

# Relata

## User Guide

Version 1.0

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Relata User Guide

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## Table of Contents

INTRODUCING RELATA .....	6
<i>How to Get More Done</i> .....	7
<i>What are Your Desired Outcomes?</i> .....	8
<i>What Can Relata Help You Do?</i> .....	11
<i>What Features Does Relata Offer?</i> .....	12
<i>User Requirements</i> .....	12
<i>Creating Links for Easy Access to the Relata Application</i> .....	13
EXECUTING AND LOGGING ON TO RELATA .....	14
<i>Understanding the Main Window</i> .....	15
<i>Refreshing At a Glance View</i> .....	15
<i>Personal and Shared Views</i> .....	15
USING THE ACTIVITY MANAGER .....	16
<i>Planning Your Time with the Activity Manager</i> .....	16
<i>Showing and Hiding the Calendar</i> .....	17
<i>Viewing Daily or Monthly Activities</i> .....	18
<i>Changing Dates for Activities</i> .....	20
<i>Viewing Regular or Hidden Activities</i> .....	21
<i>Viewing Your Activities: Personal or Shared</i> .....	22
<i>Viewing Activities by All, Personal, or Team</i> .....	22
<i>Viewing Activities by Status</i> .....	22
<i>Viewing Activities by All Items, To-Do Items, and Calendar Items</i> .....	23
<i>Viewing Activities for Today or This Week</i> .....	23
<i>Adding Activities to Relata</i> .....	24
<i>Marking a Activity as Completed</i> .....	26
MANAGING YOUR CONTACTS .....	27
<i>Selecting Contact Groups</i> .....	27
<i>Changing How Contact Names Appear</i> .....	27
<i>Viewing a Contact's Information</i> .....	28
<i>Adding Contacts to Relata</i> .....	28
<i>Copying a Contact's Information to the Windows Clipboard</i> .....	30
<i>Duplicating a Contact Entry</i> .....	30
<i>Deleting a Contact's Information</i> .....	30
MANAGING YOUR ACCOUNTS .....	31
<i>Viewing an Account's Information</i> .....	31
<i>Adding an Account</i> .....	32
<i>Deleting an Account</i> .....	33
WORKING WITH THE OUTCOMES MANAGER .....	34
<i>Working with Your Outcomes</i> .....	34
<i>Adding Outcomes</i> .....	35
<i>Adding Sub-Outcomes</i> .....	36
<i>Linking Activities</i> .....	37
<i>Linking New Activities</i> .....	38
<i>Marking Outcomes as Open or Complete</i> .....	39
<i>Viewing, Editing, and Deleting Outcomes</i> .....	41
<i>Working with Your Focus Areas</i> .....	43
<i>Viewing Linked Notes</i> .....	44
<i>Unlinking a Note</i> .....	45
WORKING WITH LOGS .....	46
<i>Creating Logs</i> .....	47
<i>Editing Logs</i> .....	48
<i>Deleting Logs</i> .....	49
<i>Exporting Logs to Microsoft Word</i> .....	50
USING THE GROUP EMAIL MANAGER .....	51

<i>Sending an Email to a Contact</i> .....	51
WORKING WITH KNOWLEDGE MANAGEMENT .....	52
<i>Creating Folders</i> .....	53
<i>Renaming and Deleting Folders</i> .....	54
<i>Creating Documents</i> .....	55
<i>Editing and Deleting Documents</i> .....	56
<i>Viewing a Document's Change Log</i> .....	57
WORKING WITH THE FILE MANAGER .....	58
<i>Creating Folders and Sub-Folders</i> .....	59
<i>Renaming Folders and Sub-Folders</i> .....	61
<i>Deleting Folders and Sub-Folders</i> .....	62
<i>Uploading Files</i> .....	63
<i>Downloading Files</i> .....	65
<i>Checking In Files and Checking Out Files</i> .....	67
<i>Editing a File's Attributes</i> .....	71
<i>Renaming Files</i> .....	72
<i>Deleting Files</i> .....	73
<i>Viewing the Change Log for a File</i> .....	74
<i>Viewing a File's Properties</i> .....	75
WORKING WITH NOTES .....	76
<i>Viewing Notes</i> .....	77
<i>Adding Notes</i> .....	78
<i>Editing Notes</i> .....	79
<i>Deleting Notes</i> .....	80
GENERATING STATISTICS AND REPORTS .....	81
<i>Viewing a Summary</i> .....	83
<i>Viewing Contacts</i> .....	84
<i>Viewing Activities</i> .....	85
<i>Viewing Accounts</i> .....	86
<i>Viewing Outcomes</i> .....	87
<i>Viewing Focus Areas</i> .....	88
<i>Viewing Logs</i> .....	89
<i>Viewing Documents</i> .....	90
<i>Viewing Files</i> .....	91
<i>Viewing Notes</i> .....	92
<i>Viewing Productivity</i> .....	93
CONFIGURING RELATA WITH THE SETTINGS MANAGER .....	94
<i>Assigning Users to Groups</i> .....	95
<i>Adding a Group</i> .....	96
<i>Deleting a Group</i> .....	97
<i>Working with Extra Fields</i> .....	98
<i>Adding Extra Fields</i> .....	99
<i>Deleting Extra Fields</i> .....	100
<i>Working with Teams of Users</i> .....	101
<i>Adding a Team</i> .....	102
<i>Deleting Teams</i> .....	103
<i>Adding Users to a Team</i> .....	104
<i>Deleting Users from a Team</i> .....	105
<i>Modifying a User's Read/Write Access</i> .....	105
<i>Changing Login Settings</i> .....	106
<i>Adding a New User</i> .....	108
<i>Changing a User's Password</i> .....	108
<i>Designating a User as a Relata Account Manager</i> .....	109
<i>Deleting Users from Your Account</i> .....	110
<i>Viewing Your Account History</i> .....	111
<i>Blocking Users</i> .....	112

SEARCHING RELATA FOR INFORMATION .....	113
BACKING UP YOUR RELATA INFORMATION.....	115
MANAGING RELATA USERS .....	117
SYNCHRONIZING DATA.....	118
<i>System Requirements</i> .....	118
<i>Launching Resync</i> .....	119
<i>Configuring Resync</i> .....	119
<i>Setting the Relata Preferences</i> .....	120
FREQUENTLY ASKED QUESTIONS .....	121
<i>General Questions</i> .....	121
<i>Licensing Questions</i> .....	122
<i>Installation Questions</i> .....	123
<i>Payment Questions</i> .....	124
<i>Support Questions</i> .....	124

## INTRODUCING RELATA

If you find yourself swamped with to-do lists and an almost never-ending amount of stuff that needs to get done, then take heart --- this guide is for you.

You may be someone who desperately needs to get more done in a day, but feels like you're just spinning your wheels.

Maybe you have a workgroup or employees whose productivity you are responsible for, and you need some way to help them get more done that doesn't cost you more of your own time.

We have good news for you: **Relata** is a system designed to help you and your workgroup get more done in a day, and it works.

Those who get the most benefit from **Relata** are people who spend a good portion of their day at or near a computer. These people are called "knowledge workers" and they already account for nearly 50 percent of the workforce.

Most of us develop lists of things we are supposed to do. Some of us use day planners, some use PDAs, and some use sticky-notes and scraps of paper. Some of us use all four.

And then there is the stuff that doesn't get written down, that just gets stored away in your memory banks, taking up mental space. Stuff that you hope you'll remember to do, places you're supposed to go, random ideas, random lists --- you name it.

In addition to all that stuff, you have appointments you are supposed to attend, contacts you have to keep current with, customers or suppliers you have to stay on top of, notes and memos you have to file, internal documents you have to access, and files you need to update.

Plus, if you have employees or are part of a workgroup, a lot of your information gets shared back and forth, meaning it gets even harder to manage and keep up-to-date.

After awhile, it can feel like you and those you work with are spending the majority of the day just trying to catch-up on all this stuff, and never really gaining that much of a sense of accomplishment. Sometimes the day ends and you ask yourself "what did I do all day?" and you don't really have a satisfying answer. You may have worked very hard, but have no sense that anything meaningful got done.

The **Relata** system was designed with the express purpose of helping you and those you work with get more done in a day, and to focus your energy on those things which are important to you or your organization.

When we designed **Relata**, we chose to design it as software rather than a paper-based system, since most knowledge workers are around computers a good portion of their day. We also thought it would make sense to have the software accessible through a web-browser, rather than forcing individual users to download and install software, since knowledge workers often have constant internet access.

## How to Get More Done

The one thing you can do right now that will help you get more done in a day is to make sure that the things you spend your time doing are consistent with your desired outcomes. "Desired outcomes" is just another way of saying "goals", or "objectives", or "results."

You may be thinking that the previous paragraph is stating the obvious, and it is. But very few of us actually do it.

For example, if you are a salesperson and your desired outcome is to gross \$100,000 in sales this month, you need to make sure the things you do every day are consistent with hitting your target. If you spend your day working with the product-development staff, organizing your paper filing system, having a pow-wow with the IT guys to figure out why your computer keeps crashing, while all the time being interrupted by incoming phone calls from an irate client who needs your help getting the product to work properly --- you may find that your target of \$100,000 doesn't get reached.

Why? Because you were allowing yourself to do things that were unrelated to your desired outcome. Even though you may feel that all those things you were doing were absolutely necessary, the bottom line is that none of them helped you reach your target of \$100,000 in gross sales.

Similarly, if you are an architect, and your desired outcome is to finish the drawings for a house so they can be sent to the city planning department for approval 7 days from now, you need to make sure you invest a considerable amount of time every day in accomplishing this. However, if you spend your day training the new guy, answering your telephone every time it rings, phoning the newspaper to place an advertisement, reading the latest architectural digest that came across your desk, and attending unrelated meetings, you may find that the 7 days come and go and your drawings remain unfinished.

Sounds obvious. But most of us fall into these unproductive patterns every day.

So really there are two changes that most of us have to make: first, we have to decide what our desired outcomes are for; second, we have to make sure those things which we plan to do today are consistent with our desired outcomes.

This process is very simple and effective, but it is surprising that more of us don't do it.

It only takes a few minutes to do, but it really improves your productivity.

## What are Your Desired Outcomes?

In order to answer this question, you first have to ask yourself: what things are important to me?

That may not seem like a very complex question, but it carries a lot of weight. By answering it, you'll more easily be able to determine what things are important for you to do, and what things aren't.

For example, is it really important for you to read the architectural digest from cover-to-cover, or could you skim it? Or could you ignore it completely? When was the last time you actually benefited from anything you read in that digest? Is it important, or is it more like an entertaining diversion?

When you use the **Relata** system, you can plan your day, or your week, or your month, and every one of your to-do items and appointments can be linked to a desired outcome which in turn is linked to an area of your life that is important to you. This will help you get more done, focus your time more efficiently, and allow you to finally get control over your day and your life.

You have to decide what your desired outcomes are. If you haven't made those decisions, or don't know what your desired outcomes are, please --- don't worry; you will find it is remarkably simple to do.

What key areas of your professional/work life are really important? (For now, we'll talk about how to use Relata as a tool for getting more done in your professional/work/business life. However, you will soon see that Relata can be used to get more done in all areas of your life --- both professional and personal).

Here is an example of how you might answer this question: If you are a salesperson, then it is probably important that you generate new prospects. Similarly, it is important that you contact those new prospects and turn them into customers. It is probably also important to ensure that your existing customers are satisfied. It is also important that you intimately understand the products you are selling. These are all crucial components of your position as a salesperson. In **Relata**, we call these your *Focus Areas*.

Your *Focus Areas* are those aspects of your work that are absolutely crucial.

Sometimes, when you are first doing this exercise, it is challenging to come up with your Focus Areas. That's ok --- just take your best guess at them for now --- you can always modify them later. Also, if you are an employee or if you have a team you work with, it is a good idea to talk with your manager or team leader to get a sense of what your *Focus Areas* are. You may find that your boss has a different idea than you do of what your *Focus Areas* are, in which case it's best to sort them out before you go any further.

Here is another example. Suppose you are an office manager for a small company. In identifying your *Focus Areas*, you may find they are: interviewing, hiring, and training office employees; planning, assigning, and directing office work; appraising performance of office staff; rewarding and disciplining office employees; addressing complaints and resolving problems.

*Focus Areas* are usually different for most people. Everyone's professional life is unique to some extent, and so are their *Focus Areas*. To one person, customer service is a *Focus Area*. To another person, cost management is a *Focus Area*. To another person, sales is a *Focus Area*. To another, team building is a *Focus Area*. To another, leadership is a *Focus Area*. To another, training is a *Focus Area*. And so on.



Next, provide a bit more detail about your *Focus Areas*. Using the above example of the salesperson, think about:

- what it would look like if the process of identifying new prospects was everything you wanted it to be;
- what it would look like if the process of prospect-conversion was really awesome;
- what it would be like to have customers who are truly satisfied;
- and how it would be if your product knowledge was really top-notch?

In other words, identify how each of your *Focus Areas* would look in an ideal world. In **Relata**, we call this your Vision.

You might say:

- “Well, if the process of generating new sales leads was all I wanted it to be, I would always have a steady supply of new leads flowing to me, each of whom is qualified and interested in hearing about the products I am selling.”
- “My idea of successful prospect-conversion is to have a high-percentage of my prospects becoming sales, in a rapid time frame.”
- “When I think of satisfied customers, I want all my customers to tell their friends and colleagues how happy they are to be doing business with me. I want my customers to do repeat business with me, and be a regular source of new referrals.”
- “To me, I want to understand the products I am selling inside and out, so that I can answer any question in the sales process and so I can provide useful feedback to the people in product development.”

If you are an employee, or are part of a workgroup, you should consider speaking to your boss or your team leader about the Vision for each of your *Focus Areas*. Hopefully your Vision for each of your *Focus Areas* should be consistent with the Vision that he or she has for you.

The next step in this process is to ask yourself the question: “In order for me to attain the Visions I have outlined for each of my *Focus Areas*, what needs to happen?” Specifically, let’s look at the example of generating new sales leads.

“Well” you might say, “In order to attain my Vision of having a steady flow of leads coming to me that are highly qualified, I’d need to have a great source of sales leads that have been screened to ensure they are actually interested in my products. I’d also have to make sure that the leads don’t cost too much. I also don’t want too many leads all at once, in fact I can only handle about 20 leads per week.” In **Relata**, we call this your *Outcome*. Think of *Outcomes* as goals, or objectives.

So, for your *Focus Area* called “Generating New Leads” you have now identified your desired Outcome: “20 Great Low-Cost Qualified Leads per Week”. This is what we call your top-level *Outcome* for the *Focus Area* “Generating New Leads”.

The next step is to take this top-level *Outcome* and make it more manageable. It’s sometimes easier to accomplish your desired Outcomes if you recognize that they can be sub-divided into smaller components. We do this by creating sub-Outcomes.

So, underneath “20 Great Low-Cost Qualified Leads per Week” you could add three sub-Outcomes, such as “Have a Source of Great Leads” and “Have a Great Lead-Screening Process” and “Get Approval from Boss”.

Now we are at the point where the rubber meets the road. You have defined some of your *Focus Areas*, and underneath those you have defined some top-level *Outcomes*, and underneath that

you have learned that you can define sub-Outcomes. But now you have to actually commit to doing specific activities of some kind that will bring about the desired *Outcomes*.

For example, to accomplish the sub-Outcome called "Get Approval from Boss," you can schedule an activity called "Meeting with Boss re Lead Expenses," tomorrow morning at 10 am.

Similarly, for the top-level *Outcome* "Have a Source of Great Leads" you could create several to-do items like "Search web for cost-per-lead providers" and "Purchase and read a book on successful lead generation" and "Contact direct marketer about lead generation campaign."

In this way, you have managed to connect your daily activities to your *Outcomes* and your *Focus Areas* --- the things that are actually important. Using this simple system will help you get more things done every day, and will also show you how the things you do every day move you closer to the things that really matter.

## What Can Relata Help You Do?

- ☒ **accomplish more** work in less time
- ☒ manage your personal and corporate **goals**
- ☒ monitor and measure **productivity**
- ☒ track and manage your **tasks and outcomes**
- ☒ **collaborate** with others
- ☒ **share** information, **yet retain control**
- ☒ manage your **contacts**
- ☒ eliminate redundant tasks, **automate** others
- ☒ manage **schedules**
- ☒ capture and centralize **knowledge assets**
- ☒ **access knowledge** and information, rapidly
- ☒ **synchronize** your data with Palm and Outlook

## What Features Does Relata Offer?



**Outcomes/Focus Areas** - manage personal and corporate goals with Outcomes Manager



**Reporting** - monitor and measure personal and workgroup productivity



**Calendar/To-Do List** - manage and share schedules and tasks with Activity Manager



**Files** - upload and share computer files with File Manager



**Documents** - manage and share web-based documents through Knowledge Management



**Weblogs** - centralize notes and journal entries with Log Manager, share with others



**Notes** - organize random notes and memos, share with others



**Address Book** - centralize and share contacts with Contact Manager



**Accounts** - centralize and share accounts through Account Manager



**Group Email** - automate email communications to small groups with Group Email Manager



**Search** - locate personal information based on keyword



**Backup** - backup personal data to the PC



**Sync** - synchronize data with Palm Desktop or Microsoft Outlook



**Messaging** – communicate with other Relata users

## User Requirements

To use **Relata**, you must have the following hardware and software:

- A computer using either Microsoft Windows 98, Windows ME, or Microsoft Windows NT 4.0 with Service Pack 3 or later, Windows 2000, or Windows XP.
- Microsoft Internet Explorer version 6.0 SP1 or later. Firefox 1.0 or later is also supported.
- A continuous Internet connection while using **Relata**.
- Palm Desktop or Microsoft Outlook for data synchronization (optional).

## Creating Links for Easy Access to the Relata Application

Since you will be connecting to the **Relata** application through a service provider (or your organization) one or more times a day, it is advantageous to create a link in *Internet Explorer's* (IE) Links Bar to the system. To add the **Relata** application's web page to IE's Links Bar (when on the page), drag the icon for the system from the Address Bar to the Links Bar. If the links displayed on the Links Bar are not organized, drag each individual link to a new position on the Links Bar. This helps keep the links on the Links Bar organized and readily available.

You can create a shortcut on your desktop to the **Relata** application. To create a shortcut, right-click your desktop and select *New/Shortcut*. The **Create Shortcut** window appears. Type the URL to the **Relata** application and click **Next**. Finally, type a name for your shortcut such as *Relata* and click **Finish**. The shortcut appears on your desktop. Alternatively, create a desktop shortcut by dragging a link from the IE window (if it is NOT maximized) to the desktop or to a folder on the desktop.

Another option is to add a link to IE's **Favorites** list. To add the **Relata** application page to your **Favorites** list, first load the **Relata** application's web page. On the **Favorites** menu, click **Add to Favorites**. Type a name such as *Relata*. Connect to the **Relata** application's web page by accessing it through the **Favorites** menu or by clicking **Favorites** on IE's toolbar and clicking the *Relata* item.

## EXECUTING AND LOGGING ON TO RELATA

To log on to **Relata**, execute *Internet Explorer* or *Firefox* and type the URL for your **Relata** installation in the address bar, or select the *Relata Application* page from your **Favorites** menu. When you press enter, the **Login** window appears.



**Figure 1: The Relata Login Window**

Type in your **Relata** login and then press tab to move to the *Password* field. After you type your password, click **Login**. You may also place a check beside '*Don't ask me to login for two weeks.*', should you like to remain logged into the **Relata** system for two weeks (as long as you don't log out manually). **Relata** will verify your login information and will display the **Main** window if your login information is correct.

If you don't have a **Relata** login and password, please ask your **Relata** Account Manager to create a **Relata** account for you.

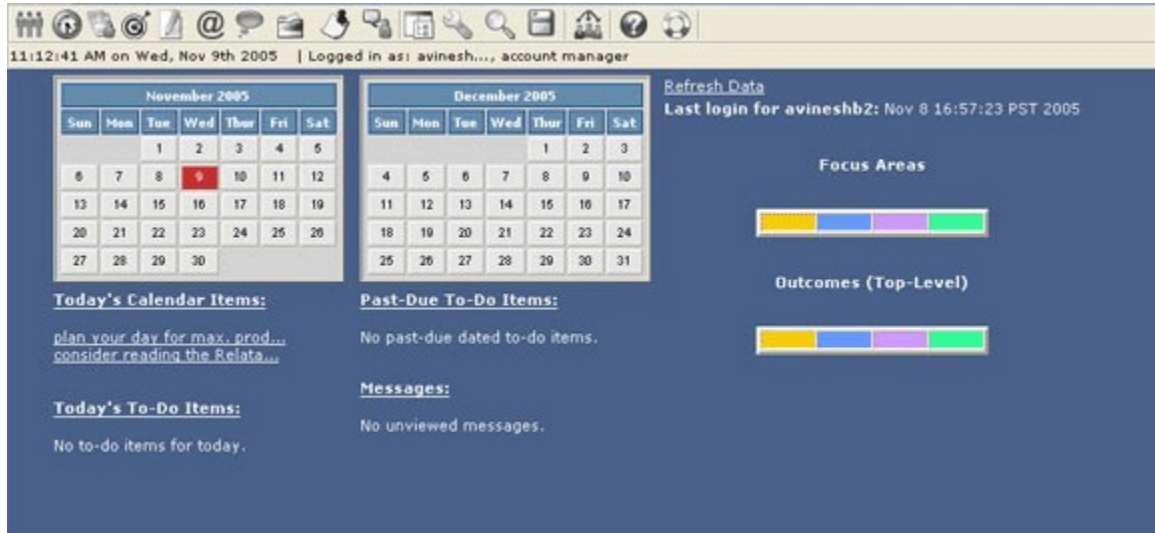


Figure 2: Main Window

- **To log on to Relata:**
  1. Execute *Internet Explorer* or *Firefox*.
  2. Type the URL for **Relata** and press ENTER. The **Login** window appears.
  3. Click the *Login* field and type your **Relata** username.
  4. Click the *Password* field and type your password.
  5. Click **Login**.

## Understanding the Main Window

When **Relata** is executed, its **Main** window displays the current date and time and who you are logged on as. **Relata** Account Managers are denoted with 'account manager' after their **Relata** username. Below this information, **Relata** displays today's Calendar items, To-Do items, Past-Due To-Do items, and unread Messages from other **Relata** users. Finally, **Relata** displays the Focus Areas and Outcomes charts. If the above information is not visible, click the "**at a glance**" icon in the **Relata** toolbar.

## Refreshing At a Glance View

Data is updated on the **Relata** server periodically. You can force the system to refresh data on the "**At a Glance**" view by clicking **Refresh Data** on the Main window. After a few seconds, the **Main** window is updated with new data from the **Relata** server.

- **To refresh the "At a Glance" view:**
  - Click **Refresh Data**.

## Personal and Shared Views


When using **Relata**, you can determine which view you are currently in. To do so, look at the status bar just below the **Relata** toolbar. You will see a message similar to *Viewing: personal activities* or *Viewing: shared activities*, depending on which module of **Relata** you are in. Personal view shows you items that are not shared, whereas Shared view shows items that other **Relata** users have shared with you.

9:23:44 AM on Fri, Jan 7th 2005 | Logged in as: davidfo..., customer Viewing: personal activities

## USING THE ACTIVITY MANAGER

The **Activity Manager** helps you manage your day-to-day and monthly activities. You can create personal and shared activities, and complete to-do items.

### Planning Your Time with the Activity Manager

To use **Activity Manager** to manage your activities, click the **Activity Manager** icon  in the toolbar. The **Activity Manager** window appears.

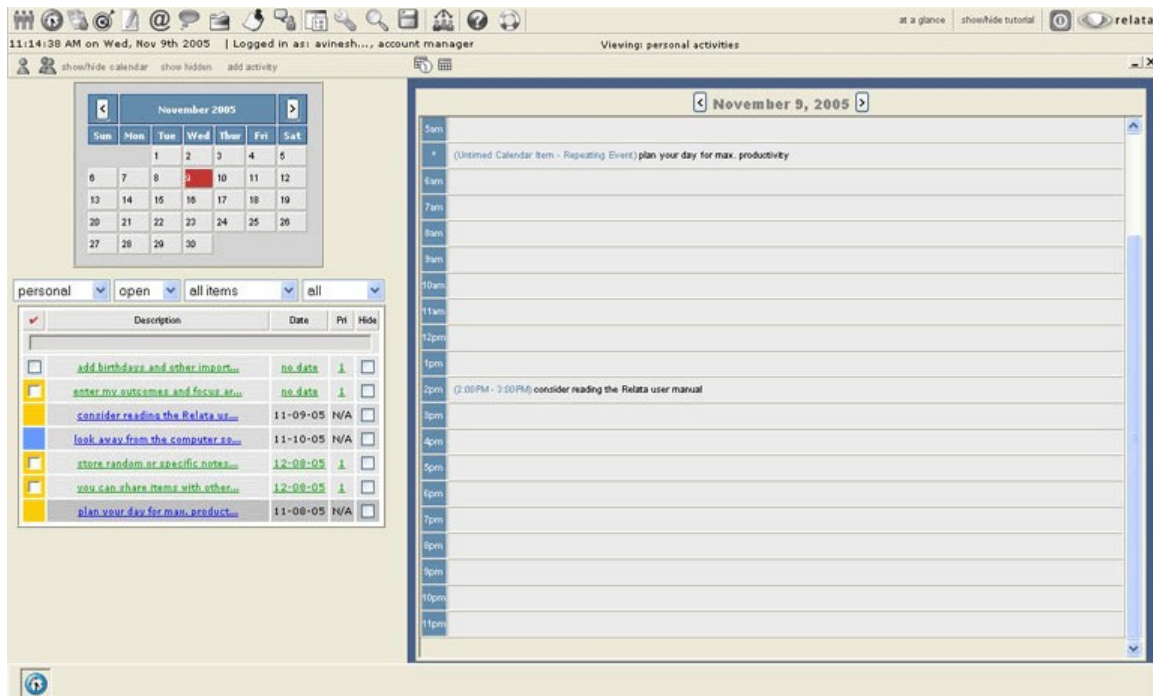


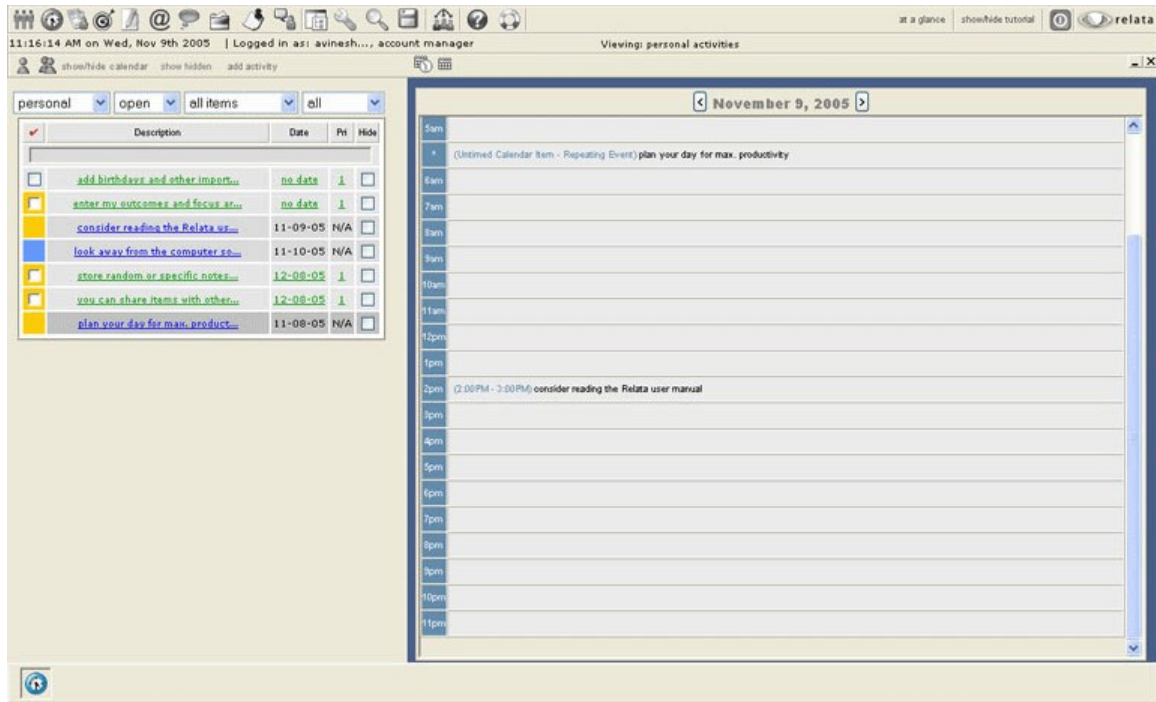
Figure 3: Activity Manager Window

- **To access the Activity Manager:**
  - Click the **Activity Manager** icon in the **Main** window. The **Activity Manager** window appears.



## Showing and Hiding the Calendar

A calendar appears in the left-hand pane of the **Activity Manager** window. You can hide this calendar by clicking the **Show/Hide Calendar** icon in the toolbar. The **Activity Manager** window appears without the calendar displayed.




**Figure 4: Activity Manager Calendar Hidden**

To see the calendar again, click the **Show/Hide Calendar** icon a second time. The calendar appears in the **Activity Manager** window.

- **To hide the calendar:**
  1. Click the **Activity Manager** icon. The **Activity Manager** window appears.
  2. Click **Show/Hide Calendar**. The *calendar* is removed from the window.
- **To show the calendar:**
  1. Click the **Activity Manager** icon. The **Activity Manager** window appears.
  2. Click **Show/Hide Calendar**. The *calendar* appears in the window.

## Viewing Daily or Monthly Activities

You can view activities by the day or by the month in **Relata**. To view activities by the day, click the **Day View** icon . The activities appear in the window.

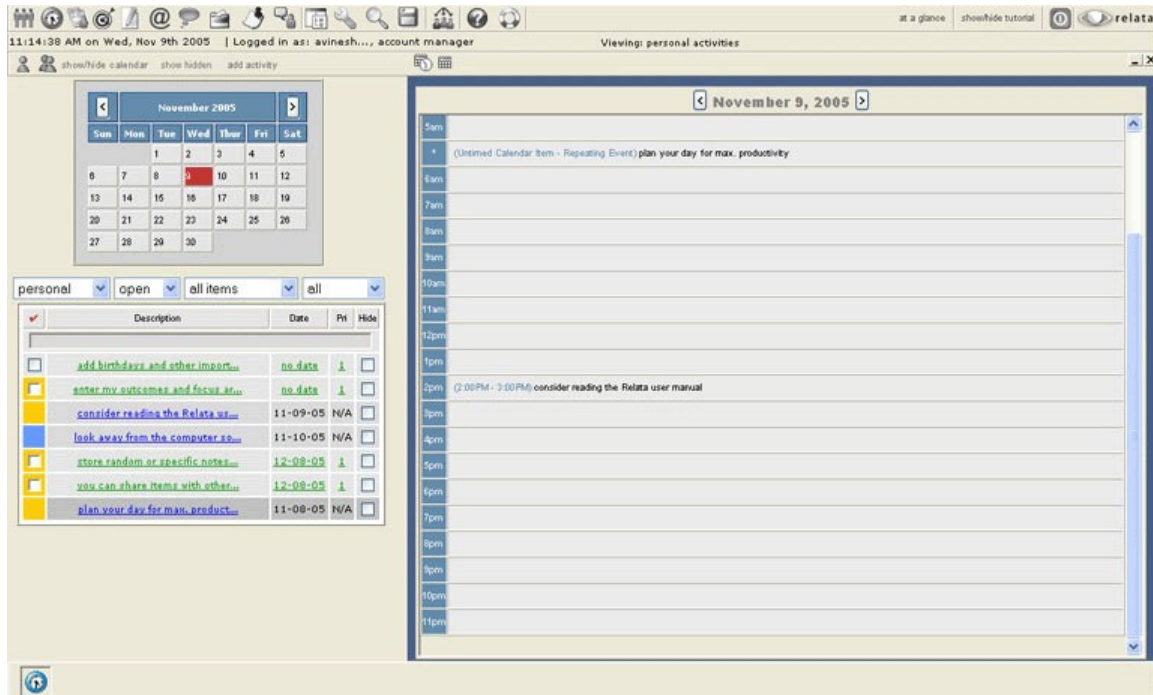

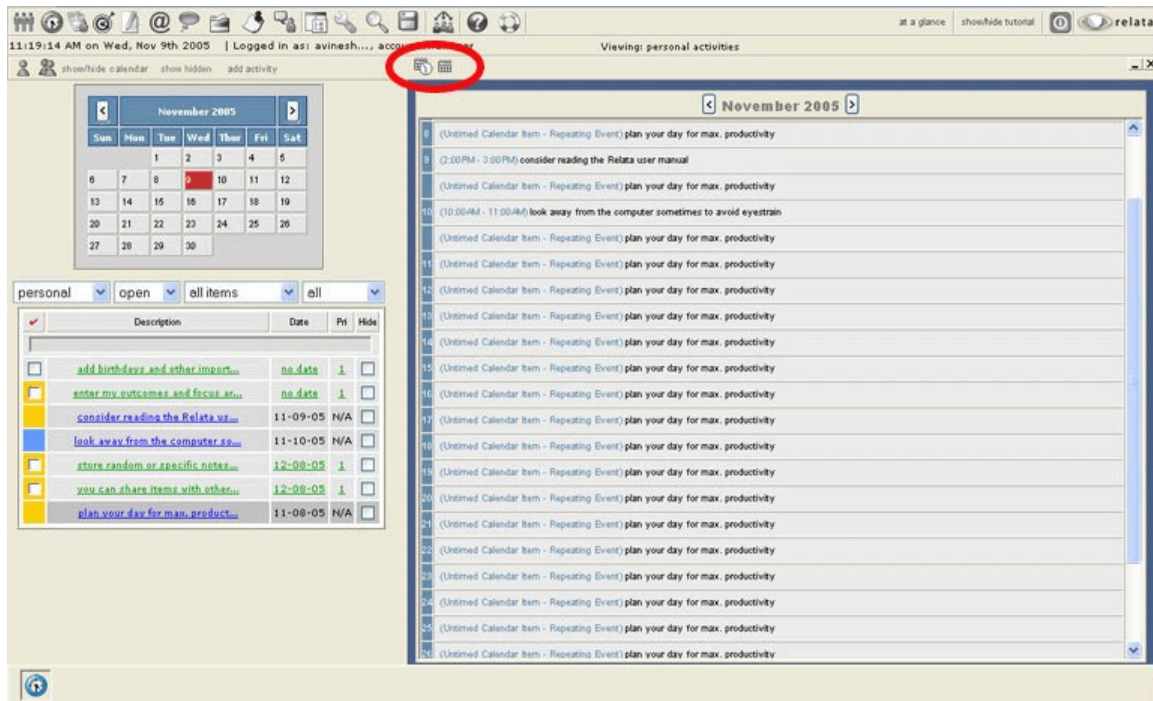


Figure 5: Viewing Activities by Day

If you want to view activities by the month, click the **Month View** icon . The activities for the entire month appear in the **Activity Manager** window.



**Figure 6: Viewing Activities by Month**

At any time, you can click the < icon in the activities list to see items for the previous day or month. Similarly, you can click the > icon in the activities list to see items for the next day or month.

- **To view activities by the day:**
  1. Click the **Activity Manager** icon. The **Activity Manager** window appears.
  2. Click the **Day View** icon.
- **To view activities by the month:**
  1. Click the **Activity Manager** icon. The **Activity Manager** window appears.
  2. Click the **Month View** icon.

## Changing Dates for Activities

You can click a to-do item's date in the activity list to extend the due date. A context menu will appear with a list of choices.



**Figure 7: Context Menu**

If you want to change the to-do item's date, select either the *Today*, *Tomorrow*, *2 Days from Now*, *3 Days from Now*, or *1 Week from Now* option.

- **To change the date for an activity:**
  1. Click the **Activity Manager** icon. The **Activity Manager** window appears.
  2. Click an activity item and select the *Today*, *Tomorrow*, *2 Days from Now*, *3 Days from Now*, or *1 Week from Now* option.

## Viewing Regular or Hidden Activities

By default, **Relata** displays all activities, for the respective view you are in, in the **Activity Manager** window. You can also view activities that have been hidden. To view hidden activities, click the **Show Hidden** icon. The **Activity Manager** window displays the hidden activities, if any.

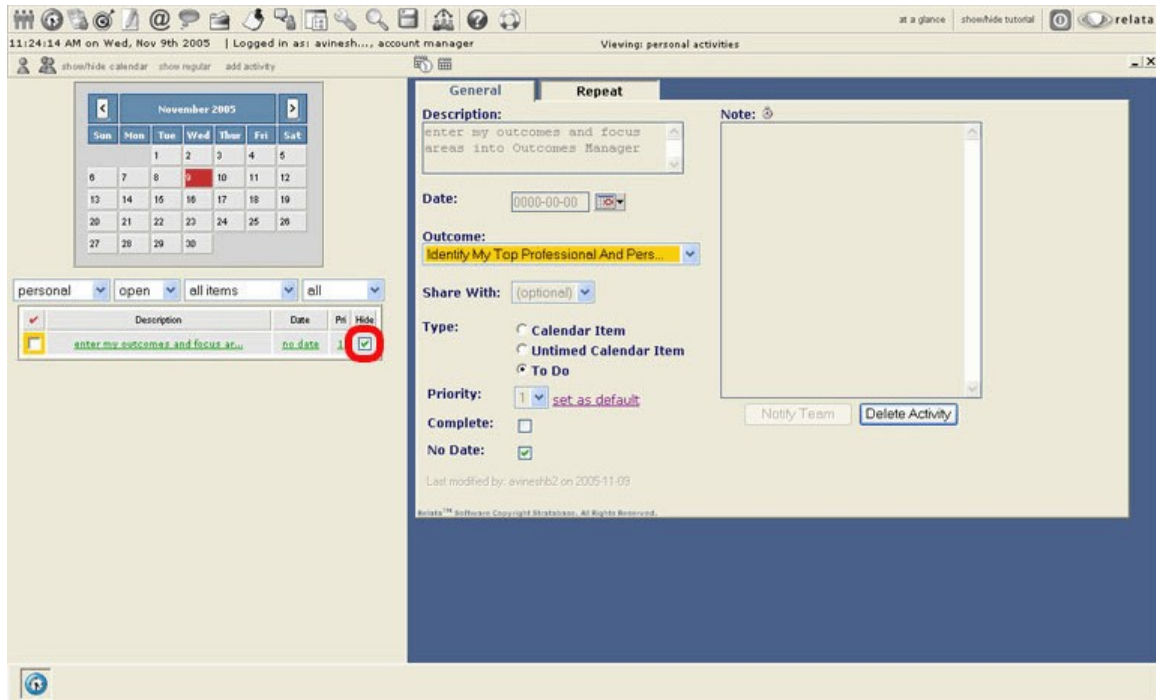



Figure 8: Showing Hidden Activities


While viewing the hidden activities, notice the **Show Hidden** icon **show hidden** now appears as **Show Regular**. You can click the **Show Regular** icon to view regular activities again.



You can have **Relata** hide an activity by selecting the *Hide* check box next to the selected activity.

- **To hide an activity:**
  1. Click the **Activity Manager** icon. The **Activity Manager** window appears.
  2. Select the **Hide** check box to the immediate right of the activity.
- **To view hidden activities:**
  1. Click the **Activity Manager** icon. The **Activity Manager** window appears.
  2. Click **Show Hidden**.
- **To view regular activities:**
  1. Click the **Activity Manager** icon. The **Activity Manager** window appears.
  2. Click **Show Regular**.

## Viewing Your Activities: Personal or Shared

To view your personal activities, click the **Show My Entries** icon . The **Activity Manager** window appears with only your personal activities listed. This is the default view.

You can also view shared activities in **Relata**. To see all activities that other **Relata** users have shared with you, click the **Show Shared Entries** icon .

- **To view your personal activities:**
  1. Click the **Activity Manager** icon. The **Activity Manager** window appears.
  2. Click the **Show My Entries** icon .
- **To view activities that have been shared with you:**
  1. Click the **Activity Manager** icon. The **Activity Manager** window appears.
  2. Click the **Show Shared Entries** icon .

## Viewing Activities by All, Personal, or Team

You can view the activities in the **Activity Manager** window by *All*, *Personal*, or team name (providing you have created a team using the **Settings Manager**). To do so, click the DOWN ARROW in the *Personal* field and select one. Only those matching activities will appear in the window.

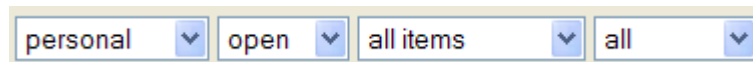


Figure 9: Selecting Activities to View

- **To view all activities, personal activities, or activities you have shared with any teams you have defined:**
  1. Click the **Activity Manager** icon. The **Activity Manager** window appears.
  2. Click the DOWN ARROW in the *Personal* field and select *All*, *Personal*, or *Team*.

## Viewing Activities by Status

You can see a list of activities according to their status. An activity may be open or closed. To see activities based on their status, click the DOWN ARROW in the *Open* field and select *Open*, *Closed*, or *All*.

- **To view open or closed activities:**
  1. Click the **Activity Manager** icon. The **Activity Manager** window appears.
  2. Click the DOWN ARROW in the *Open* field and select *Open*, *Closed*, or *All*.

## Viewing Activities by All Items, To-Do Items, and Calendar Items

**Relata** allows you to see all activities by default. You can, however, see only those items that are to-do's or calendar items. To do so, click the DOWN ARROW in the *All Items* field and select *All Items*, *To-Do Items*, or *Calendar Items*.

- **To view all items, to-do items, or calendar items:**
  1. Click the **Activity Manager** icon. The **Activity Manager** window appears.
  2. Click the DOWN ARROW in the *All Items* field and select *All Items*, *To-Do Items*, or *Calendar*.


## Viewing Activities for Today or This Week

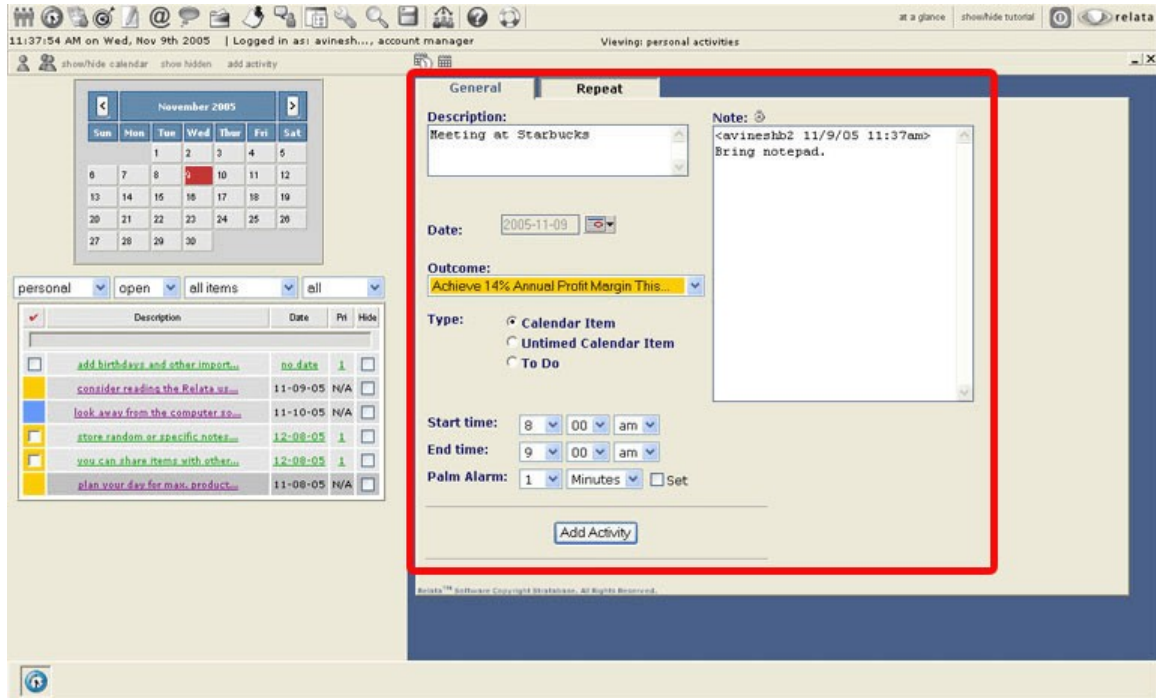
By default, **Relata** displays all activities in the **Activity Manager** window. You can view only those items for today or for the entire week. To do so, click the DOWN ARROW in the *All* field and select *All*, *This Week*, or *Today*.

- **To view all items for today or for one week:**
  1. Click the **Activity Manager** icon. The **Activity Manager** window appears.
  2. Click the DOWN ARROW in the *All* field and select *All*, *This Week*, or *Today*.



## Adding Activities to Relata

You can add activities to **Relata**. To add an activity, click **Add Activity** . The **Add Activity** window appears.




**Figure 10: Add Activity Window**

In the *Description* field, type a description for the activity. Next, in the *Type* field, select whether the activity is a calendar item, an untimed calendar item, or a to-do item. If the activity is a calendar item or an untimed calendar item or a to-do item, you must make a selection in the *Date* field. Conversely, if the activity is a to-do item (no date), then you do not have to make a selection in the *Date* field. To-do items with no date can be quickly inserted by using the quick entry field immediately above the list of activities.

In the *Outcome* field, click the DOWN ARROW to select the outcome you want to link this activity to (optional).

Since an activity can be shared with more than one **Relata** user, you can select the team of users you want to share the activity with.

In the *Type* field, select the type of activity. You can specify this activity as a calendar item, an untimed calendar item, or as a to-do item. For *Calendar* items, you can specify the start and end time. You can also specify whether the alarm will sound on a Palm device if you click **Palm Alarm Set**. If this is a *To-Do* item, you can set its *Priority* level from 1 through 5 (1 is the highest priority). Untimed calendar items and to-do items without dates can also be created – these appear at the top of the list of activities in the **Activity Manager** window.

In the *Note* field, type any notes you would like for this activity. While typing the note, you can quickly insert the current date and time by clicking the **Timer** icon .

To have this activity repeated, click the **Repeat** tab on the **Add Activity** window. The **Repeat** window appears. Only calendar items can be set to repeat.



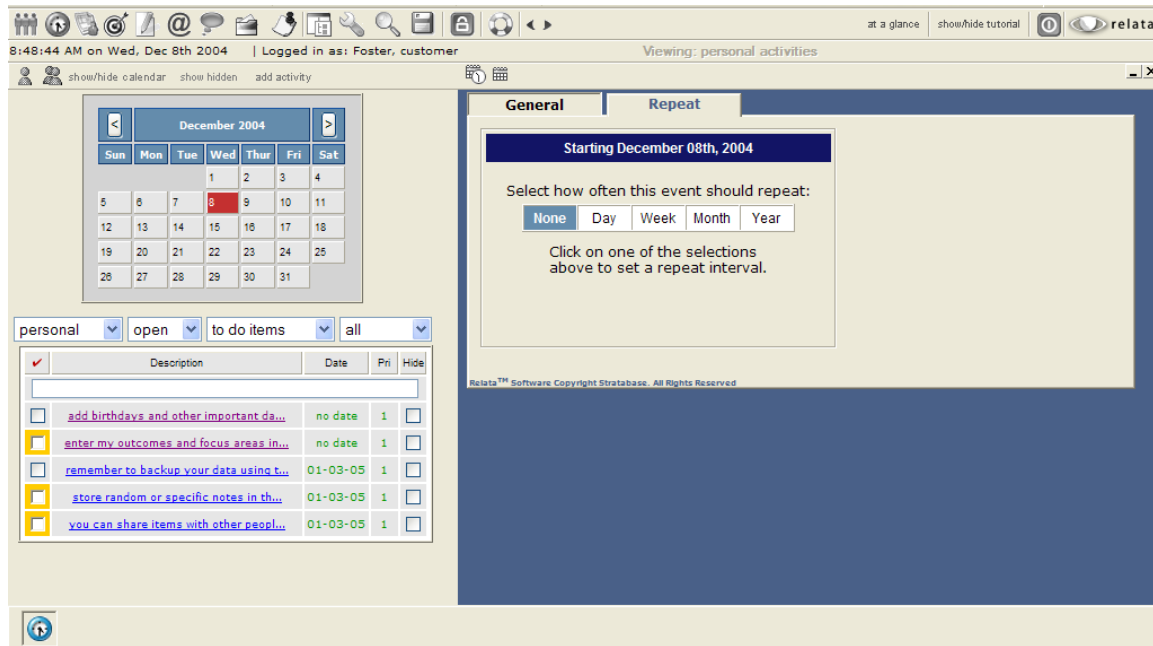



Figure 11: Repeat Window

To specify how often this activity should be repeated, click the *None*, *Day*, *Week*, *Month*, or *Year* fields respectively. The activity will then be repeated according to your selection.

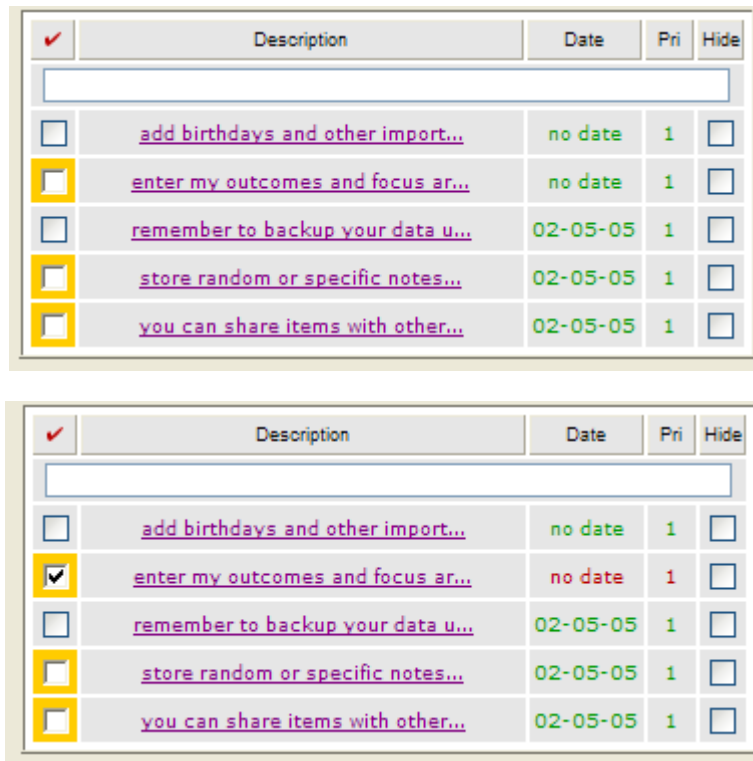
Finally, click the **General** tab and then click **Add Activity**. The new activity will be listed in the **Activity Manager** window.

➤ **To add an activity:**

1. Click the **Activity Manager** icon. The **Activity Manager** window appears.
2. Click **Add Activity**. The **Add Activity** window appears.
3. Click the *Description* field. Type a description for this activity.
4. Click the **Calendar**  and select the date this activity is to be done on.
5. Click the DOWN ARROW in the *Outcome* field and select a type of outcome for this activity (optional).
6. In the *Share With* drop-down, select a team of users, if any, with whom you will share this activity.
7. In the *Type* field, select the activity's type. For calendar items, select the starting and ending times and the Palm alarm time. For to-do items, select the priority level; if this to-do item is not date-specific, select the *No Date* check box.
8. Click the *Notes* field and type any comments about this activity.
9. For calendar items only, click the **Repeat** tab and specify how often this activity is to be repeated.
10. Click the **General** tab.
11. Click **Add Activity**.

## Marking a Activity as Completed

When you have completed an activity, you should select the *Check-Mark* check box ☐ beside the item you have completed.



<input checked="" type="checkbox"/>	Description	Date	Pri	Hide
<input type="checkbox"/>	<a href="#">add birthdays and other import...</a>	no date	1	<input type="checkbox"/>
<input checked="" type="checkbox"/>	<a href="#">enter my outcomes and focus ar...</a>	no date	1	<input type="checkbox"/>
<input type="checkbox"/>	<a href="#">remember to backup your data u...</a>	02-05-05	1	<input type="checkbox"/>
<input checked="" type="checkbox"/>	<a href="#">store random or specific notes...</a>	02-05-05	1	<input type="checkbox"/>
<input checked="" type="checkbox"/>	<a href="#">you can share items with other...</a>	02-05-05	1	<input type="checkbox"/>


<input checked="" type="checkbox"/>	Description	Date	Pri	Hide
<input type="checkbox"/>	<a href="#">add birthdays and other import...</a>	no date	1	<input type="checkbox"/>
<input checked="" type="checkbox"/>	<a href="#">enter my outcomes and focus ar...</a>	no date	1	<input type="checkbox"/>
<input type="checkbox"/>	<a href="#">remember to backup your data u...</a>	02-05-05	1	<input type="checkbox"/>
<input checked="" type="checkbox"/>	<a href="#">store random or specific notes...</a>	02-05-05	1	<input type="checkbox"/>
<input checked="" type="checkbox"/>	<a href="#">you can share items with other...</a>	02-05-05	1	<input type="checkbox"/>

When a to-do item is marked *Complete*, it is now a “closed” activity. Similarly, when a calendar item is completed one day in the past, it automatically becomes “closed”. Therefore, to view your completed to-do’s or past calendar items, select *Closed* from the dropdown menu in the left frame of the **Activity Manager** window.

The **Activity Manager** module synchronizes data with the *Palm Date Book* and *Microsoft Outlook Calendar* applications using *Resync*. To-do items are synchronized with the *Palm Todo List* and *Microsoft Outlook Tasks* application.

- **To mark a to-do as completed:**
  1. Click the **Activity Manager** icon. The **Activity Manager** window appears.
  2. Select the *Check-Mark* check box next to the to-do you want to specify as completed. Only to-do items can be checked as complete.

## MANAGING YOUR CONTACTS

You can add, edit, delete, and share contacts using the **Contact Manager**. To do so, click the **Contact Manager** icon  on the **Main** window. The **Contact Manager** window appears.

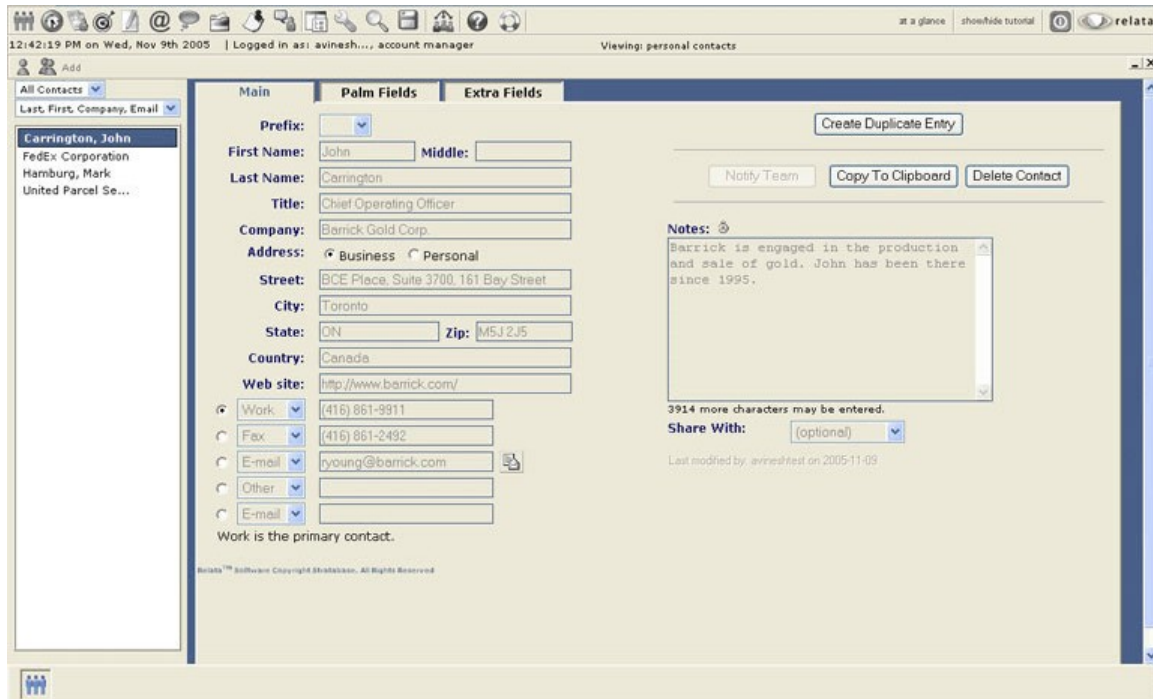


Figure 12: Contact Manager Window

- **To manage your contacts:**
  - Click the **Contact Manager** icon. The **Contact Manager** window appears.

## Selecting Contact Groups

The **Contact Manager** allows you to view all your contacts or a group's contacts. To select the type of contacts you want to view, click the DOWN ARROW in the *All Contacts* field. The **Contact Manager** will display that group of contacts.

- **To view a subset of contacts:**
  1. Click the **Contact Manager** icon. The **Contact Manager** window appears.
  2. Click the DOWN ARROW in the *All Contacts* field and select a group.

## Changing How Contact Names Appear

By default, **Relata** displays the contact list by *Last Name*, *First Name*, *Company Name*, and *Email address*. If you click the DOWN ARROW in the *Last*, *First*, *Company*, *Email* field, you can have **Relata** display the names by *Company Name*, *Last Name*, *First Name*, *Email* or by *Email*, *Last Name*, *First Name*, *Company Name* order.

- **To select the information shown for each contact:**
  1. Click the **Contact Manager** icon. The **Contact Manager** window appears.
  2. Click the DOWN ARROW in the *Last, First, Company, Email* field and select the option you want.

## Viewing a Contact's Information

When the **Contact Manager** window appears, the first contact's information appears. You can view information about a different contact by clicking a name.

- **To view a contact's information:**
  1. Click the **Contact Manager** icon. The **Contact Manager** window appears.
  2. Click the contact's name. The information about that contact appears in the window.

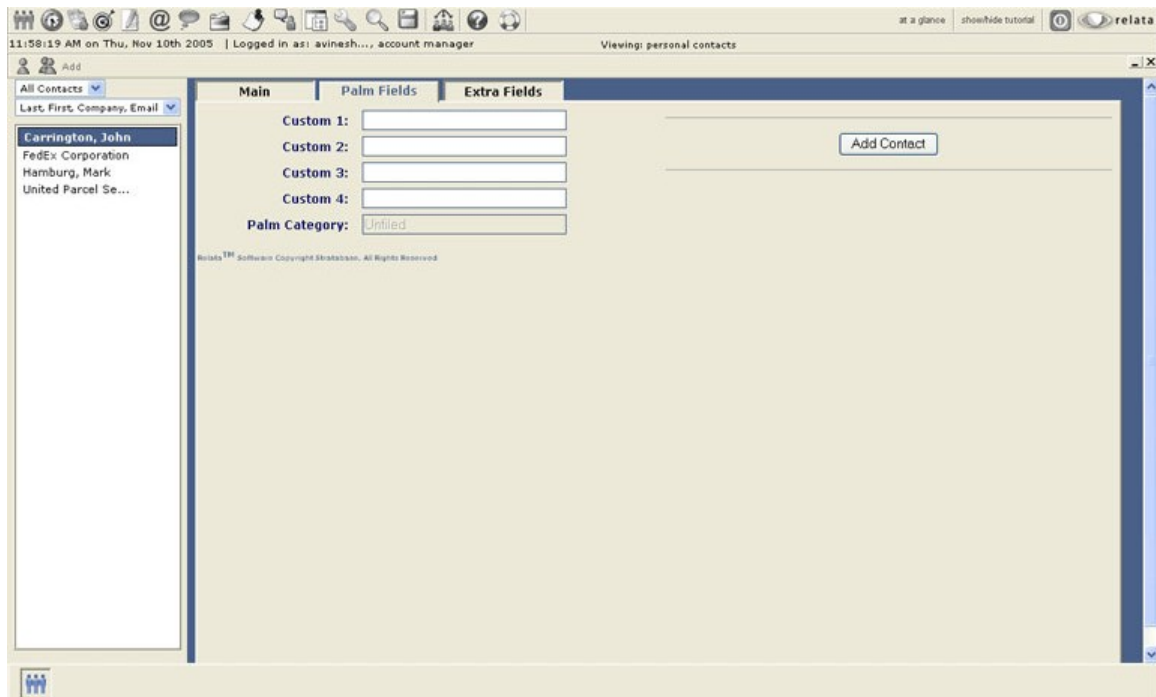
## Adding Contacts to Relata

You can add a contact to **Relata**. To add a contact, click **Add**. The **Add Contact** window appears.

**Figure 13: Add Contact Window**

Type the name, address, and telephone information for the contact. (Note: You only need type the first name or last name or email or company information – these are all required fields). If you want to add comments about the contact, type the comments in the *Notes* field. The **timer** icon will allow you to quickly insert the current date and time into the *Notes* field. You can also optionally share the contact with a team of users or a group.

The **Palm Fields** tab lets you add Palm-specific information about this contact, if you are synchronizing your **Relata** data with your Palm device.



**Figure 14: Add Contact Palm Fields Window**

You can click the **Extra Fields** tab to type data in any extra fields you have previously defined in the **Settings Manager**. When you have finished entering the information for this new contact, click **Add Contact**. The contact's name appears in the listing of contacts on the left.

➤ **To add a contact:**

1. Click the **Contact Manager** icon. The **Contact Manager** window appears.
2. Click **Add**. The **Add Contact** window appears.
3. Click the DOWN ARROW in the *Prefix* field and select the contact's prefix (optional).
4. Click the *First Name* field and type the contact's first name (optional).
5. Click the *Middle* field and type the contact's middle name, if any (optional).
6. Click the *Last Name* field and type the contact's surname (optional).
7. Click the *Title* field and type the contact's title, if any (optional).
8. Click the *Company* field and type the contact's company name (optional).
9. In the *Address* field, select the type for this contact – business or personal (optional).
10. Click the *Street* field and type the street address (optional).
11. Click the *City* field and type the name of the city (optional).
12. Click the *State* field and type the province or state name (optional).
13. Click the *Zip* field and type the zip or postal code (optional).
14. Click the *Country* field and select the country (optional).
15. Click the *Web-site* field and type the full URL for the contact's website (optional).
16. Click the DOWN ARROW in the *Work*, *Home*, *Fax*, *Other*, or *E-mail* fields and select the type. Next, click the adjacent field and type the corresponding telephone number or email address (optional).
17. Click the *Notes* field and type any comments about this contact (optional).
18. In the *Groups* field, if any, select the appropriate groups to assign this contact to (optional).
19. In the *Share With* drop-down, select a team of users, if any, with whom you will share this activity (optional).

20. Click the **Palm Fields** tab. Click the *Custom* field and type a name for the custom field. You can specify up to four custom fields (optional). (This is only for **Relata** users who are synchronizing their data with their Palm device.)
21. Click the **Extra Fields** tab. Enter the information for the extra fields, if any (optional).
22. Click **Add Contact**.

## Copying a Contact's Information to the Windows Clipboard

You can transfer a contact's information to another application in Windows. To copy a contact's information, click **Copy to Clipboard**. In the other Windows (eg. Notepad) application, select the *Paste* menu item to copy the contact's information from the *Clipboard* to the other application.

- **To copy a contact's information to the Windows Clipboard:**
  1. Click the **Contact Manager** icon. The **Contact Manager** window appears.
  2. Click the contact's name. The contact's information appears in the window.
  3. Click **Copy to Clipboard**.

## Duplicating a Contact Entry

You can create a duplicate of a contact entry, should you need to create multiple contact entries with repetitive information. To duplicate a contact, click **Create Duplicate Entry**. Make changes to the contact details and then click **Add Contact**.


- **To duplicate a contact entry:**
  1. Click the **Contact Manager** icon. The **Contact Manager** window appears.
  2. Click the contact's name. The contact's information appears in the window.
  3. Click **Create Duplicate Entry**. The add contact template appears.
  4. Make changes and then click **Save** to save the new entry.

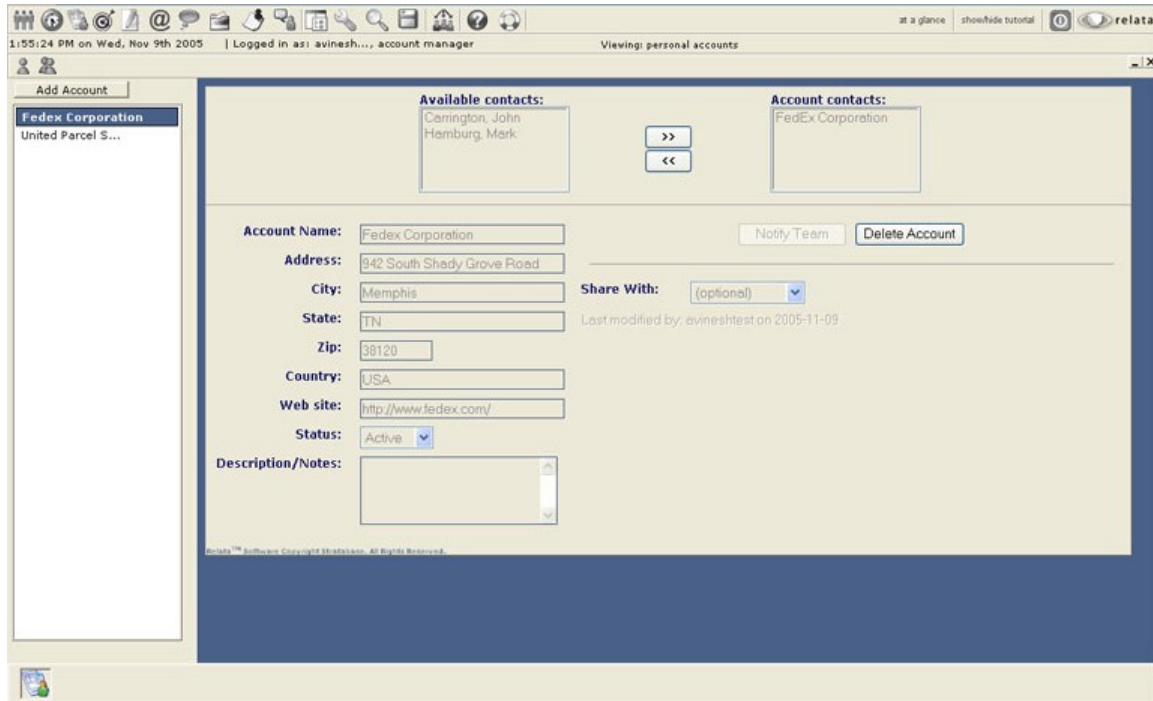
## Deleting a Contact's Information

You can remove a contact from the **Contact Manager**. To delete a contact, click the contact's name. The **Contact Manager** window appears showing the selected contact's information. Click **Delete Contact**. You are asked to confirm the delete request. Click **OK** to permanently delete the contact. (The **Contact Manager** is synchronized with the Palm Address application.)

- **To delete a contact's information:**
  1. Click the **Contact Manager** icon. The **Contact Manager** window appears.
  2. Click the contact's name you want to delete.
  3. Click **Delete Contact**.
  4. Click **OK**.

## MANAGING YOUR ACCOUNTS

You can add, edit, delete, and share accounts in **Relata**. You can also add contacts to a specific account. To manage your accounts, click the **Account Manager** icon . The **Account Manager** window appears.



**Figure 15: Account Manager Window**

The **Account Manager** window displays the information for the first account by default. The **Account Manager** window lists the available contacts and account contacts for this account, as well as other account information.

- **To manage your accounts:**
  - Click the **Account Manager** icon. The **Account Manager** window appears.

## Viewing an Account's Information

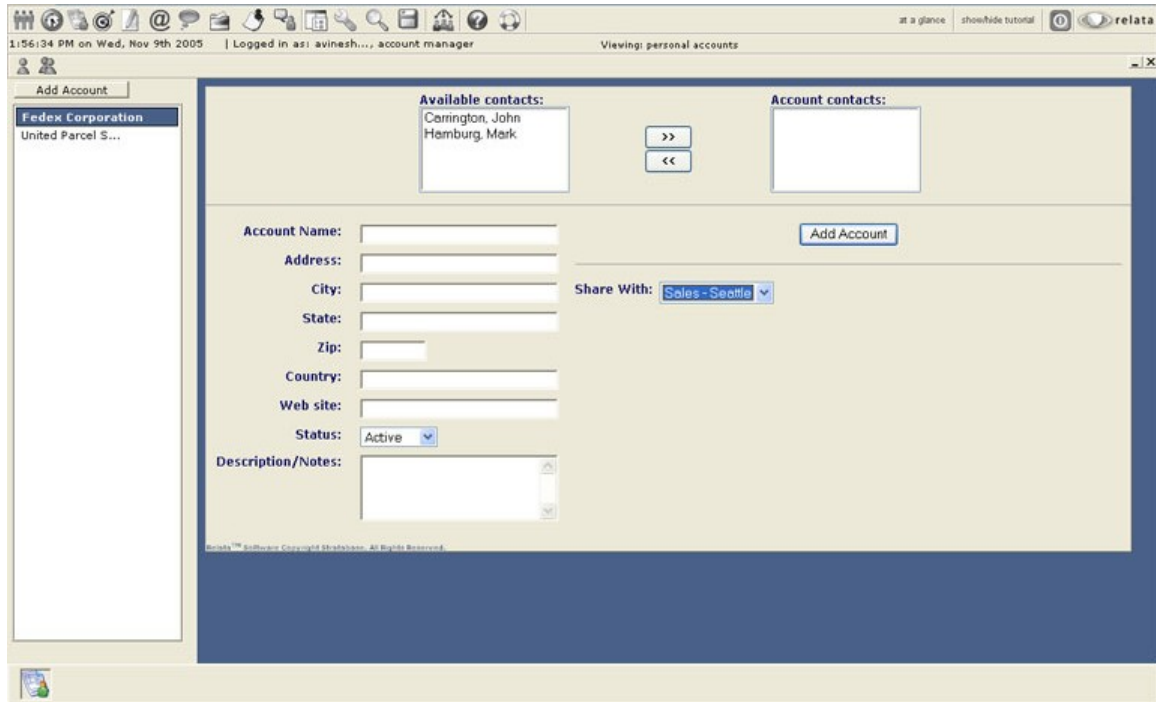
When the **Account Manager** window appears, the first account's information appears. You can view information about a different account by clicking an account.

- **To view information about an account:**
  1. Click the **Account Manager** icon. The **Account Manager** window appears.
  2. Click the account's name. The account's information appears in the window.



## Adding an Account

To add an account, click **Add Account**. The **Add Account** window appears.



**Figure 16: Add Account Window**

The *Available Contacts* field displays a list of contacts you can link to this account. Select the name from the *Available Contacts* field and then click the **>>** button. The selected contact's name appears in the *Account Contacts* box. To add more contacts to this account, repeat this process. If you want to remove a contact from this account, select the contacts name in the *Account Contacts* field and click the **<<** button.

**Note:** It is mandatory that you link at last one contact to an account, otherwise **Relata** won't let you create the account.

Type the information for this account in the appropriate fields. If this account is to be shared, select the team in the *Share With* field. When you have finished entering the information for this account, click **Add Account**. The new account appears in the list of accounts on the left.

➤ **To add an account:**

1. Click the **Account Manager** icon. The **Account Manager** window appears.
2. Click **Add Account**. The **Add Account** window appears.
3. Click a name in the *Available Contacts* field and click **>>** to add this contact to this account.
4. Click the *Account Name* field and type a name for this account.
5. Click the *Address* field and type the street address (optional).
6. Click the *City* field and type the name of the city (optional).
7. Click the *State* field and type the name of the province or state (optional).
8. Click the *Zip* field and type the zip or postal code (optional).
9. Click the *Country* field and select the country (optional).
10. Click the *Web-Site* field and type the URL to this contact's website (optional).




11. Click the DOWN ARROW in the *Status* field and select the status for this account (optional).
12. Click the *Description/Notes* field and type any comments about this account (optional).
13. In the *Share With* drop-down, select a team of users, if any, with whom you will share this activity.
14. In the *Share With* field, select the team to share the account with, if any.
15. Click **Add Account**.

## Deleting an Account

To delete an account, click the account's name. Next, click **Delete Account**. You are asked to confirm the delete request. Click **OK** to permanently delete the account.

- **To delete an account:**
  1. Click the **Account Manager** icon. The **Account Manager** window appears.
  2. Click the name of the account you want to delete. The account's information appears in the window.
  3. Click **Delete Account**.
  4. Click **OK**.

## WORKING WITH THE OUTCOMES MANAGER

The **Outcomes Manager** in **Relata** lets you manage your outcomes, or goals. To manage your outcomes, click the **Outcomes** icon  on the **Main** window. The **Outcomes Manager** window appears.

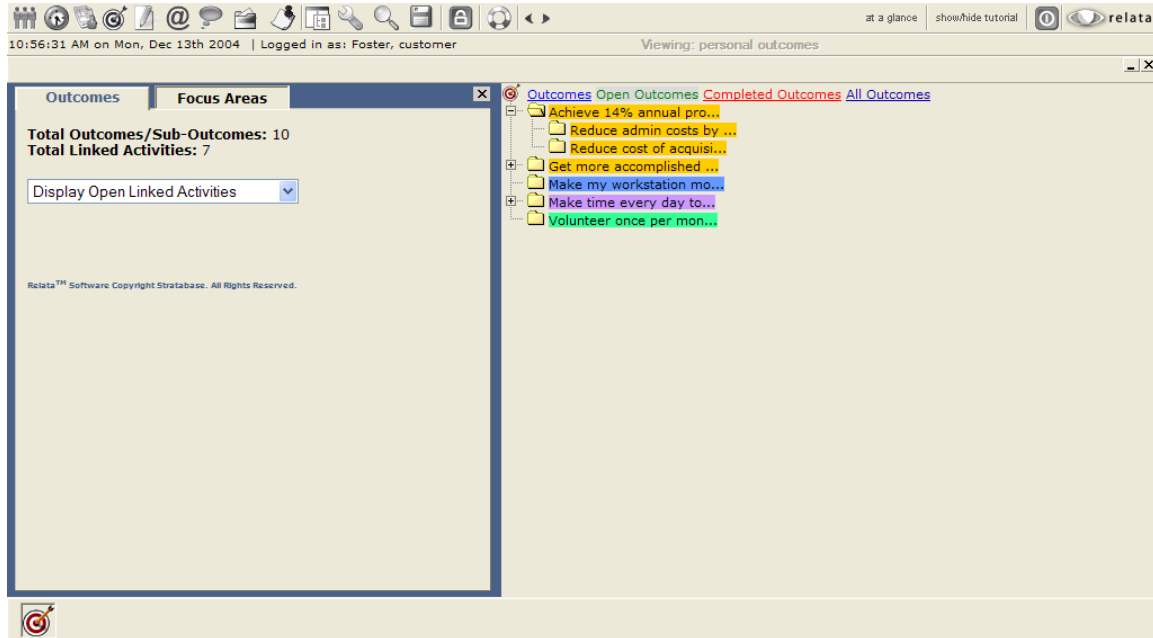


Figure 17: Outcomes Manager Window

- To manage your outcomes:
  - Click the **Outcomes** icon. The **Outcomes Manager** window appears.

## Working with Your Outcomes

When you click the **Outcomes** tab on the **Outcomes Manager** window, your outcomes, or goals, appear. You can click the DOWN ARROW in the *Outcomes* pane to see (in the right frame) all open linked activities, completed linked activities, or all linked activities. The *Outcomes* pane also displays the total number of outcomes and sub-outcomes you have, and also the total number of linked activities.

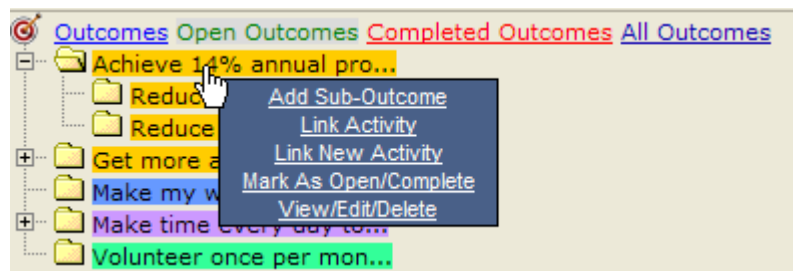
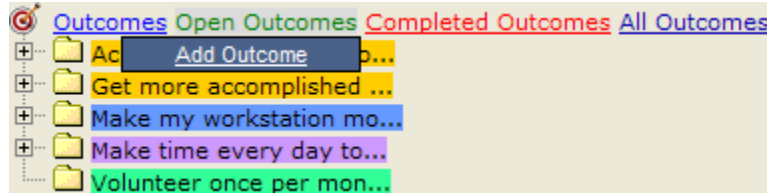


Figure 18: List of Outcomes

- **To view outcomes and sub-outcomes:**
  1. Click the **Outcomes** icon. The **Outcomes Manager** window appears.
  2. Click the DOWN ARROW in the *Outcomes* pane and select the type of outcomes to view.

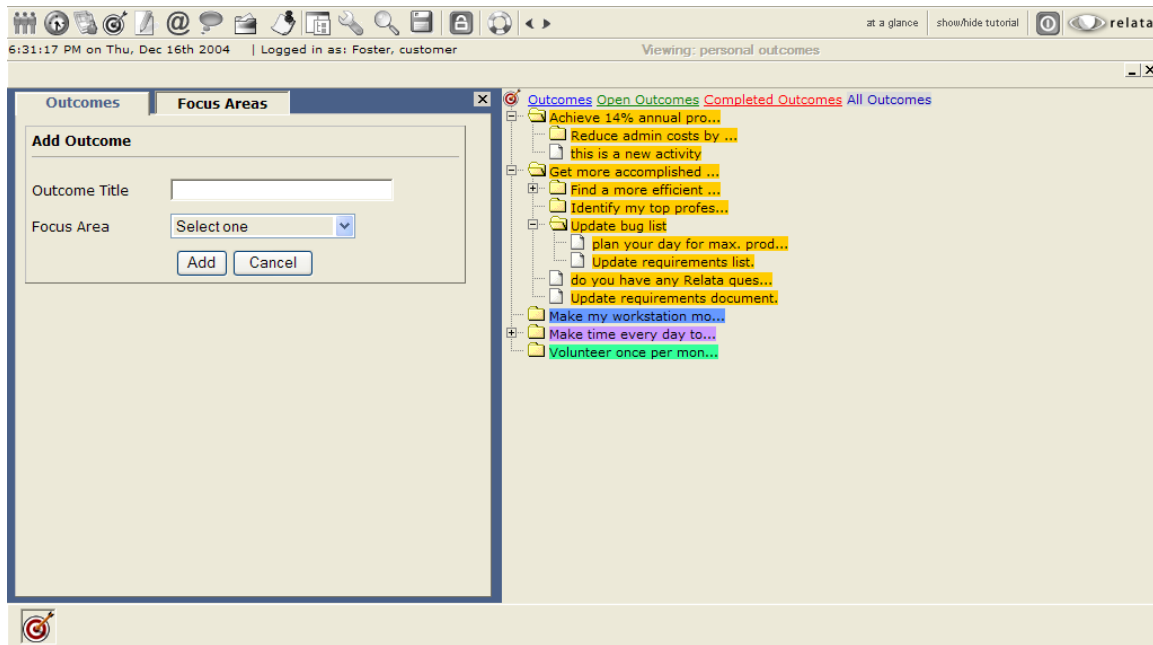
## Adding Outcomes

To add an outcome, click the **Outcomes** link.



**Figure 19: Add Outcome Pop-Up Window**

When you click the *Add Outcome* link, the **Add Outcome** window appears.



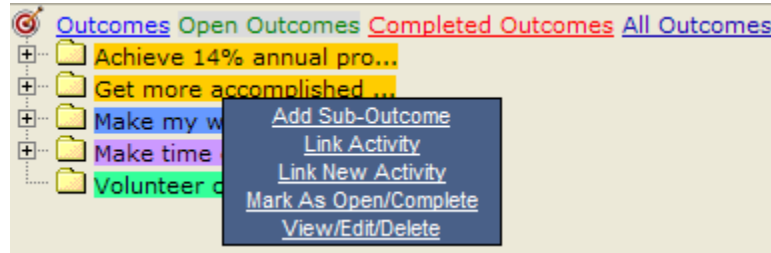
**Figure 20: Add Outcome Window**

Type a title for the new outcome and optionally select a focus area from the dropdown list. When you have finished entering the information, click **Add**. The outcome appears in the right window.

- **To add an outcome:**
  1. Click the **Outcomes** icon. The **Outcomes Manager** window appears.
  2. Click the **Outcome** link. The **Add Outcome** window appears.
  3. Click the *Outcome Title* field and type a name for this outcome.
  4. Click the DOWN ARROW in the *Focus Area* field and optionally select a focus area for this outcome.
  5. Click **Add**.

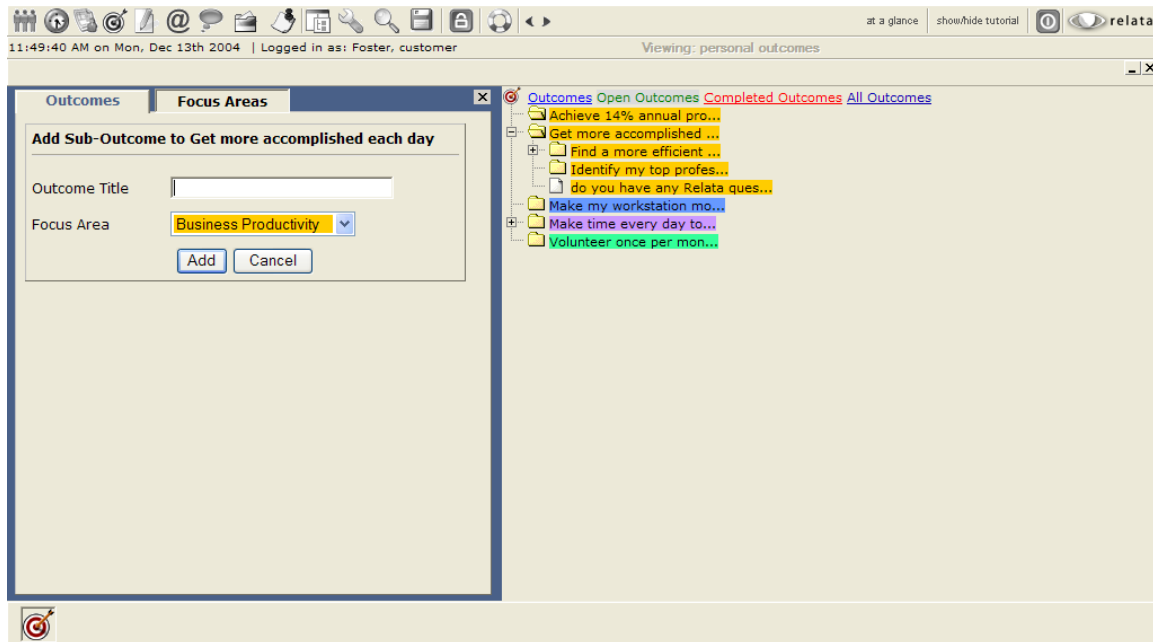
## Adding Sub-Outcomes

You can add a sub-outcome to an outcome in **Relata**. To do so, click the outcome you want to add the sub-outcome to. The **Add Sub-Outcome Pop-Up** window appears.



**Figure 21: Add Sub-Outcome Pop-Up Window**

Click the *Add Sub-Outcome* link. The **Add Sub-Outcome** window appears.



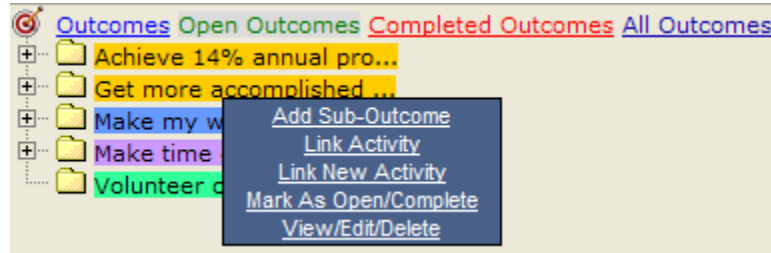
**Figure 22: Add Sub-Outcome Window**

Click the *Outcome Title* field and type a title for this sub-outcome. Next, click the DOWN ARROW in the *Focus Area* field and select a focus area. Finally, click **Add** to create the sub-outcome.

- **To add a sub-outcome to an outcome:**
  1. Click the **Outcomes** icon. The **Outcomes Manager** window appears.
  2. Click the outcome you want to add the sub-outcome to and select *Add Sub-Outcome*. The **Add Sub-Outcome** window appears.
  3. Click the *Outcome Title* window and type a name for the sub-outcome.
  4. Click the DOWN ARROW in the *Focus Area* field and select a focus area.
  5. Click **Add**.

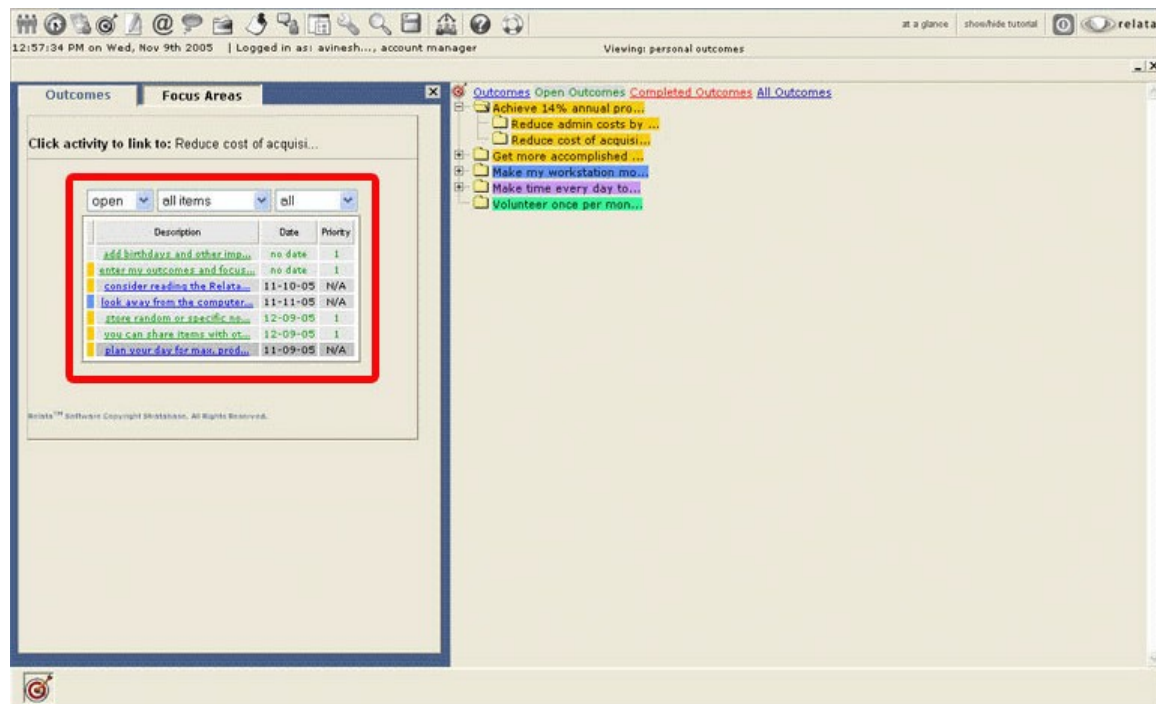
## Linking Activities

You can link an activity to an outcome or sub-outcome. To do so, click the outcome or sub-outcome you want to link an activity to. The **Add Sub-Outcome Pop-Up** window appears.



**Figure 23: Add Sub-Outcome Pop-Up Window**

Click the *Link New Activity* link. The **Link Activity** window appears.



**Figure 24: Link Activity Window**

Using the scroll bar, identify the activity you want to link to this outcome or sub-outcome by clicking the target activity. The activity is now linked to the outcome or sub-outcome.

- **To link an activity to an outcome or sub-outcome:**
  1. Click the **Outcomes** icon. The **Outcomes Manager** window appears.
  2. Click the outcome you want to link an activity to and select *Link Activity*. The **Link Activity** window appears.
  3. Click the activity you want to link to the selected outcome.

## Linking New Activities

You can link an outcome or sub-outcome to a new activity. To do so, click the target outcome or sub-outcome and select *Link New Activity*.

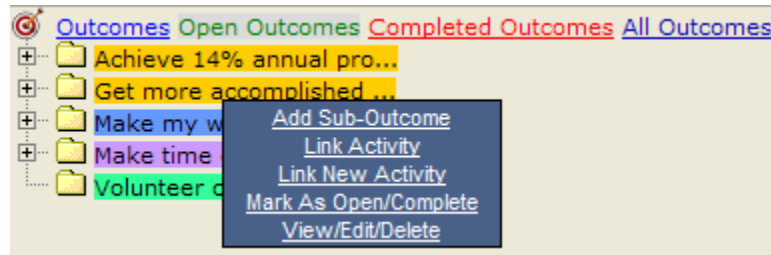


Figure 25: Link New Activity Pop-Up Menu

The **Link New Activity** window appears.

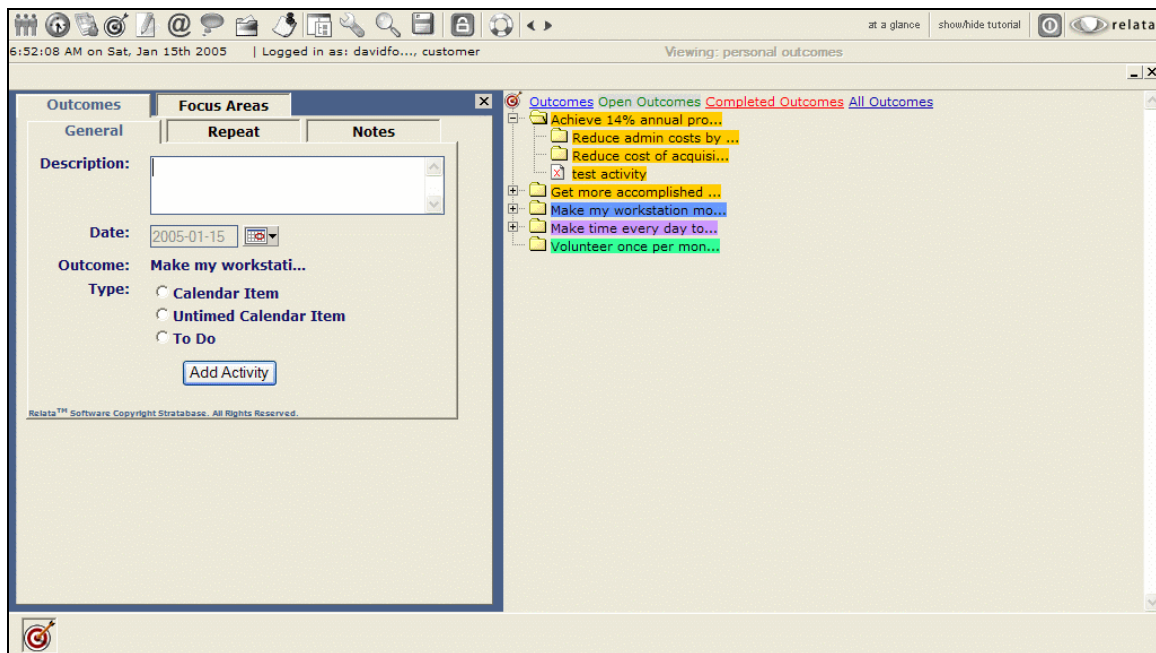


Figure 26: Link New Activity Window

Click the *Description* field and type a description for this activity. Next, select a date for the activity and type of activity to create. When you have finished entering the information for this activity, click **Add Activity**. Relata updates the list of **Outcomes** and activities.

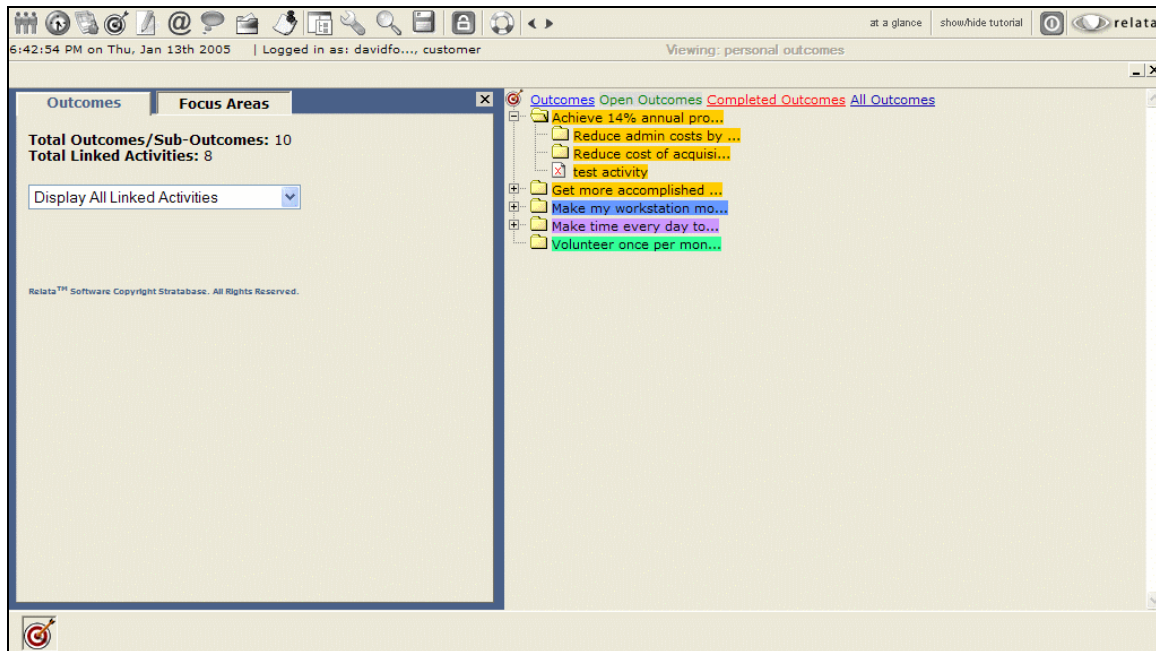


Figure 27: Outcomes Window

- **To link an outcome or sub-outcome to a new activity:**
  1. Click the **Outcomes** icon. The **Outcomes Manager** window appears.
  2. Click the target outcome or sub-outcome and select *Link New Activity*. The *Link New Activity* window appears.
  3. Click the *Description* field and type a description for this activity.
  4. Select a date for the activity.
  5. In the *Type* field, select the type for this activity. Finish entering the information for this activity.
  6. Click **Add Activity**.

## Marking Outcomes as Open or Complete

You can specify an outcome as being open or complete. To do so, click the outcome to see the **Add Sub-Outcome** context menu.

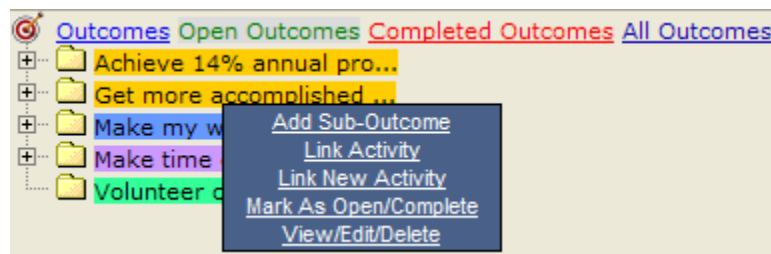
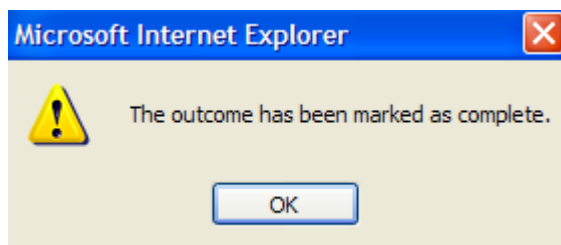
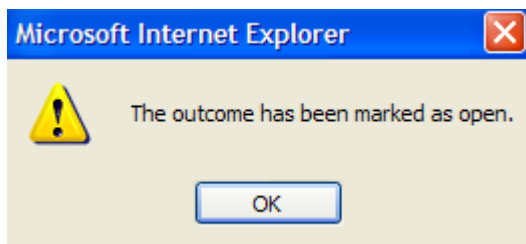


Figure 28: Add Sub-Outcome Pop-Up Window

Click the *Mark As Open/Complete* link.



**Figure 29: Outcome Marked As Complete**



**Figure 30: Outcome Marked As Open**

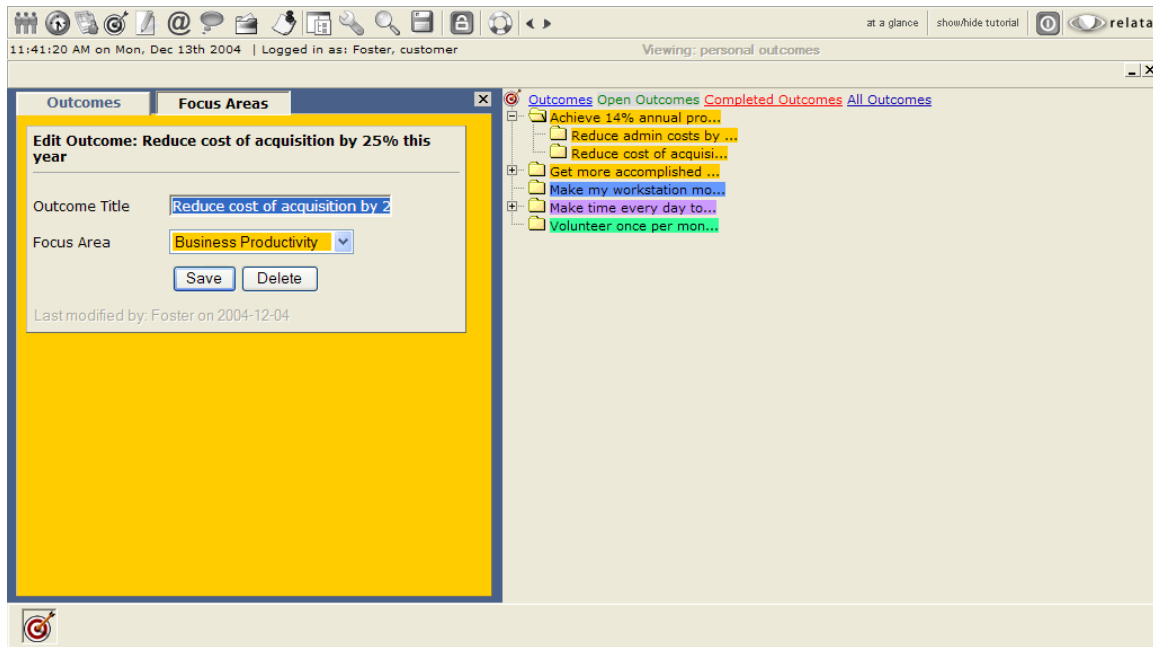
The outcome is marked as open or complete when you click **OK**.

- **To mark an outcome as open or complete:**
  1. Click the **Outcomes** icon. The **Outcomes Manager** window appears.
  2. Click the outcome you want to mark as open or complete and select *Mark As Open/Complete*.
  3. Click **OK**.



## Viewing, Editing, and Deleting Outcomes

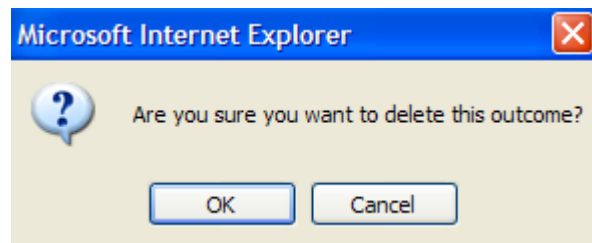
You can view, edit, and delete outcomes in the **Outcomes Manager**. To do so, click the outcome and select *View/Edit/Delete*. The **View/Edit/Delete Outcomes** window appears.



**Figure 31: View/Edit/Delete Outcomes Window**

To edit the outcome, click the *Outcome Title* field and type a new title for the outcome or click the DOWN ARROW and select a different focus area for this outcome. Click **Save** to save your changes.

To delete the outcome, click **Delete**. The **Delete Outcome Confirmation** window appears.



**Figure 32: Delete Outcome Confirmation Window**

Click **OK** to permanently delete this outcome or click **Cancel** to return to the **View/Edit/Delete Outcomes** window.

- **To view an outcome:**
  1. Click the **Outcomes** icon. The **Outcomes Manager** window appears.
  2. Click the outcome and select *View/Edit/Delete*. The outcome's information appears in the window.
- **To edit an outcome:**
  1. Click the **Outcomes** icon. The **Outcomes Manager** window appears.
  2. Click the outcome and select *View/Edit/Delete*. The **View/Edit/Delete Outcomes** window appears.

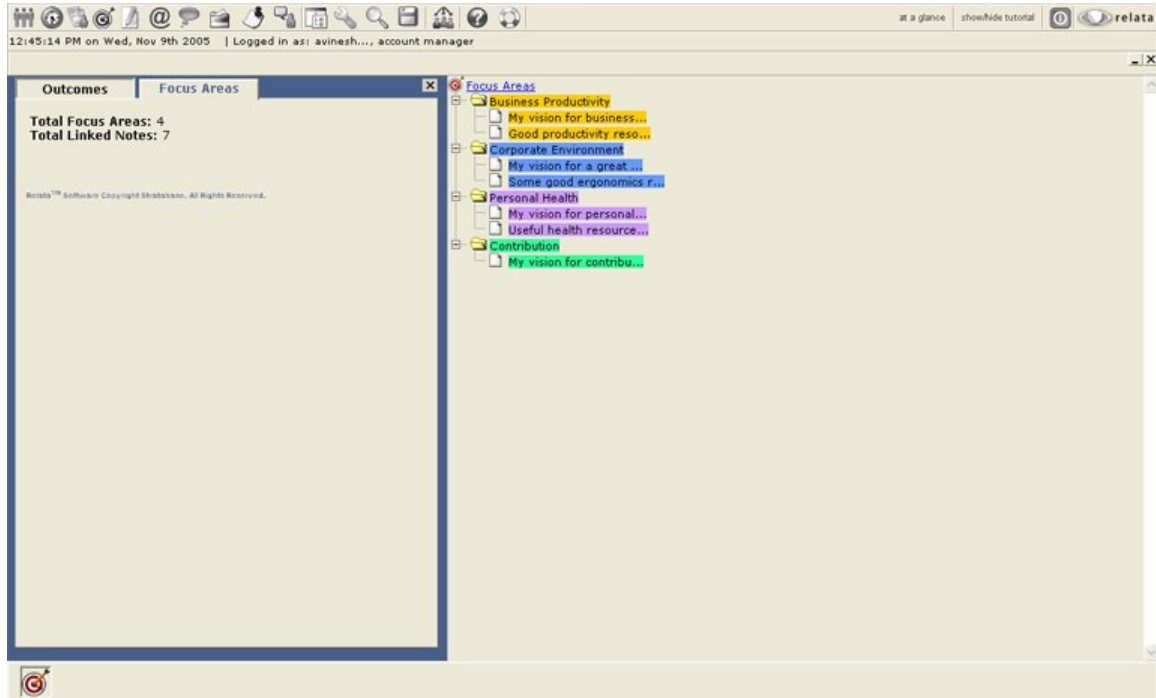
3. Click the *Outcome Title* field and type a new title for this outcome or click the DOWN ARROW and select a different focus area.
4. Click **Save**.

➤ **To delete an outcome:**

1. Click the **Outcomes** icon. The **Outcomes Manager** window appears.
2. Click the activity and select *View/Edit/Delete*. The **View/Edit/Delete Outcomes** window appears.
3. Click **Delete**. The **Delete Outcome Confirmation** window appears.
4. Click **OK**.

## Working with Your Focus Areas

To work with your **Focus Areas**, click the **Focus Areas** tab on the **Outcomes Manager** window. The **Focus Areas** window appears.



**Figure 33: Focus Areas Window**

When you click the **Focus Areas** tab, the **Focus Areas** window appears, showing you the number of focus areas you have and the number of linked notes. The focus areas are color-coded.

- **To view your Focus Areas:**
  1. Click the **Outcomes** icon. The **Outcomes Manager** window appears.
  2. Click the **Focus Areas** tab. The **Focus Areas** window appears.

## Viewing Linked Notes

You can view a note which has been linked to a Focus Area. To do so, click the item to see the **Focus Areas** context menu.

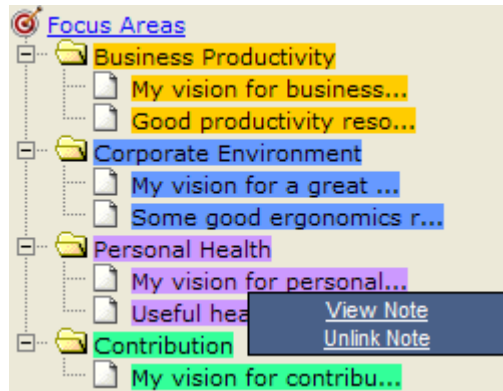


Figure 34: Focus Areas Context Menu

Click the *View Note* link. The note content appears in the left window.

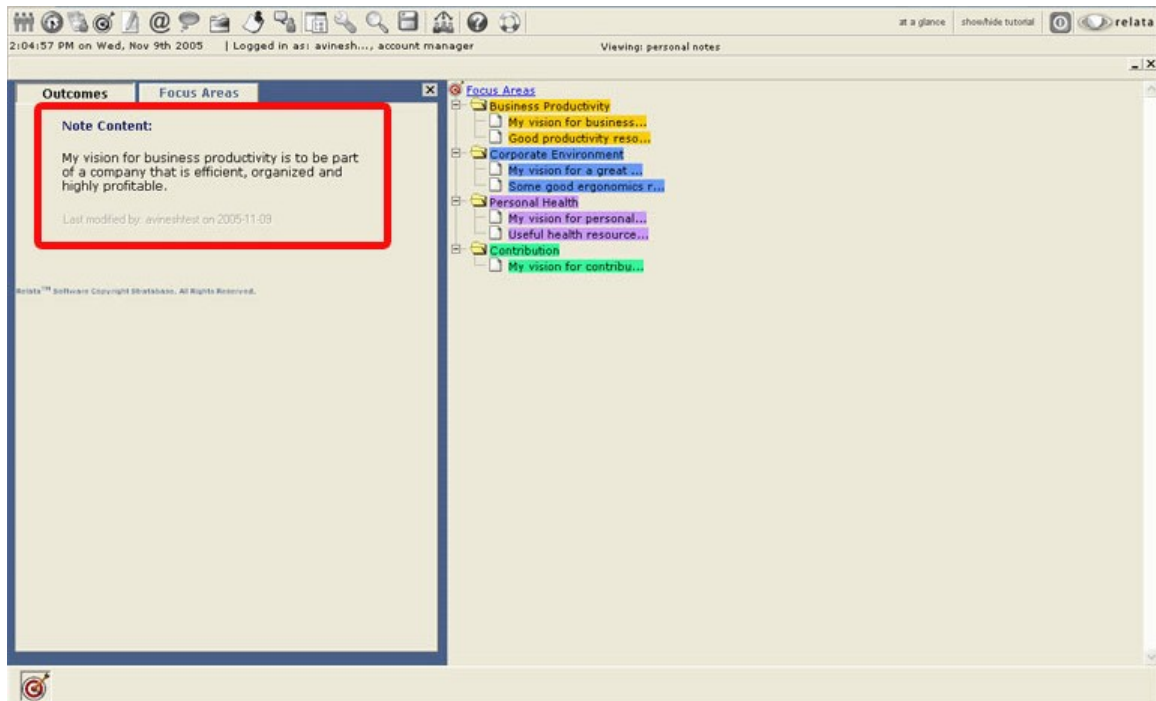
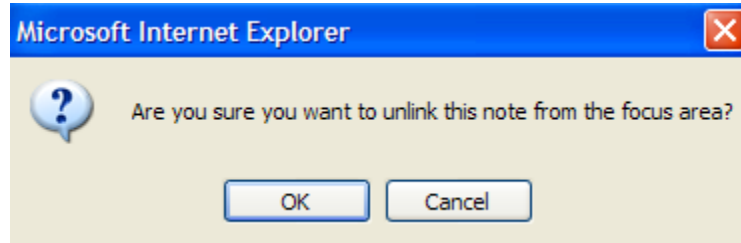


Figure 35: View Note Window

- **To view a note that is linked to a Focus Area:**
  1. Click the **Outcomes** icon. The **Outcomes Manager** window appears.
  2. Click the **Focus Areas** tab. The **Focus Areas** window appears.
  3. Click the item and select *View Note*. The note content appears in the left window.

## Unlinking a Note

You can unlink a note from a Focus Area. To unlink the note, click the note and select *Unlink Note*. The **Unlink Note Confirmation** window appears.




**Figure 36: Unlink Note Confirmation Window**

Click **OK** to unlink the note.

- **To unlink a note from a Focus Area:**
  1. Click the **Outcomes** icon. The **Outcomes Manager** window appears.
  2. Click the **Focus Areas** tab. The **Focus Areas** window appears.
  3. Click the note and select *Unlink Note*. The **Unlink Note Confirmation** window appears.
  4. Click **OK**.

## WORKING WITH LOGS

The **Log Manager** lets you record special notes, or logs, about topics. You can create, edit, delete, and share log entries and export your log entries to *Microsoft Word*.

To use the **Log Manager**, click the **Log Manager** icon . The **Log Manager** window appears.



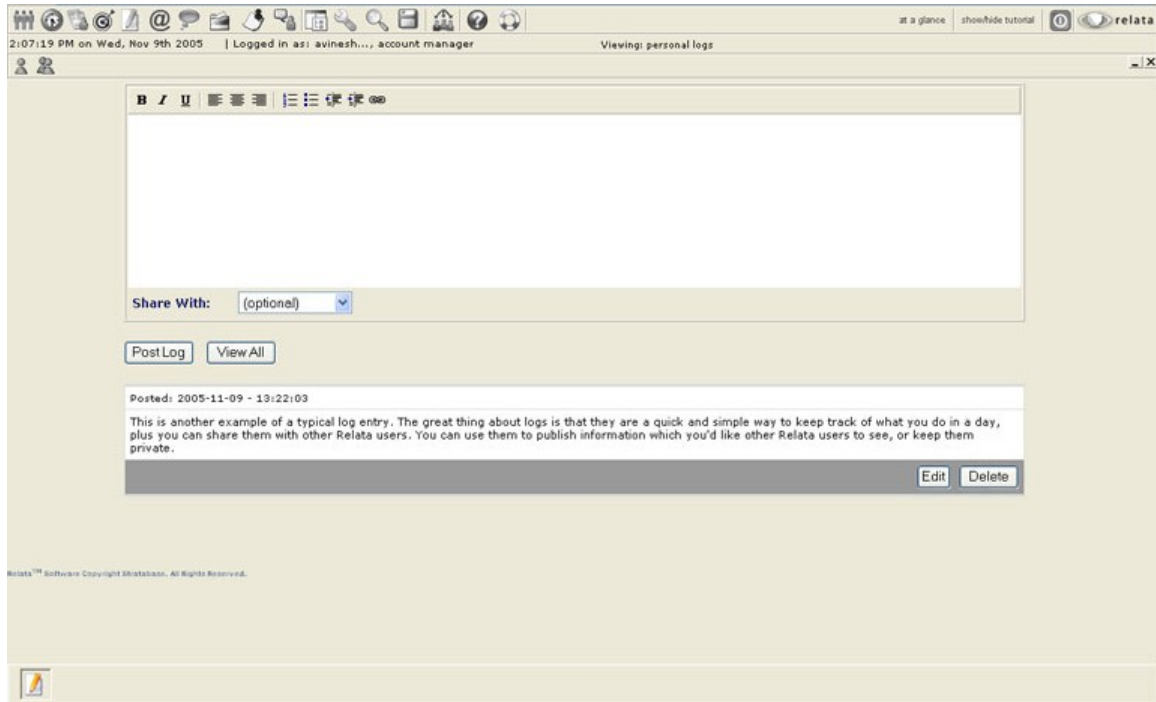
**Figure 37: Log Manager Window**

The **Log Manager** displays your most recent logs.

- **To manage your logs:**
  - Click the **Log Manager** icon. The **Log Manager** window appears.

## Creating Logs

To create a log, click **Add New Log**. The **Add Log** window appears.



**Figure 38: Add Log Window**

You can type the text for this log in the window. The **Log Editor** has a formatting toolbar – it lets you use bold, italics, and so on to format your log.

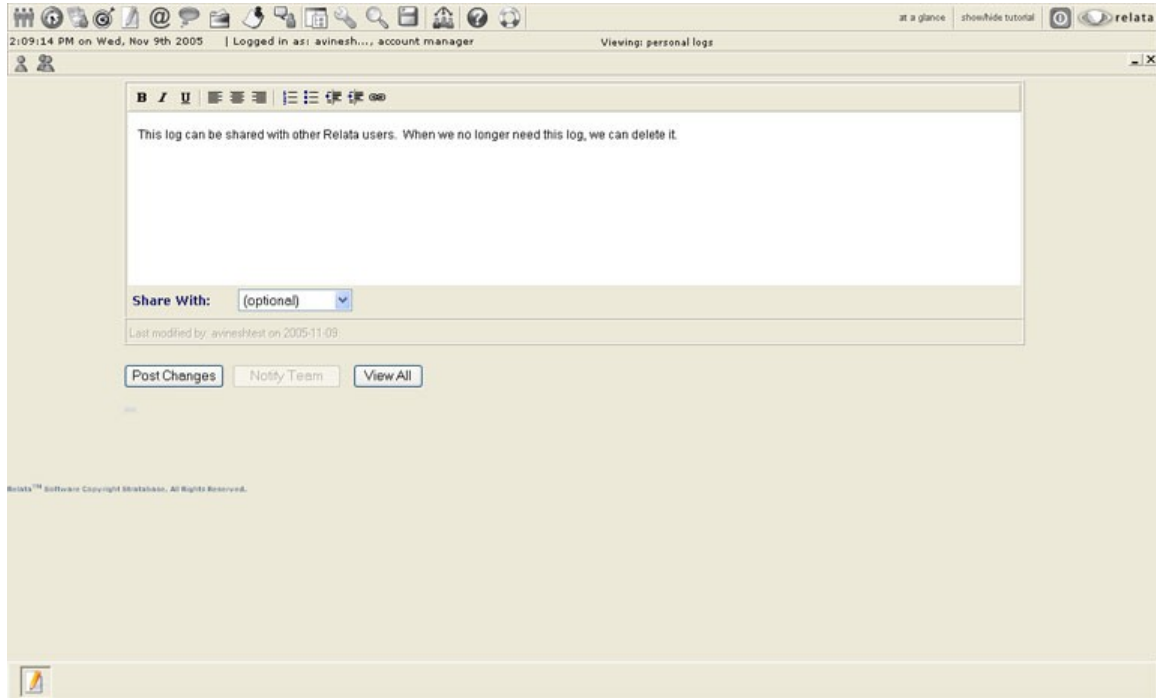
If you want to share this log with one of your **Relata** teams, select the *Share With* drop-down. When you are ready to create the log, click **Post Log**.

➤ **To create a log:**

1. Click the **Log Manager** icon. The **Log Manager** window appears.
2. Click **Add New Log**. The **Add Log** window appears.
3. Type the text for the log.
4. In the *Share With* field, select the team this log will be shared with (optional).
5. Click **Post Log**.

## Editing Logs

You can change the content of a log in **Relata**. To edit a log, click **Edit**. The **Edit Log** window appears.



**Figure 39: Edit Log Window**

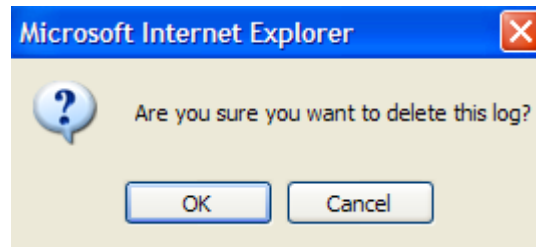
After you have edited your log, click **Post Changes**. The new information for this log is saved.

- **To edit a log:**
  1. Click the **Log Manager** icon. The **Log Manager** window appears.
  2. Click **Edit**. The **Edit Log** window appears.
  3. Edit the log entry.
  4. Click **Post Changes**.



## Deleting Logs

To remove a log, click **Delete**. The **Delete Confirmation** window appears.



**Figure 40: Delete Confirmation Window**

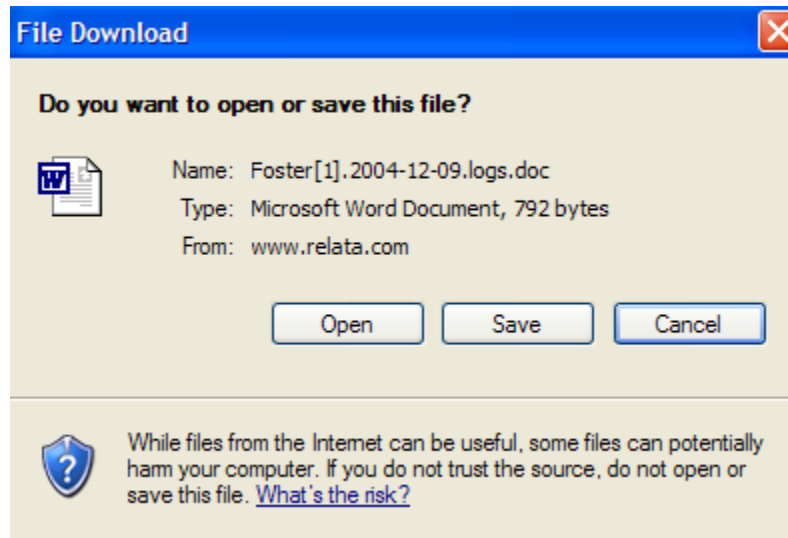
Click **OK** to permanently delete this log or click **Cancel** to return to the **Log Manager**.

➤ **To delete a log:**

1. Click the **Log Manager** icon. The **Log Manager** window appears.
2. Click **Delete**. The **Delete Confirmation** window appears.
3. Click **OK**.

## Exporting Logs to Microsoft Word

You can export your logs from **Relata** to *Microsoft Word*. To do so, click **Export Logs to Word**. The **File Download** window appears.




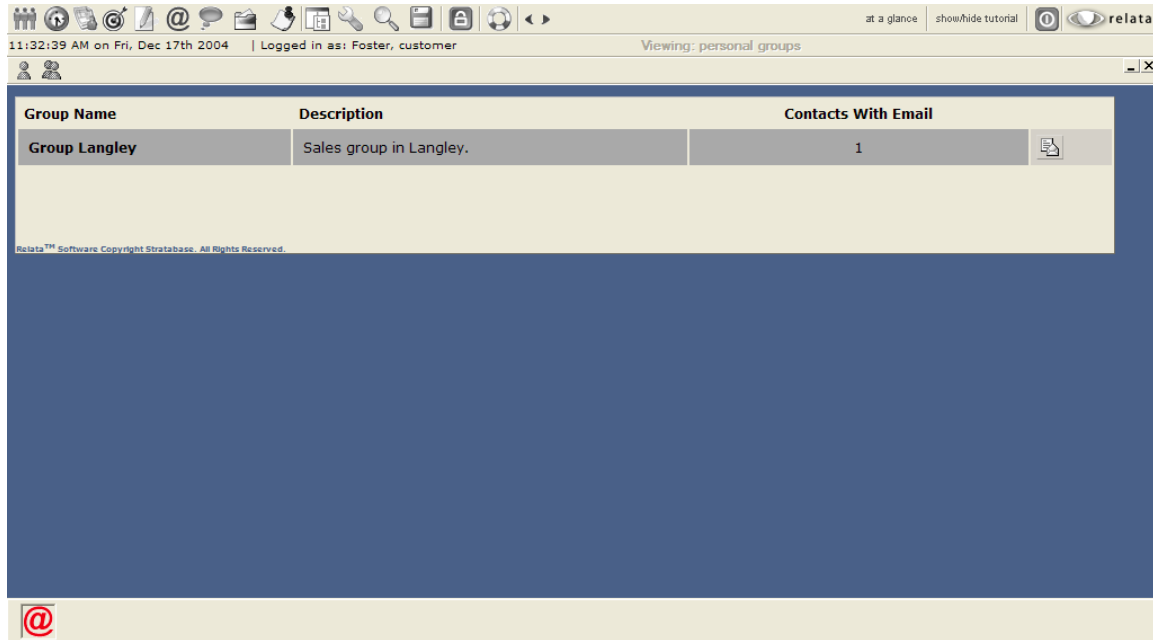
**Figure 41: File Download Window**

Click **Save**. The **Save As** window appears. You can change the name of the file, if desired, or just click **Save** to export the file to *Microsoft Word*. You can then open this file using *Microsoft Word*.

- **To export logs to Microsoft Word:**
  1. Click the **Log Manager** icon. The **Log Manager** window appears.
  2. Click **Export Logs to Word**. The **File Download** window appears.
  3. Click **Save**. The **Save As** window appears.
  4. Click **Save**.

## USING THE GROUP EMAIL MANAGER

You can manage your group emails. To do so, click the **Group Email Manager** icon  on the **Relata** toolbar. The **Group Email Manager** window appears.



**Figure 42: Group Email Manager Window**

For each group, the window displays the group's name, description, and the number of contacts in that group that have an email address specified.


- **To manage group emails:**
  - Click the **Group Email Manager** icon. The **Group Email Manager** window appears.

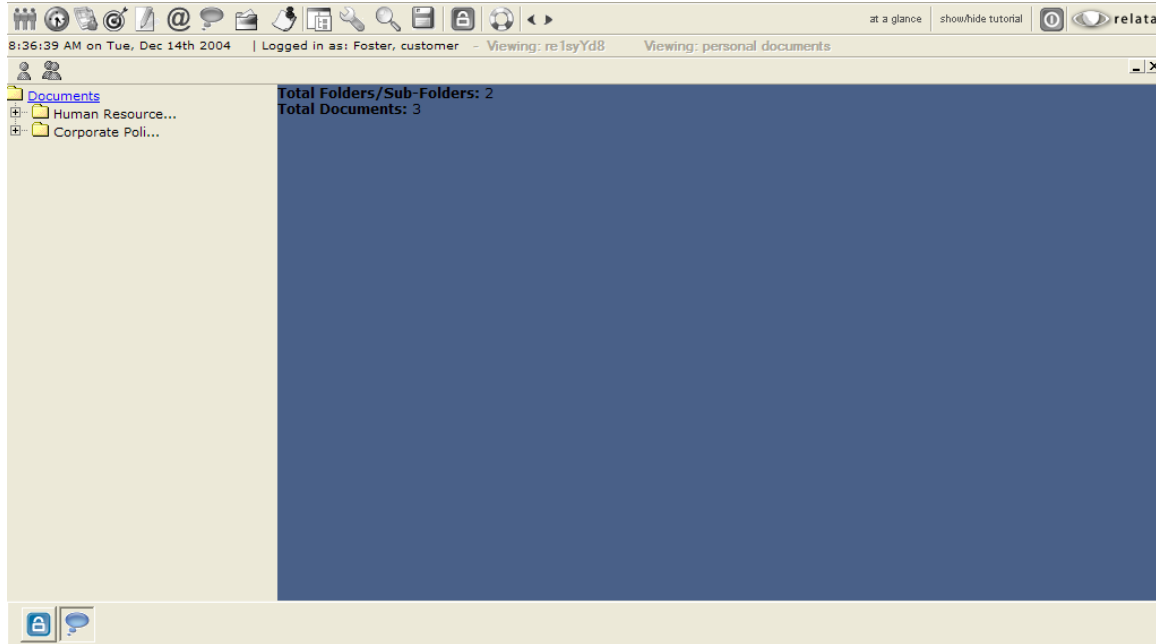
## Sending an Email to a Contact

You can send an email to a contact within a group. To send an email, click the **Email** icon. A new window appears in your default mail application (*Microsoft Outlook, Outlook Express, Eudora, and so on*). You can write the email information and click **Send** to send the email.

- **To send an email to a contact:**
  1. Click the **Group Email Manager** icon. The **Group Email Manager** window appears.
  2. Click the **Email** icon.
  3. Type the information for the email.
  4. Click **Send**.

## WORKING WITH KNOWLEDGE MANAGEMENT

**Knowledge Management** lets you create and manage documents. To create and manage your documents, click the **Knowledge Management** icon  on the **Main** window. The **Knowledge Management** window appears.



**Figure 43: Knowledge Management Window**

The **Knowledge Management** window displays a list of your documents, arranged in folders and sub-folders, as well as the total number of folders and documents you have in **Relata**.

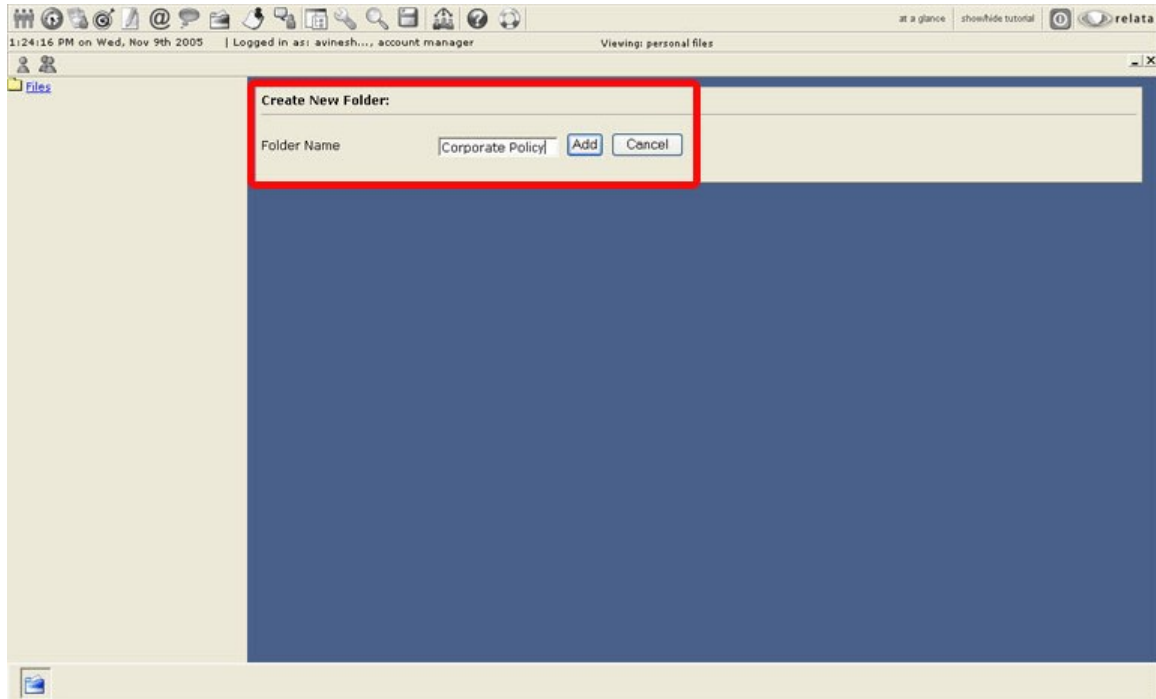
- **To manage your documents:**
  - Click the **Knowledge Management** icon. The **Knowledge Management** window appears.

## Creating Folders

You can create a folder or sub-folder in **Knowledge Management**. To do so, click the folder you want to create a sub-folder in and select *Create Folder*.

[Create Sub-Folder](#)  
[Create Document](#)  
[Edit/Delete](#)

The **Create Folder** window appears.



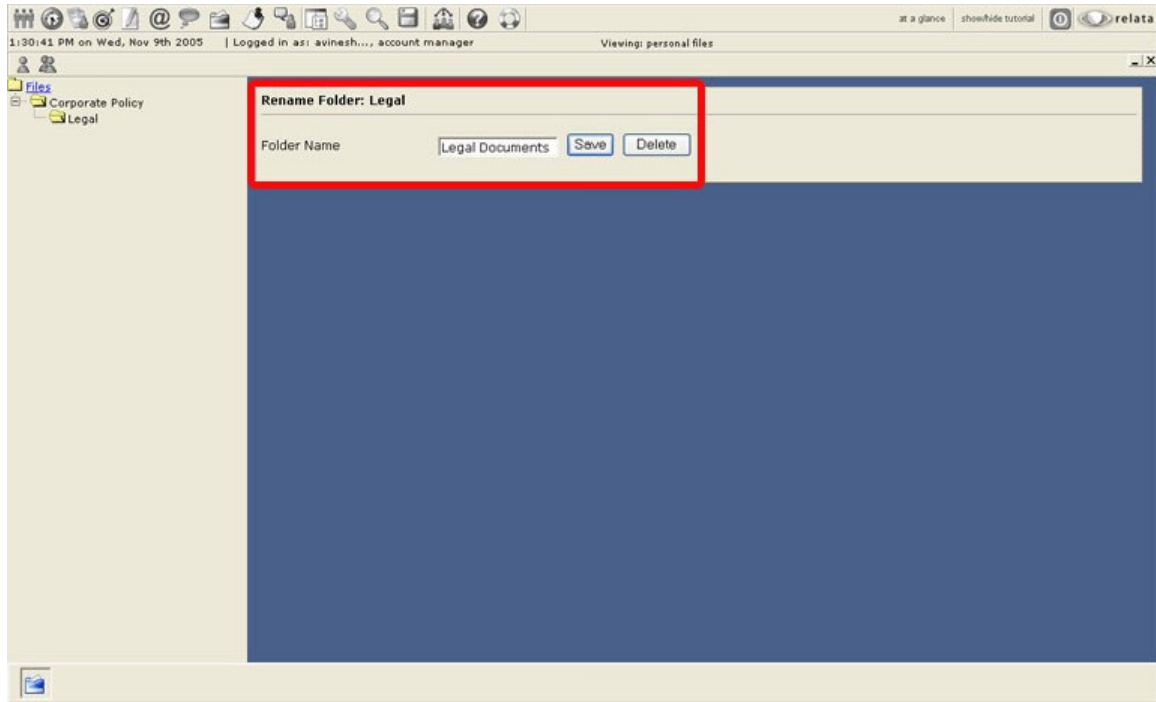
**Figure 44: Create Folder Window**

Click the *Folder Name* field and type a name for this folder. When you have finished entering the name, click **Add**. The folder is created.

- **To create a folder:**
  1. Click the **Knowledge Management** icon. The **Knowledge Management** window appears.
  2. Click the target folder and select *Create Folder*. The **Create Folder** window appears.
  3. Click the *Folder Name* field and type a name for the folder.
  4. Click **Add**.

## Renaming and Deleting Folders

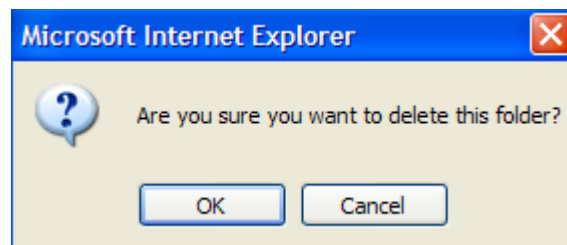
You can rename or delete a folder in **Knowledge Management**. To do so, click the folder you want to work with and select *Edit/Delete*. The **Rename Folder** window appears.



**Figure 45: Rename Folder Window**

If you want to rename this folder, type a new name for the folder and click **Save**.

If you want to delete a folder, the folder must not contain any documents. You must delete all sub-folders and documents stored in this folder before you can delete it. To delete a folder, click **Delete**. The **Delete Folder Confirmation** window appears.



**Figure 46: Delete Folder Confirmation Window**

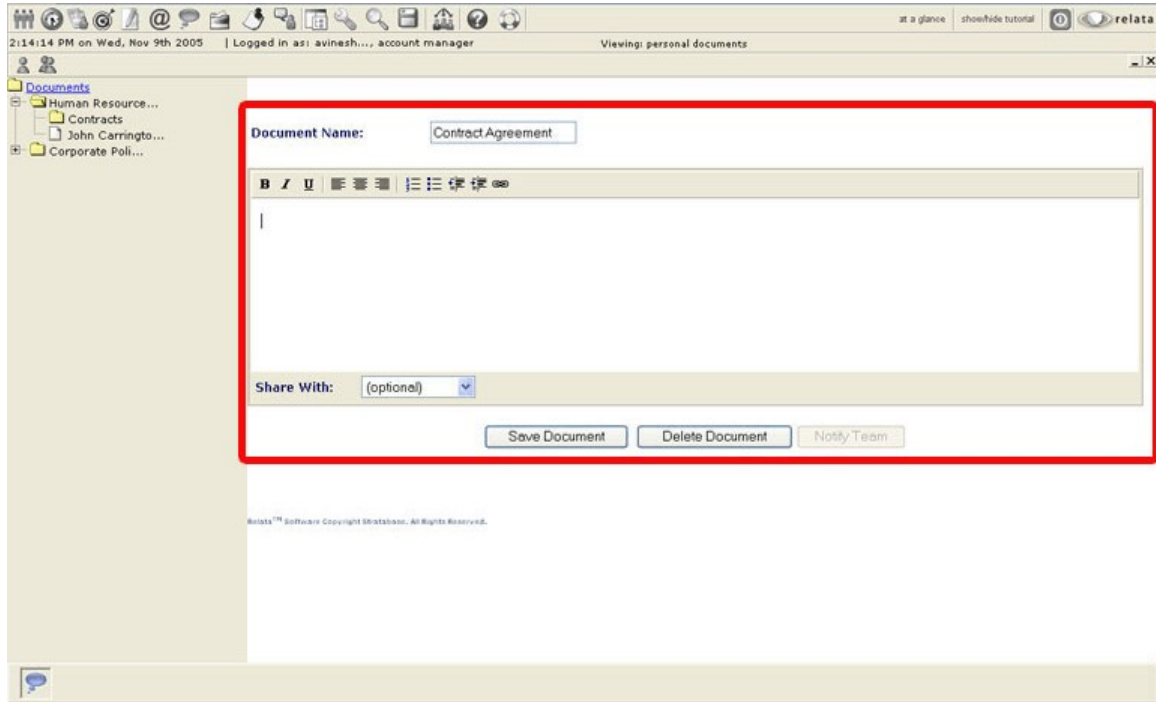
Click **OK** to permanently remove the folder from **Knowledge Management**.

➤ **To rename or delete a folder:**

1. Click the **Knowledge Management** icon. The **Knowledge Management** window appears.
2. Click the target folder and select *Edit/Delete*. The **Rename Folder** window appears.
3. To rename the folder, click the *Folder Name* field, type a new name for the folder, and click **Save**.
4. To delete the folder, click **Delete**.

## Creating Documents

You can create a document in **Knowledge Management**. To create a document, click the item for which you want to create a document and select *Create Document*. The **Create Document** window appears.



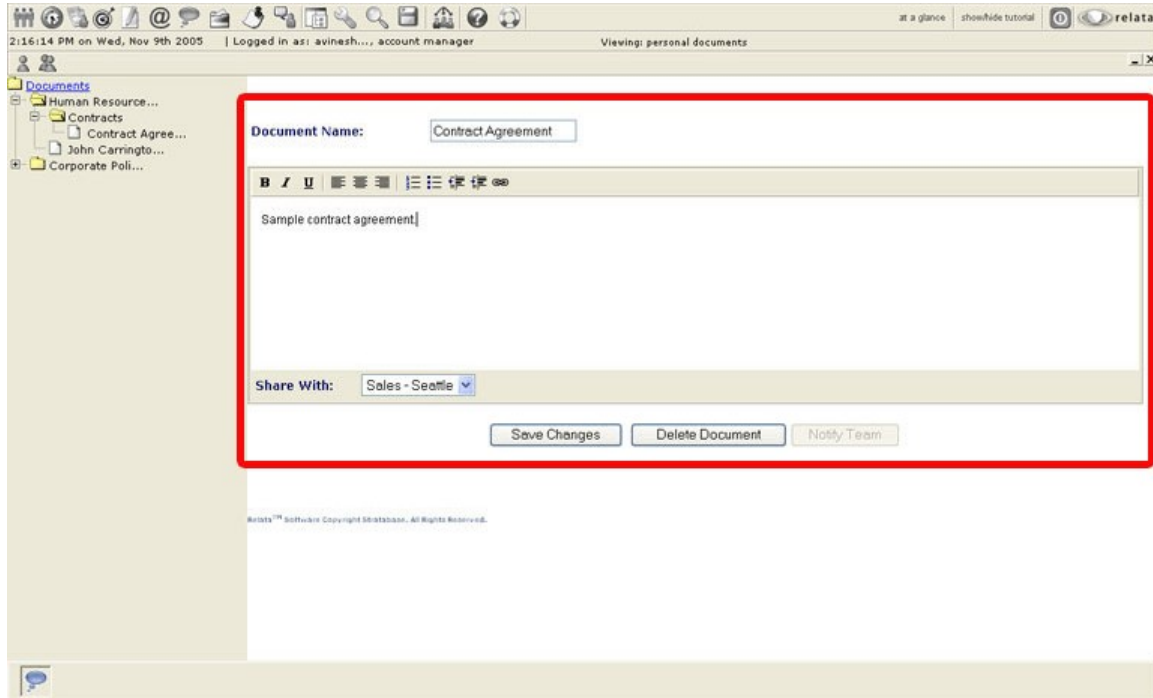
**Figure 47: Create Document Window**

Click the *Document Name* field and type a name for this document. Next, click the editor's window and type the text for this document. If you want to share the document, select a team from the *Share With* drop-down menu. Click **Save Document** to save the document.

- **To create a document:**
  1. Click the **Knowledge Management** icon. The **Knowledge Management** window appears.
  2. Click the target item and select *Create Document*. The **Create Document** window appears.
  3. Click the *Document Name* field and type a name for this document.
  4. Click the editor field and type the text for this document.
  5. In the *Share With* field, select a team with whom to share this document (optional).
  6. Click **Save Document**.

## Editing and Deleting Documents

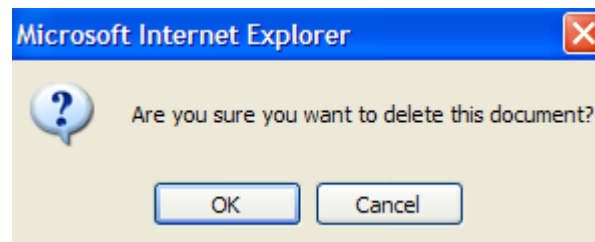
You can edit or delete a document. To do so, click the document and select *Edit Document*. The **Edit Document** window appears.



**Figure 48: Edit Document Window**

Make the changes to the document and click **Save Changes**. The document's changes are saved.

Alternatively, if you want to delete a document, click **Delete Document**. The **Delete Document Confirmation** window appears.



**Figure 49: Delete Document Confirmation Window**

Click **OK** to permanently delete the document.

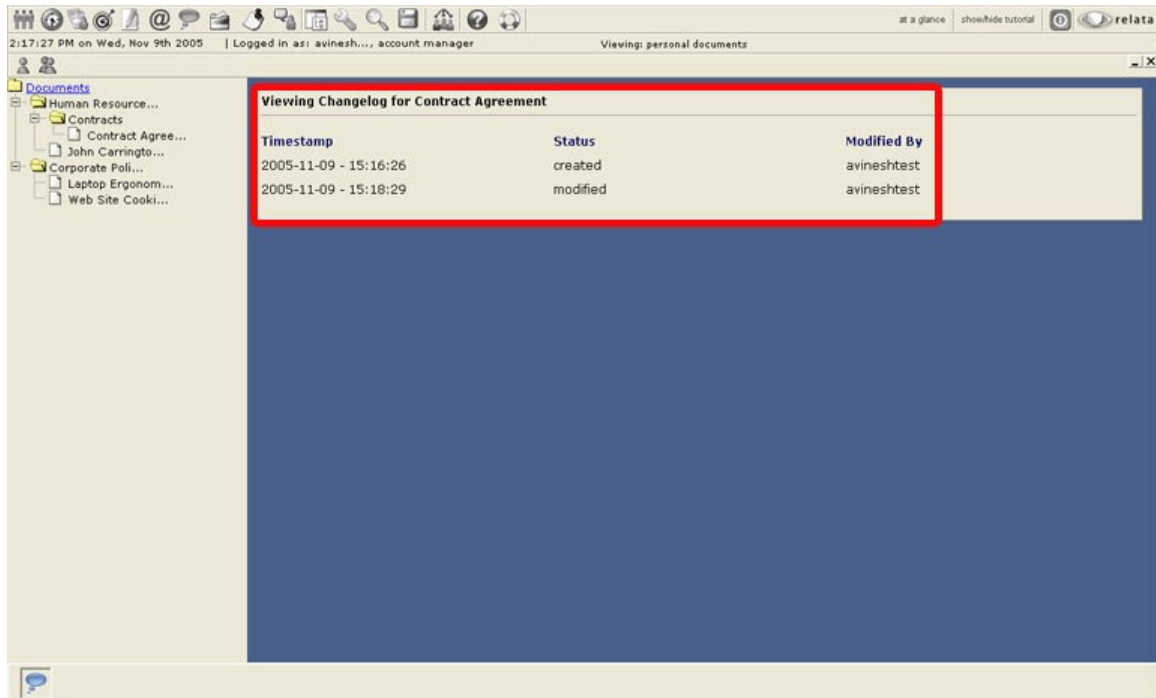
➤ **To edit or delete a document:**

1. Click the **Knowledge Management** icon. The **Knowledge Management** window appears.
2. Click the document and select *Edit Document*. The **Edit Document** window appears.
3. If you want to edit this document, make the changes and click **Save Changes**.
4. If you want to delete this document, click **Delete Document**. The **Delete Document Confirmation** window appears. Click **OK**.



## Viewing a Document's Change Log

You can view the *Change Log* for a document. It provides statistical information on when a document was created and modified. Click a document and select *View ChangeLog*. The **View ChangeLog** window appears.




**Figure 50: View ChangeLog Window**

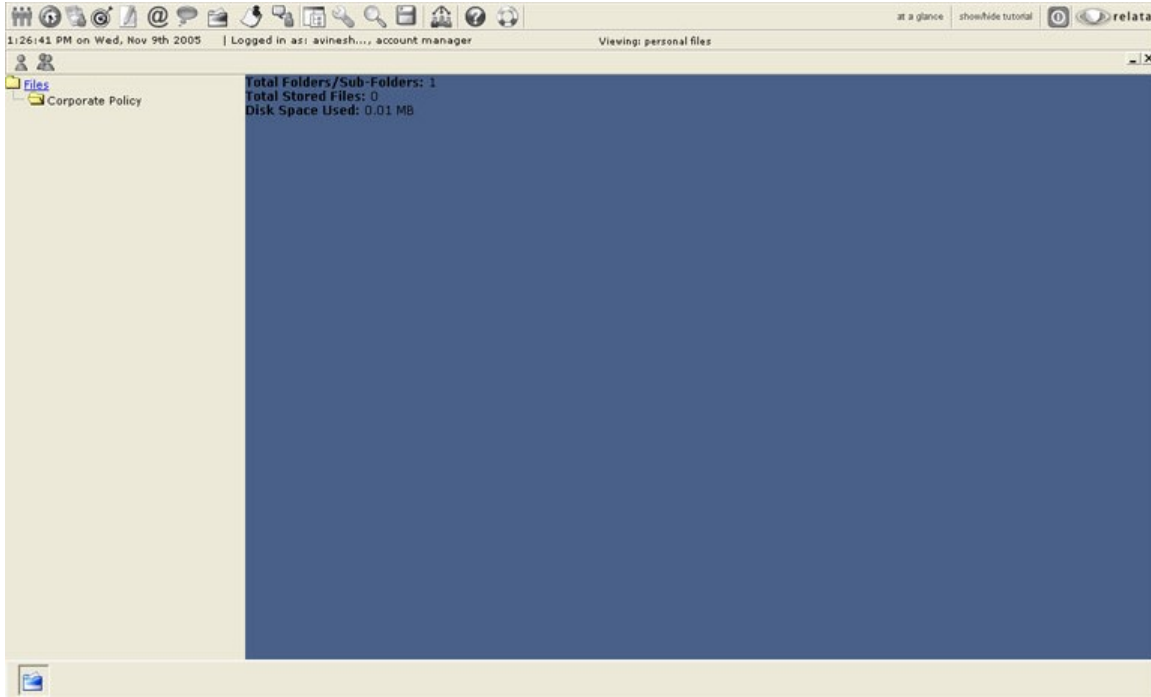
The **ChangeLog** window displays the date and time a change was made, the type or status of the change, and who made the change.

- **To view a document's Change Log:**
  1. Click the **Knowledge Management** icon. The **Knowledge Management** window appears.
  2. Click the document and select *View ChangeLog*. The **View ChangeLog** window appears.

## WORKING WITH THE FILE MANAGER

**Relata's File Manager** lets you organize your documents. Using **File Manager**, you can create sub-folders to organize related documents and you can upload and delete files, as well as sub-folders as required.

To manage your files, click the **File Manager** icon . The **File Manager** window appears.



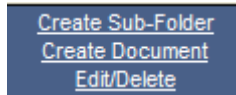
**Figure 51: File Manager Window**

The folders and documents you have stored in **Relata** are shown on the left side of the **File Manager** window. The right side of the **File Manager** window shows you the number of folders and sub-folders you have created, the number of files or documents you have stored in **Relata**, and the amount of disk space used by those files.

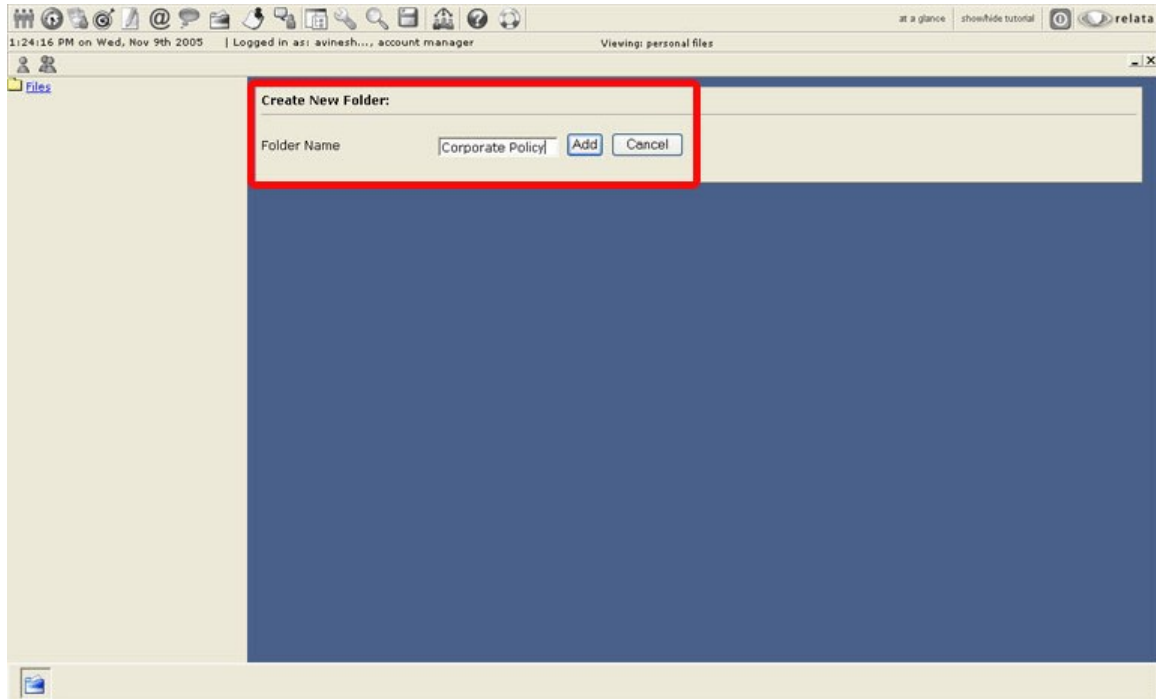
- **To manage your files:**
  - Click the **File Manager** icon. The **File Manager** window appears.

## Creating Folders and Sub-Folders

You can create a folder or sub-folder by clicking the *Files* item. Next, select the *Create Folder* item.



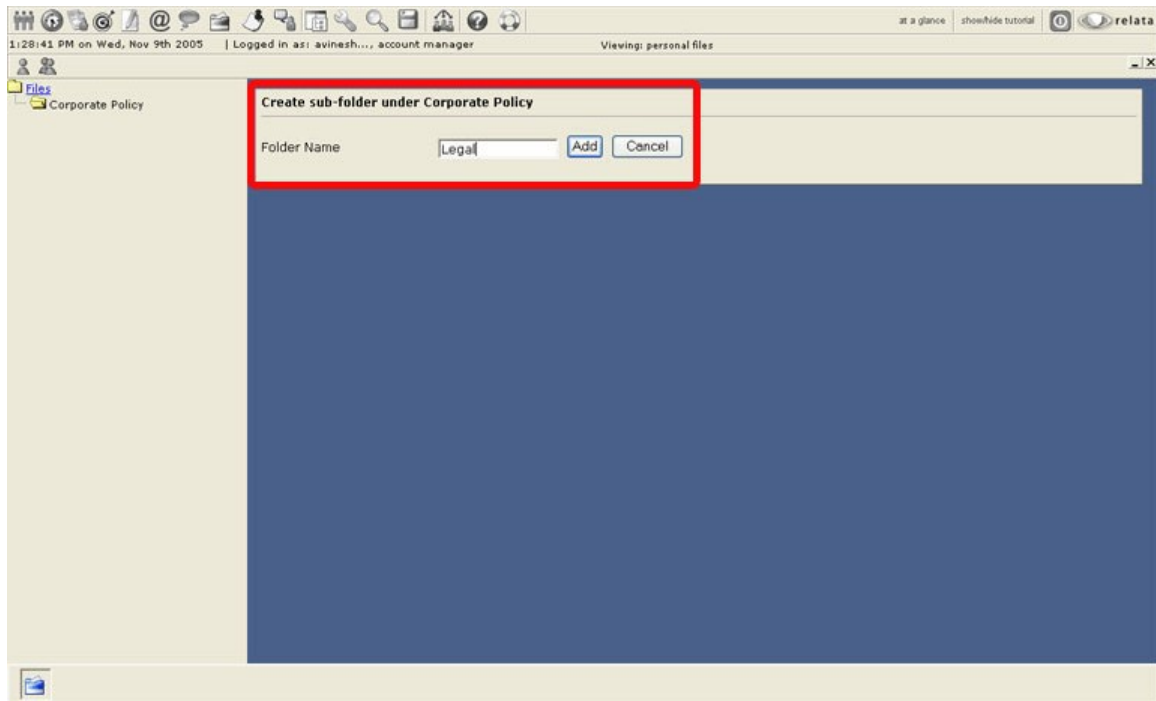
The **Create Folder** window appears.



**Figure 52: Create Folder Window**

Click the *Folder Name* field and type a name for this new folder and then click **Add**. The folder appears in the folder list.

If you want to create a sub-folder, click the parent folder's name and then select *Create Sub-Folder*. The **Create Sub-Folder** window appears.



**Figure 53: Create Sub-Folder Window**

The *Folder Name* field is automatically populated with the parent folder's name. Click this field and type a name for the sub-folder you want to create. Click **Add** to create the sub-folder.

➤ **To create a folder:**

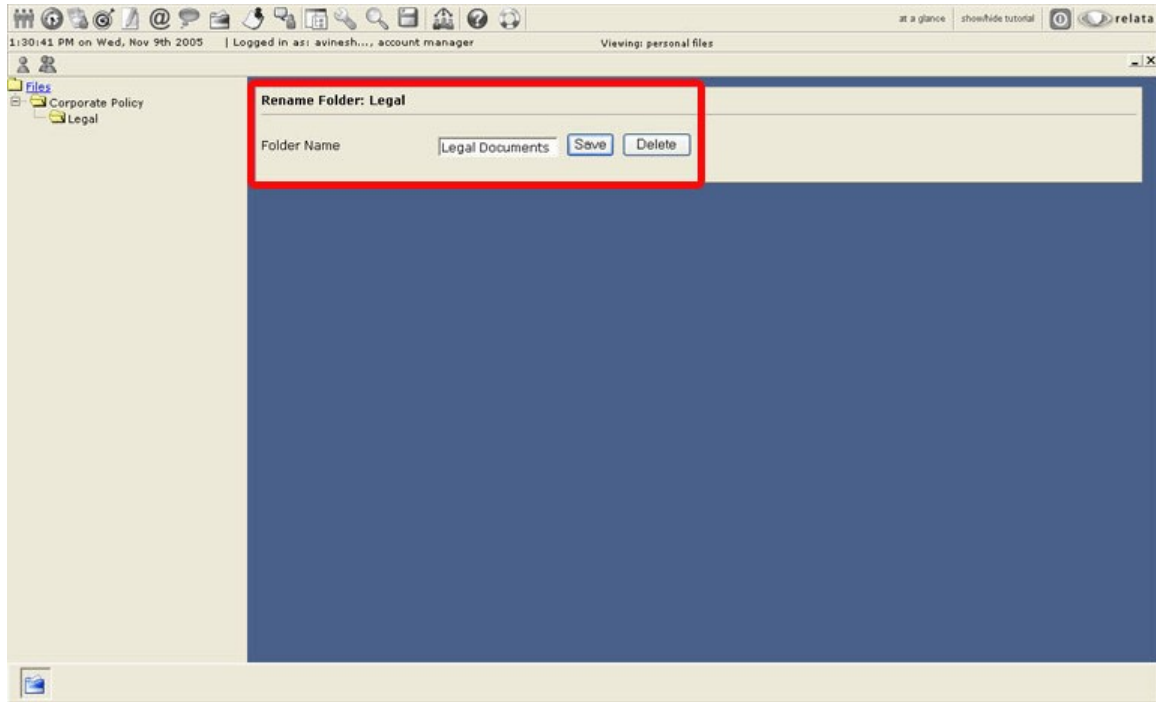
1. Click the **File Manager** icon. The **File Manager** window appears.
2. Click the *Files* item and select *Create Folder*. The **Create Folder** window appears.
3. Click the *Folder Name* field and type a name for the folder.
4. Click **Add**.

➤ **To create a sub-folder:**

1. Click the **File Manager** icon. The **File Manager** window appears.
2. Click the parent folder's name and select *Create Sub-Folder*. The **Create Sub-folder** window appears.
3. Click the *Folder Name* field and type a name for the sub-folder.
4. Click **Add**.

## Renaming Folders and Sub-Folders

You can change the name of a folder or sub-folder in **Relata**. To rename a folder, click the folder's name and select *Edit/Delete Folder*. The **Rename Folder** window appears.



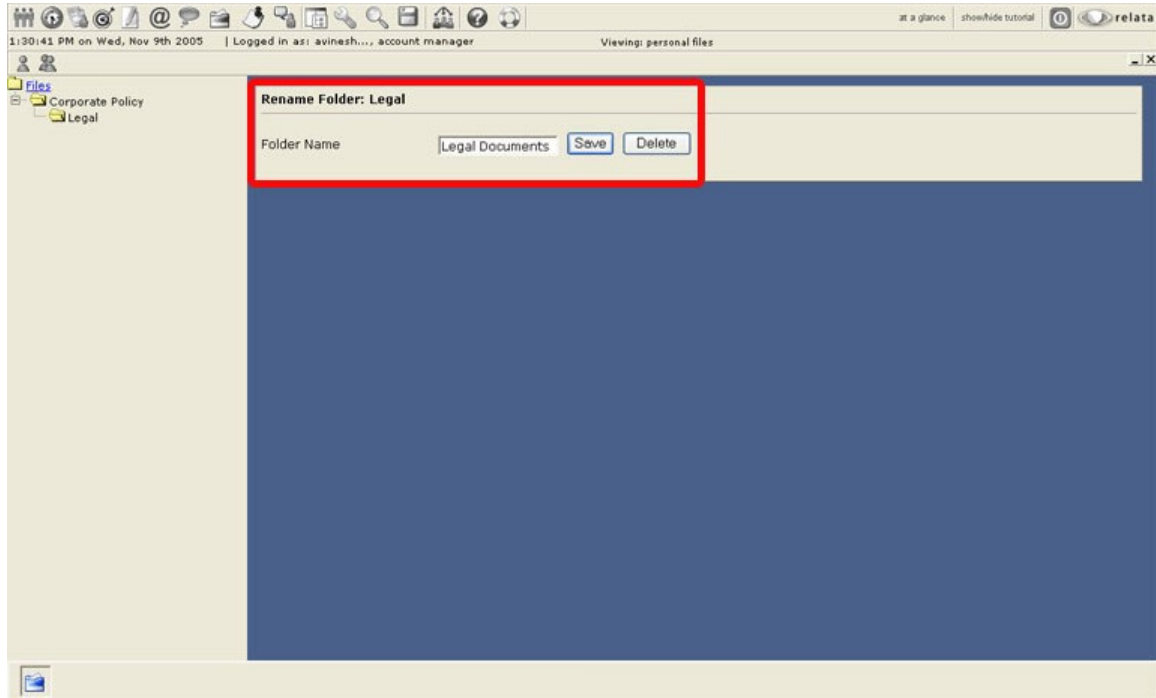
**Figure 54: Rename Folder Window**

The folder's name appears in the *Folder Name* field. Type a new name for the folder and click **Save**.

- **To rename a folder:**
  1. Click the **File Manager** icon. The **File Manager** window appears.
  2. Click the folder you want to rename and select *Edit/Delete Folder*. The **Rename Folder** window appears.
  3. Click the *Folder Name* field, and type a new name for the folder.
  4. Click **Save**.

## Deleting Folders and Sub-Folders

You can delete a folder or sub-folder in **Relata**. To delete a folder, click the folder's name and then select *Edit/Delete* folder. The **Rename Folder** window appears.



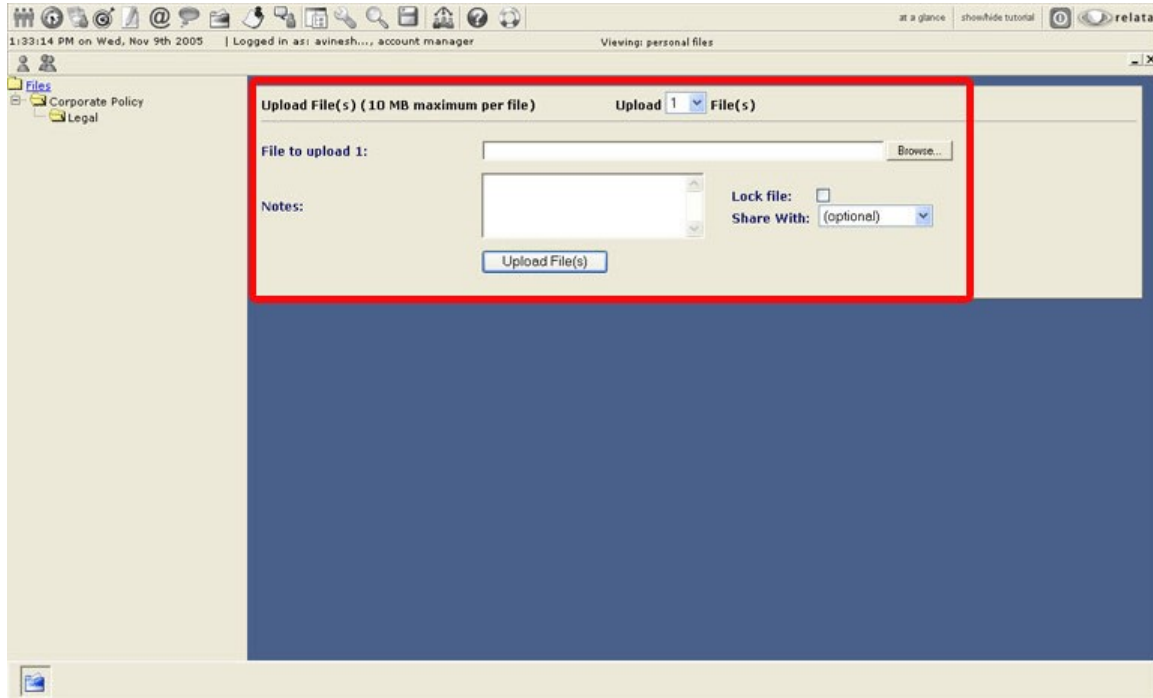
**Figure 55: Rename Folder Window**

The folder's name appears in the *Folder Name* field. To delete this folder, click **Delete**.

- **To delete a folder or sub-folder:**
  1. Click the **File Manager** icon. The **File Manager** window appears.
  2. Click the folder you want to delete and select *Edit/Delete Folder*. The **Rename Folder** window appears.
  3. Click **Delete**.

## Uploading Files

You can upload, or store, files in **Relata**. To upload a file, click the folder you want to add the file to and select *Upload File*. The **Upload File** window appears.



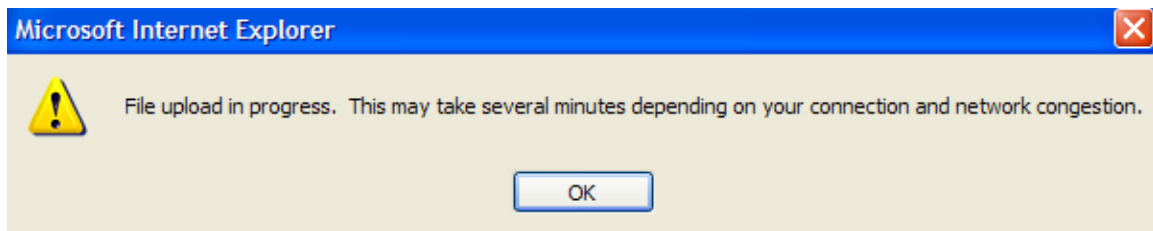
**Figure 56: Upload Files Window**

Click **Browse** to locate the file on your local computer's hard disk. Next, click the *Notes* field and type any comments about this file. You can upload up to ten files at a time.

If you want to lock the file, select the *Lock File* check box. When you lock a file, that file cannot be modified by other **Relata** users until it is unlocked.

If you want other **Relata** users to be able to access this file, select an appropriate team from the *Share With* drop-down.

Click **Upload File**. The **File Upload in Progress** window appears. Click **OK** to begin uploading the file.



**Figure 57: File Upload in Progress Window**

When the file has been successfully uploaded to **Relata**, click **OK**.



**Figure 58: File Uploaded Successfully Window**

You'll see the uploaded file in the folder list.

➤ **To upload a file:**

1. Click the **File Manager** icon. The **File Manager** window appears.
2. Click the target folder and select *Upload File*. The **Upload File** window appears.
3. Click **Browse** to find the file you want to upload.
4. Click the *Notes* field and type any comments about the file.
5. Select the *Lock File* check box if the file is to be locked.
6. In the *Share With* drop-down, select a team to share the file with (optional).
7. Click **Upload File**. The **File Upload in Progress** window appears.
8. Click **OK**.
9. Click **OK**.



## Downloading Files

You can download a file from **Relata** to your local computer. To do so, click the filename and select *Download*. The **Download File** window appears.

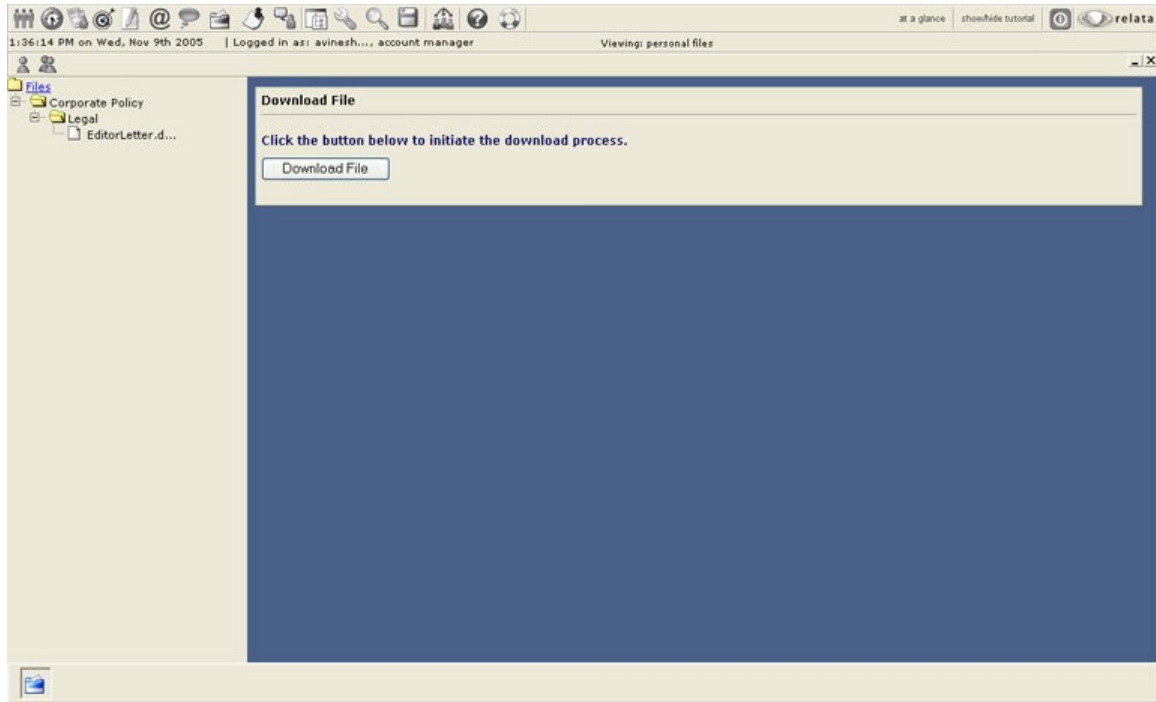


Figure 59: Download File Window

Click **Download File**. The **File Download** window appears.

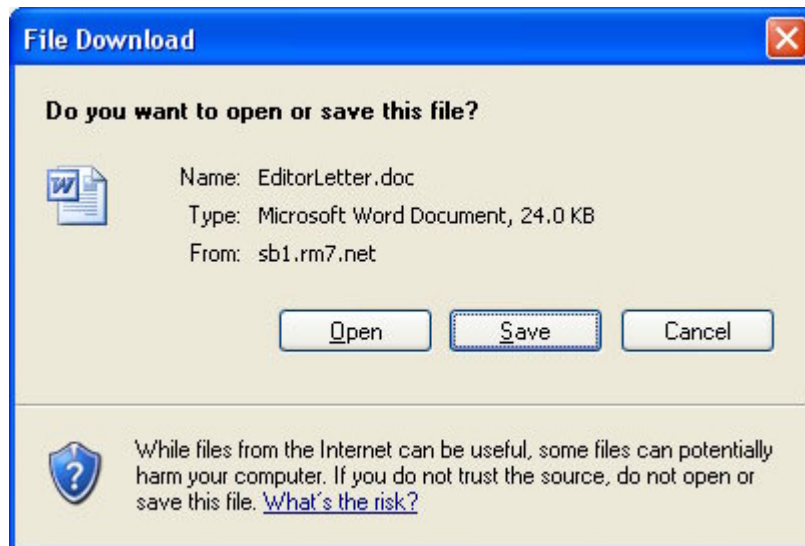


Figure 60: File Download Window

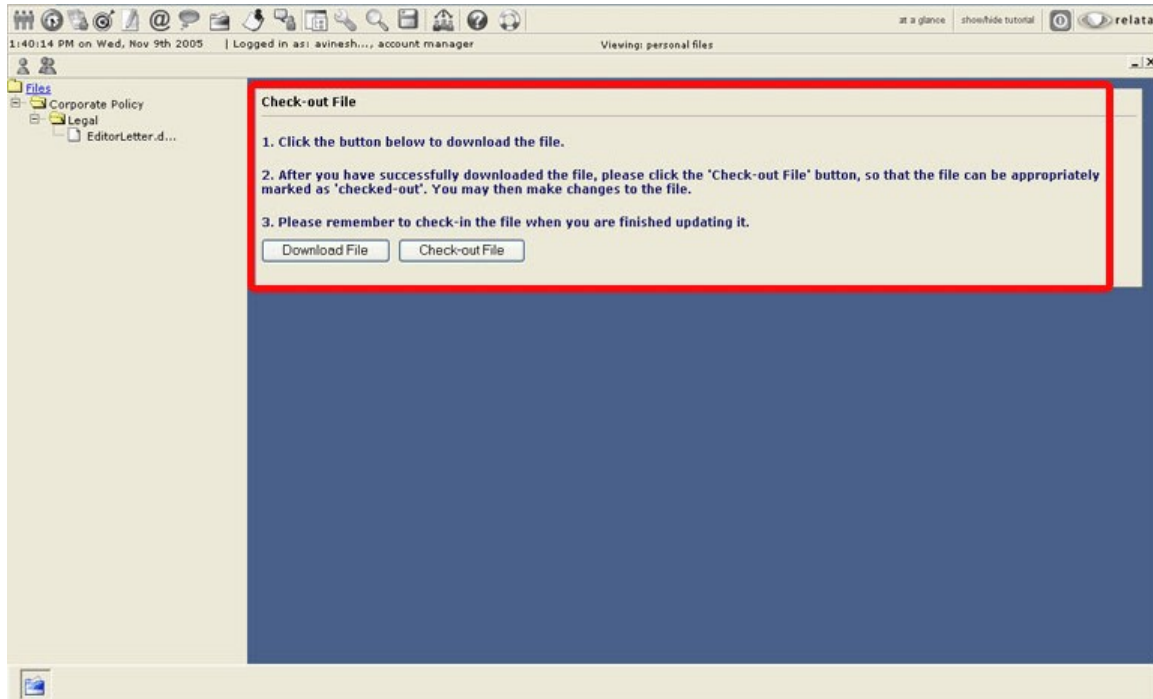
Click **Save** to begin downloading the file. The **Save As** window appears. Click **Save** to download the file.

- **To download a file:**
1. Click the **File Manager** icon. The **File Manager** window appears.
  2. Click the file you want to download and select *Download*. The **Download File** window appears.
  3. Click **Download File**. The **File Download** window appears.
  4. Click **Save**. The **Save As** window appears.
  5. Click **Save**.

## Checking In Files and Checking Out Files

If you have stored a file in **Relata** and want to edit it, you must first check the file out of **Relata**. You can then modify the file. When you have finished modifying the file, you will need to check the file back into **Relata**. Otherwise, other **Relata** users will not be able to work with the updated file.

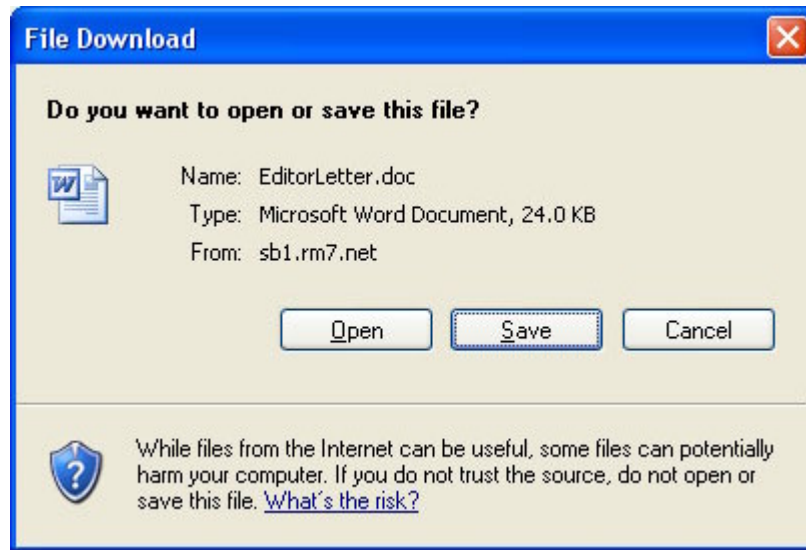
To check a file out of **Relata**, click the file's name and then select *Check-Out*. The **Check Out File** window appears.



**Figure 61: Check Out File Window**

Since another **Relata** user may have modified this file, you will need to download a copy of the file to your local computer. After you download the file, you must then check the file out of **Relata**. When you check the file out, **Relata** lets other users know you have the file and that it is being modified.

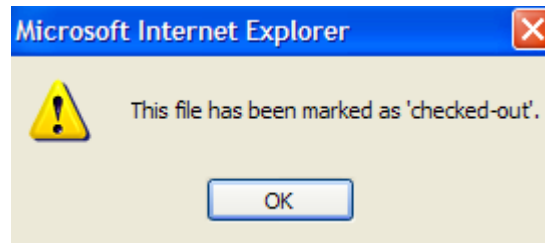
To check out the file, click **Download File**. The **File Download** window appears.



**Figure 62: File Download Window**

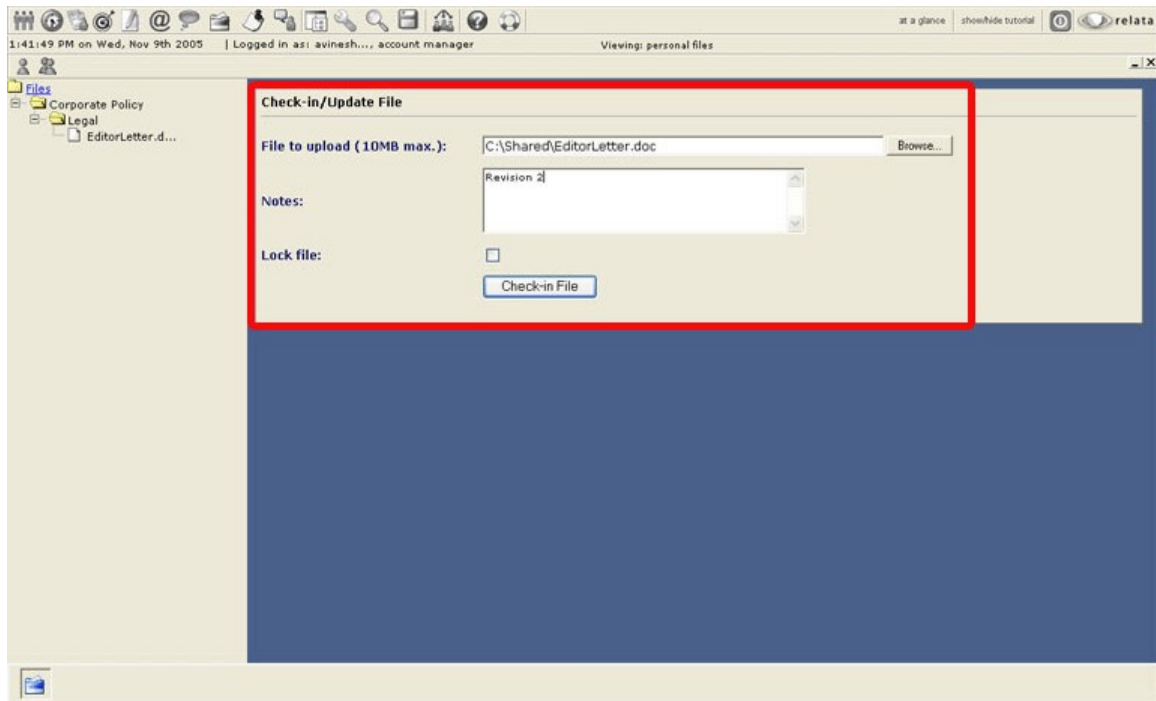
Click **Save** to begin downloading the file. The **Save As** window appears. Click **Save** to download the file.

Next, you'll need to check the file out of **Relata**. To check the file out, click **Check-Out File**. **Relata** displays a window telling you the file is checked out.



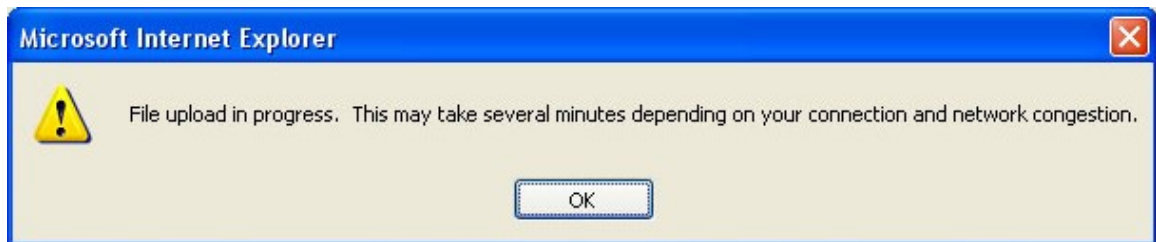
**Figure 63: File Checked Out Window**

After you have finished working with the file, you will need to check it back into **Relata** so other users can access it. To check the file back into **Relata**, click the file's name and select *Check-in/Update*. The **Check-In/Update File** window appears.



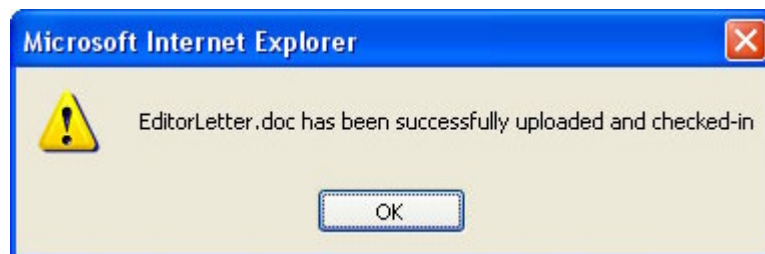
**Figure 64: Check-In/Update File Window**

Locate the file on your local computer by clicking **Browse**. Next, edit any comments about the file and select the **Lock File** check box, if needed. Finally, click **Check-In File**. The **File Upload in Progress** window appears.



**Figure 65: File Upload in Progress Window**

Click **OK** to begin checking the file in. When the file has been successfully checked in, click **OK**.



**Figure 66: File Successfully Checked In Window**

➤ **To check a file out of Relata:**

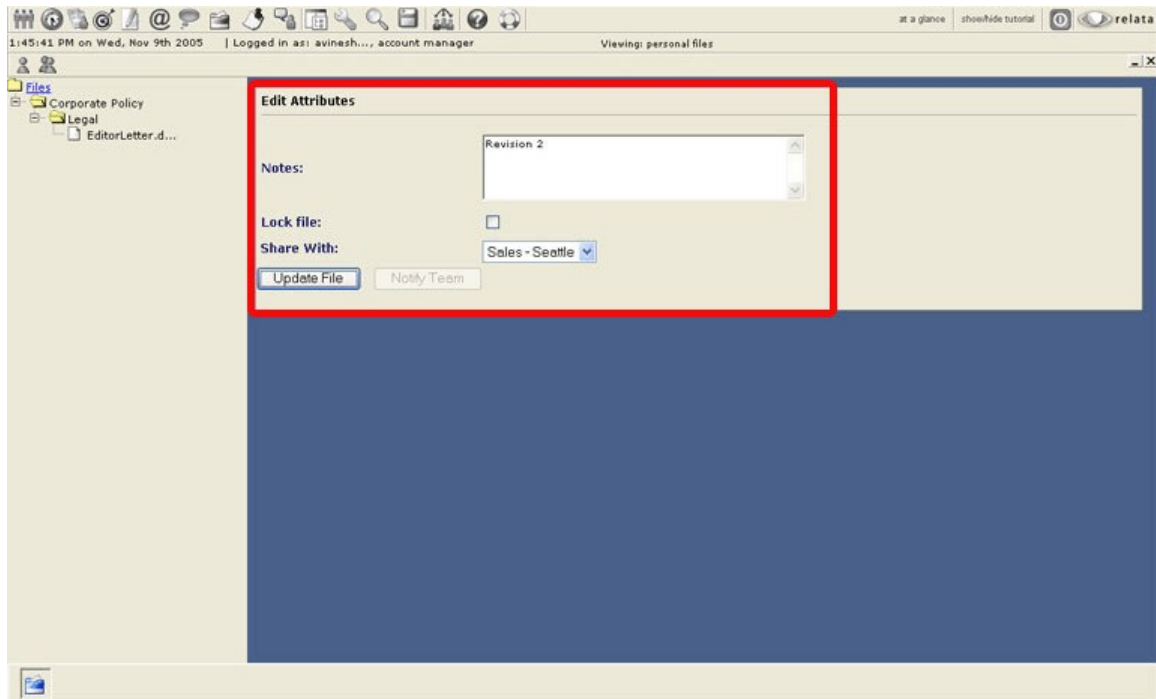
1. Click the **File Manager** icon. The **File Manager** window appears.
2. Click the file you want to check out and select *Check-Out*. The **Check-Out File** window appears.
3. Click **Download File**. The **File Download** window appears.
4. Click **Save**. The **Save As** window appears.
5. Click **Save**.
6. Click **Check-Out File**.
7. Click **OK**.

➤ **To check a file in to Relata:**

1. Click the **File Manager** icon. The **File Manager** window appears.
2. Click the file you want to check in and select *Check-In Update*. The **Check-In/Update File** window appears.
3. Click **Browse** to find the file.
4. Click the *Notes* field and type any comments about the file.
5. Select the *Lock File* check box if the file is to be locked.
6. In the *Share With* field, select the groups that will share this file.
7. Click **Check-In File**. The **File Upload in Progress** window appears.
8. Click **OK**.
9. Click **OK**.

## Editing a File's Attributes

You can change the attributes about a file. To change a file's attributes, click the file and select *Edit Attributes*. The **Edit Attributes** window appears.



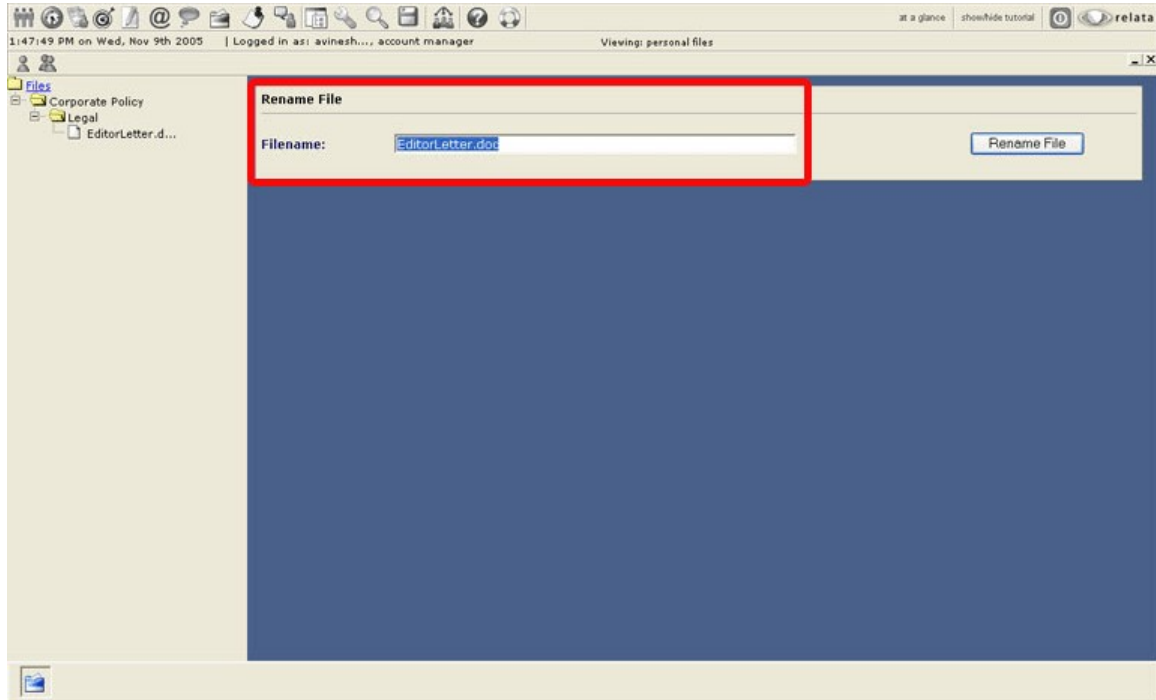
**Figure 67: Edit Attributes Window**

Edit the *Notes*, *Lock File*, and *Share With* fields as required. When you click **Update File**, the file's new attributes are saved.

- **To edit a file's attributes:**
  1. Click the **File Manager** icon. The **File Manager** window appears.
  2. Click the file you want to modify and select *Edit Attributes*. The **Edit Attributes** window appears.
  3. Click the *Notes* field and edit the comments, if required.
  4. Select or deselect the *Lock File* check box, if desired.
  5. Select a team to share the file with, if desired.
  6. Click **Update File**.

## Renaming Files

You can rename a file stored in **Relata**. If a user has locked the file, you will first have to remove the lock from the file before you can rename it. To rename a file, click the file's name and select *Rename*. The **Rename File** window appears.



**Figure 68: Rename File Window**

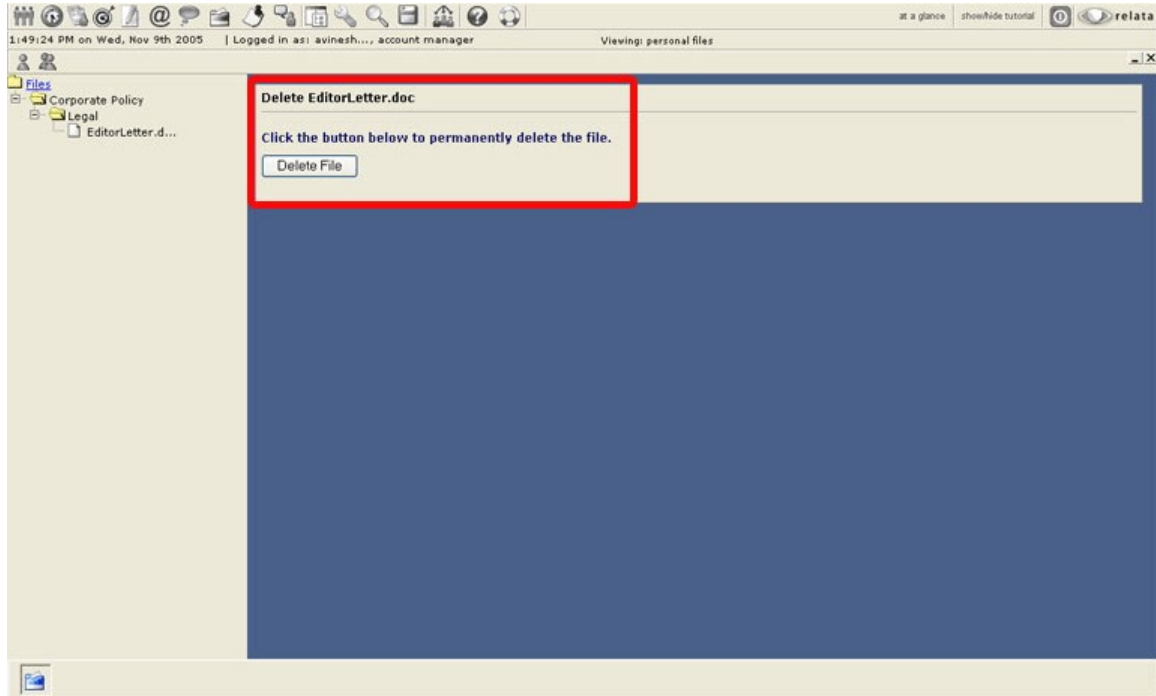
The file's original name appears in the *Filename* field. Type a new name for the file and click **Rename File**. When the **File is Renamed** window appears, click **OK**.

- **To rename a file:**
  1. Click the **File Manager** icon. The **File Manager** window appears.
  2. Click the file you want to rename and select *Rename*. The **Rename File** window appears.
  3. In the *Filename* field, type the new name for this file.
  4. Click **Rename File**.
  5. Click **OK**.



## Deleting Files

If you want to remove a file from **Relata**, click the filename and then select *Delete*. The **Delete File** window appears.



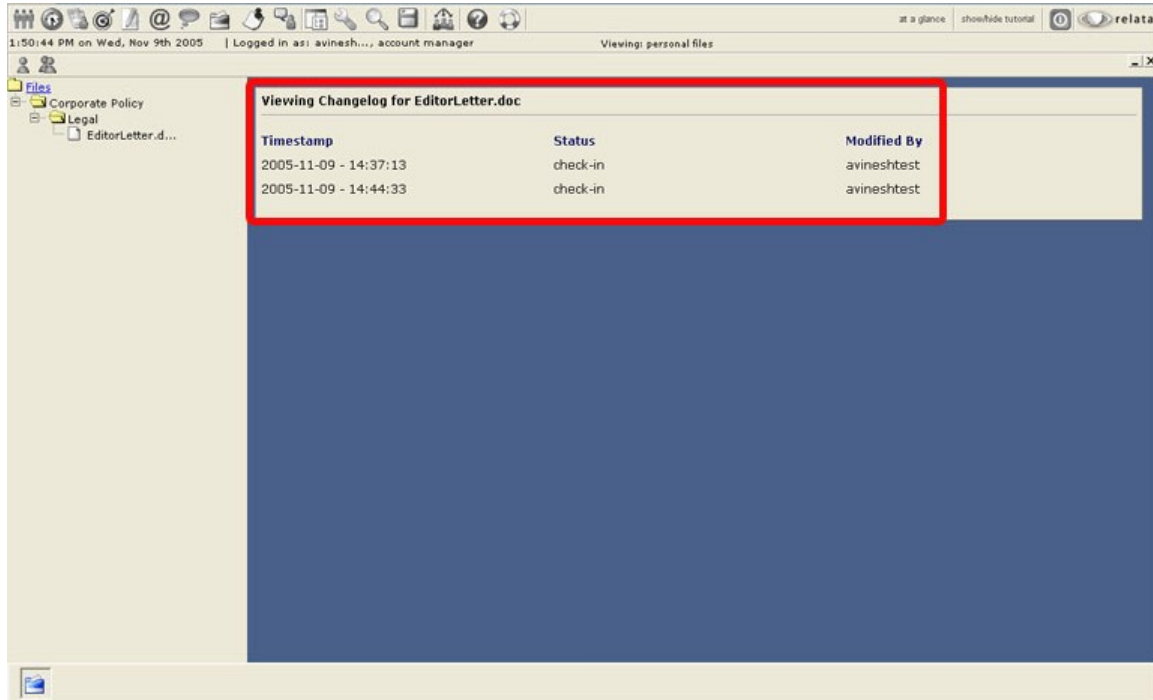
**Figure 69: Delete File Window**

If you want to permanently delete this file from **Relata**, click **Delete File**. The file is deleted.

- **To delete a file:**
  1. Click the **File Manager** icon. The **File Manager** window appears.
  2. Click the file you want to delete and select *Delete File*. The **Delete File** window appears.
  3. Click **Delete File**.

## Viewing the Change Log for a File

Each time you modify a file, **Relata** records that change. To view the *Change Log* for a file, click the file and then select *View ChangeLog*. The **ChangeLog** window appears.



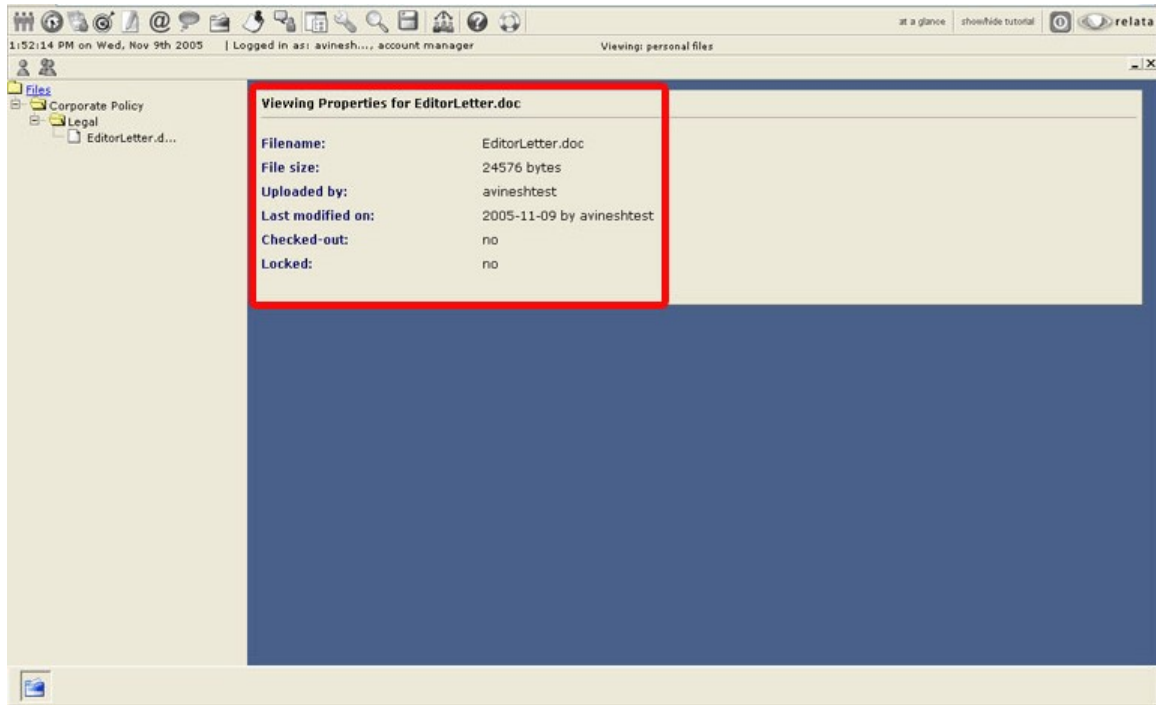
**Figure 70: ChangeLog Window**

The **ChangeLog** window displays the timestamp, status, and modified by information about the selected file. Each time the file is edited, renamed, or deleted that change is recorded in the *Change Log*.

- **To view a file's Change Log:**
  1. Click the **File Manager** icon. The **File Manager** window appears.
  2. Click the file you want to view a *Change Log* for and select *View ChangeLog*. The **ChangeLog** window appears.

## Viewing a File's Properties

You can view information about a file stored in **Relata**. To do so, click the file you want to view information about and then click **View Properties**. The **View Properties** window appears.




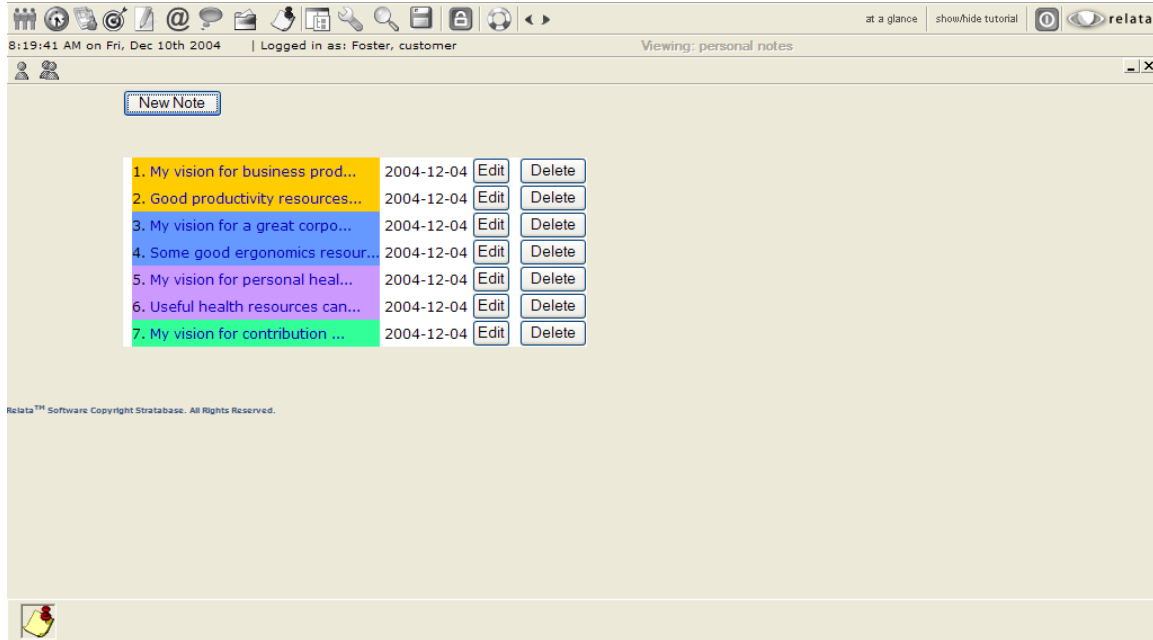
**Figure 71: View Properties Window**

For each file, the **View Properties** window displays the filename and size, the name of the user who uploaded the file, when the file was last modified and by whom, whether the file is currently checked out by a user, and, finally, whether the file is locked.

- **To view a file's properties:**
  1. Click the **File Manager** icon. The **File Manager** window appears.
  2. Click the file you want to view properties for and click **View Properties**. The **View Properties** window appears.

## WORKING WITH NOTES

**Relata** allows you to store notes about whatever you want. A note may be a memo, list, or practically anything else. To create, edit, delete, or share a note, click the **Notes** icon . The **Notes Manager** window appears.



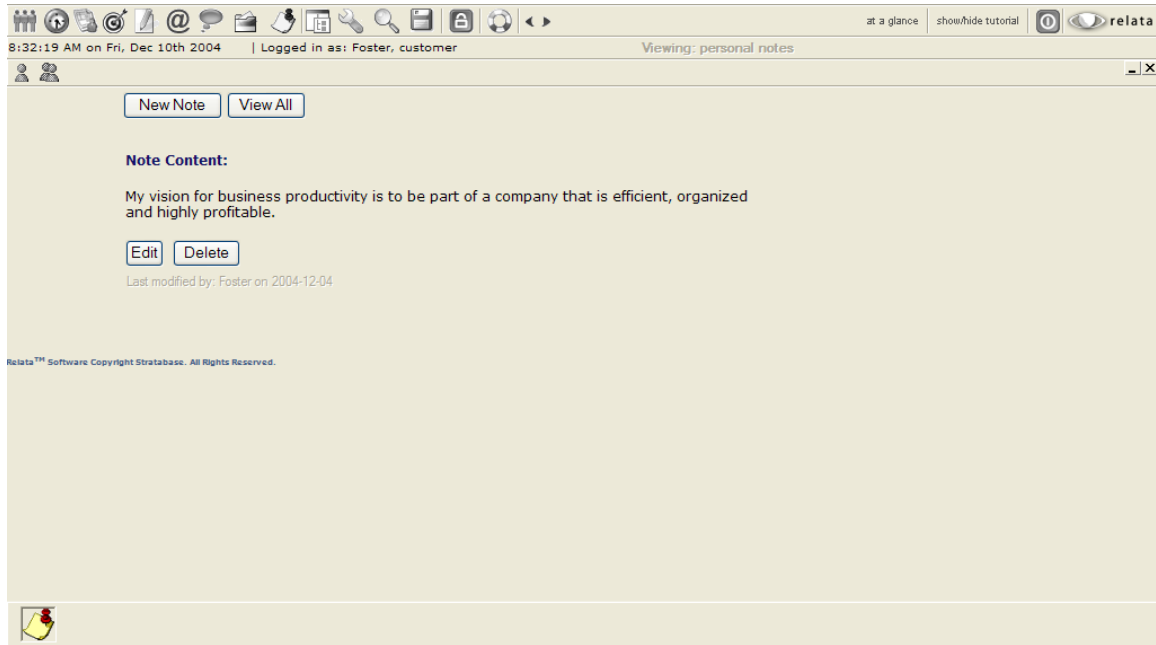
**Figure 72: Notes Manager Window**

The **Notes** window displays a list of notes and the dates they were created or last modified. The notes are color-coded according to the Focus Area you have associated them with. Notes are also synchronized with the *Palm Memo Pad*.

- **To manage your notes:**
  - Click the **Notes** icon. The **Notes Manager** window appears.

## Viewing Notes

You can view a specific note in the **Notes Manager**. To do so, click the text of the note you want to read. The **Note Content** window appears.



**Figure 73: Note Content Window**

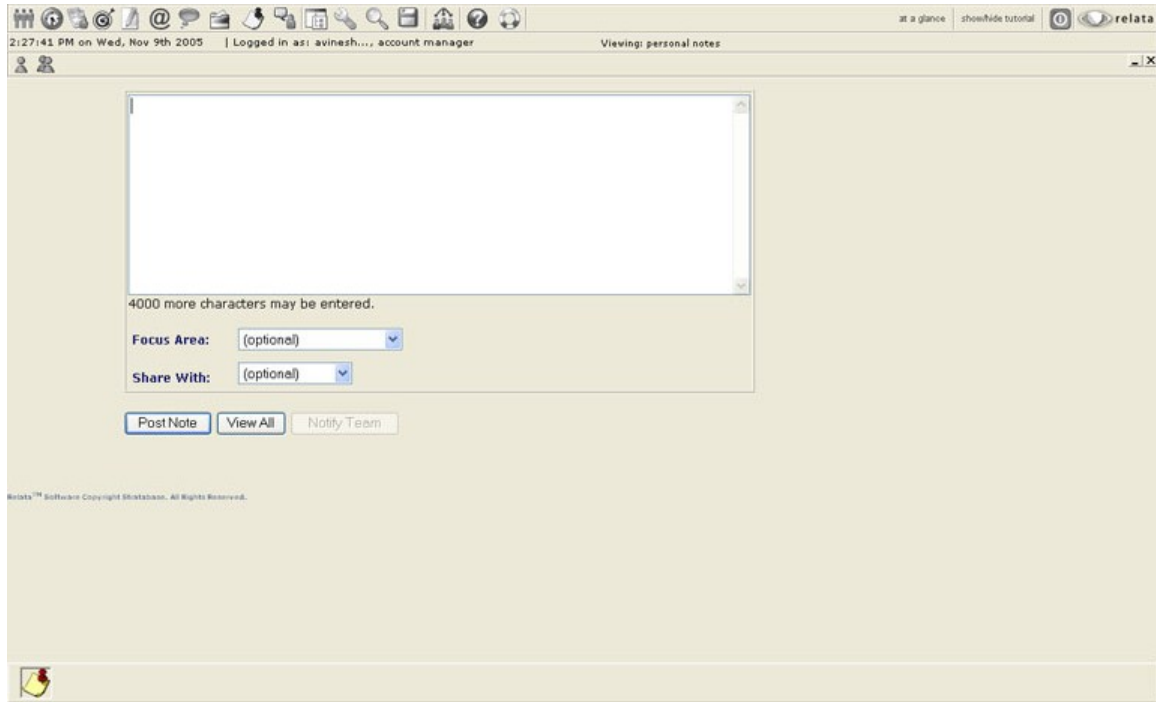
The **Note Content** window displays the note in its entirety. You can add a note, edit this note, or delete this note or share this note with your team(s).

➤ **To manage your notes:**

1. Click the **Notes** icon. The **Notes Manager** window appears.
2. Click the note you want to review. The **Note Content** window appears.

## Adding Notes

You can add a note to the **Note Manager**. To do so, click **New Note**. The **Add Note** window appears.



**Figure 74: Add Note Window**

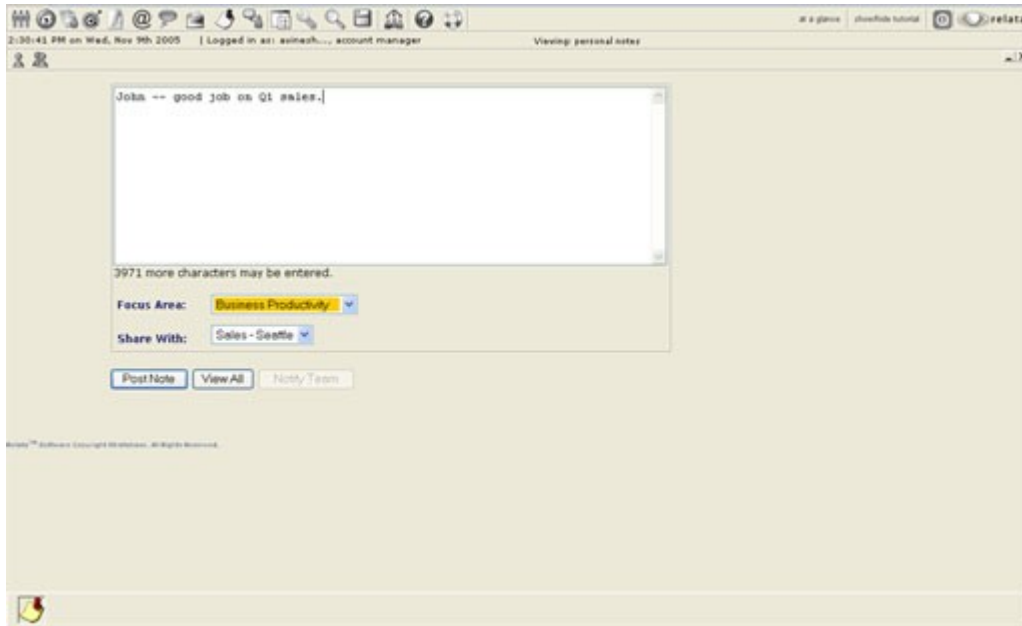
Each note may be up to 4,000 characters in length. Type the note content in the field. Next, select the Focus Area you want to assign this note to (optional). The Focus Area means the note pertains to that specific topic, such as *Business Productivity*. In the *Share With* field, select a team with whom you want to share this note (optional). When you have finished entering the information for this note, click **Post Note**. The new note is listed in the **Notes Manager** window.

➤ **To add a note:**

1. Click the **Notes** icon. The **Notes Manager** window appears.
2. Click **New Note**. The **Add Note** window appears.
3. Type the text for this note.
4. Click the DOWN ARROW in the *Focus Area* field and select the Focus Area for this note (optional).
5. In the *Share With* drop-down, select the team with whom you want to share this note (optional).
6. Click **Post Note**.

## Editing Notes

You can edit a note in the **Notes Manager**. To edit a note, click **Edit** next to the note you want to change. The **Edit Note** window appears.



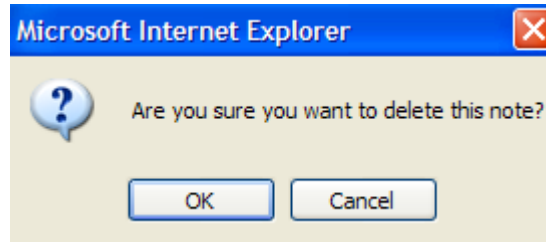
**Figure 75: Edit Note Window**

Make the changes to the note as required. When you have finished editing the note, click **Post Changes**.

- **To edit a note:**
  1. Click the **Notes** icon. The **Notes Manager** window appears.
  2. Click **Edit** adjacent to the note you want to modify. The **Edit Note** window appears.
  3. Change the information for the note.
  4. Click **Post Changes**.

## Deleting Notes

You can delete a note you no longer need to store in **Relata**. To delete a note, click **Delete** next to the note you want to remove. You are asked to confirm the delete request.




**Figure 76: Confirm Delete Request**

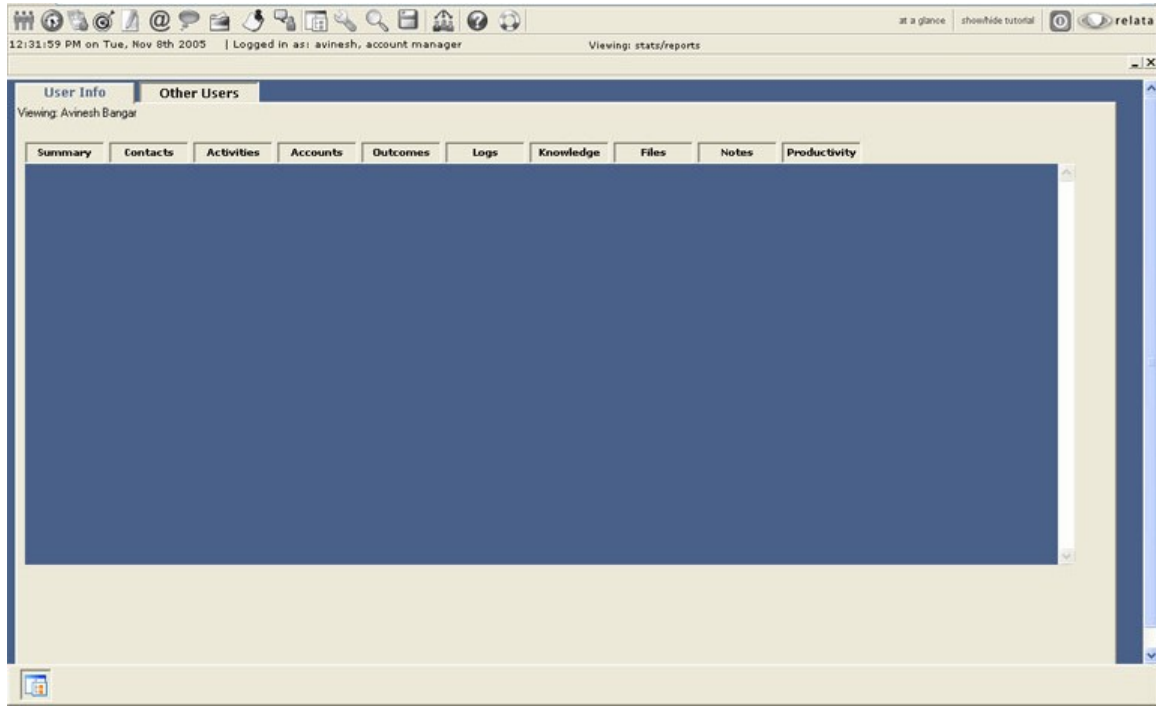
Click **OK** to delete the specified note or **Cancel** to return to the **Note Manager** window.

- **To delete a note:**
  1. Click the **Notes** icon. The **Notes Manager** window appears.
  2. Click **Delete** adjacent to the note you want to delete. The **Confirm Delete Request** window appears.
  3. Click **OK**.



## GENERATING STATISTICS AND REPORTS

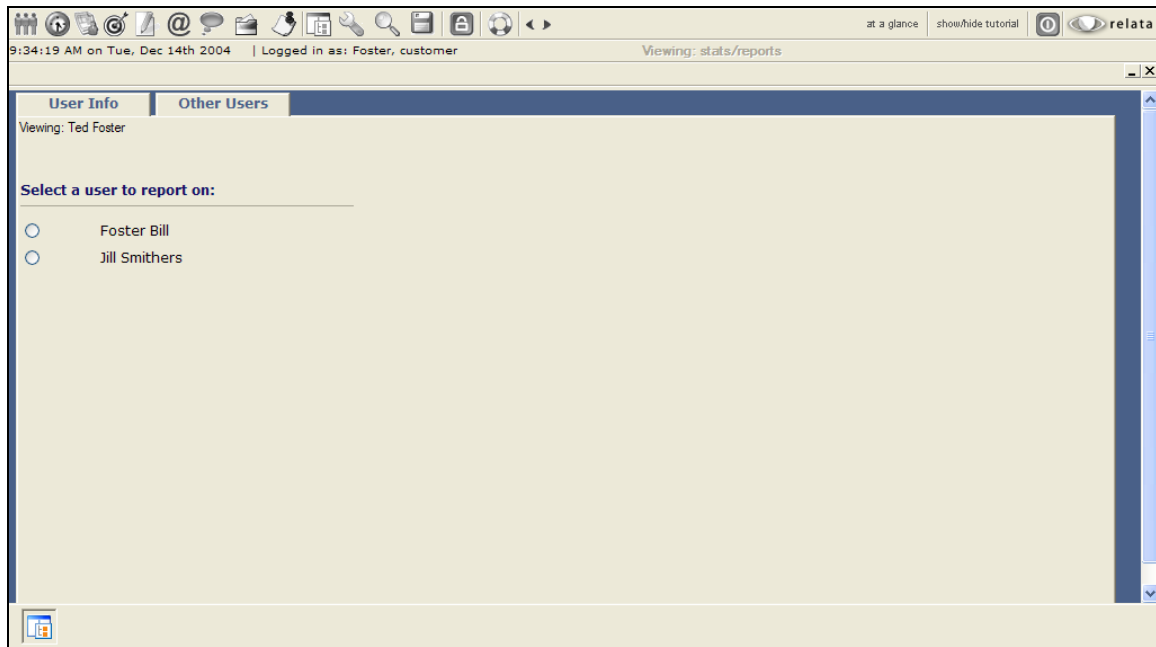
You can view statistics and generate reports in **Relata**. To do so, click the **Stats and Reports** icon  on the **Main** window. The **Statistics** window appears.



**Figure 77: Statistics Window**

Using the **Statistics** window, you can view statistics about yourself or other users (if you are the Account Manager for your **Relata** account). To view your personal statistics, ensure the **User Info** tab is selected.

To view statistics about another user, click the **Other Users** tab. The **Other Users** window appears.



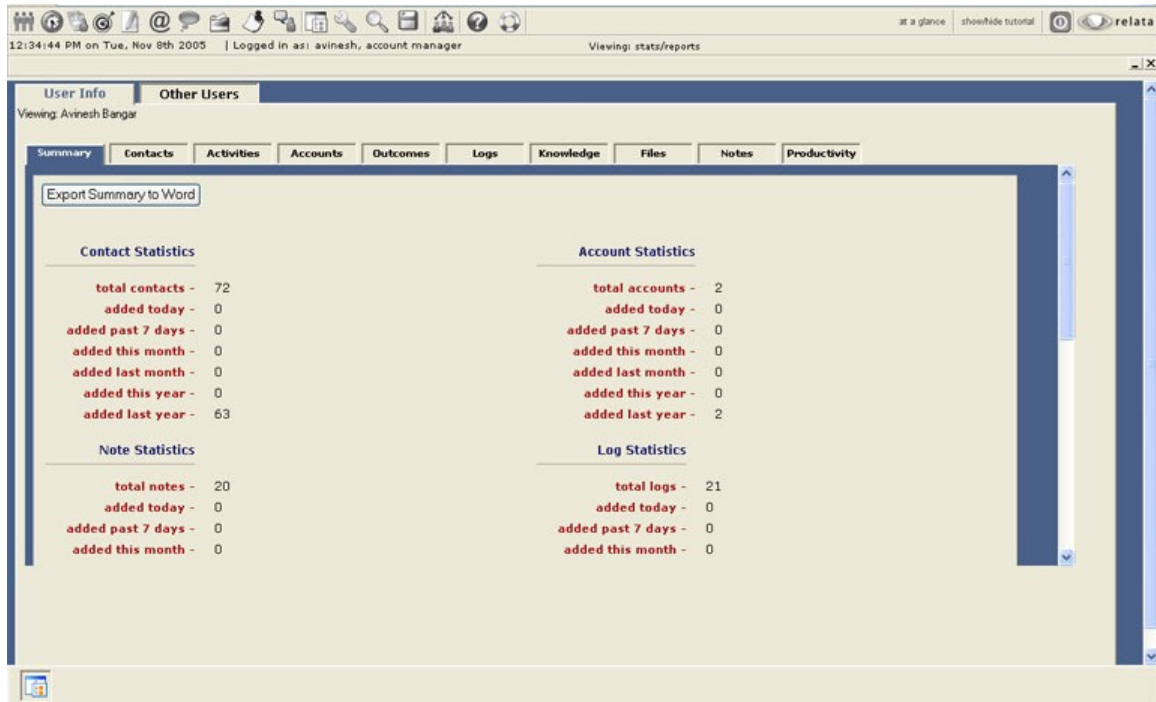
**Figure 78: Other Users Window**

The **Other Users** window lists all users associated with your **Relata** account, if you are the Account Manager. Click the user you would like to view statistics for.

- **To generate statistics and reports:**
  1. Click the **Stats and Reports** icon. The **Statistics** window appears.
  2. To view your personal statistics, click the **User Info** tab.
  3. To view statistics about another user, click the **Other Users** tab. The **Other Users** window appears. Select the user's name.

## Viewing a Summary

You can view a summary of various statistics. To do so, click the **Summary** tab. The **Summary** window appears.



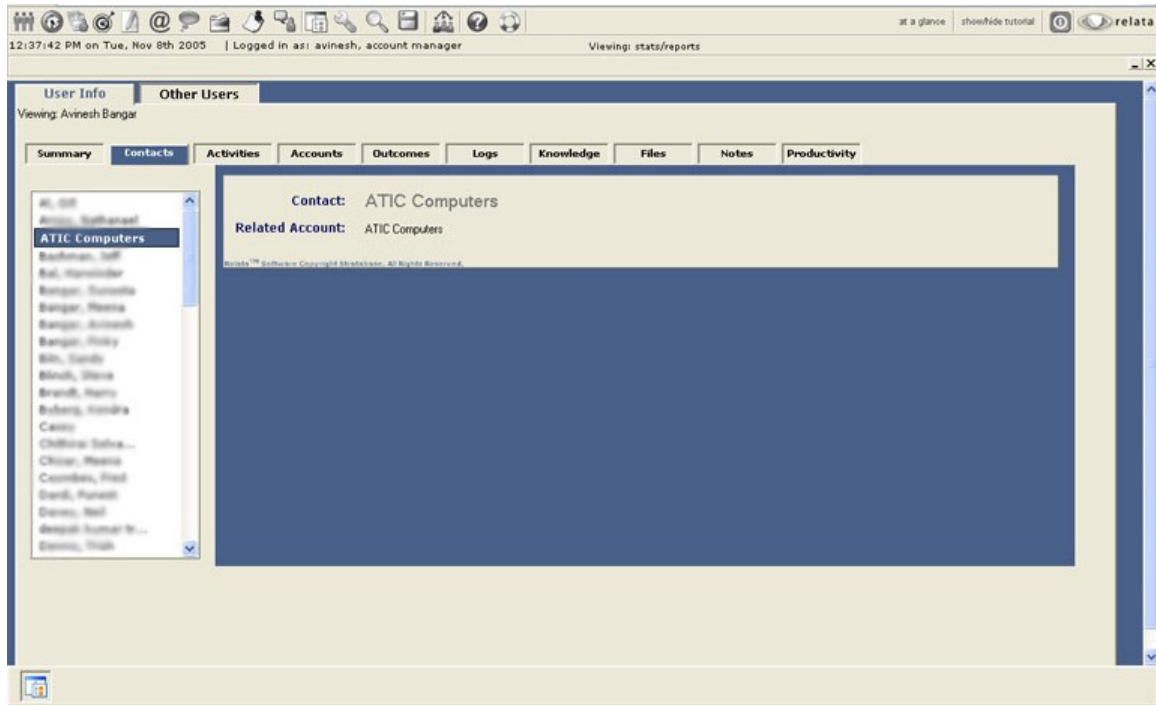
**Figure 79: Summary Window**

The **Summary** window displays statistics about your contacts, activities, accounts, outcomes, logs, documents, files and notes.

- **To view a summary of user information:**
  1. Click the **Stats and Reports** icon. The **Statistics** window appears.
  2. Click the **Summary** tab. The **Summary** window appears.

## Viewing Contacts

You can view the contacts associated with your user account. To view your contacts, click the **Contacts** tab on the **Statistics** window. The **Contacts** window appears.



**Figure 80: Contacts Window**

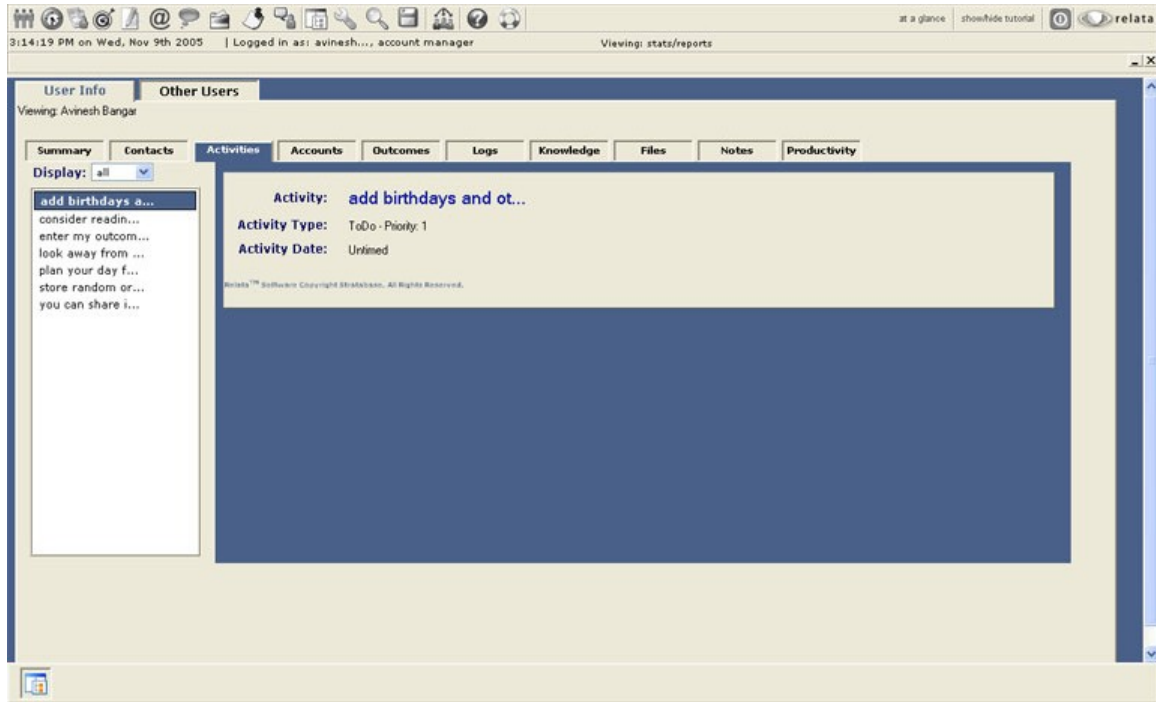
You can click a contact's name to see his information and the accounts related to that user, if any.

➤ **To view contacts:**

1. Click the **Stats and Reports** icon. The **Statistics** window appears.
2. Click the **Contacts** tab. The **Contacts** window appears.
3. Click the contact's name.

## Viewing Activities

You can see a list of all your activities in **Relata**. To view your activities, click the **Activities** tab on the **Statistics** window. The **Activities** window appears.



**Figure 81: Activities Window**

For each activity, the **Activities** window displays the activity's description, type, and date.

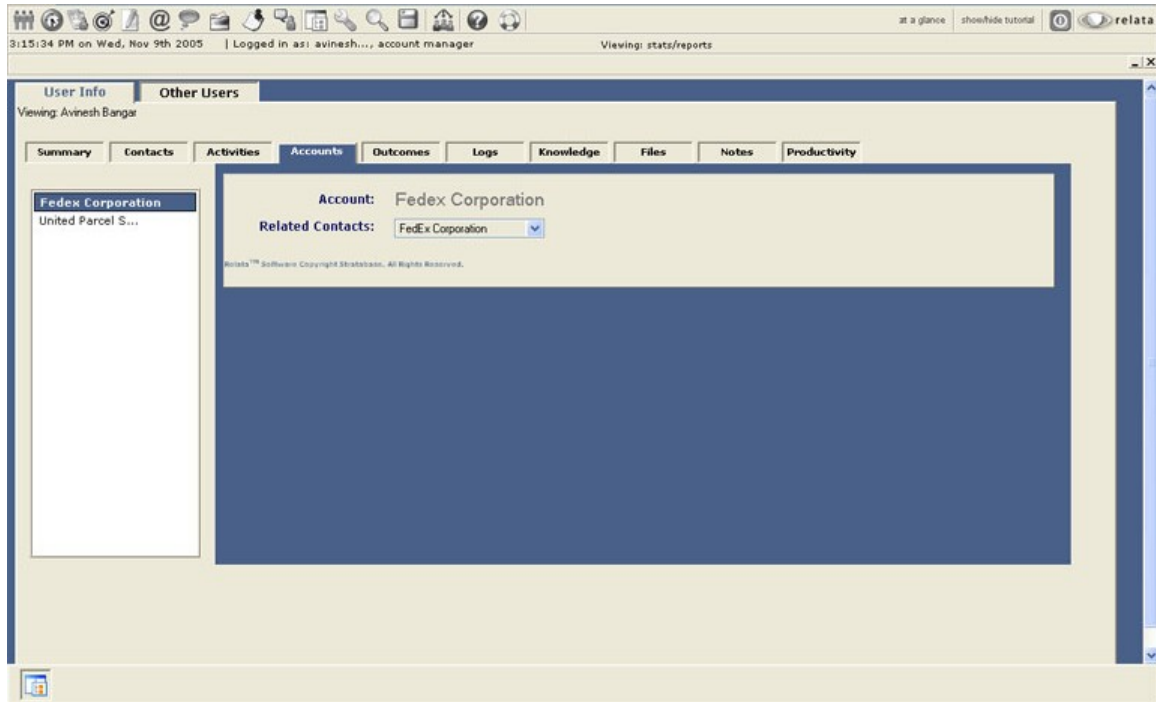
You can click the DOWN ARROW in the *Display* field to view all activities, open activities, or closed activities.

➤ **To view activities:**

1. Click the **Stats and Reports** icon. The **Statistics** window appears.
2. Click the **Activities** tab. The **Activities** window appears.
3. Click the DOWN ARROW in the *Display* field to view all activities, open activities, or closed activities.

## Viewing Accounts

You can view accounts. To do so, click the **Accounts** tab on the **Statistics** window. The **Accounts** window appears.



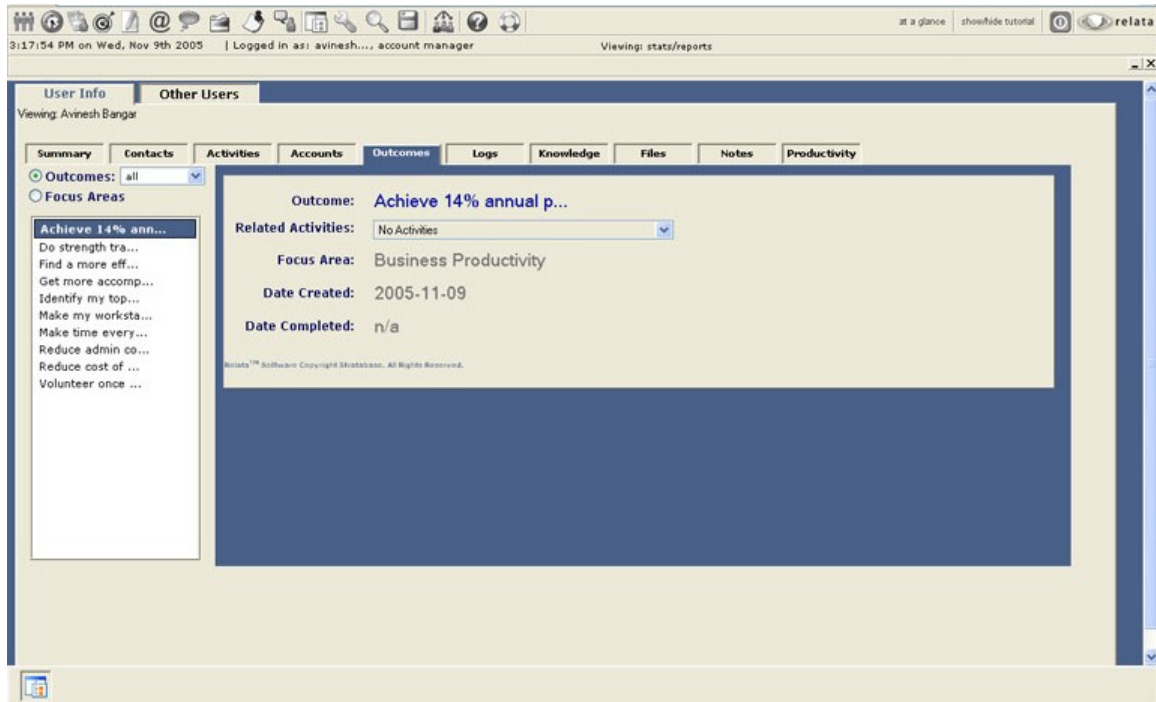
**Figure 82: Accounts Window**

For each account, the **Accounts** window display the account's name and related contacts. You can click the DOWN ARROW in the *Related Contacts* field to see which contacts are associated with the account.

- **To view accounts:**
  1. Click the **Stats and Reports** icon. The **Statistics** window appears.
  2. Click the **Accounts** tab. The **Accounts** window appears.
  3. Click the DOWN ARROW in the *Related Contacts* field to see the contacts associated with the account.

## Viewing Outcomes

You can see the outcomes you have created. To see the outcomes, click the **Outcomes** tab on the **Statistics** window. The **Outcomes** window appears.



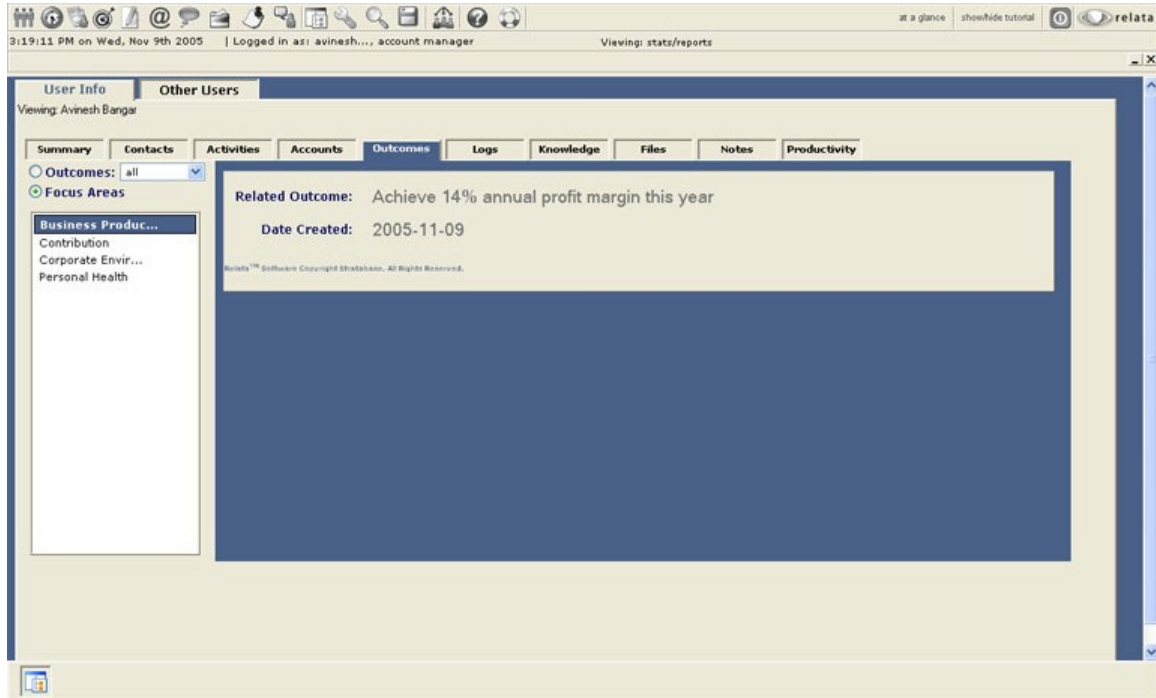
**Figure 83: Outcomes Window**

The **Outcomes** window displays the outcome's title, related activities, the date the outcome was created, and the date the outcome was completed, if applicable.

- **To view outcomes:**
  1. Click the **Stats and Reports** icon. The **Statistics** window appears.
  2. Click the **Outcomes** tab. The **Outcomes** window appears.

## Viewing Focus Areas

You can see the focus areas you have created. To see the focus areas, click the **Outcomes** tab on the **Statistics** window. The **Outcomes** window appears. Click the circle besides **Focus Areas**.



**Figure 84: Focus Areas Window**

The **Outcomes** window displays the focus area, related outcome, and the date the focus area was created.

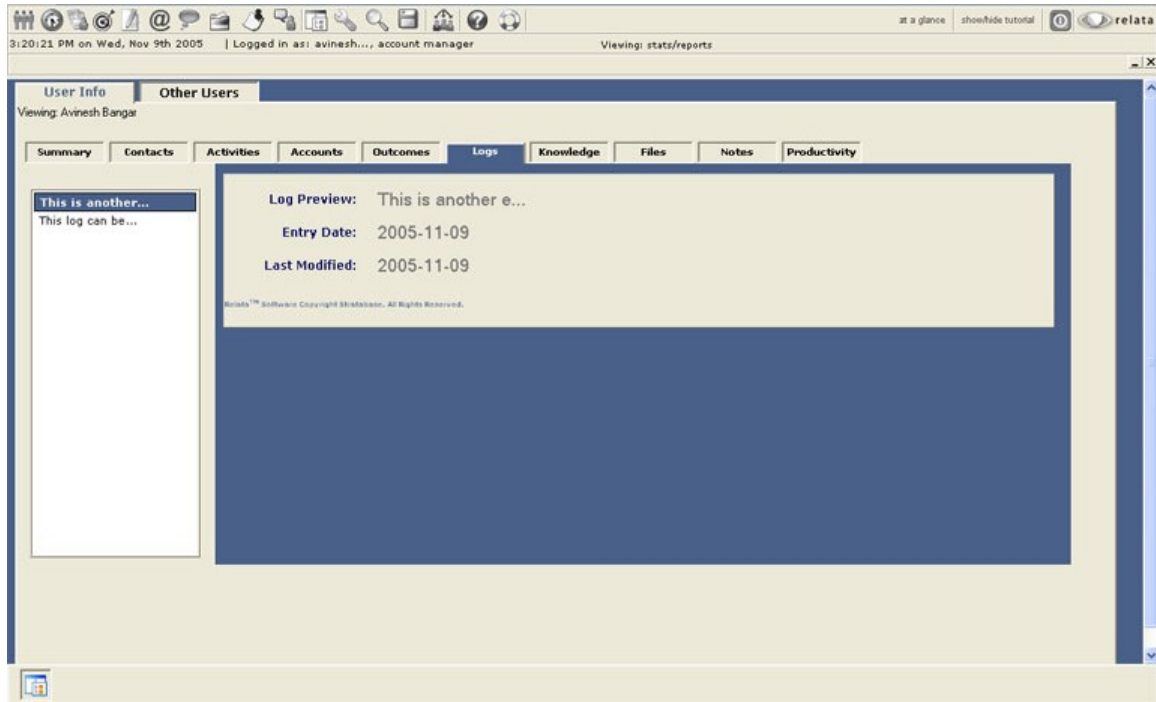
➤ **To view focus areas:**

1. Click the **Stats and Reports** icon. The **Statistics** window appears.
2. Click the **Outcomes** tab. The **Outcomes** window appears.
3. Click the circle besides **Focus Areas**.



## Viewing Logs

You can see the logs you have created. To see the logs, click the **Logs** tab on the **Statistics** window. The **Logs** window appears.



**Figure 85: Logs Window**

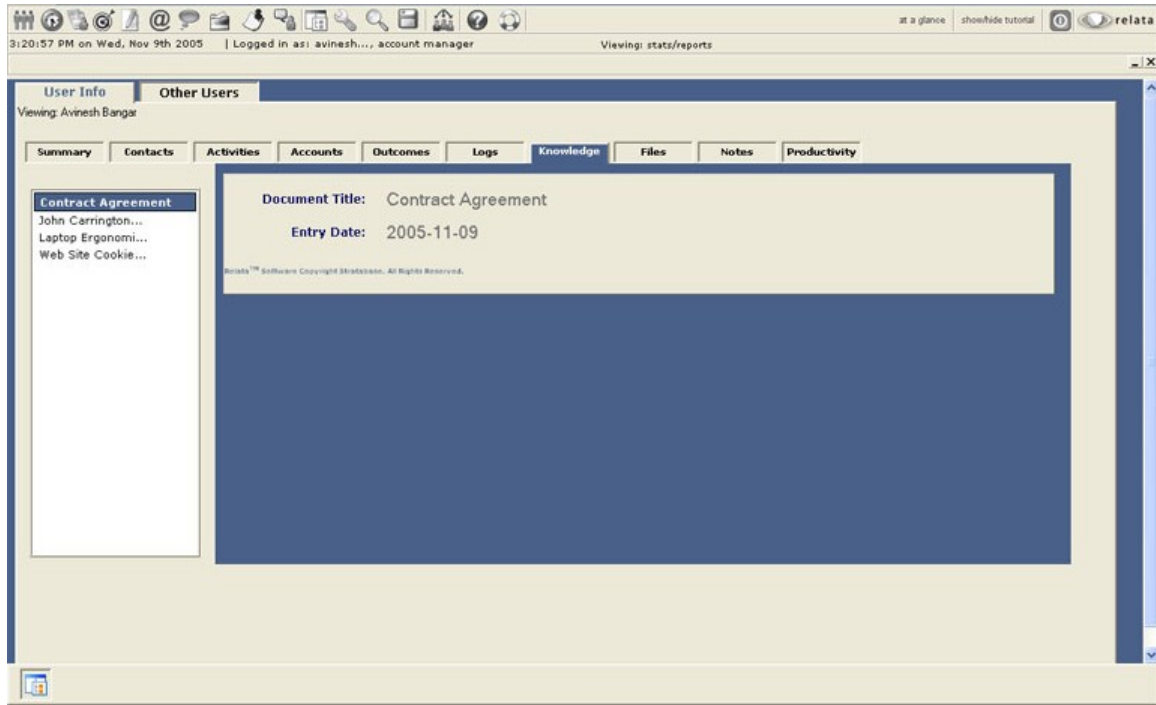
The **Logs** window displays the log, the date the log was created, and the date it was last modified.

➤ **To view logs:**

1. Click the **Stats and Reports** icon. The **Statistics** window appears.
2. Click the **Logs** tab. The **Logs** window appears.

## Viewing Documents

You can see the documents you have created. To see the documents, click the **Knowledge** tab on the **Statistics** window. The **Knowledge** window appears.



**Figure 86: Knowledge (Documents) Window**

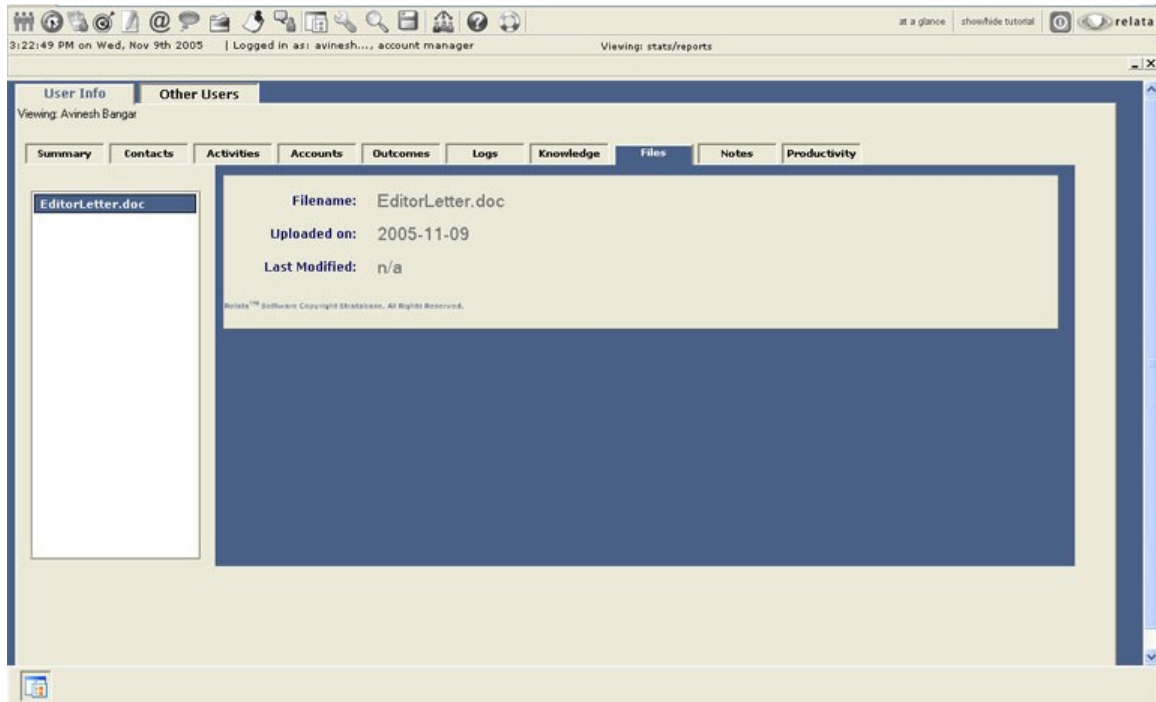
The **Knowledge** window displays the document title and the date the document was created.

➤ **To view documents:**

1. Click the **Stats and Reports** icon. The **Statistics** window appears.
2. Click the **Knowledge** tab. The **Knowledge** window appears.

## Viewing Files

You can see the files you have uploaded. To see the files, click the **Files** tab on the **Statistics** window. The **Files** window appears.



**Figure 87: Files Window**

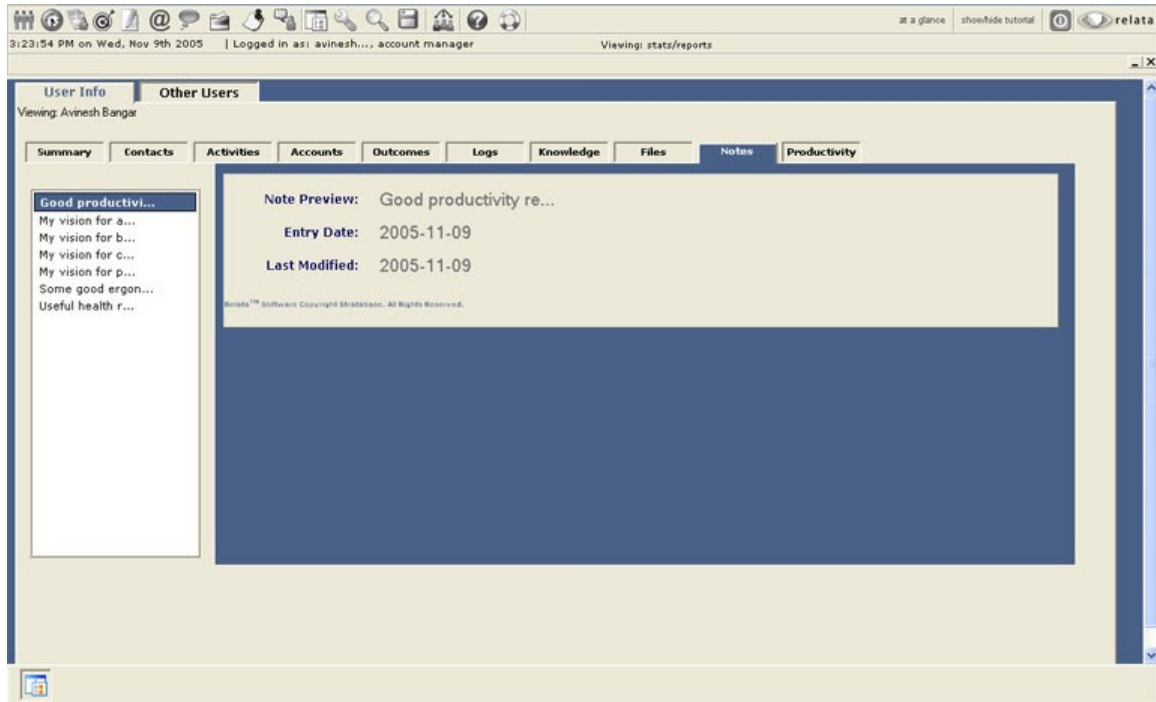
The **Files** window displays the filename, the date the file was uploaded, and the date the file was last modified.

➤ **To view files:**

1. Click the **Stats and Reports** icon. The **Statistics** window appears.
2. Click the **Files** tab. The **Files** window appears.

## Viewing Notes

You can see the notes you have created. To see the notes, click the **Notes** tab on the **Statistics** window. The **Notes** window appears.



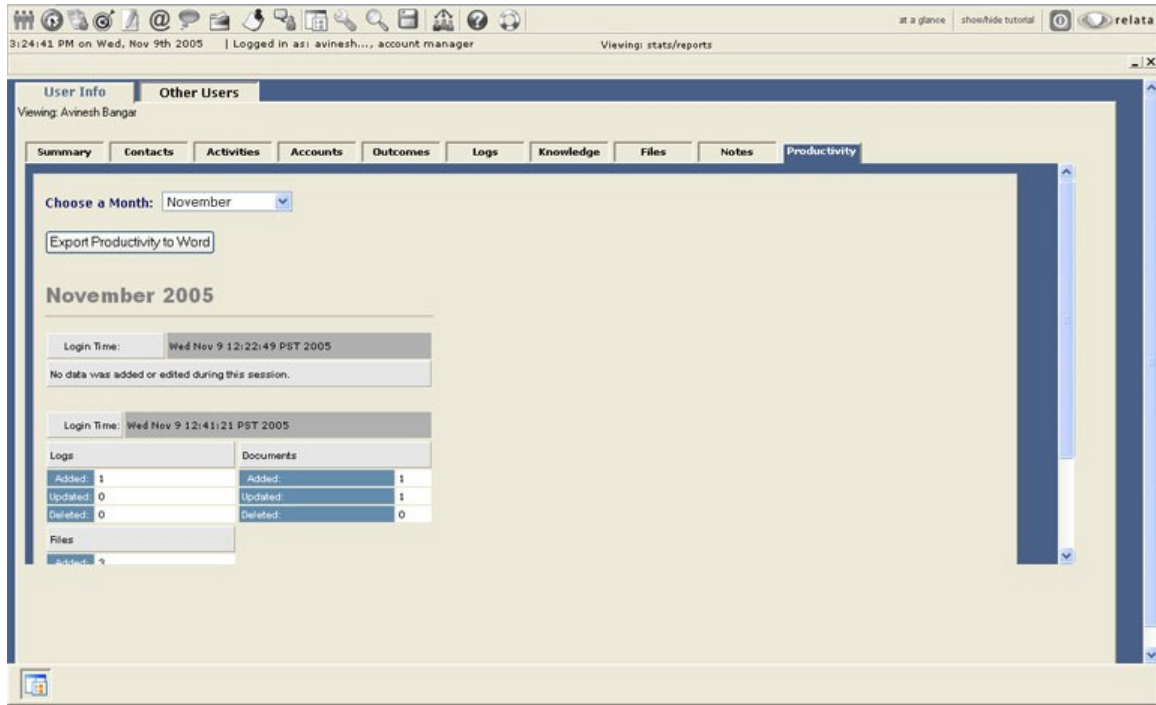
**Figure 88: Notes Window**

The **Notes** window displays a preview of the note, the date it was created, and the date it was modified.

- **To view notes:**
  1. Click the **Stats and Reports** icon. The **Statistics** window appears.
  2. Click the **Notes** tab. The **Notes** window appears.

## Viewing Productivity

You can view your productivity statistics. To do so, click the **Productivity** tab on the **Statistics** window. The **Productivity** window appears.




**Figure 89: Productivity Window**

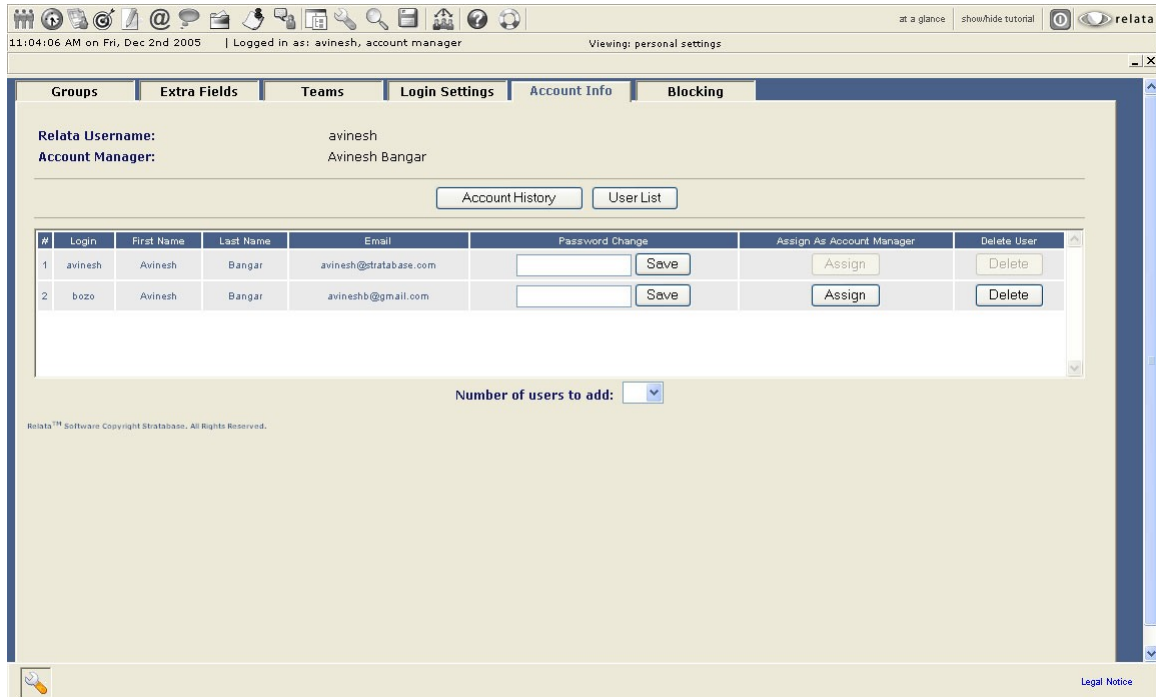
To view your productivity statistics, click the DOWN ARROW in the *Choose a Month* field and select a target month. The productivity statistics for a month can also be exported to a Word document by clicking **Export Productivity to Word**.

The **Productivity** window lists the times you logged on to **Relata** and the activities you performed.

- **To view productivity statistics:**
  1. Click the **Stats and Reports** icon. The **Statistics** window appears.
  2. Click the **Productivity** tab. The **Productivity** window appears.
  3. To view statistics for a specific month, click the DOWN ARROW and select the month.

## CONFIGURING RELATA WITH THE SETTINGS MANAGER

You can define groups, add extra fields, create teams, update login settings, edit account information, and set team blocking parameters in **Relata**. To do so, click the **Settings Manager** icon . The **Settings Manager** window appears.



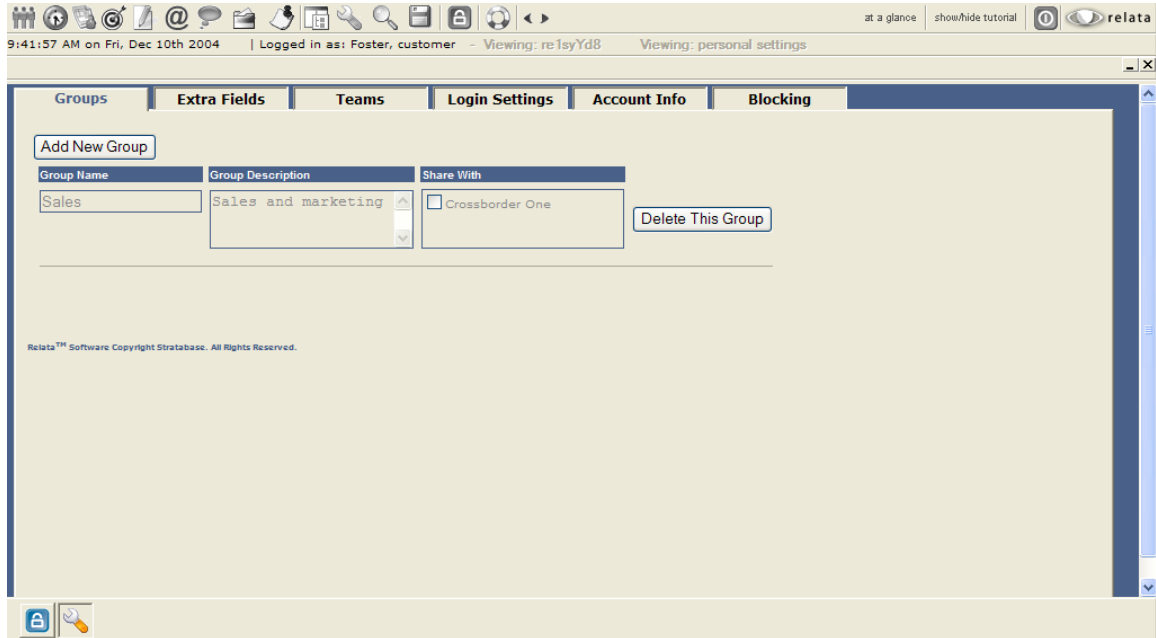
**Figure 90: Settings Manager Window**

The **Settings Manager** window displays your account information as the default view. The window displays your username, the name of your account manager (either yourself or the **Relata** Account Manager), and the number of users supported by your **Relata** license. To add support for more users, your **Relata** Account Manager can upgrade your **Relata** license by going to the **Relata** web site.

- **To configure your Relata settings:**
  - Click the **Settings Manager** icon. The **Settings Manager** window appears.

## Assigning Users to Groups

You can assign your contacts to groups so you can send out group emails to those contacts. To assign contacts to a group, click the **Groups** tab on the **Settings Manager** window. You assign your contacts to groups so you can send group email to them. The **Groups** window appears.



**Figure 91: Groups Window**

The **Groups** window displays the list of groups you have defined in **Relata**. You can add, edit, or delete groups as needed.

- **To configure your groups:**
  1. Click the **Settings Manager** icon. The **Settings Manager** window appears.
  2. Click the **Groups** tab. The **Groups** window appears.

## Adding a Group

To add a group to **Relata**, click **Add New Group**. The **Groups** window is refreshed and displays fields for the new group.

**Figure 92: Add Group Window**

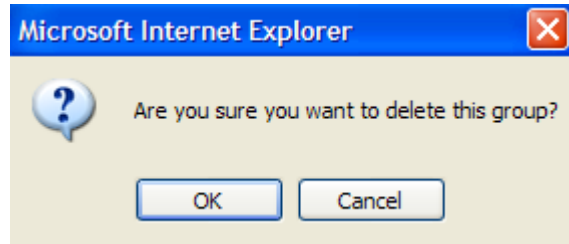
Type a name for this new group in the *Add Group Name* field. Next, type a description for the group. In the *Share With* field, select the team(s) this group will be shared with. Finally, click **Add This Group** to create the group.

- **To add a group:**
  1. Click the **Settings Manager** icon. The **Settings Manager** window appears.
  2. Click the **Groups** tab. The **Groups** window appears.
  3. Click **Add New Group**. The **Add Group** window appears.
  4. Type a name for the group in the *Add Group Name* field.
  5. In the *Add Group Description* field, type a description for this group.
  6. In the *Share With* field, select the team(s) this group will be shared with.
  7. Click **Add This Group**.



## Deleting a Group

You can remove a group from **Relata**. To remove a group, click **Delete** next to the group you want to delete. The **Delete Confirmation** window appears.



**Figure 93: Delete Group Confirmation Window**

Click **OK** to permanently delete this group, or **Cancel** to return to the Group window.

- **To delete a group:**
  1. Click the **Settings Manager** icon. The **Settings Manager** window appears.
  2. Click the **Groups** tab. The **Groups** window appears.
  3. Click Delete adjacent to the group you want to delete. The **Delete Group Confirmation** window appears.
  4. Click **OK**.

## Working with Extra Fields

You can define extra fields for your various contacts. To do so, click the **Extra Fields** tab in the **Settings Manager** window. The **Extra Fields** window appears.

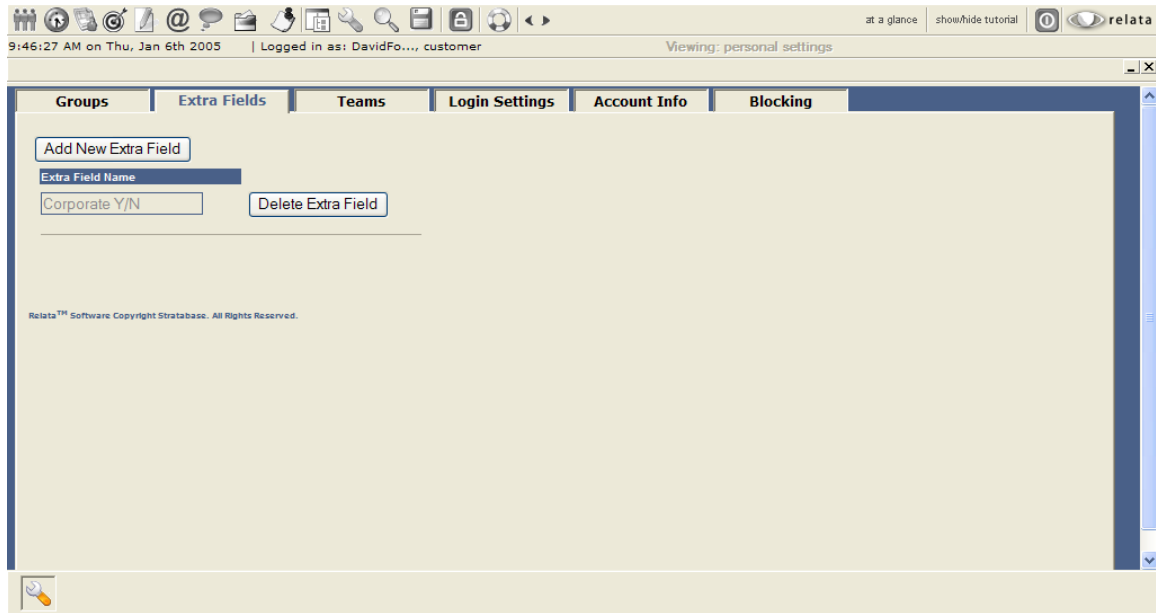
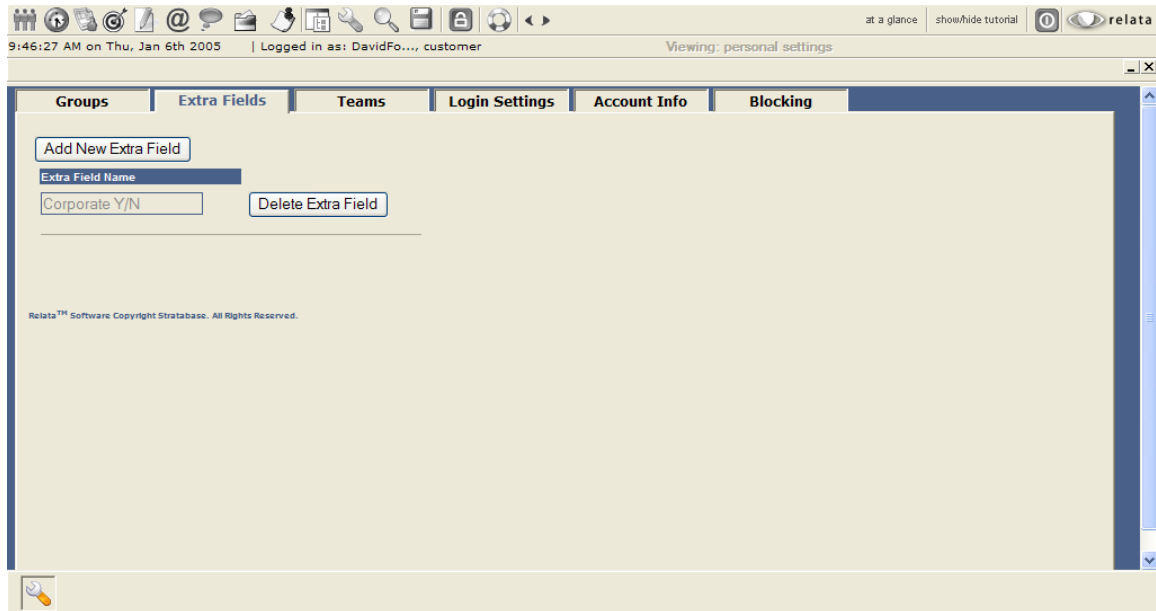


Figure 94: Extra Fields Window

## Adding Extra Fields

To add an extra field, click **Add New Extra Field**. The **Add Extra Field** window appears.



**Figure 95: Add Extra Field Window**

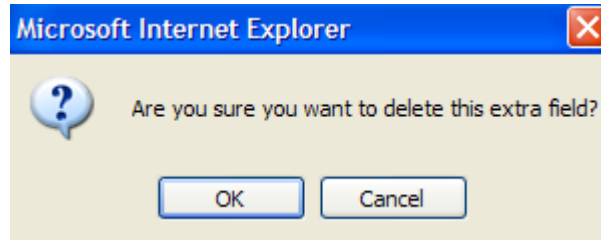
You can name the field anything you want. Click the *Add Extra Field Name* field and type a name for the field. When you have finished typing the name, click **Add Extra Field**.

➤ **To add extra fields:**

1. Click the **Settings Manager** icon. The **Settings Manager** window appears.
2. Click the **Extra Fields** tab. The **Extra Fields** window appears.
3. Click **Add New Extra Field**. The **Add Extra Field** window appears.
4. In the *Add Extra Field Name* field, type a name for the field.
5. Click **Add Extra Field**.

## Deleting Extra Fields

If you previously created an extra field and no longer need that field, click **Delete Extra Field** next to the field you want to remove. The **Delete Extra Field Confirmation** window appears.



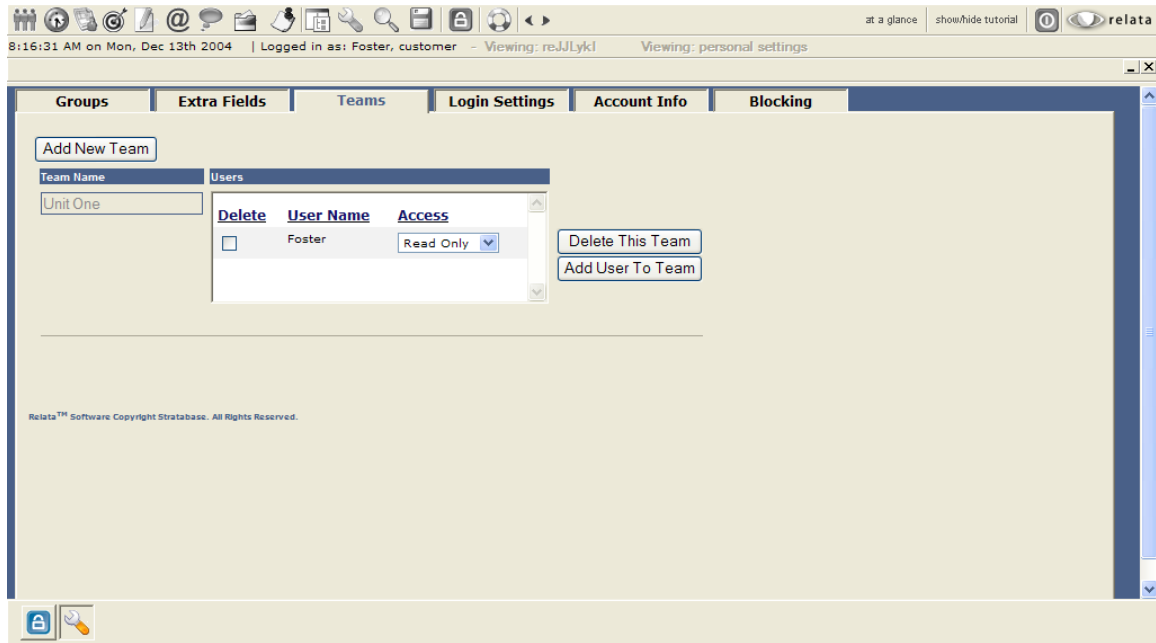
**Figure 96: Delete Extra Field Confirmation Window**

Click **OK** to delete the field. The extra field is immediately removed from **Relata**.

- **To delete extra fields:**
  1. Click the **Settings Manager** icon. The **Settings Manager** window appears.
  2. Click the **Extra Fields** tab. The **Extra Fields** window appears.
  3. Click **Delete Extra Field** adjacent to the field you want to delete. The **Delete Extra Field** window appears.
  4. Click **OK**.

## Working with Teams of Users

You can organize **Relata** users into teams. A team may have one or more users. To create a team, click the **Teams** icon. The **Teams** window appears.



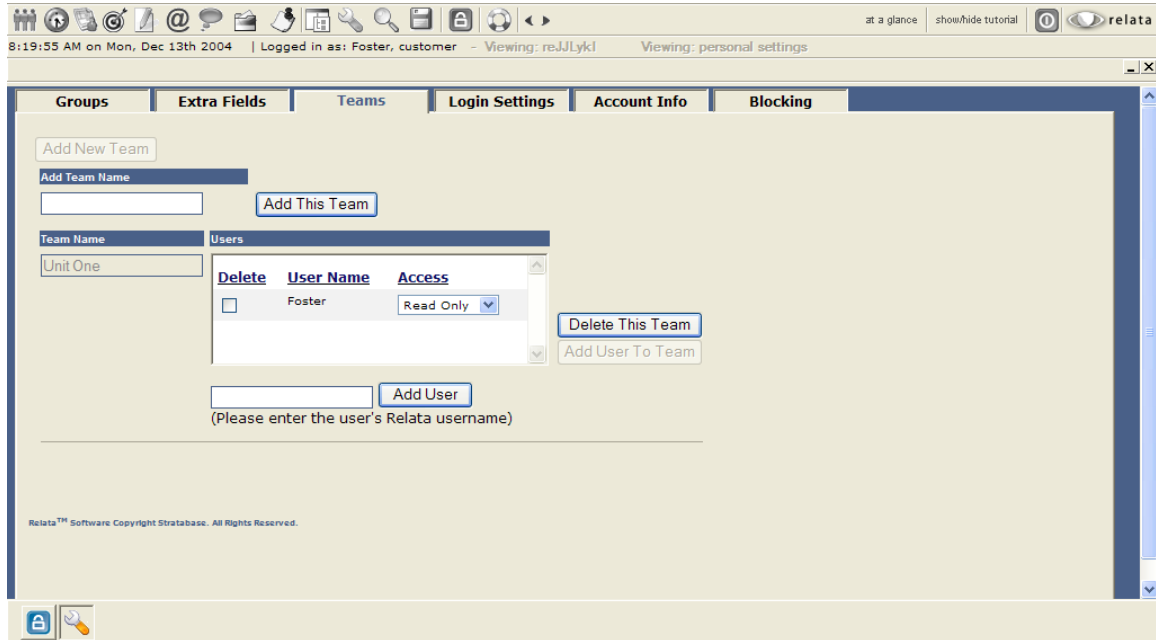
**Figure 97: Teams Window**

The **Teams** window lists each team you have created and the users assigned to that team.

- **To manage your teams:**
  1. Click the **Settings Manager** icon. The **Settings Manager** window appears.
  2. Click the **Teams** tab. The **Teams** window appears.

## Adding a Team

To create a team, click **Add New Team**. The **Add New Team** window appears.



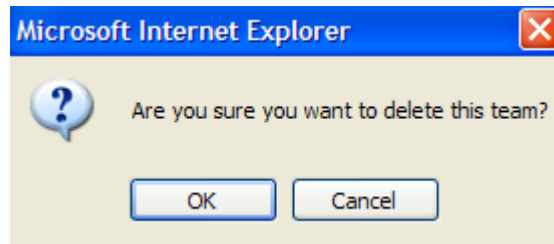
**Figure 98: Add New Team Window**

Type a name for the new team and click **Add This Team**. The team's name appears in the window.

- **To create a team:**
  1. Click the **Settings Manager** icon. The **Settings Manager** window appears.
  2. Click the **Teams** tab. The **Teams** window appears.
  3. Click **Add New Team**. The **Add New Team** window appears.
  4. In the *Add Team Name* field, type a name for this team.
  5. Click **Add This Team**.

## Deleting Teams

If you don't need a team you have previously defined, you can remove it. To delete a team, click **Delete This Team**. The **Delete Team Confirmation** window appears.



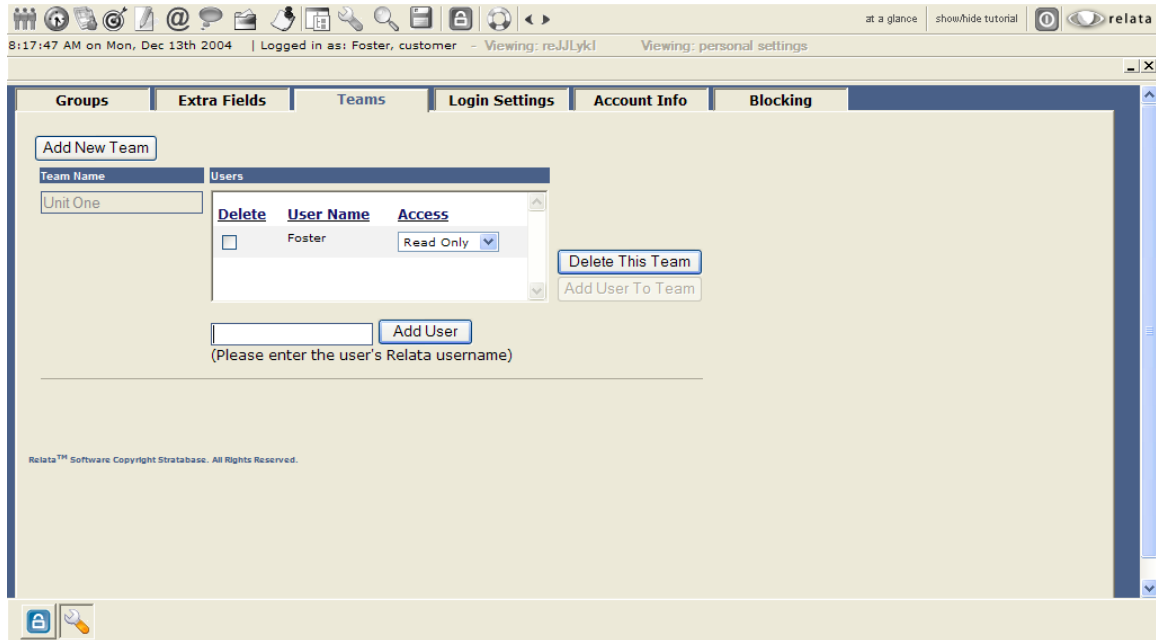
**Figure 99: Delete Team Confirmation Window**

Click **OK** to delete this team. The team information is immediately deleted from **Relata**.

- **To delete a team:**
  1. Click the **Settings Manager** icon. The **Settings Manager** window appears.
  2. Click the **Teams** tab. The **Teams** window appears.
  3. Click **Delete This Team**. The **Delete Team Confirmation** window appears.
  4. Click **OK**.

## Adding Users to a Team

You can add any **Relata** user to a team. As long as the person has a **Relata** username, you can add them to your team, even if they aren't associated with your **Relata** account. To add a user, click **Add User To Team**. The **Add User to Team** window appears.



**Figure 100: Add User to Team Window**

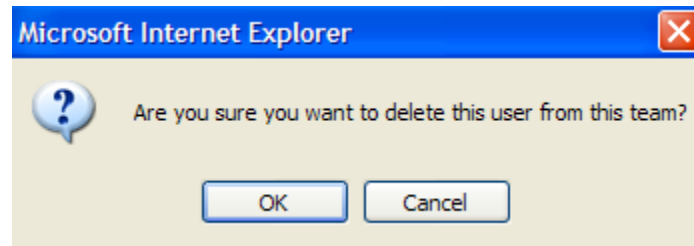
Type the user's name in the field and click **Add User**. The team is now updated to include this user.

- **To add a user to a team:**
  1. Click the **Settings Manager** icon. The **Settings Manager** window appears.
  2. Click the **Teams** tab. The **Teams** window appears.
  3. Click **Add User To Team**. The **Add User to Team** window appears.
  4. In the *Add User* field, type the name of the user you want to add.
  5. Click **Add User**.



## Deleting Users from a Team

If you want to remove a user from a team, select the *Delete* check box next to the user's name. The **Delete User from Team Confirmation** window appears.



**Figure 101: Delete User from Team Confirmation Window**

Click **OK** to permanently remove this user from this team. The user's information is not deleted from **Relata** – they are just removed from this team.

- **To delete a user from a team:**
  1. Click the **Stats and Reports** icon. The **Statistics** window appears.
  2. Click the **Teams** tab. The **Teams** window appears.
  3. Select the *Delete* check box next to the user's name that you want to delete. The **Delete User from Team Confirmation** window appears.
  4. Click **OK**.

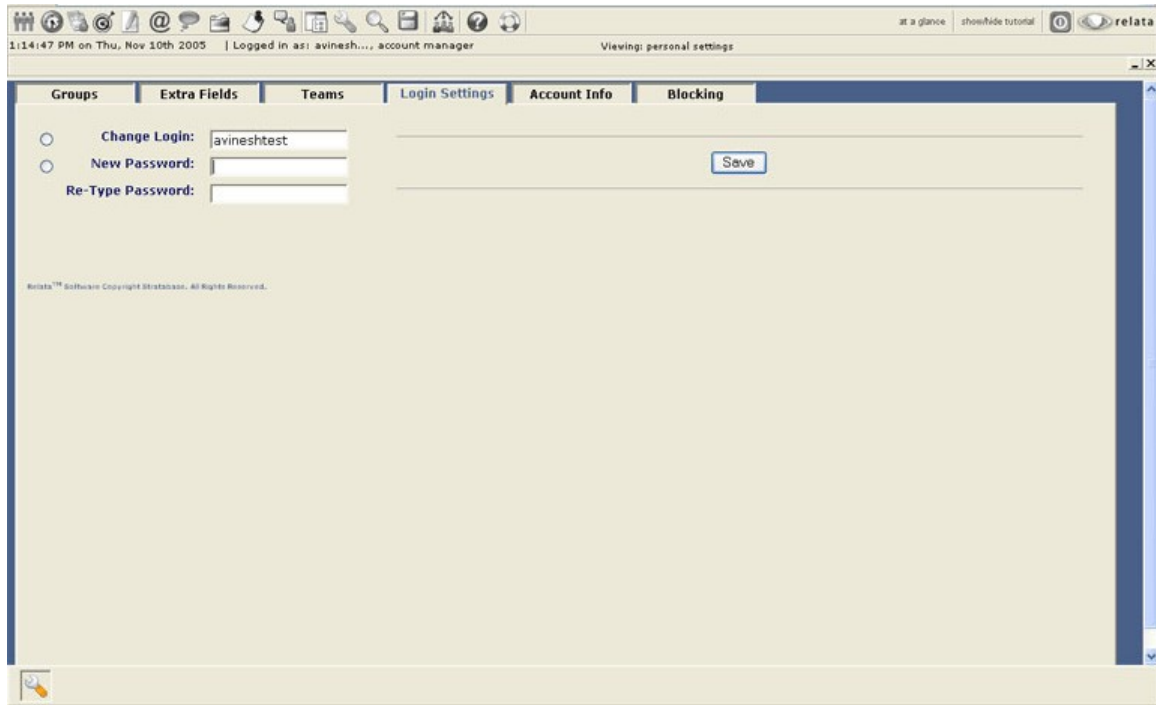
## Modifying a User's Read/Write Access

Each user you add to a team can have read and write or read only access to **Relata**. Click the DOWN ARROW in the *Access* field and select *Read/Write* or *Read Only* to assign that level to the user.

- **To modify a user's read/write access:**
  1. Click the **Settings Manager** icon. The **Settings Manager** window appears.
  2. Click the **Teams** tab. The **Teams** window appears.
  3. Click the DOWN ARROW in the *Access* field and select *Read/Write* or *Read Only*.

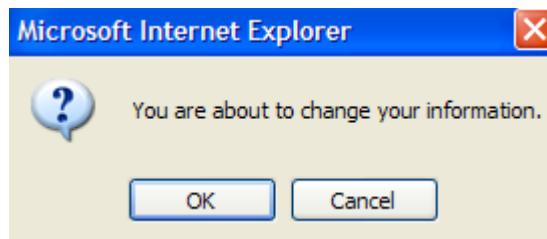
## Changing Login Settings

To change your login settings, click the **Login Settings** tab on the **Settings Manager** window. The **Login Settings** window appears.



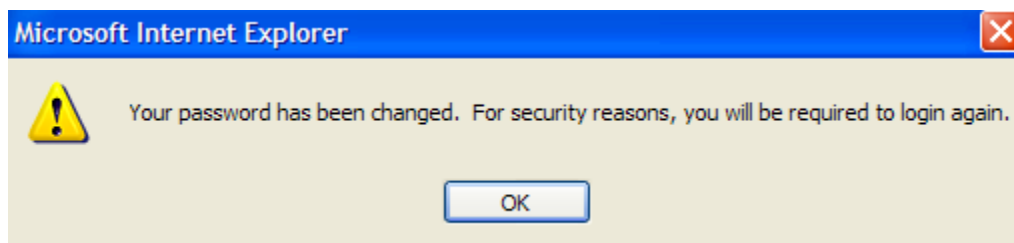
**Figure 102: Login Settings Window**

To change your username, click the *Change Login* field and type your new **Relata** username. When you click **Save**, you'll be asked to confirm the new name.



Click **OK**. You will then need to log out of **Relata** and log back in with your new username.

To assign a new password, click the *New Password* field and type the new password. Confirm the password by typing it a second time in the *Re-Type Password* field. Click **Save**.



When you click **OK**, your password is updated. Again, you will need to log out of **Relata** and log back in with your new password.

➤ **To change your username:**

1. Click the **Settings Manager** icon. The **Settings Manager** window appears.
2. Click the **Login Settings** tab. The **Login Settings** window appears.
3. Click the *Login* field and type your new username.
4. Click **Save**.
5. Click **OK**.

➤ **To change your login settings:**

1. Click the **Settings Manager** icon. The **Settings Manager** window appears.
2. Click the **Login Settings** tab. The **Login Settings** window appears.
3. Click the *New Password* field and type a new password.
4. Type the password a second time in the *Re-Type Password* field.
5. Click **Save**.
6. Click **OK**.

## Adding a New User

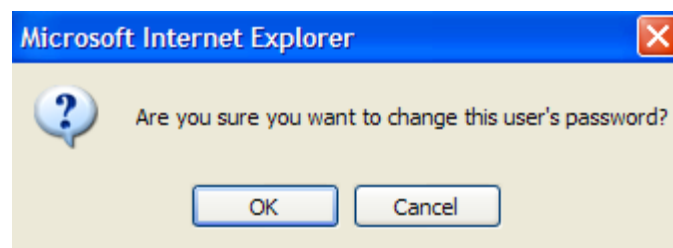
To add a new **Relata** user to your account, click on the Number of users to add drop-down menu and select the number of users to add. You will then be able to specify the new user's first name, last name and e-mail address. You can optionally create sample data for the new user. Click **Save** to create the new user. The new user will receive their **Relata** login instructions (including a temporary password) via e-mail.

**Figure 103: Create New User Window**

If you exceed the maximum number of users supported by your license, then you will be presented with an error dialog. You may purchase an upgrade to your existing **Relata** license by contacting **Relata Support**.

## Changing a User's Password

If you are the Account Manager for your **Relata** account, you can change a user's password. To do so, click the *Password Change* field for that user and type the new password you want to assign to this user. Click **Save**. The **Password Change Confirmation** window appears.



**Figure 104: Password Change Confirmation Window**

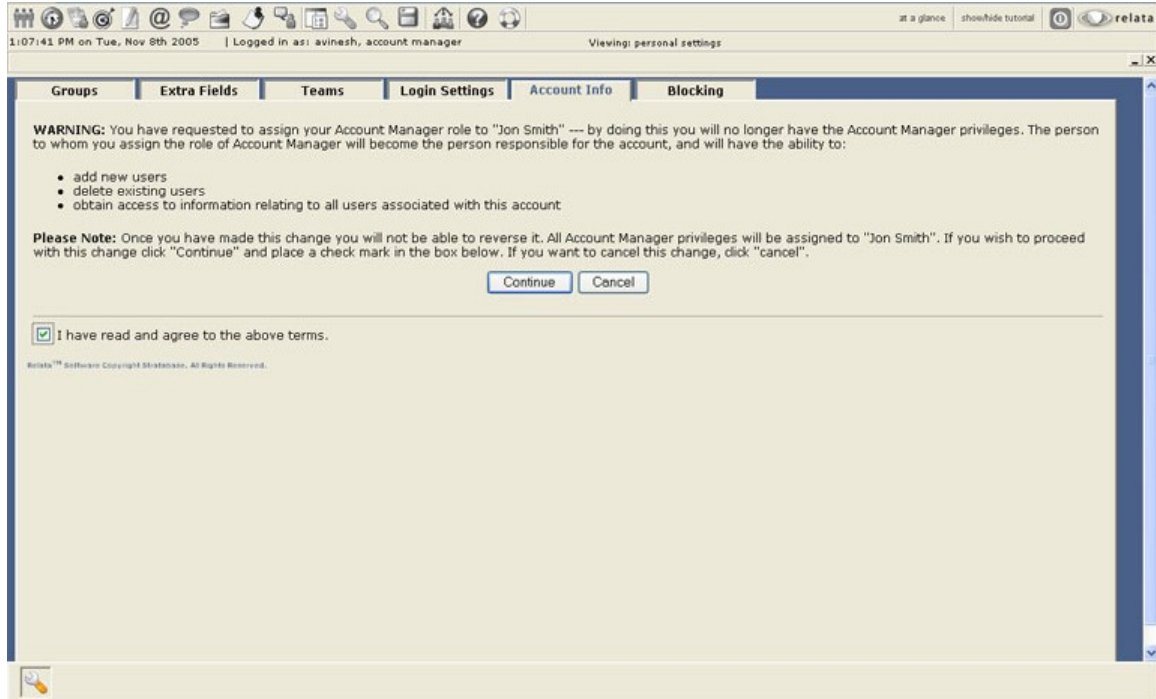
Click **OK** to save the new password or click **Cancel** to leave the original password as is.

- **To change a user's password:**
  1. Click the **Settings Manager** icon. The **Settings Manager** window appears.
  2. Click the **Account Info** tab. The **Account Information** window appears.
  3. In the *Password Change* field, type the new password for this user.
  4. Click **Save**. The **Password Change Confirmation** window appears.
  5. Click **OK**.

## Designating a User as a Relata Account Manager

A user in your account can be designated as the **Relata** Account Manager. Account Managers can add and delete users from your account, and access information relating to all users in your account.

To designate a user as the **Relata** Account Manager, click **Assign As Account Manager/Assign** next to the user's name. The **Assign Account Manager Warning** window appears.



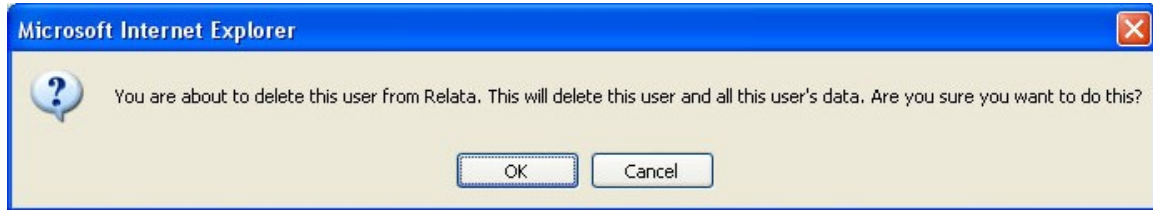
**Figure 105: Assign Account Manager Warning Window**

Click **Continue** to make this user your Account Manager or click **Cancel** to return to the **Account Information** window.

- **To designate a user as a Relata Account Manager:**
  1. Click the **Settings Manager** icon. The **Settings Manager** window appears.
  2. Click the **Account Info** tab. The **Account Information** window appears.
  3. Click **Assign As Account Manager/Assign** next to the user's name. The **Assign Account Manager Warning** window appears.
  4. Click **Continue**.

## Deleting Users from Your Account

If you are the Account Manager for your **Relata** account, you can delete a user from your **Relata** account. To do so, click **Delete** next to the user's name in the **Account Information** window. The **Delete User Account Confirmation** window appears.



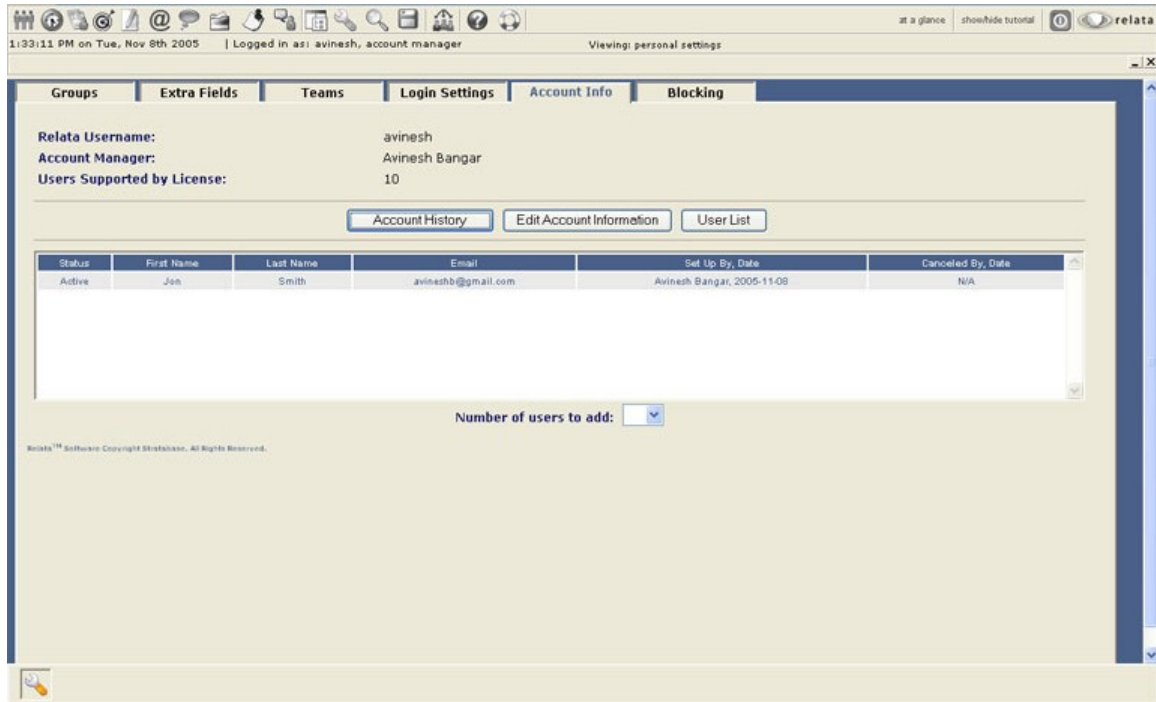
**Figure 106: Delete User Account Confirmation Window**

Click **OK** to permanently delete this account. All data associated with this user will be deleted from the server on which **Relata** resides.

- **To delete a user from your account:**
  1. Click the **Settings Manager** icon. The **Settings Manager** window appears.
  2. Click the **Account Info** tab. The **Account Information** window appears.
  3. Click **Delete** adjacent to the user's name you want to delete. The **Delete User Account Confirmation** window appears.
  4. Click **OK**.

## Viewing Your Account History

You can view a history of your account in **Relata**. To do so, click **Account History**. The **Account History** window appears.



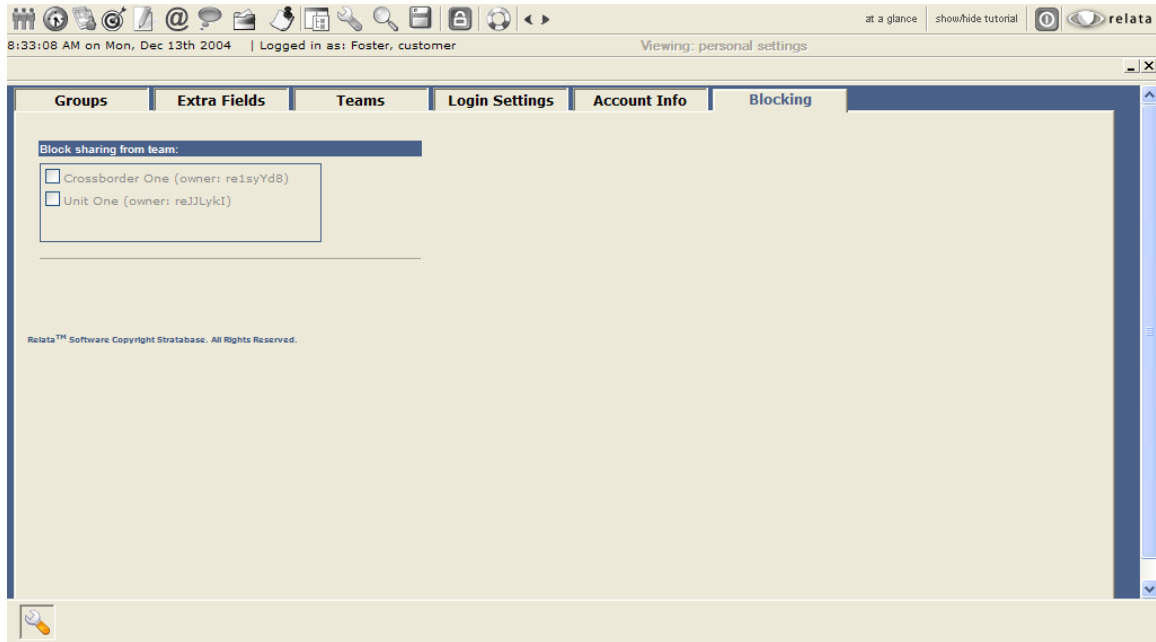
**Figure 107: Account History Window**

The **Account History** window lists all active and inactive users. For each user, the **Account History** window displays the user's first and last name, the user's email address, the name of the person who created this user's account, and the date the account was created.

- **To view your account settings history:**
  1. Click the **Settings Manager** icon. The **Settings Manager** window appears.
  2. Click the **Account Info** tab. The **Account Information** window appears.
  3. Click **Account History**. The **Account History** window appears.

## Blocking Users

In **Relata**, teams can share information. You can prevent a team from sharing its information with you. To do so, click the **Blocking** tab on the **Settings Manager** window. The **Blocking** window appears.



**Figure 108: Blocking Window**

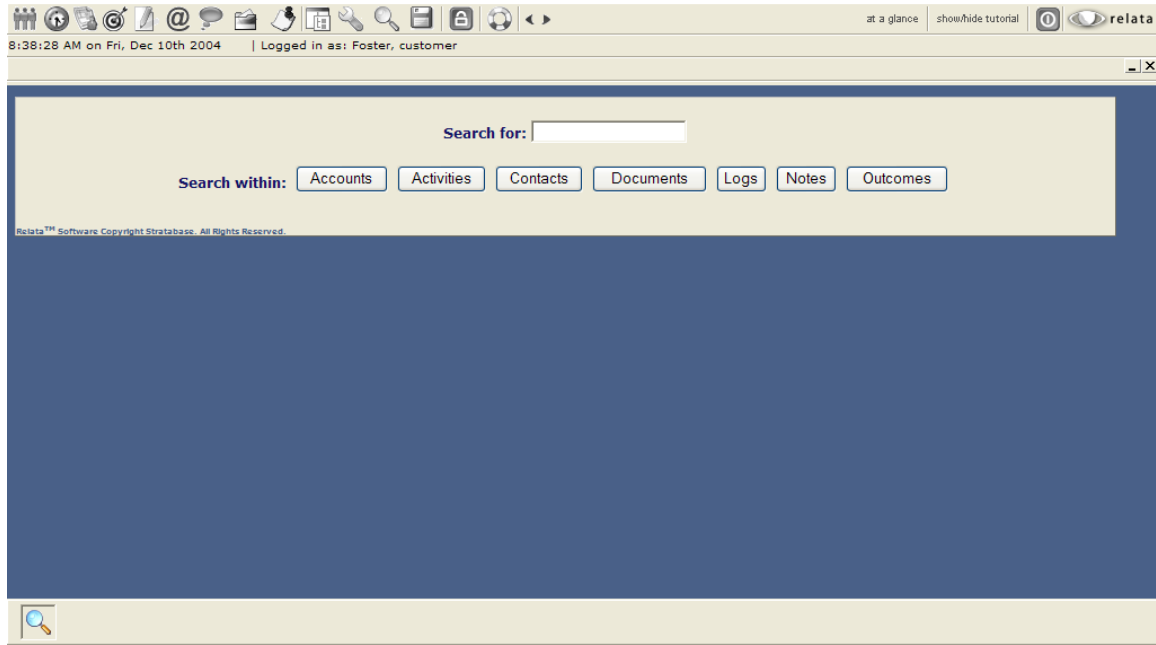
If you want to block a team from sharing its information with you, click the check box next to the team's name.

- **To block teams from sharing information with you:**
  1. Click the **Settings Manager** icon. The **Settings Manager** window appears.
  2. Click the **Account Info** tab. The **Account Information** window appears.
  3. Click the **Blocking** tab. The **Blocking** window appears.
  4. Select the check box next to the team's name you want to block.



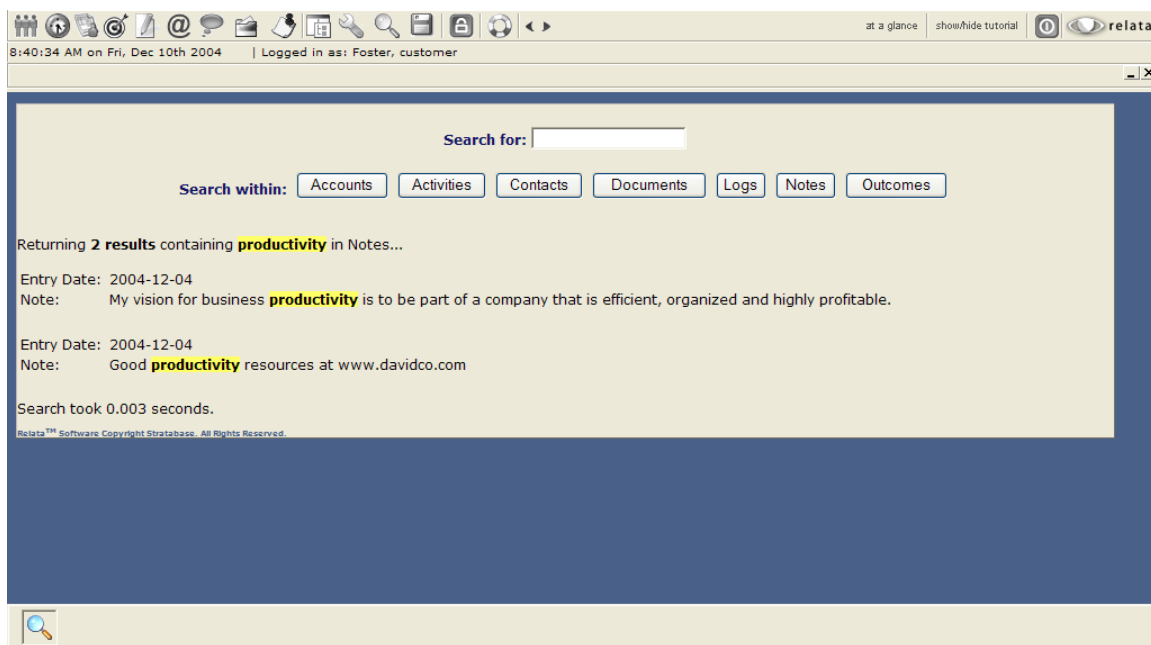
## SEARCHING RELATA FOR INFORMATION

You can search for specific information in **Relata**. To do so, click the **Search** icon . The **Search** window appears.



**Figure 109: Search Window**


When searching for information in **Relata**, you type the word or phrase you want to find in the *Search For* field. (You can separate multiple keywords by using a space -- for example, you can search for *productivity* or just *business productivity* for a more concise search). Quotes in keywords are not supported. Then click the category you want to search within – for example, *Contacts*. The **Search Results** window displays the matching entries with the keyword(s) highlighted.

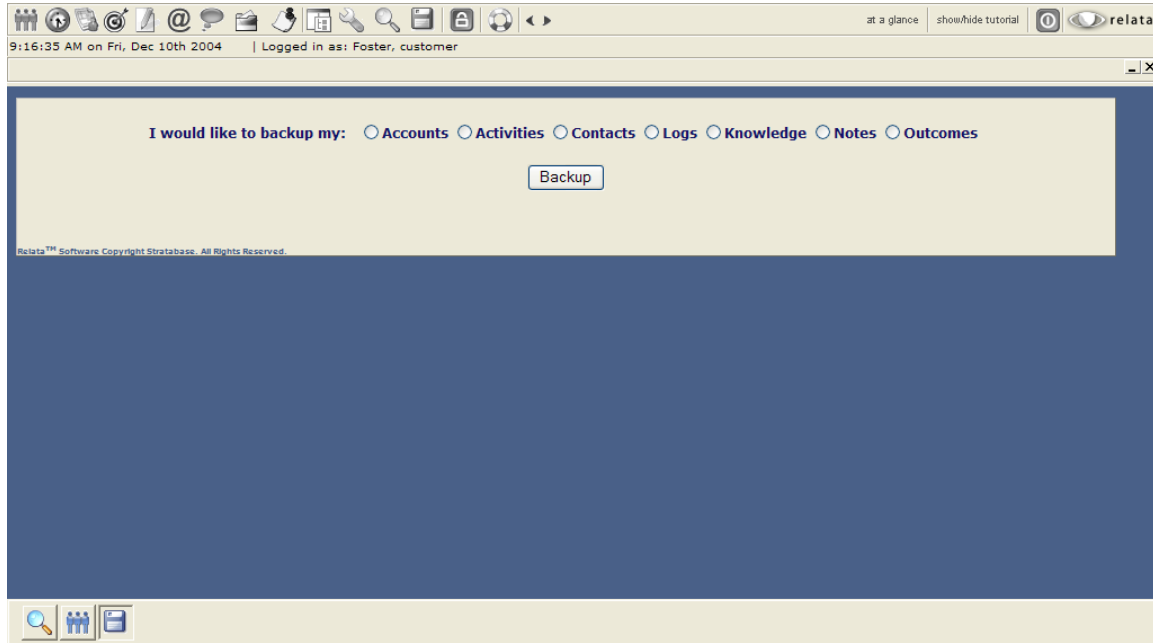


**Figure 110: Search Results Window**

- **To search Relata for information:**
1. Click the **Search** icon.. The **Search** window appears.
  2. In the *Search for* field, type the text you want to search for.
  3. In the *Search within* field, click the type of information you want to search in.

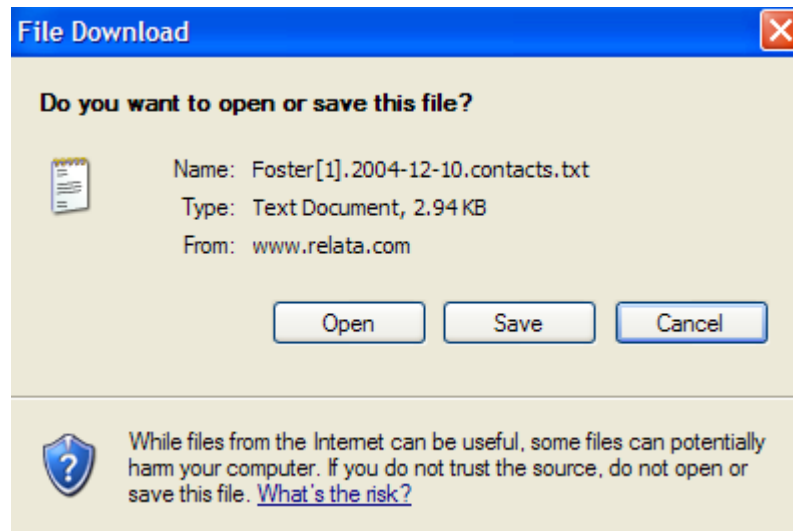
## BACKING UP YOUR RELATA INFORMATION

You should periodically backup your **Relata** information. To backup your information, click the **Backup** icon  on the **Main** window. The **Backup** window appears.



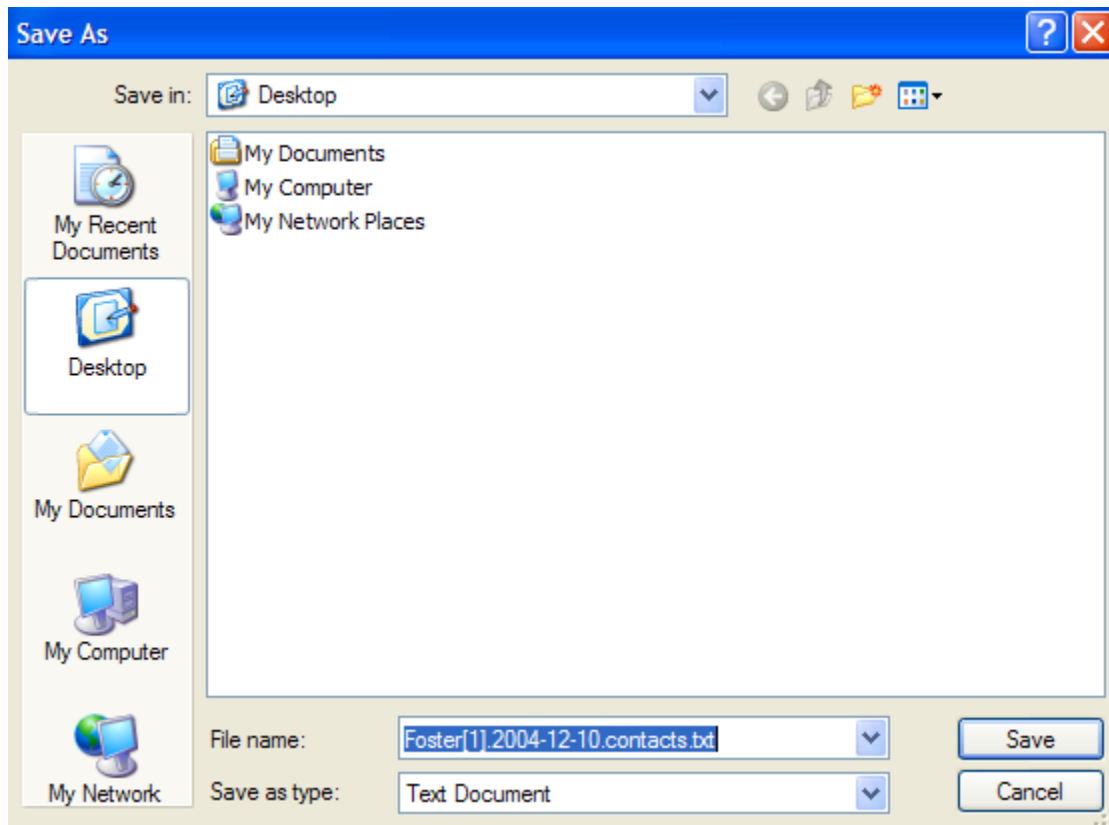
**Figure 111: Backup Window**

**Relata** lets you backup your accounts, activities, contacts, logs, knowledge data, notes, and outcomes. You can only backup one of these items at a time. Click the item you want to backup and click **Backup**. The **File Download** window appears.



**Figure 112: File Download Window**

Since you are performing a backup, you'll want to click **Save** to create the backup file. The **Save As** window appears.



**Figure 113: Save As Window**


Select the folder you want to save the file to and click **Save**. When the file has been saved to your local computer, the **Download Complete** window appears.

The file you have just created can be opened using a text editor (Notepad, WordPad, Microsoft Word, and so on).

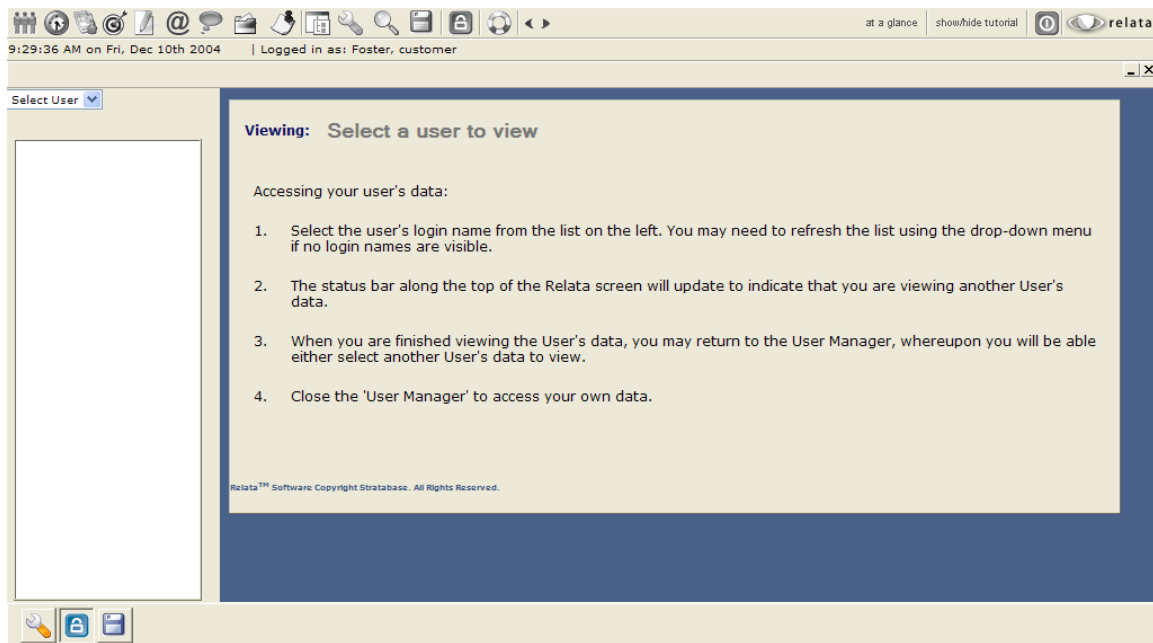
➤ **To backup Relata information:**

1. Click the **Backup** icon. The **Backup** window appears.
2. Select the item you want to backup and click **Backup**. The **File Download** window appears.
3. Click **Save**. The **Save As** window appears.
4. Click **Save**.

## MANAGING RELATA USERS

You can add, edit, and delete users in **Relata** if you are a **Relata** Account Manager. To manage the users associated with your **Relata** account, click the **User Manager** icon . The **User Manager** window appears.

The **User Manager** can be minimized and you can access various **Relata** modules to view a user's data (eg. productivity statistics).



**Figure 114: User Manager Window**

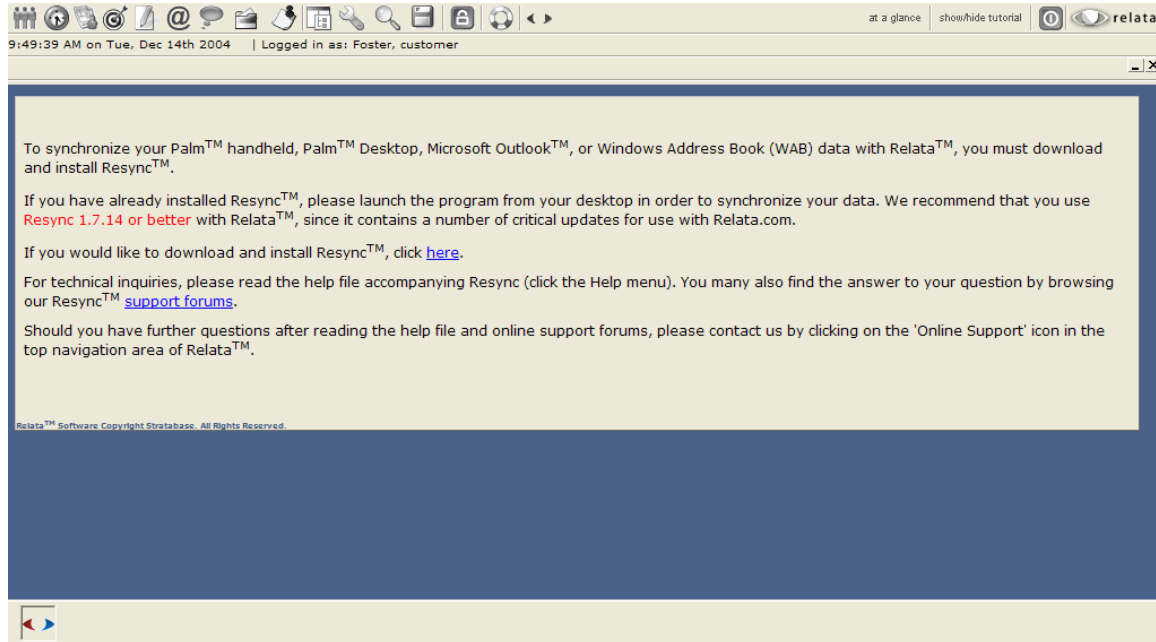
- **To manage the users associated with your Relata account:**
  - Click the **User Manager** icon. The **User Manager** window appears.
  - The **User Manager** can be minimized and you can access various **Relata** modules to view a user's data (eg. productivity statistics).

## SYNCHRONIZING DATA

You can synchronize your **Relata** information, such as contacts, with your Palm device or Windows PocketPC device. To synchronize your data, click the **Data Synchronization** icon



on the **Main** window. The **Synchronize** window appears.



**Figure 115: Synchronize Window**

As explained in this window, you will first need to install the *Resync (Relata Edition)* application to your PC. Then, execute the *Resync (Relata Edition)* application when you are ready to synchronize your data.

## System Requirements

*Resync* requires the following, in order to execute:

- Microsoft Windows 98, ME, NT, 2000, XP, or Vista
- Palm Desktop 4.01 or 4.1 (4.1.4 is not supported) or Microsoft Outlook 2000 – 2003.
- Pentium II 400 MHz or better
- 16 MB of RAM minimum
- 16 MB of free hard disk space

## Launching Resync

Launch the *Resync* application by double-clicking the *Resync* icon on your desktop. *Resync* will open. In a few moments, you will be presented with the *Resync* window. *Resync* uses two-way data synchronization.

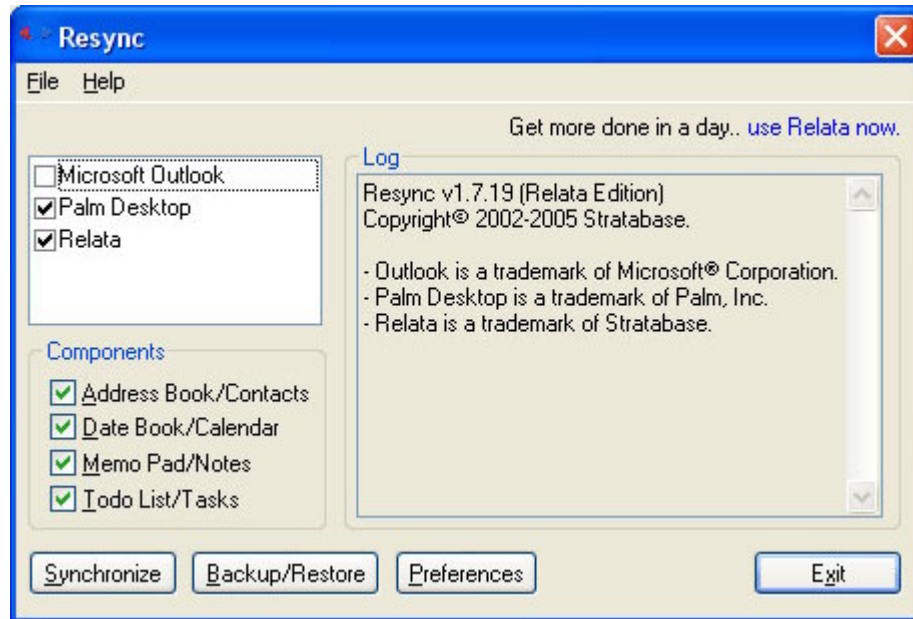


Figure 116: The Resync Window

## Configuring Resync

From the *Resync* window, you can select which applications you would like to synchronize with. To synchronize Palm Desktop and Relata, select *Palm Desktop* and *Relata*.

To configure the Palm Desktop plug-in, simply double-click it in the *Resync* window. Select your Palm username from the drop-down. Likewise, to configure the Microsoft Outlook plug-in, double-click it and select your Outlook profile from the drop-down menu. Changes are saved automatically when you exit *Resync*.

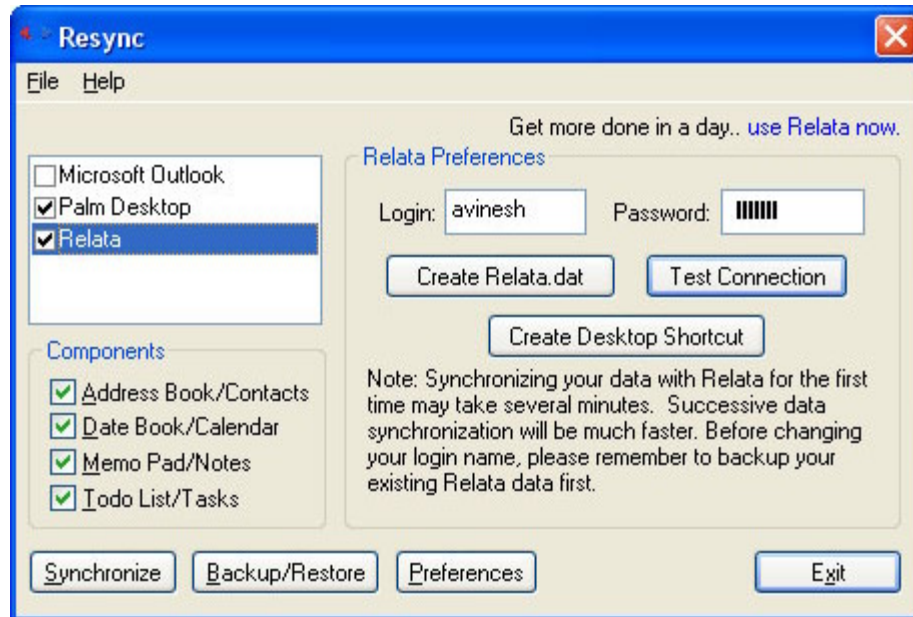
You can also select which components to synchronize against. The following table compares the various components.

Relata Module Name	Palm Desktop	Microsoft Outlook
Contact Manager	Address Book	Contacts
Activity Manager – Calendar Items	Date Book	Calendar
Note Manager	Memo Pad	Notes
Activity Manager – To-do Items	To-do List	Tasks

Figure 117: Component Name Comparison Table

## Setting the Relata Preferences

Double-click the *Relata* plug-in name in *Resync*. You will be presented with the following window.

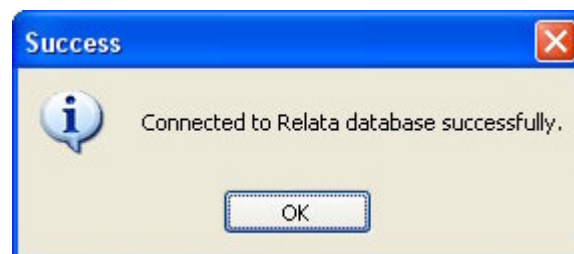


**Figure 118: Relata Preferences Window**

Put your mouse cursor in the *Login* field and type in your *Relata* username. Next, place the mouse cursor in *Password* field and type in your *Relata* password.

Your *Relata* administrator should have supplied you with a file called *Relata.dat*, which is to be stored in the *Resync* plugins folder. If you are the sole user of *Relata*, then you can click *Create Relata.dat* to create the *Relata.dat* file for you. See the *Relata Administrator's Guide* for detailed instructions on creating *Relata.dat*.

Once the *Relata* configuration file has been correctly installed or created, you can click *Test Connection* to test the connection between your computer and the *Relata* server. If the connection between your computer and the *Relata* server is working correctly, you will be presented with the following window.



**Figure 119: Relata Connection Success Window**

You can create a desktop shortcut to *Relata* if the test was successful by clicking *Create Desktop Shortcut*.



## FREQUENTLY ASKED QUESTIONS

Note: Do not send support inquiries to our phone lines unless you have purchased a phone support package. Please contact our support department via e-mail at [support@relata.com](mailto:support@relata.com).

### General Questions

#### **What versions of Relata are available? Can I upgrade to another version?**

There are three versions of Relata available – Relata Lite, Relata Pro and Relata Enterprise. You can upgrade from one version of Relata to another. However, you cannot downgrade.

#### **Can I try Relata before I have to pay for it?**

Yes, you can download a fully functional 14-day trial version of Relata for free. However, it will not function without a Relata license.

Once Relata is installed, you will need to request a Relata license by contacting our support team or via our web site. Also, please see the 'What is a server data block?' FAQ, as they will require that information to create a Relata license.

Once the temporary license expires, you will no longer be able to use Relata unless you purchase a license for yourself or your organization. A full license has no expiry date.

Non-profit, educational and government institutions are subject to discounted pricing.

#### **What are the system requirements to use Relata?**

Relata requires the following:

- Apache 1.3.x or Apache 2.x. Internet Information Server (IIS) 6.0 or better.
- PHP 4.x.x or better. PHP 5 has not been tested.
- MySQL 3.x or 4.x. MySQL Max is recommended for corporate/enterprise users.
- ionCube loader for Linux or Windows (<http://www.ioncube.com/loaders.php> -- free)
- eAccelerator 0.9.3 or ionCube PHP Accelerator (optional)
- phpMyAdmin for MySQL administration (optional)

User requirements:

- Internet Explorer 6.0 or better. Firefox 1.0.7 or better.
- Palm Desktop 4.1 or Microsoft Outlook 2000 – 2003 for data synchronization (optional)

For optimal use, we recommend a LAMP server – Linux, Apache, MySQL and PHP.

We recommend 10 MB of server disk space per user. If you have 100 Relata users, you should have at least 1 GB of free disk space on your server for the Relata database and user file storage.

#### **Can I create additional Relata users at any time?**

Yes, see the *Settings* module in Relata. The Relata license governs the number of users that can be created. A Relata license can be upgraded to support more Relata users.

## Licensing Questions

### Can I install Relata on more than one computer or server?

Yes, as long as you obtain a license for each server. Each Relata license is locked to a particular server name (domain name), IP address, and/or MAC address.

Multiple departments can use the same Relata license, provided that the Relata installation resides on a single server. Multiple Relata Account Managers can be created using Relata, each having their own set of distinct Relata users.

Volume discounts are available. Please contact us at 1.800.475.3349 (9 AM to 5 PM PST) or via e-mail at [support@relata.com](mailto:support@relata.com) for pricing.

Non-profit, educational and government institutions are subject to discounted pricing.

### What is a server data block?

The server data block helps us reduce unlicensed Relata installations and also helps prevent individuals from requesting new trial licenses repeatedly for the same server. A Relata license 'locks' the Relata installation to a particular server name and IP address, or MAC address. Multiple server names can be encoded into a Relata license for \$10 USD per additional server name. Server details can be changed in a license file for \$10 USD per change, should you need to move to a new server or change an IP / MAC address.

Before we can create a (temporary or permanent) Relata license for you or your organization, we require you to execute *datablock.php* (in *install* directory of the Relata installation) on your server. The PHP script creates the server data block and outputs the contents to 'server.txt' and also to your browser. The file itself or the contents displayed in your browser may then be e-mailed to us. It's normal for the contents to be unreadable, as they are encrypted.

The file contains the following information: your server's name (eg. [www.relata.com](http://www.relata.com)), your server's IP addresses and MAC addresses of installed network cards. From the file, we extract the server name and IP address (or the IP and MAC addresses for systems behind a firewall) that you wish to use with Relata. This information is then encoded into the Relata license to allow Relata to run on your server.

### What if I don't want to send in a server data block?

If you cannot send in a server data block, you will be required to fax us a copy of the domain name you wish to use with Relata, as well as the IP address of the server, as well as the MAC address of the network card. We will then issue a Relata license. However, if the Relata license does not function due to a mistake in the domain name, server IP address or MAC address, we will charge a \$20 USD processing fee to reissue a new Relata license.

For servers behind a firewall, that use internal IP addressing (eg. 192.168.1.1), we will require the IP address and MAC address of the server. For most other servers, we require the domain name and IP address associated with the server.

IP addresses follow this notation: nnn.nnn.nnn.nnn

MAC addresses follow this notation: xx:xx:xx:xx:xx:xx

## Installation Questions

### I am not familiar with MySQL. Is there an easy way to install Relata?

Yes, we recommend running the *Relata Installation Helper*. It's located in the *install* directory of the Relata archive, and is called *relatahelper.php*. It will help you set up Relata in minutes.

### Can I use Relata with Windows?

Yes, as long as you meet the system requirements, you can run Relata under Windows.

### What are the system requirements to use Relata?

Relata requires the following:

- Apache 1.3.x or Apache 2.x recommended. Internet Information Server (IIS) 6.0 or better.
- PHP 4.1.0 or better. PHP 5 has not been tested, but should work.
- MySQL 3.x or 4.x. MAX version is recommended for performance.
- ionCube loaders (<http://www.ioncube.com/loaders.php> -- free)
- eAccelerator 0.9.3 or ionCube PHP Accelerator (optional)
- phpMyAdmin for MySQL administration (optional)
- 128 MB RAM minimum (256 MB or more recommended)
- 32 MB of disk space minimum (1 GB or more recommended)

User requirements:

- Internet Explorer 6.0 or better. Firefox 1.0.7 or better. 1024x768 screen resolution.
- Palm Desktop 4.1 or Microsoft Outlook 2000 – 2003 for data synchronization (optional)

We recommend allocating 10 MB of disk space per user. If you have 100 Relata users, you should have at least 1 GB of free disk space on your server for the Relata database and user file storage.

### Can you install Relata for my organization?

Yes and no. Yes, if you assume all liability for any damages that can occur from us installing Relata on your system. Relata requires Apache, MySQL and PHP to be installed on your system. If Apache, MySQL and PHP are not installed on your system, we can install them for you. However, if any existing software packages break or cease to function as a result, we will not be held liable. We are experienced with Linux and other operating systems, and will do our best to ensure the Relata installation does not disrupt any existing software that is installed.

To install Relata remotely on a Linux server, we require that your system has secure shell (SSH) installed. We do not perform remote installations over telnet. We do not require a super-user account, but in the event we need to make changes to any system configuration files, we will document them and allow you to perform the required operations. Microsoft Windows installations require that Terminal Services are enabled. We have deployed Relata on clean servers and also large-scale servers hosting well over 140 domains.

Our installation rates are \$60 USD per hour, which is also the minimum fee. We will quote you an installation fee based on your system configuration. If the install takes longer than an hour, we will bill you for additional time. Most Linux installations can be performed in under a half-hour. You will be required to fax in a signed *Relata Remote Installation Agreement* before installation will commence. Please do not e-mail us your system configuration and passwords.

## Payment Questions

### **What types of payment do you accept? Can you invoice us?**

Currently we only accept Visa and MasterCard via our online payment system. We are not able to accept a purchase order nor can we invoice you. You may only place an order for Relata via our web site or you may fax it in. However, to increase accuracy and prevent mistakes in creating your Relata license, we recommend that you use our online payment system instead. We do not store credit card numbers and any such confidential information is destroyed after processing.

Please do not e-mail us your credit card information.

### **Do you support payment via PayPal, HyperWallet, StormPay, etc?**

All supported payment methods are listed on our web site.

## Support Questions

### **Can I get my data out if I want to discontinue using Relata?**

Yes, if for any reason you want to discontinue using Relata, you can easily download your data through our Resync application, or through our standard *Backup* module.