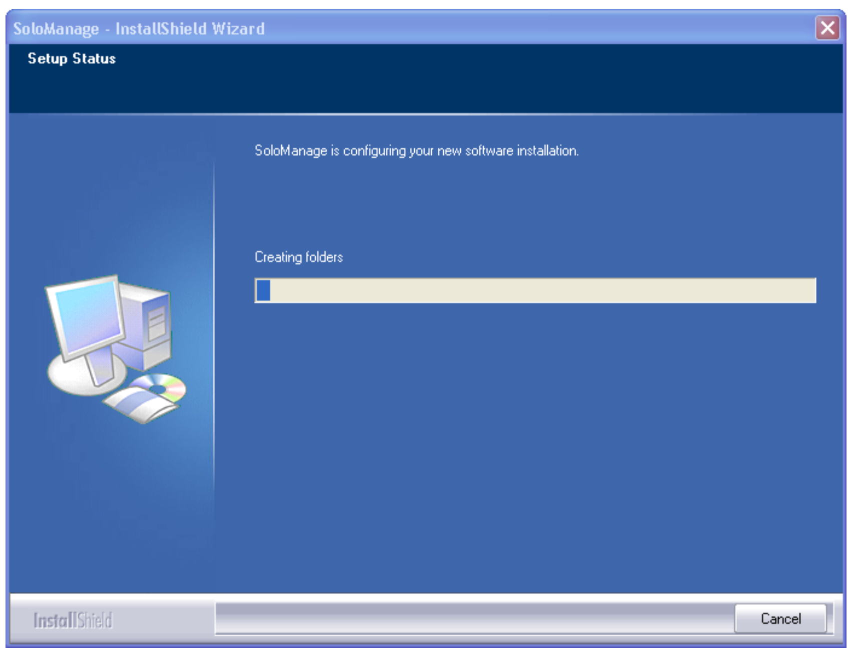


Click five

The setup process now has enough information to begin copying and configuring files. If you would like to review or alter any step, click Back, or click Next to begin.

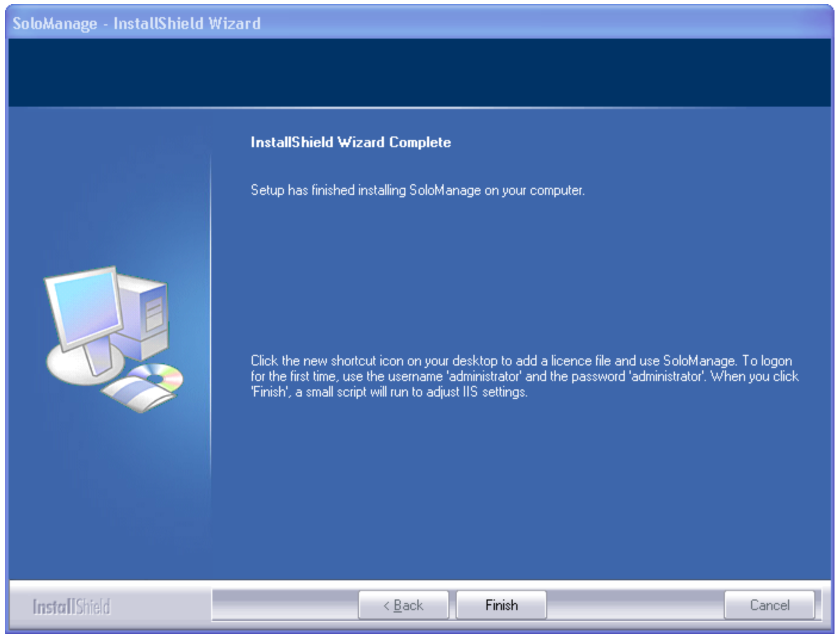


The setup process will now begin copying and configuring, and progress windows similar to this will be displayed.



Click six

Success! The setup has completed.



The final window provides the initial default username and password which all copies of the software initially share. The username is ‘administrator’ and the password is ‘administrator’. Remember to change the password to a stronger one of your own choice when you logon for the first time.

When you click next, a small script will run in a command window to configure IIS settings.

You can now use SoloManage by either clicking on the new icon on your desktop, which looks like this:

Or by selecting from your Program menu: Start->All Programs->Quartile Software->SoloManage

On the first use of SoloManage, IIS adjusts some internal settings, which causes a slightly slower than usual start for SoloManage. In normal use, the initial adjustment is not necessary, and the software starts at normal speed.

SoloManage uses popup windows and JavaScript for some of its functions. You may need to enable those features in your browser when you first use SoloManage.

SoloManage functions with Internet Explorer and Firefox browsers, but Safari is not supported.

QUICK START

This section will provide a guide to getting started quickly with SoloManage. In a series of short steps, you will learn how to:

- Create a client
- Create a project for the client
- Add tasks and files to the project
- Complete a time sheet
- Adjust settings for your company or location
- Prepare an invoice

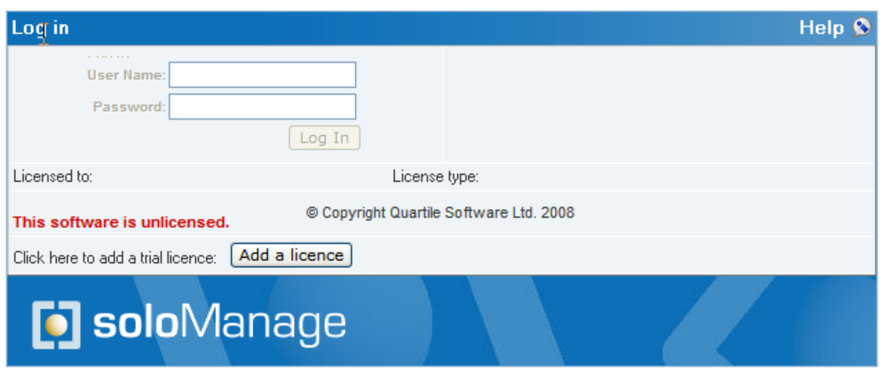
More complete and up to date guides and help can be found at http://www.solomanage.com

First steps

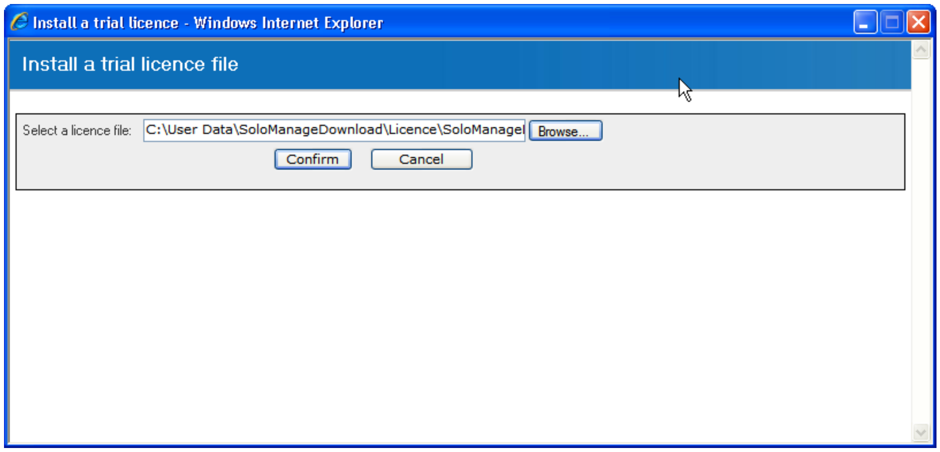
Before using SoloManage for the first time, you will need to install a trial or purchased licence file, and alter the default administrator password.

Double click the SoloManage icon on your desktop, and you will see this Logon box.

Click the Add a licence file button, then click the Browse button in the next window to locate the licence file you downloaded and unzipped.

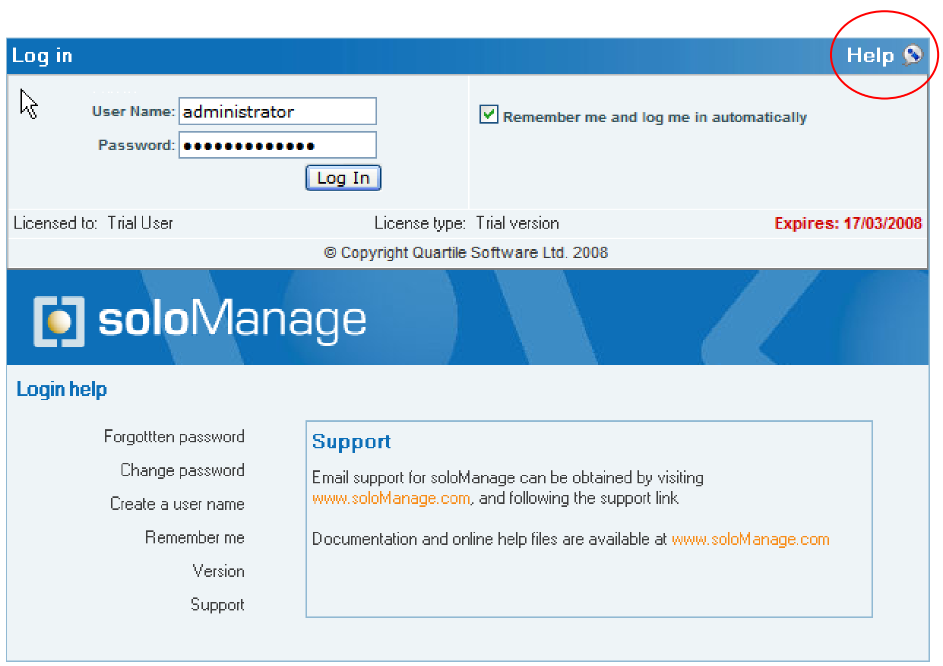


Select the licence file, and click 'Confirm'



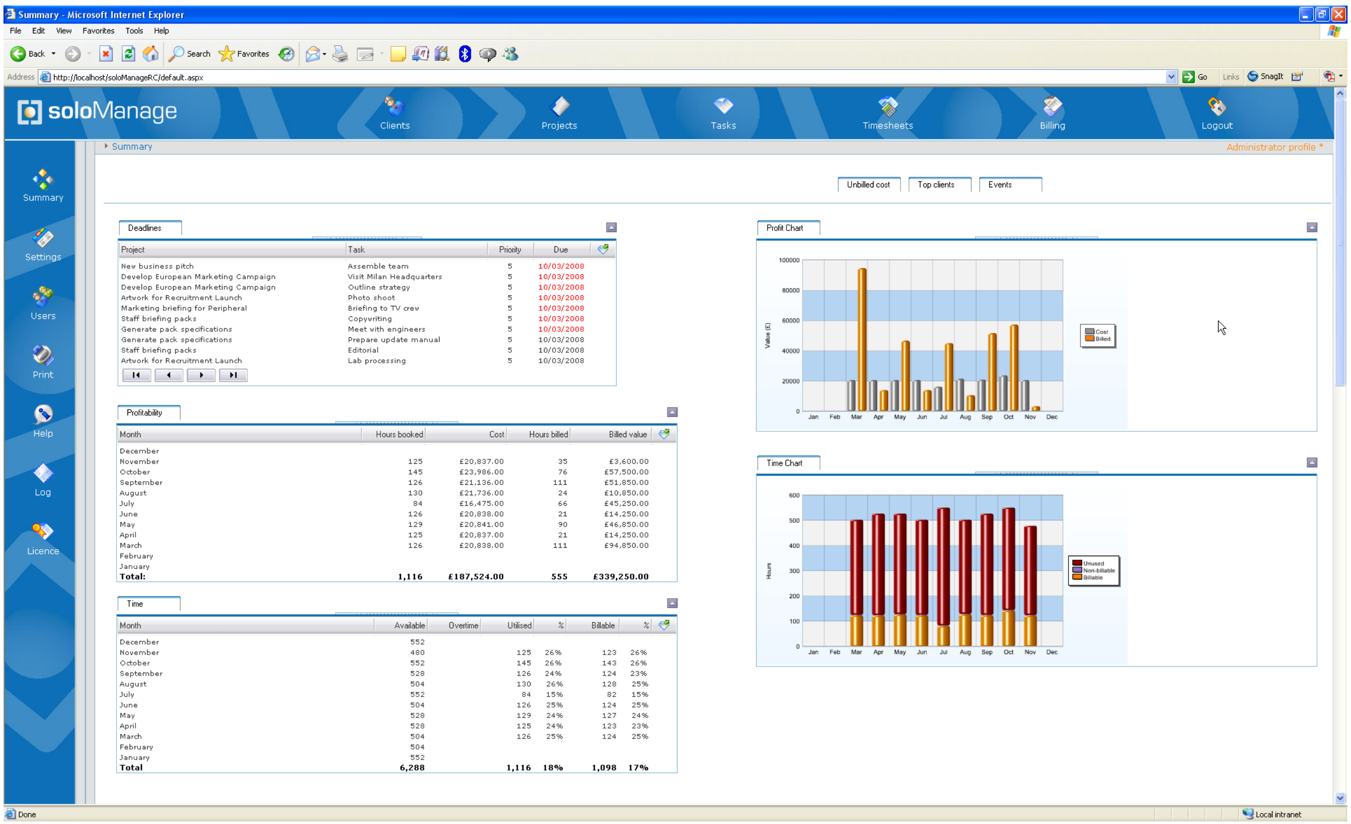
You can now Logon using the default username and password.

If you need help with Logon, click the Help icon at the top right of the Logon box.



The dashboard

The dashboard is the default view which users have after logging on. It contains key indicators, graphs and tables to help you quickly monitor your projects, tasks and time.



The left edge of the dashboard and all SoloManage pages contain two panes which may be expanded or collapsed, to suit your method of working or screen space. The pane on the left contains navigation buttons for items such as Help or Printing. The centre pane is used for quick browsing in areas such as Client lists of project lists. Click either of the grey vertical bars near the left edge of the SoloManage page to expand or collapse the panes. SoloManage remembers your choice between pages.

A dash board warning message appears on first use, reminding you to change the administrator password.

The top edge of SoloManage planes contains navigation for the main functions: Clients; Projects, Tasks, Timesheets, Billing. To continue the Quick Start and add a new client, click the Clients icon in the top navigation:

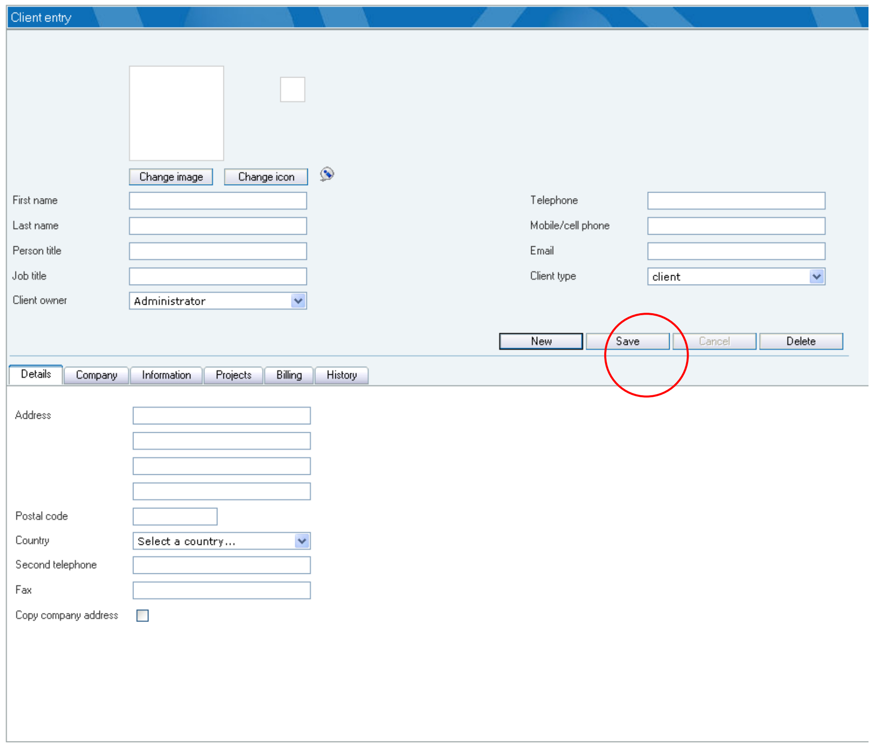
Add a client

After clicking the client icon, click the New person button near the bottom right of the Client list page. This new client page is then displayed:

Enter the details of your client in each of the areas or tabs. When you have added the information, click 'Save' to add the client.

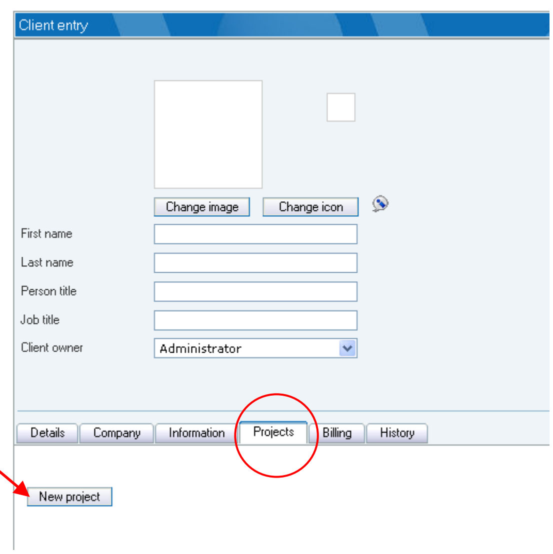
If this is not the first entry, you may choose to use the company details of an existing client by choosing the company name from the Company tab.

You may also use the company address as the person address by selecting the 'Copy Company address" option.

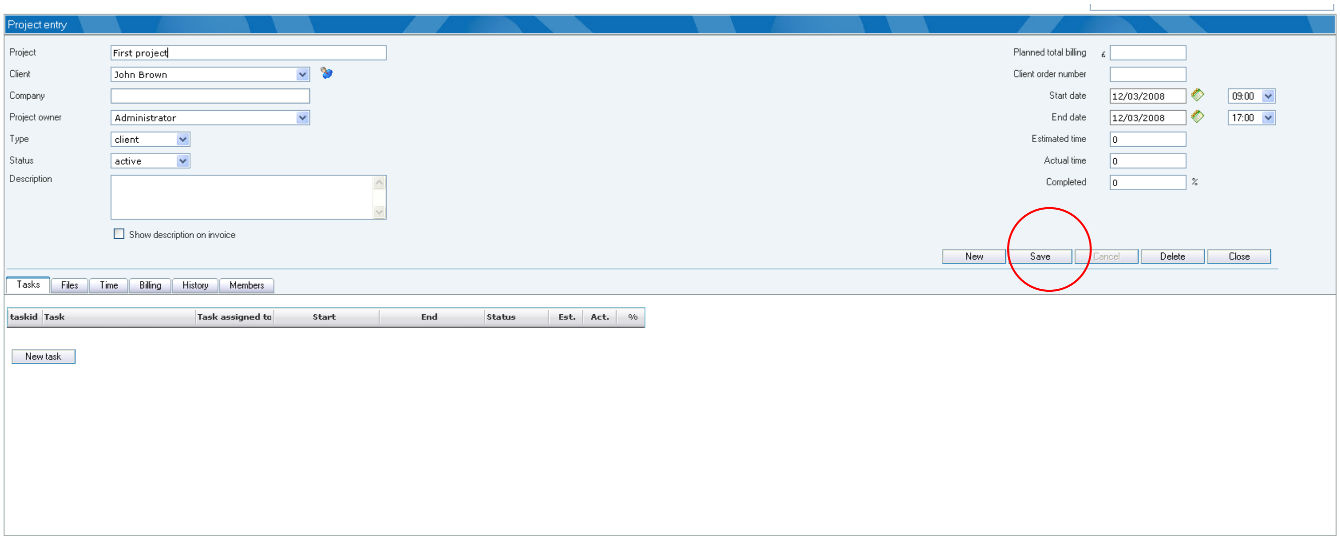


Add a project for the client

In the new client entry you made, click the Projects tab, then click the New project button to start the process of creating a project for this client.

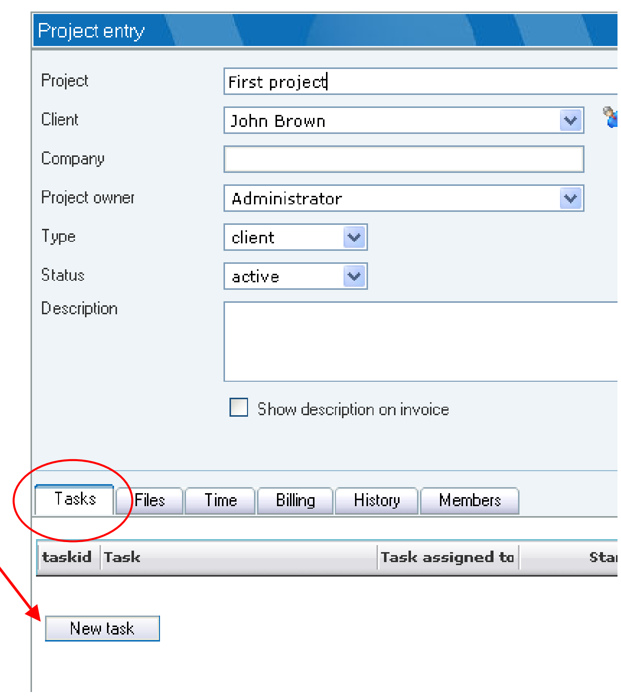


The project detail page is displayed. Enter details for the title of the project, start date, end date, expected billing amount, and any other details you wish. Click Save to create the new project.



Add a task to the project

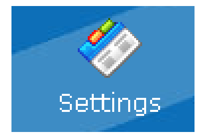
In the new project entry, click the Tasks tab, then click the New task button to start the process of creating a task for this project.



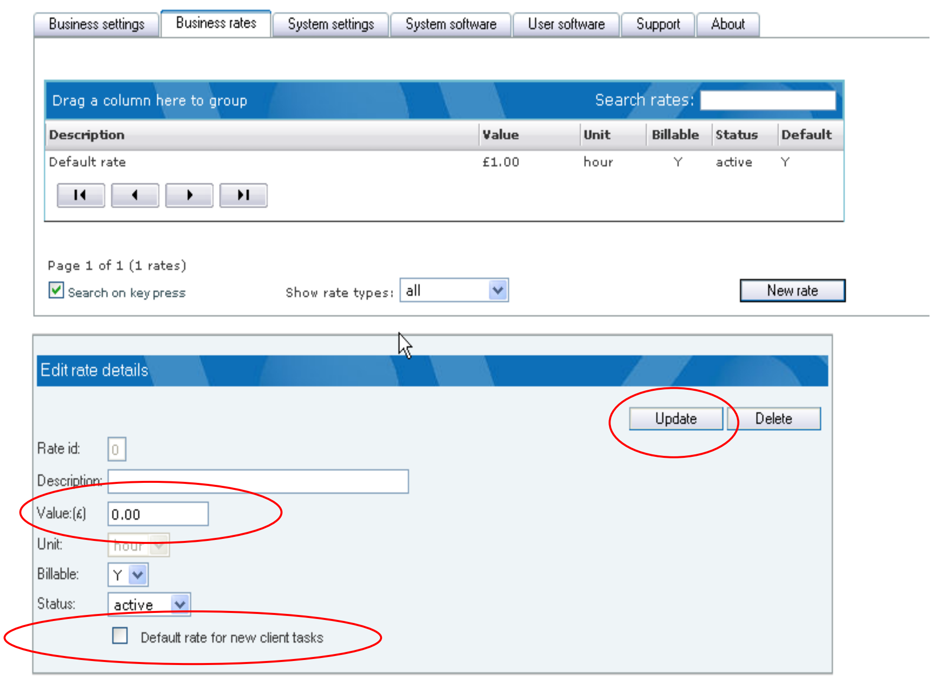
Setting a billing rate for the task

SoloManage is installed with a single default task rate, which will be used as the billing rate for every task, unless you choose to alter the default settings. The initial value of the default rate is one currency unit per hour. It is highly unlikely that the initial rate will be one which you will use, so you should now choose a value for the initial rate which is appropriate for you. If you prefer to bill time at a rate per person, instead of at a rate per task, that setting can also be selected. Altering billing rates and default settings usually needs to be done only once, and both tasks are completed in the Settings page, which is accessible to administrators from the left navigation menu.

Make sure you are logged in as an administrator, and then click on Settings in the left navigation pane:



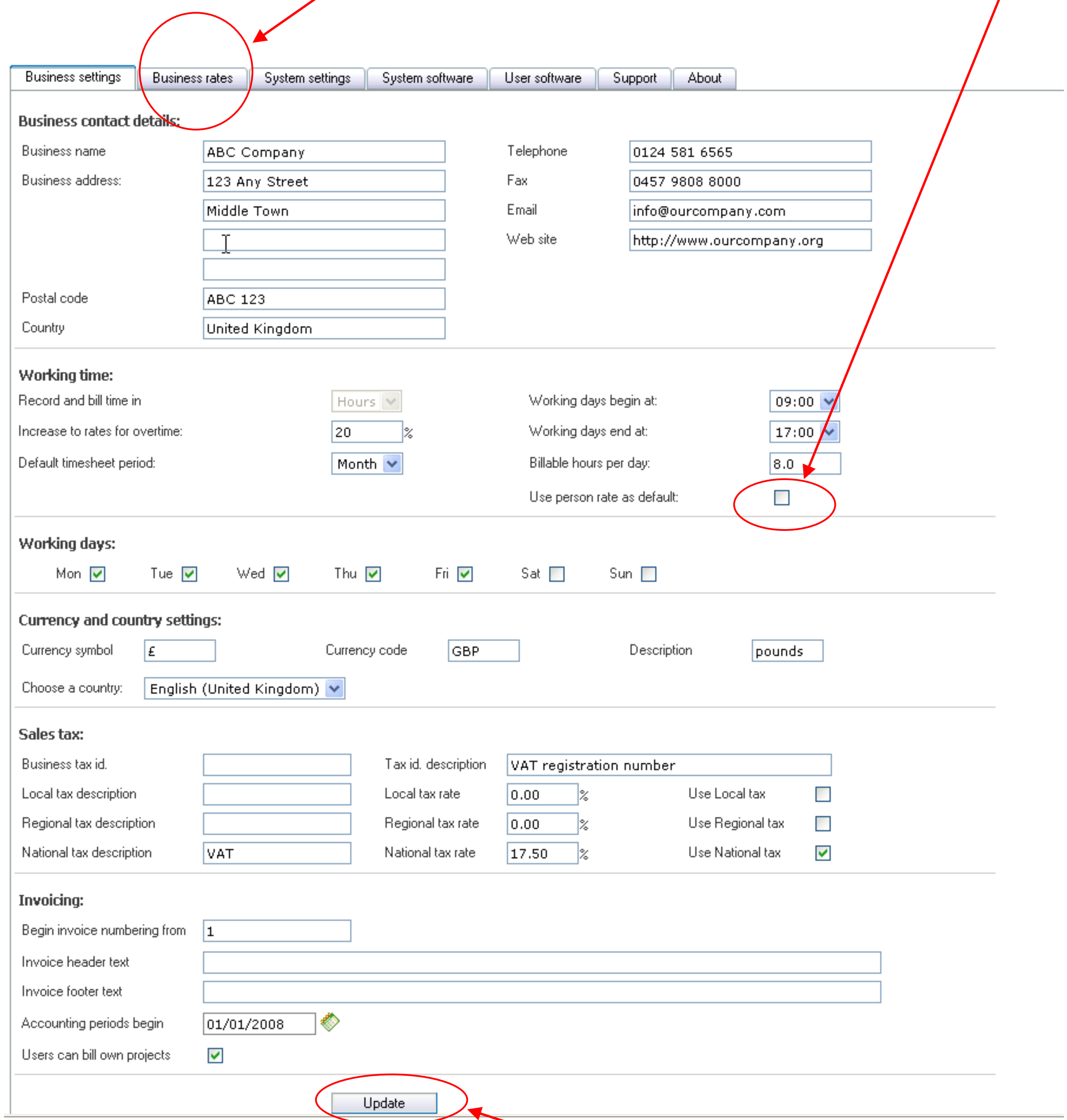
From the available tabs in the settings page, click the Business rates tab to alter the default rate, or add new rates:



Edit the default rate, and then click Update. Any single rate may be designated as the default rate. New tasks will now have the default rate you created as their billing rate.

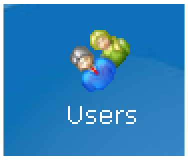
Use Business rates to also create non-billable rates to be used in timesheets, such as research, or office overheads.

The main settings page contains a tab for rates, and also contains the setting to use a person rates as the default task rate:



Check the ‘Use person rate as default’ box, and then click the Update button. The cost of time for tasks will now be calculated at the rate of the person making the time sheet entry, instead of the rate for the task.

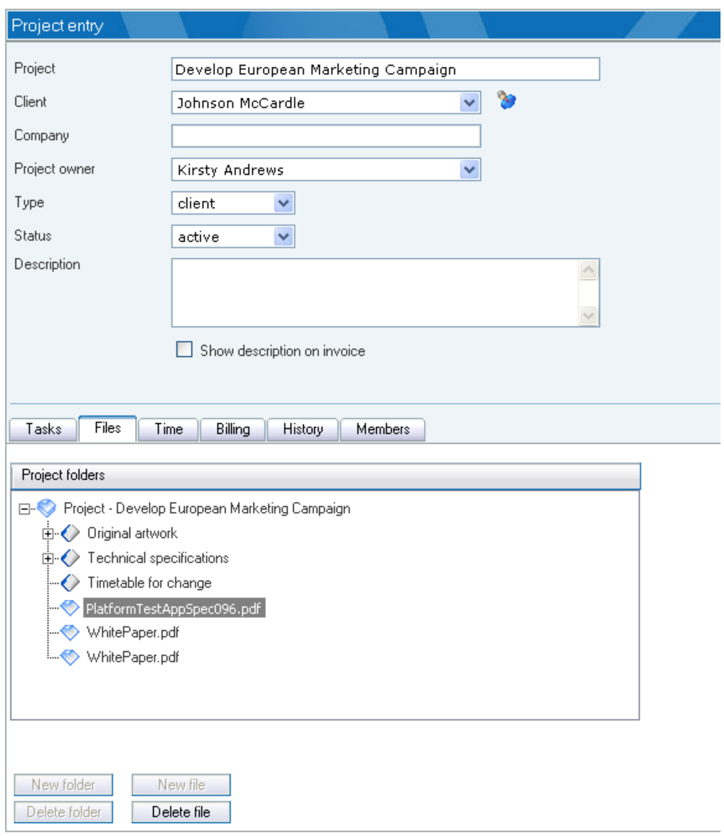
To use the billing rate for a person as the default task rate, you need to first add additional users, up to the maximum allowed by the licence your have purchased. Administrators may add users by clicking the Users icon in the left navigation pane:



Add some files to the project

The project may include files such as spreadsheets, designs, correspondence or other documents. To add these files, select the Files tab in the project detail. Then click the New file button. Use the file browse window to choose a file, and then click confirm. The file will be added to the project. To view the file, click it to open it in a new window.

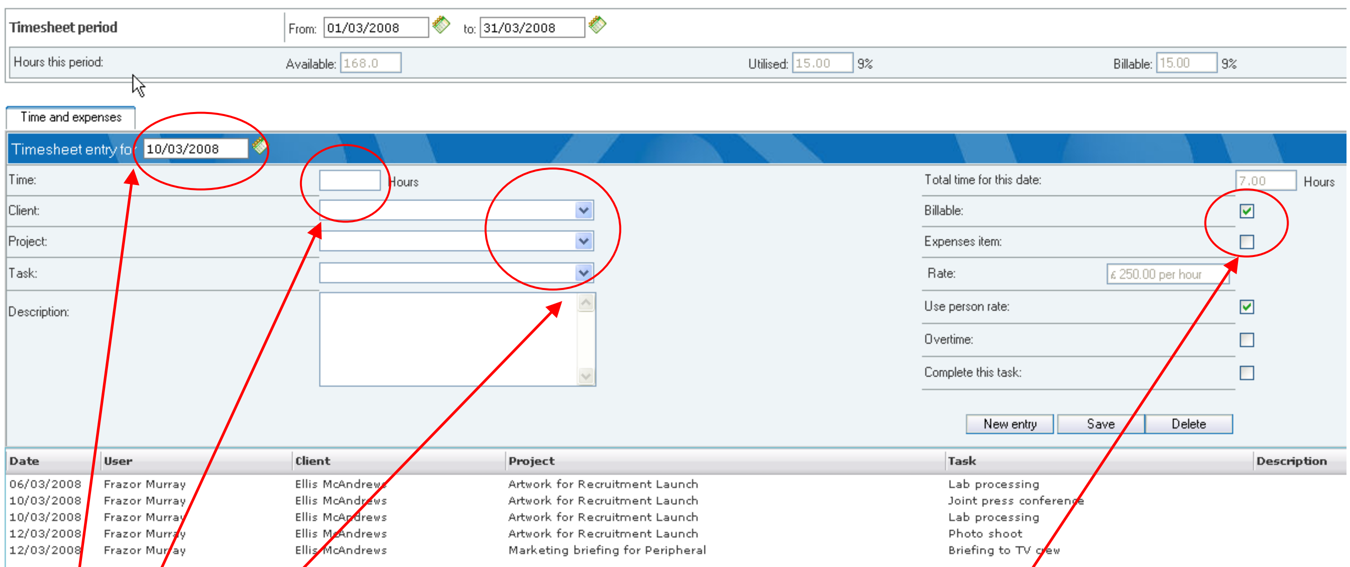
A typical files tab for a project may look like this:



Complete a timesheet

To record time for the task you created, click on Timesheets in the top navigation bar:

The timesheet page appears, with any existing entries for the period already listed:



To record a new time sheet entry:

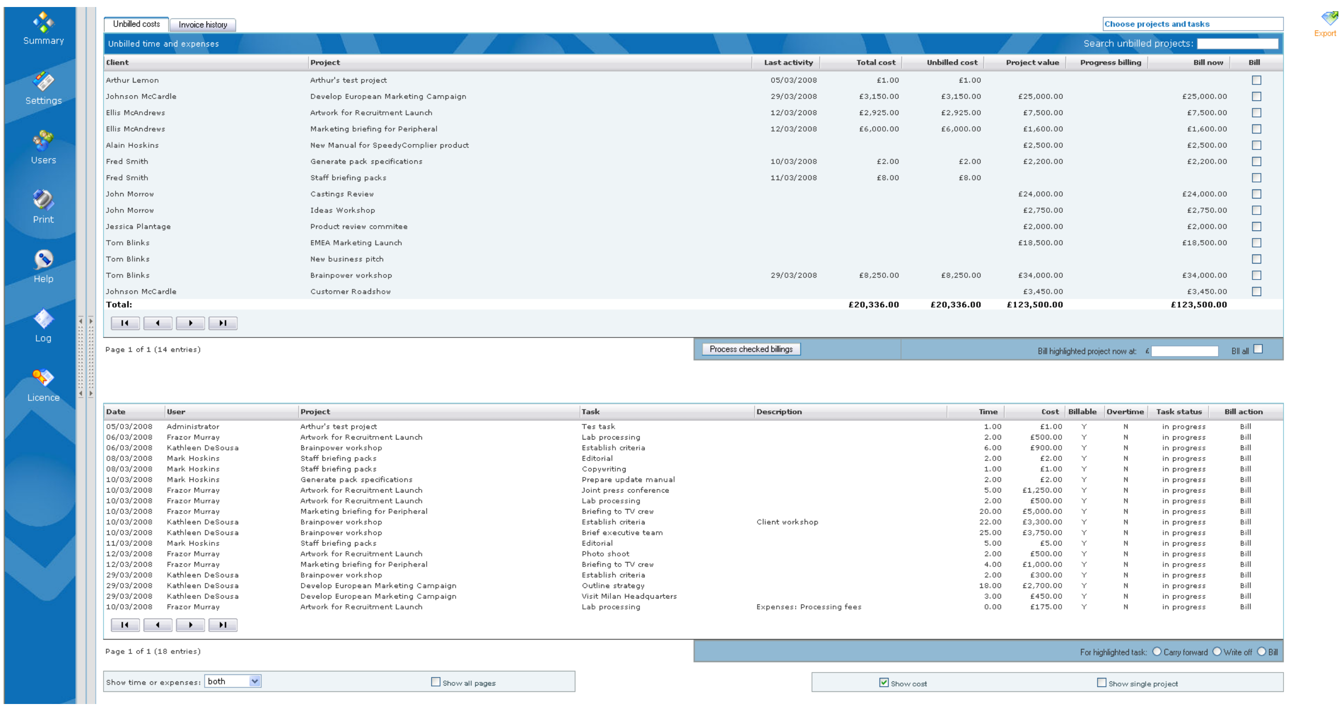
1. Select the date the entry refers to
2. Check the item should not be recorded as non-billable or expenses
3. Enter the amount of time, or the value of expenses
4. Choose the client, project and task
5. Optionally, enter a description
6. Click Save.

Prepare an invoice

To generate invoices for the time you have recorded, click on Billing in the top navigation bar:

Administrators may configure settings so that non-administrative users are allowed to or prevented from generating their own invoices.

The billing page is split into two panes. The upper pane summarises all unbilled costs and active billable projects by client. The lower pane analyses the unbilled costs recorded on timesheets:



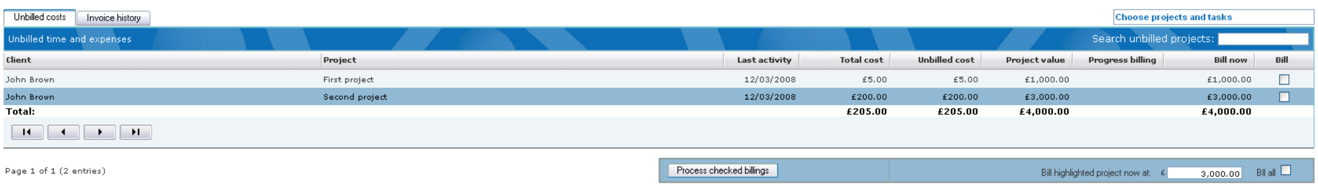
Billings can be made for all unbilled items, or selectively for individual projects. The amount of the billing can be adjusted, or the default unbilled amount accepted.

To bill time for the project you created:

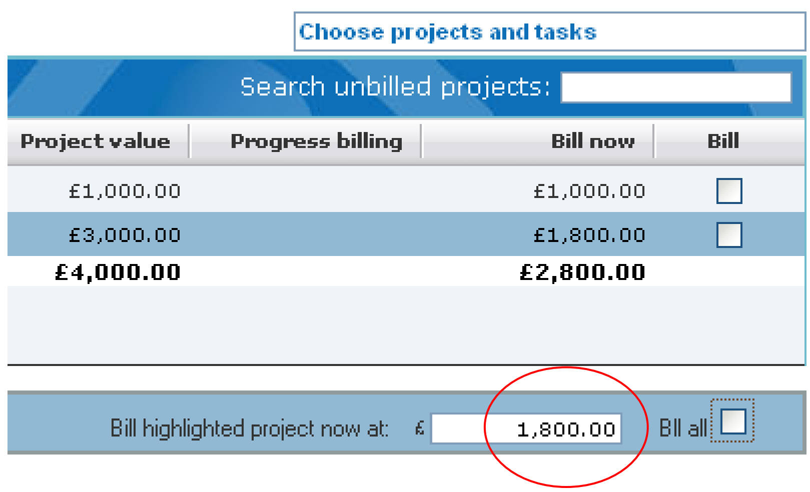
1. Click the project or projects you would like to bill in the upper pane
2. Optionally, alter the value of the invoice you are preparing now by altering the amount shown in the box at the foot of the upper pane.
3. Check the box in the 'Bill' column for projects you will bill now.
4. Optionally, choose to carry forward or write off any detailed cost lines in the lower pane.
5. Click the 'Process checked billings' button.
6. Review the generated invoices in the Invoice history tab at the top of the billings page.
7. View or print any invoices you select.

These steps are repeated below, with screenshot illustration added:

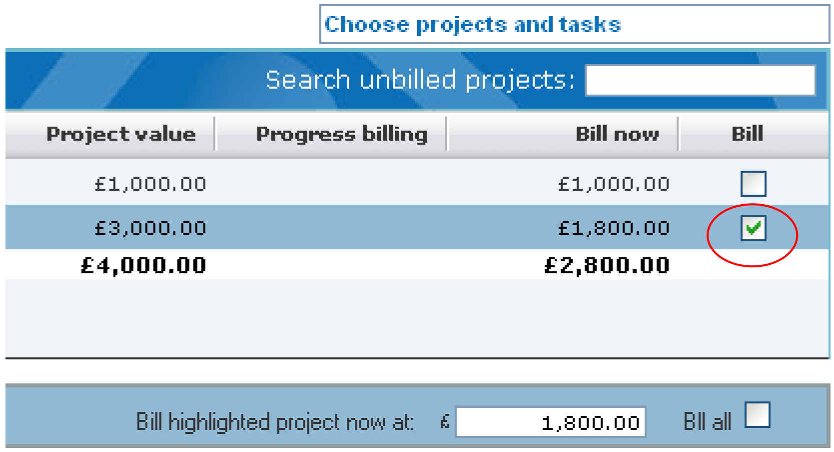
1. Click on the project you would like to bill in the upper pane of the billing page.



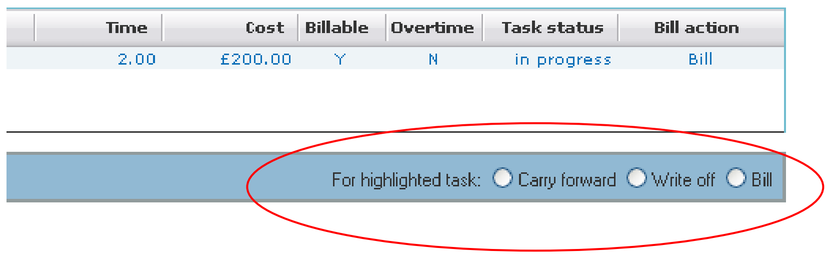
2. Optionally, in the billing value box at the foot of the upper pane, adjust the value to bill now for the project you have selected:



3. Check the box in the 'Bill' column for any projects you will to bill now.

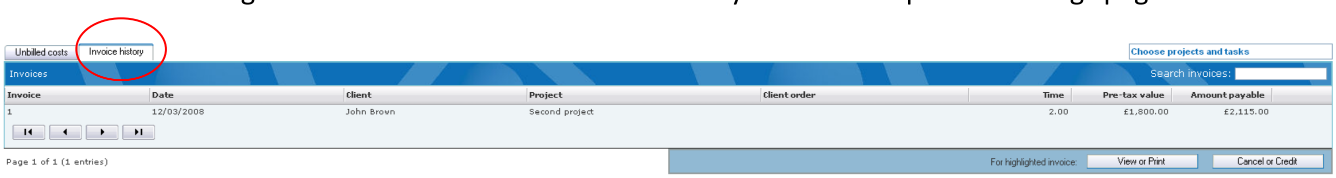


4. Optionally, choose to carry forward or write off any detailed cost lines in the lower pane.



5. Click the 'Process checked billings' button

6. Review the generated invoices in the Invoice history tab at the top of the billings page:



7. Click an invoice row, then view or print the invoice by clicking this button:

You have now completed the SoloManage Quick Start. Explore more features by creating test entries, and by referring to the most up to date documentation and support files available online at http://www.solomanage.com

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APPENDICES

System requirements

SoloManage software is browser-based, and can be installed on Windows Server 2003 or later, or Windows XP Professional Service Pack 2 or later.

Internet Explorer or Firefox browsers are supported. Safari is not supported.

Prerequisite software which must be installed on the target computer includes:

- Internet Information Services (IIS)
- Microsoft SQL Server Express
- Microsoft .Net Framework 3.0

SoloManage uses popup windows and JavaScript for some of its functions. Both popup windows and JavaScript must be enabled in the browser.

SoloManage functions with Internet Explorer and Firefox browsers, but Safari is not supported.

The generated reports, timesheets and invoices use Microsoft Office 2007 formats, and for compatibility the Microsoft Office 2007 System should be installed. For users of earlier versions of Office, a document conversion add-in is available from the Microsoft Downloads Centre. That converter will convert any Excel documents in SoloManage, but will be unable to fully convert any Word 2007 documents generated by SoloManage.