

# SoloManage

INSTALLATION AND QUICK START

2008

installation and quick start

---

Copyright ©2008 Quartile Software Ltd. All rights reserved.

No part of this publication may be reproduced, stored in a retrieval system, or transmitted in any form by any means without the prior permission of the copyright owners.

Other names and brands may be claimed as the property of others. Information regarding third party products is provided solely for educational purposes. Quartile Software Ltd. Is not responsible for the performance or support of third party products and does not make any representations or warranties whatsoever regarding quality, functionality, or compatibility of these devices or products.

Quartile Software Limited, 80 George Street, Edinburgh, EH2 3BU, UK

---

## INDEX

<b>INSTALLATION .....</b>	<b>1</b>
Check the system requirements.....	1
Download the setup file .....	1
Download a licence file.....	1
Prerequisites .....	2
Beginning the installation .....	2
The prerequisite steps .....	3
SoloManage installation.....	5
<b>QUICK START .....</b>	<b>9</b>
First steps.....	9
The dashboard.....	11
Add a client .....	12
Add a project for the client.....	12
Add a task to the project.....	13
Setting a billing rate for the task .....	14
Add some files to the project.....	16
Complete a timesheet .....	17
Prepare an invoice.....	18
<b>APPENDICES.....</b>	<b>22</b>
System requirements.....	22



# 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

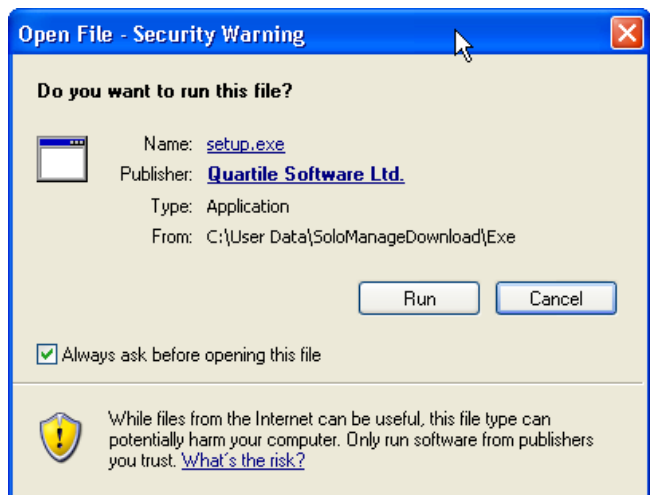
Choose any of the following methods to begin the installation:

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.

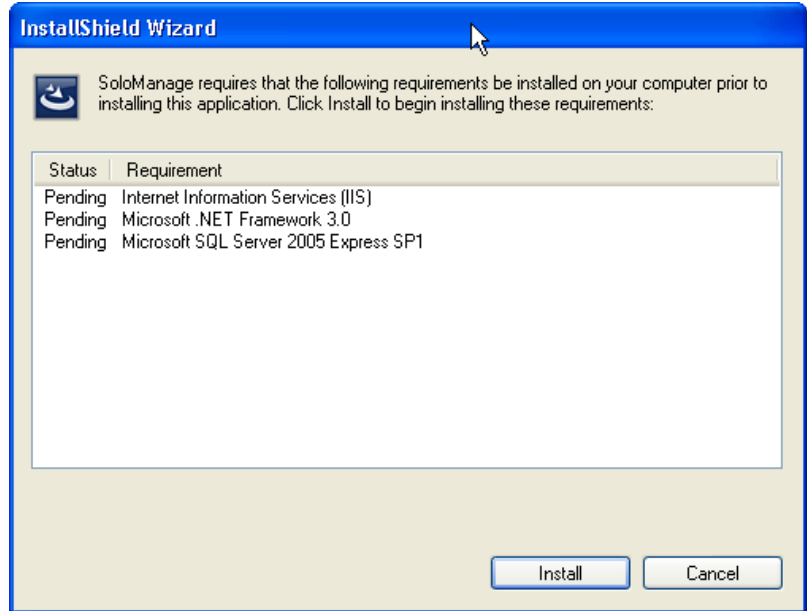


In some cases, your network may require you to adjust security settings in your browser to download content. If you are unsure of the settings to adjust, contact your network administrator or choose another method of download.

## The prerequisite steps

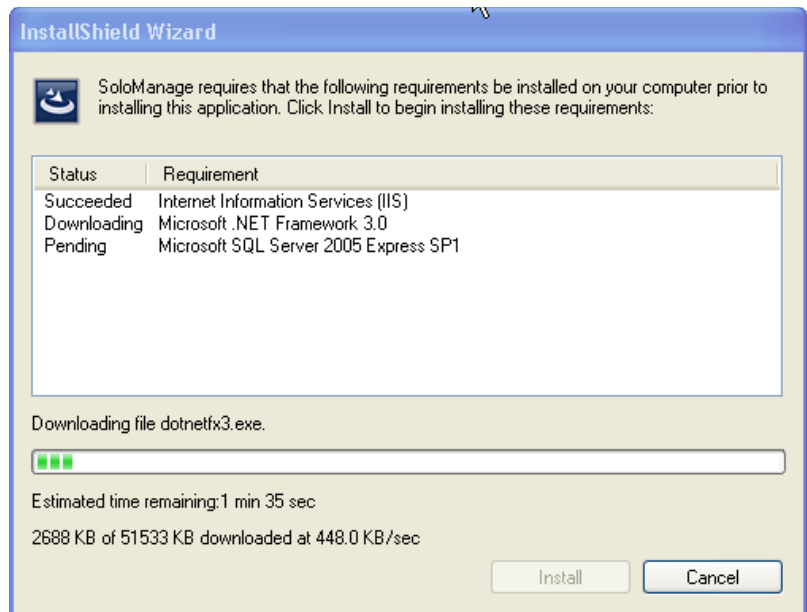
If your computer already has all of the prerequisites, skip this section and continue from the SoloManage installation section below.

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

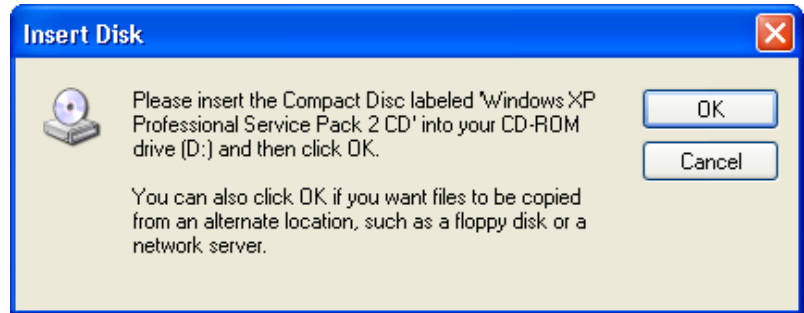


The exact contents of the prerequisite window will vary, depending on the configuration of your computer. If all of the prerequisites are already installed, you will not see this window or any related windows. Click on the install button to begin installing any prerequisites.

The prerequisite progress dialogue begins

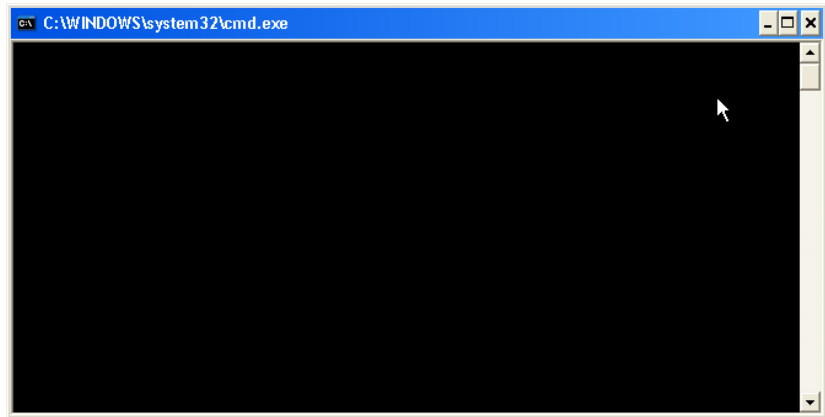


For the installation of IIS only, you will see this message. You need to insert your original Windows CD in order to install IIS.



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.

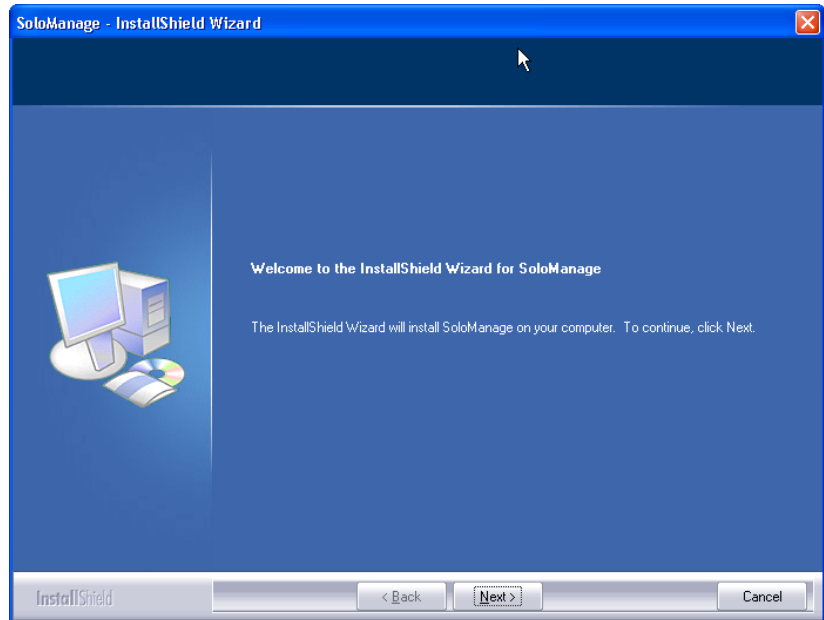
## SoloManage installation

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

### Click one

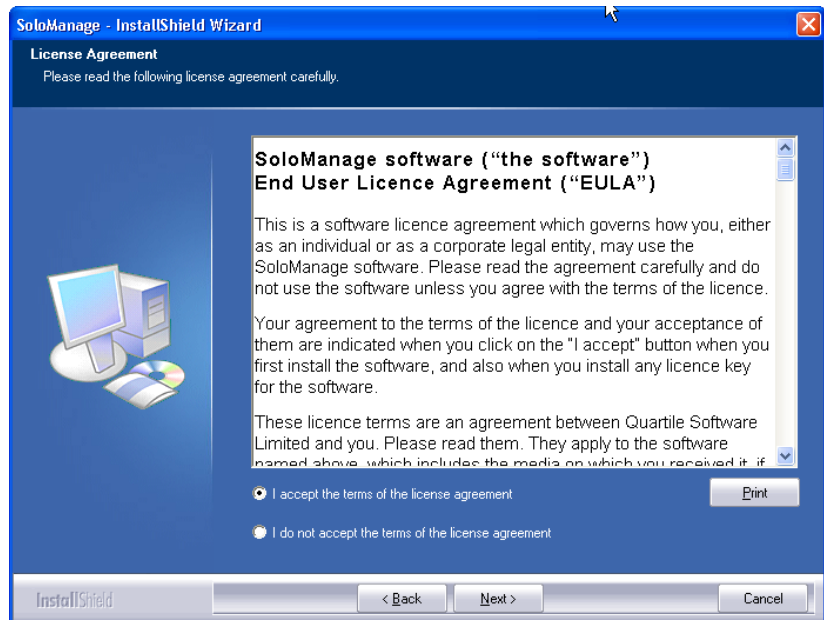
The first window in the SoloManage installation is the welcome window.

Click next to continue.



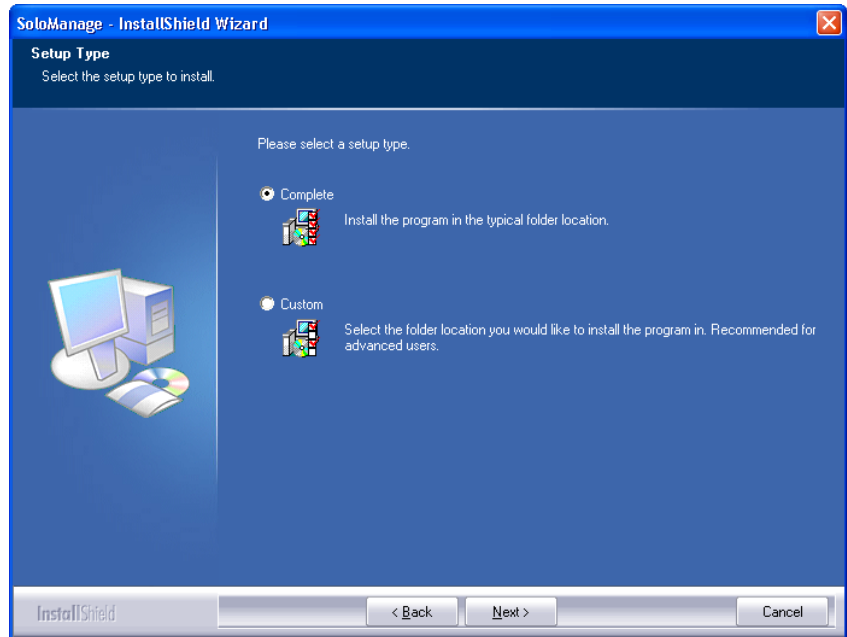
### Click two

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



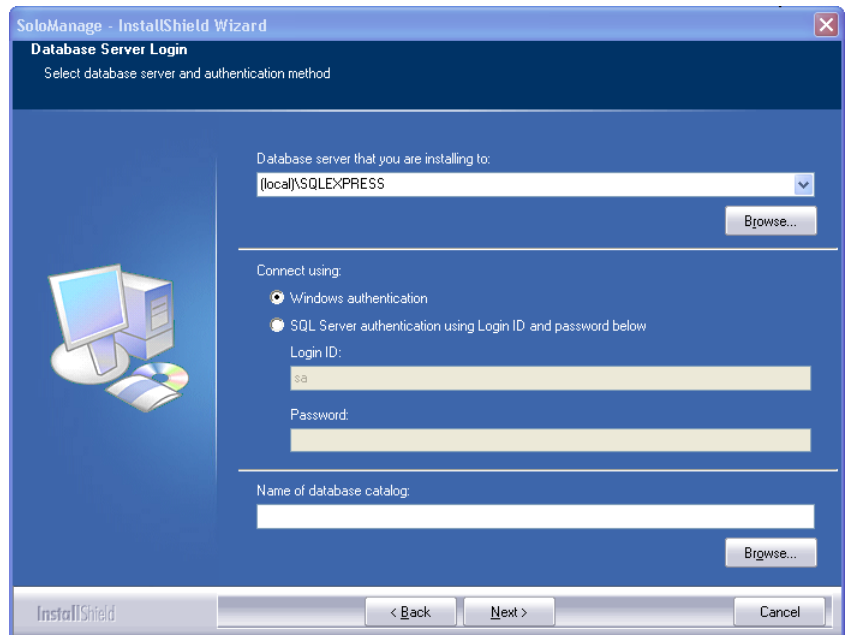
### Click three

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.



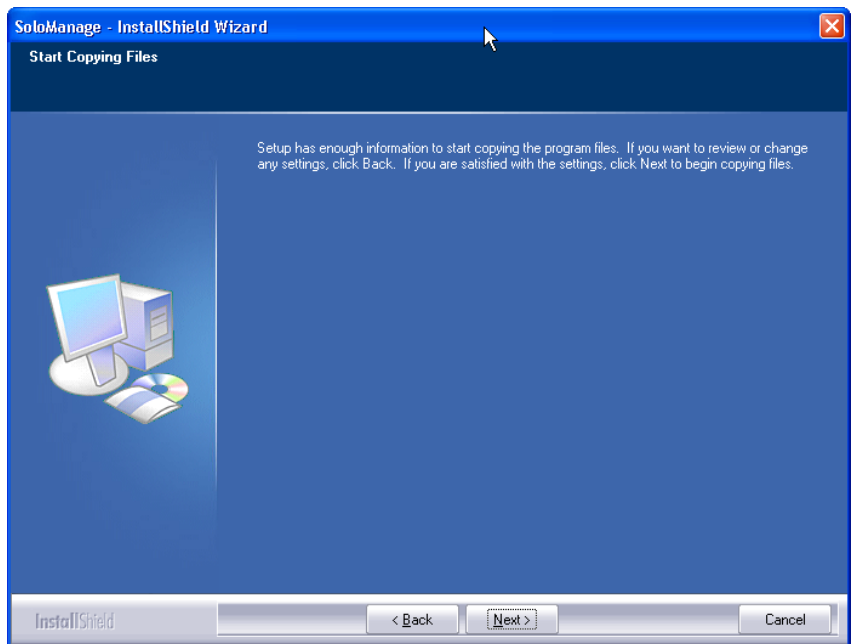
### Click four

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

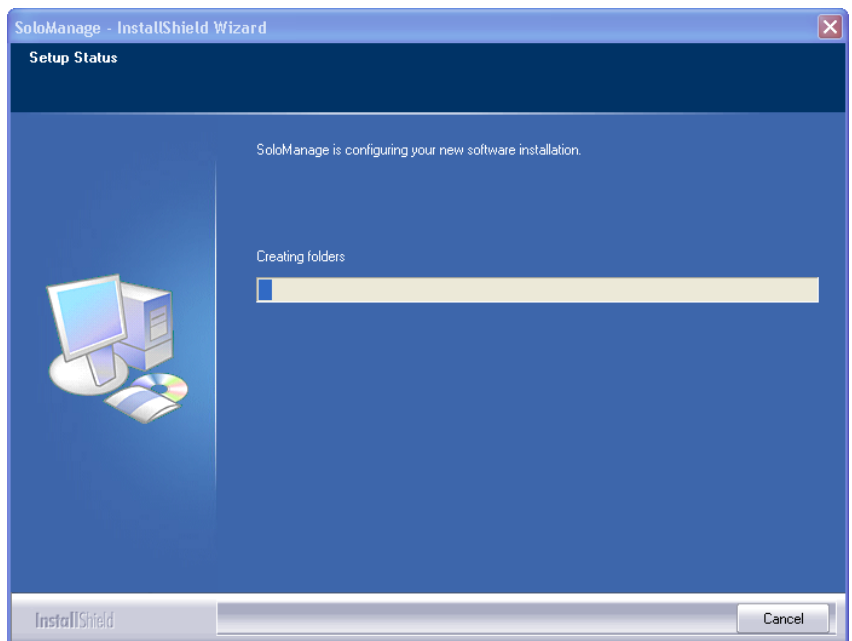


### Click five

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.

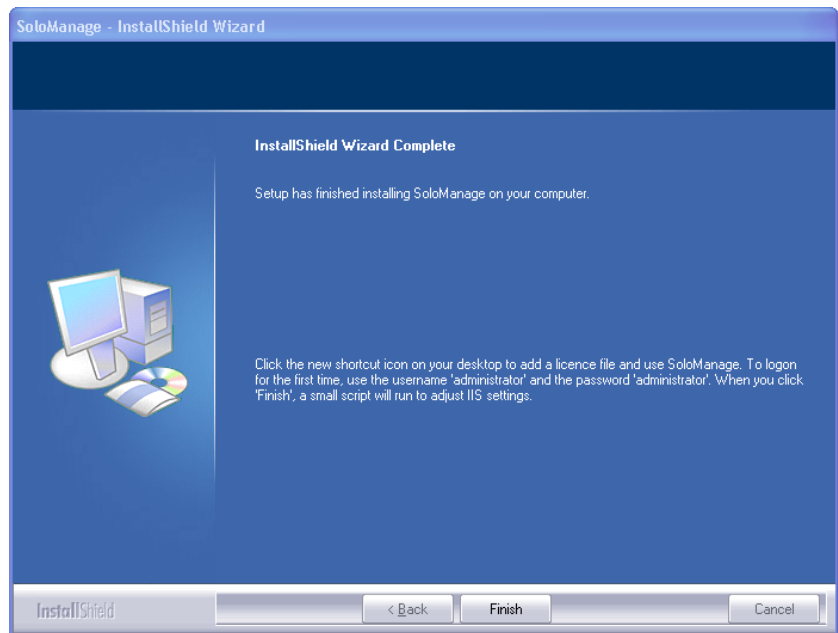


## Click six

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.

Log in Help

User Name:

Password:

Log In

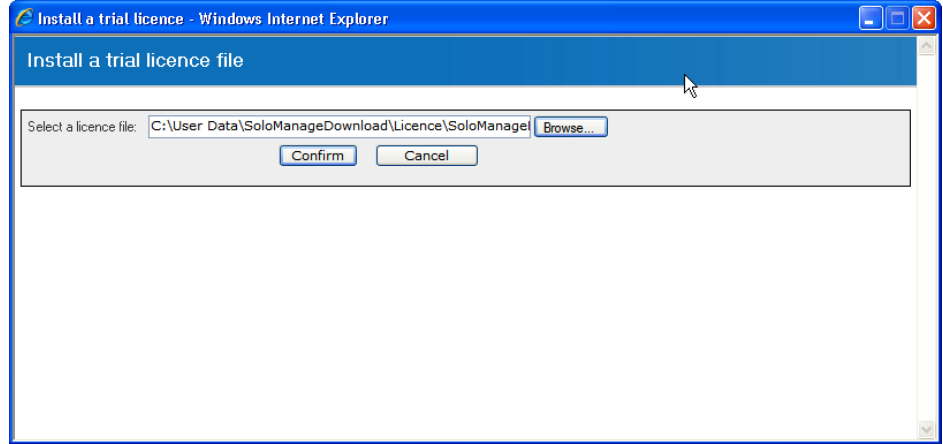
Licensed to: License type:

**This software is unlicensed.** © Copyright Quartile Software Ltd. 2008

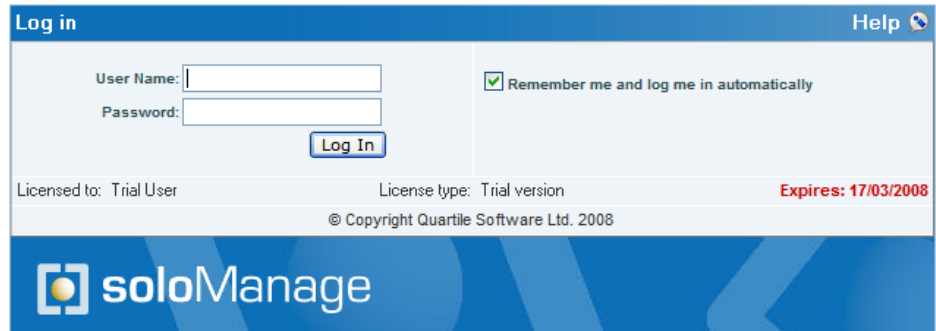
Click here to add a trial licence:

 soloManage

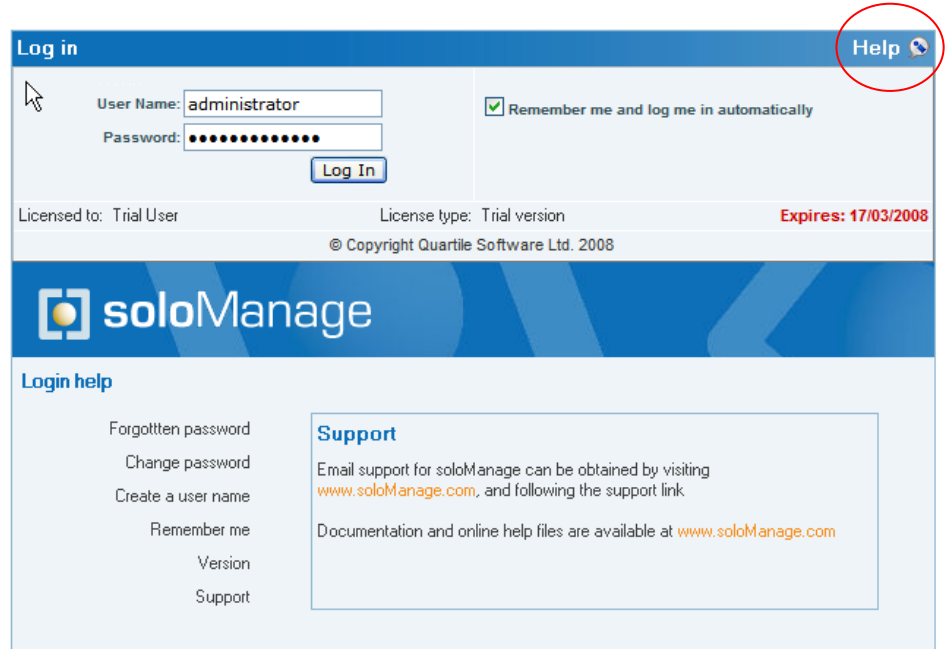
Select the licence file, and click 'Confirm'



You can now Logon using the default username and password.

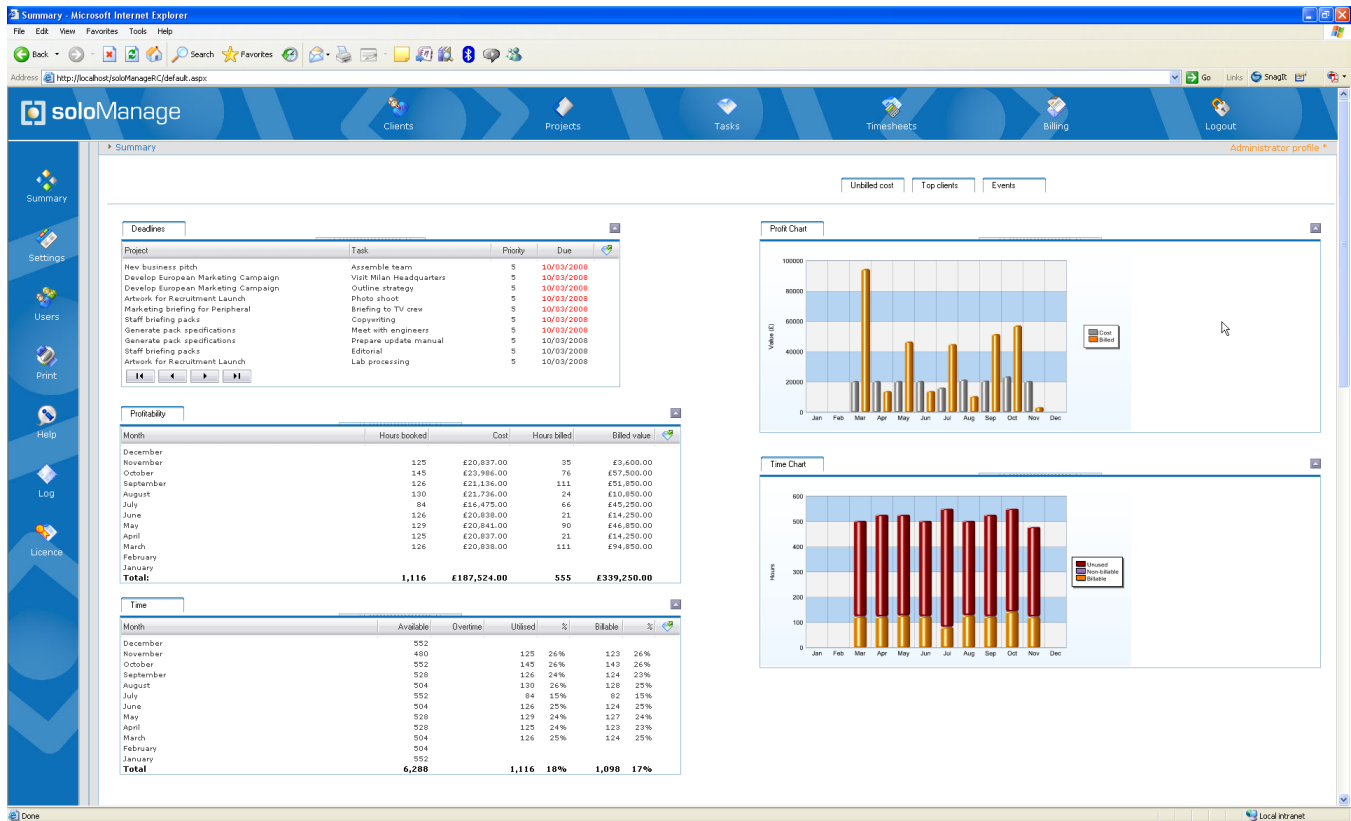


If you need help with Logon, click the Help icon at the top right of the Logon box.



## 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:



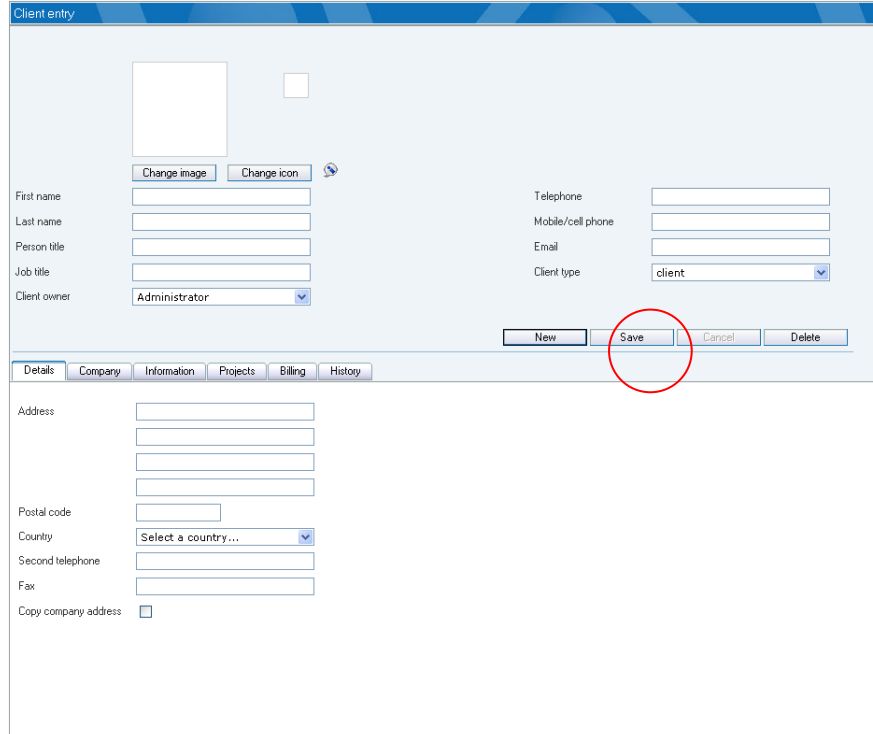
## Add a client

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.

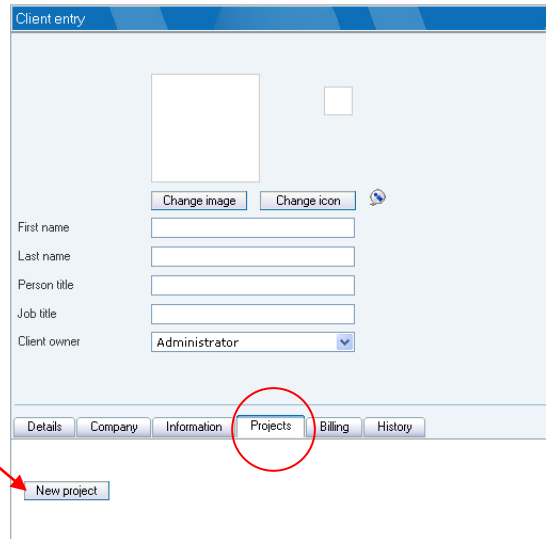
You may also use the company address as the person address by selecting the 'Copy Company address' option.



The screenshot shows the 'Client entry' form with various input fields for client details. The 'Save' button is circled in red. The form includes fields for First name, Last name, Person title, Job title, Client owner (set to Administrator), Telephone, Mobile/cell phone, Email, and Client type (set to client). There are also buttons for 'Change image' and 'Change icon'. At the bottom, there are buttons for 'New', 'Save', 'Cancel', and 'Delete'. Below the main form, there are tabs for 'Details', 'Company', 'Information', 'Projects', 'Billing', and 'History'. The 'Address' section includes fields for Address, Postal code, Country (set to 'Select a country...'), Second telephone, Fax, and a checkbox for 'Copy company address'.

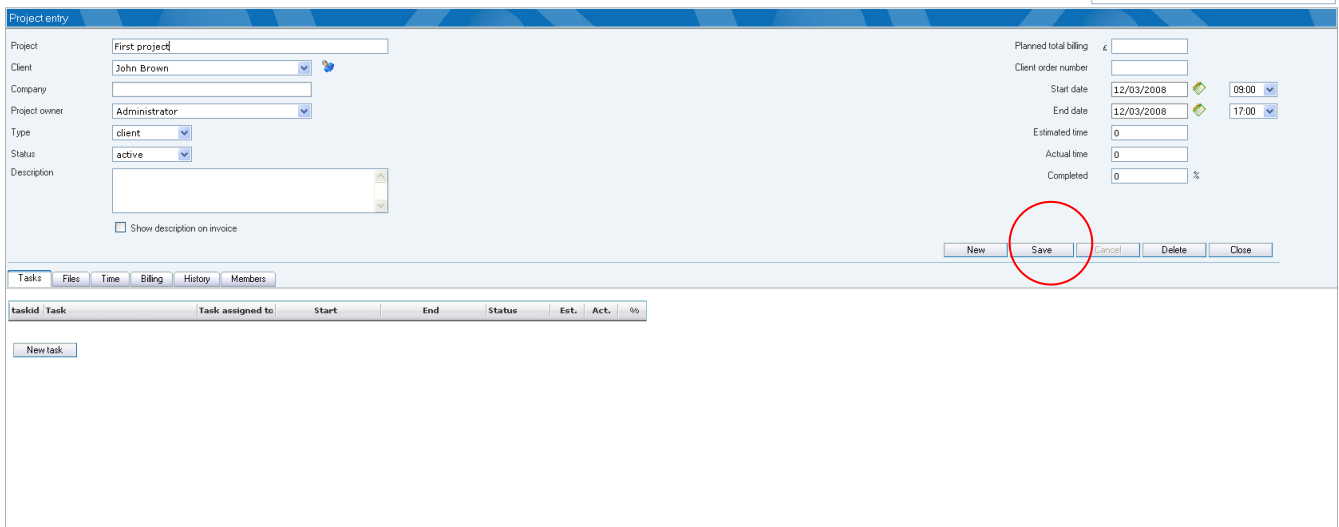
## Add a project for the client

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 screenshot shows the 'Client entry' form with the 'Projects' tab selected. The 'New project' button is circled in red. The form includes fields for First name, Last name, Person title, Job title, and Client owner (set to Administrator). There are also buttons for 'Change image' and 'Change icon'. At the bottom, there are buttons for 'Details', 'Company', 'Information', 'Projects', 'Billing', and 'History'. The 'New project' button is located below the 'Projects' tab.

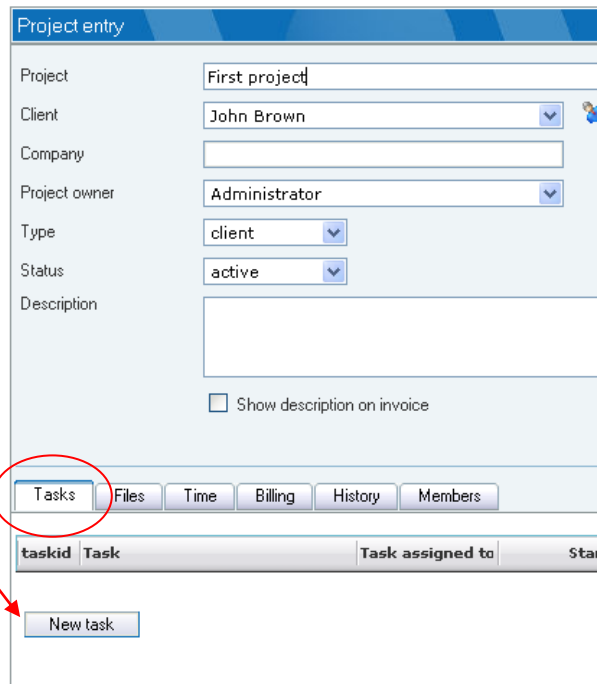
The project detail page is displayed. Enter details for the title of the project, start date, end date, expected billing amount, and any other details you wish. Click Save to create the new project.



The screenshot shows the 'Project entry' form. The 'Project' field contains 'First project'. The 'Client' is 'John Brown'. The 'Project owner' is 'Administrator'. The 'Type' is 'client' and the 'Status' is 'active'. The 'Description' field is empty. On the right side, there are fields for 'Planned total billing', 'Client order number', 'Start date' (12/03/2008), 'End date' (12/03/2008), 'Estimated time' (0), 'Actual time' (0), and 'Completed' (0 %). At the bottom right, there are buttons for 'New', 'Save', 'Cancel', 'Delete', and 'Close'. The 'Save' button is circled in red.

### 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.



The screenshot shows the 'Project entry' form with the 'Tasks' tab selected. The 'Project' field contains 'First project'. The 'Client' is 'John Brown'. The 'Project owner' is 'Administrator'. The 'Type' is 'client' and the 'Status' is 'active'. The 'Description' field is empty. At the bottom, there are tabs for 'Tasks', 'Files', 'Time', 'Billing', 'History', and 'Members'. The 'Tasks' tab is circled in red. Below the tabs, there is a table with columns 'taskid', 'Task', 'Task assigned to', and 'Sta'. A 'New task' button is located below the table.

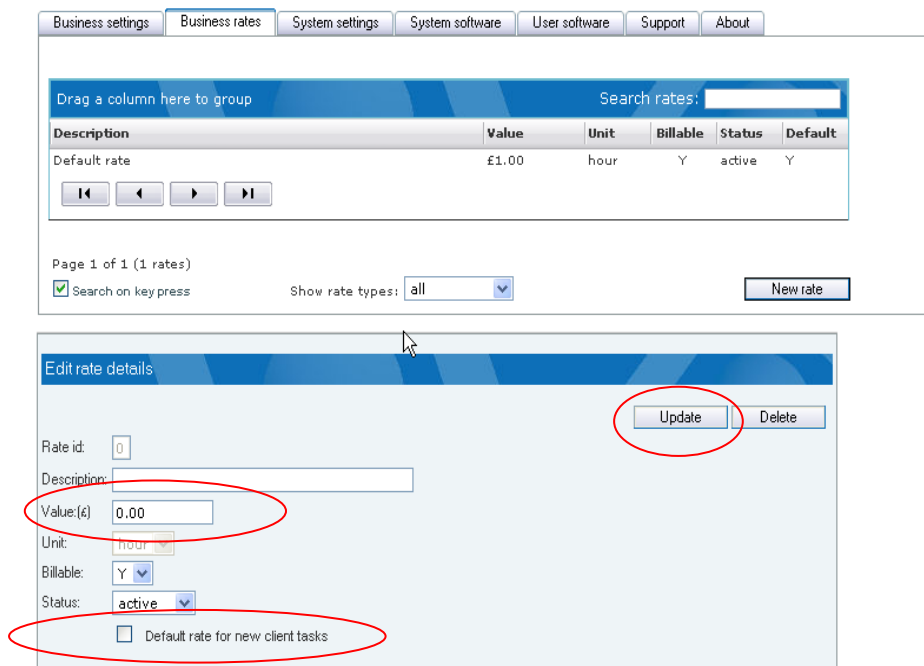
## Setting a billing rate for the task

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:



The screenshot shows the SoloManage settings interface. At the top, there are navigation tabs: Business settings, Business rates (selected), System settings, System software, User software, Support, and About. Below the tabs is a search bar labeled "Search rates:". A table displays the current rates:

Description	Value	Unit	Billable	Status	Default
Default rate	£1.00	hour	Y	active	Y

Below the table are navigation arrows and pagination information: "Page 1 of 1 (1 rates)", "Search on key press" (checked), "Show rate types: all", and a "New rate" button. The "Edit rate details" form is shown below, with several fields circled in red: "Rate id" (0), "Description" (empty), "Value: (£)" (0.00), "Unit" (hour), "Billable" (Y), "Status" (active), and the "Default rate for new client tasks" checkbox (unchecked). "Update" and "Delete" buttons are also visible.

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.

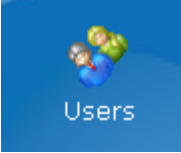
The main settings page contains a tab for rates, and also contains the setting to use a person rates as the default task rate:

The screenshot shows the 'Business rates' tab selected in the top navigation bar. The 'Business contact details' section contains fields for Business name (ABC Company), Business address (123 Any Street, Middle Town), Telephone (0124 581 6565), Fax (0457 9808 8000), Email (info@ourcompany.com), and Web site (http://www.ourcompany.org). The 'Working time' section includes 'Record and bill time in' (Hours), 'Increase to rates for overtime' (20%), 'Default timesheet period' (Month), 'Working days begin at' (09:00), 'Working days end at' (17:00), 'Billable hours per day' (8.0), and 'Use person rate as default' (checkbox). The 'Working days' section shows checkboxes for Mon, Tue, Wed, Thu, Fri, Sat, and Sun. The 'Currency and country settings' section includes 'Currency symbol' (£), 'Currency code' (GBP), 'Description' (pounds), and 'Choose a country' (English (United Kingdom)). The 'Sales tax' section includes 'Business tax id.', 'Local tax description', 'Regional tax description', 'National tax description' (VAT), 'Tax id. description' (VAT registration number), 'Local tax rate' (0.00%), 'Regional tax rate' (0.00%), 'National tax rate' (17.50%), and checkboxes for 'Use Local tax', 'Use Regional tax', and 'Use National tax'. The 'Invoicing' section includes 'Begin invoice numbering from' (1), 'Invoice header text', 'Invoice footer text', 'Accounting periods begin' (01/01/2008), and 'Users can bill own projects' (checkbox). The 'Update' button is located at the bottom of the form.

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.



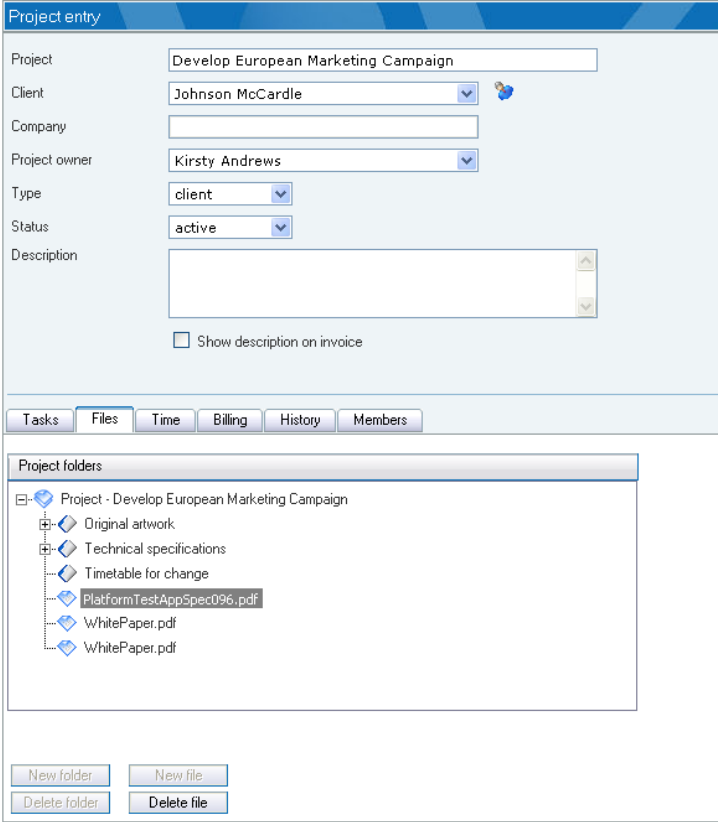
To use the billing rate for a person as the default task rate, you need to first add additional users, up to the maximum allowed by the licence your have purchased. Administrators may add users by clicking the Users icon in the left navigation pane:



**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:

Timesheet period: From: 01/03/2008 to: 31/03/2008

Hours this period: Available: 168.0 Utilised: 15.00 9% Billable: 15.00 9%

Time and expenses

Timesheet entry for 10/03/2008

Time:  Hours

Client:

Project:

Task:

Description:

Total time for this date:  Hours

Billable:

Expenses item:

Rate:

Use person rate:

Overtime:

Complete this task:

Date	User	Client	Project	Task	Description
06/03/2008	Frazor Murray	Ellis McAndrews	Artwork for Recruitment Launch	Lab processing	
10/03/2008	Frazor Murray	Ellis McAndrews	Artwork for Recruitment Launch	Joint press conference	
10/03/2008	Frazor Murray	Ellis McAndrews	Artwork for Recruitment Launch	Lab processing	
12/03/2008	Frazor Murray	Ellis McAndrews	Artwork for Recruitment Launch	Photo shoot	
12/03/2008	Frazor Murray	Ellis McAndrews	Marketing briefing for Peripheral	Briefing to TV crew	

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:

The screenshot displays the 'Billing' page interface. It features a left-hand navigation menu with options like Summary, Settings, Users, Print, Help, Log, and Licence. The main content area is divided into two sections:

**Unbilled time and expenses summary:**

Client	Project	Last activity	Total cost	Unbilled cost	Project value	Progress billing	Bill now	Bill
Arthur Lemon	Arthur's test project	05/03/2008	£1.00	£1.00				<input type="checkbox"/>
Johnson McCardle	Develop European Marketing Campaign	29/03/2008	£9,150.00	£9,150.00	£25,000.00		£25,000.00	<input type="checkbox"/>
Ellis Mokndrews	Artwork for Recruitment Launch	12/03/2008	£2,925.00	£2,925.00	£7,500.00		£7,500.00	<input type="checkbox"/>
Ellis Mokndrews	Marketing briefing for Peripheral	12/03/2008	£6,000.00	£6,000.00	£1,600.00		£1,600.00	<input type="checkbox"/>
Alain Hoskins	New Manual for SpeedyCompiler product				£2,500.00		£2,500.00	<input type="checkbox"/>
Fred Smith	Generate pack specifications	10/03/2008	£2.00	£2.00	£2,200.00		£2,200.00	<input type="checkbox"/>
Fred Smith	Staff briefing packs	11/03/2008	£8.00	£8.00				<input type="checkbox"/>
John Memov	Castings Review				£24,000.00		£24,000.00	<input type="checkbox"/>
John Memov	Ideas Workshop				£2,750.00		£2,750.00	<input type="checkbox"/>
Jessica Plantage	Product review committee				£2,000.00		£2,000.00	<input type="checkbox"/>
Tom Blinks	EMA Marketing Launch				£18,500.00		£18,500.00	<input type="checkbox"/>
Tom Blinks	New business pitch							<input type="checkbox"/>
Tom Blinks	Brainpower workshop	29/03/2008	£8,250.00	£8,250.00	£34,000.00		£34,000.00	<input type="checkbox"/>
Johnson McCardle	Customer Roadshow				£3,450.00		£3,450.00	<input type="checkbox"/>
<b>Total:</b>			<b>£20,336.00</b>	<b>£20,336.00</b>	<b>£123,500.00</b>		<b>£123,500.00</b>	

Page 1 of 1 (14 entries)

Process checked billings | Bill highlighted project now at: £ | Bill at

**Unbilled costs recorded on timesheets:**

Date	User	Project	Task	Description	Time	Cost	Billable	Overtime	Task status	Bill action
05/03/2008	Administrator	Arthur's test project	Test task		1.00	£1.00	Y	N	in progress	Bill
06/03/2008	Frazor Murray	Artwork for Recruitment Launch	Lab processing		2.00	£500.00	Y	N	in progress	Bill
06/03/2008	Kathleen DeSouza	Brainpower workshop	Establish criteria		6.00	£900.00	Y	N	in progress	Bill
08/03/2008	Mark Hoskins	Staff briefing packs	Editorial		2.00	£2.00	Y	N	in progress	Bill
08/03/2008	Mark Hoskins	Staff briefing packs	Copywriting		1.00	£1.00	Y	N	in progress	Bill
10/03/2008	Mark Hoskins	Generate pack specifications	Prepare update manual		2.00	£2.00	Y	N	in progress	Bill
10/03/2008	Frazor Murray	Artwork for Recruitment Launch	Joint press conference		5.00	£1,250.00	Y	N	in progress	Bill
10/03/2008	Frazor Murray	Artwork for Recruitment Launch	Lab processing		2.00	£200.00	Y	N	in progress	Bill
10/03/2008	Frazor Murray	Marketing briefing for Peripheral	Briefing to TV crew		20.00	£5,000.00	Y	N	in progress	Bill
10/03/2008	Kathleen DeSouza	Brainpower workshop	Establish criteria	Client workshop	22.00	£3,200.00	Y	N	in progress	Bill
10/03/2008	Kathleen DeSouza	Brainpower workshop	Brief executive team		25.00	£3,750.00	Y	N	in progress	Bill
11/03/2008	Mark Hoskins	Staff briefing packs	Editorial		5.00	£5.00	Y	N	in progress	Bill
12/03/2008	Frazor Murray	Artwork for Recruitment Launch	Photo shoot		2.00	£500.00	Y	N	in progress	Bill
12/03/2008	Frazor Murray	Marketing briefing for Peripheral	Briefing to TV crew		4.00	£1,000.00	Y	N	in progress	Bill
29/03/2008	Kathleen DeSouza	Brainpower workshop	Establish criteria		2.00	£300.00	Y	N	in progress	Bill
29/03/2008	Kathleen DeSouza	Develop European Marketing Campaign	Outline strategy		18.00	£2,700.00	Y	N	in progress	Bill
29/03/2008	Kathleen DeSouza	Develop European Marketing Campaign	Visit Milan Headquarters		3.00	£450.00	Y	N	in progress	Bill
10/03/2008	Frazor Murray	Artwork for Recruitment Launch	Lab processing	Expenses: Processing fees	0.00	£175.00	Y	N	in progress	Bill

Page 1 of 1 (18 entries)

For highlighted task:  Copy forward  Write off  Bill

Show time or expenses:  both  Show all pages  Show cost  Show single project

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.

Client	Project	Last activity	Total cost	Unbilled cost	Project value	Progress billing	Bill now	Bill
John Brown	First project	12/03/2008	£5.00	£5.00	£1,000.00		£1,000.00	<input type="checkbox"/>
John Brown	Second project	12/03/2008	£200.00	£200.00	£3,000.00		£3,000.00	<input type="checkbox"/>
<b>Total:</b>			<b>£205.00</b>	<b>£205.00</b>	<b>£4,000.00</b>		<b>£4,000.00</b>	

Page 1 of 1 (2 entries)

Process checked billings

Bill highlighted project now at: € 3,000.00 Bill all

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:

Project value	Progress billing	Bill now	Bill
£1,000.00		£1,000.00	<input type="checkbox"/>
£3,000.00		£1,800.00	<input type="checkbox"/>
<b>£4,000.00</b>		<b>£2,800.00</b>	

Bill highlighted project now at: € 1,800.00 Bill all

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

Choose projects and tasks

Search unbilled projects:

Project value	Progress billing	Bill now	Bill
£1,000.00		£1,000.00	<input type="checkbox"/>
£3,000.00		£1,800.00	<input checked="" type="checkbox"/>
<b>£4,000.00</b>		<b>£2,800.00</b>	

Bill highlighted project now at: £  Bill all

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

Time	Cost	Billable	Overtime	Task status	Bill action
2.00	£200.00	Y	N	in progress	Bill

For highlighted task:  Carry forward  Write off  Bill

5. Click the 'Process checked billings' button

Process checked billings

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

Unbilled costs **Invoice history** Choose projects and tasks

Invoices Search invoices:

Invoice	Date	Client	Project	Client order	Time	Pre-tax value	Amount payable
1	12/03/2008	John Brown	Second project		2.00	£1,800.00	£2,115.00

Page 1 of 1 (1 entries)

For highlighted invoice:

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

View or Print



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>

Quartile Software Ltd.  
80 George Street  
Edinburgh  
EH2 3BU

## 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.