

# relatia time & billing installation guide

Installing Relatia Time and Billing

## **Prerequisites:**

1. GoldMine® 5 (or greater)
2. Microsoft Internet Explorer 5 (or greater)
3. Microsoft Excel 97 (or greater for Metrics Console and reports)

You must have fully installed GoldMine® version 5 on all workstations and verified satisfactory operation. Most importantly, GoldMine's synchronization must be working properly between all workstations. Relatia Time and Billing uses GoldMine's database to store it's records and relies on synchronization to maintain them. GoldSync can automate the process of synchronization and is highly recommended.

GoldMine® can run on both dBase and SQL databases. Relatia Time and Billing has been developed to run against both the native dBase and MS SQL7 databases. There are some custom configurations of MS SQL7 and GoldMine® that will not work with Relatia Time and Billing. Specifically, having main tables located outside of SQL (i.e. as dBase tables) will result in a failure of Relatia Time and Billing. All tables normally located in the GMBase and main contact directory MUST be resident as SQL tables. We understand that it is possible to customize which tables are hosted in dBase and which are in SQL, but Relatia Time and Billing cannot operate in those environments.

The second requirement for Relatia Time and Billing is the installation of Microsoft Internet Explorer 5 (or greater). IE5 installs several components that are required by Relatia Time and Billing. You do not have to use IE5 as your preferred browser. A minimum installation of IE5 is all that is needed by Relatia Time and Billing.

The third requirement: Microsoft Excel is necessary to run and display the business metrics report and to display custom reports.

After you have verified proper operation of your GoldMine® environment, you may proceed with the first-time installation of

Relatia Time and Billing. This step is similar to an administrative installation in which you install the software, enter the master license code(s) and establish some defaults for all users. You then synchronize those changes to all workstations and proceed to install the remaining users. Because you have synced the master license(s) and options to the remote users, they will not need to enter license codes, setup system options or define resource costs and custom charge codes.

First-time installation can take place on any workstation (networked or remote) provided it can sync it's database (in the case of a remote) and the user has Master rights to GoldMine. We do not recommend using the GoldMine **Master** account for this purpose.

Relatia Time and Billing is delivered as a self-extracting executable which will unpack it's setup files into a temporary directory which you choose. You will also need the License Code and Key that was emailed to you when you purchased Relatia Time and Billing. If you are evaluating the product, you may leave the License Code and Key fields blank to create a 16-day 1-user demo license.

### **First-time installation:**

1. Run the Relatia Time and Billing self-extracting executable (it's called RTBInstall.exe). Choose a temporary location where you'd like to save the setup files. These should be saved on your local hard drive, not a network resource. Choose 'Finish'. When the files are successfully extracted, it will launch the setup program. If certain operating system files are not installed or up-to-date, the setup program will install or update them and ask you to reboot. After rebooting you will need to launch the setup program again from the temporary directory you chose above (or run RTBInstall again).

In setup you will be asked to read and accept the license agreement. You must agree for the software to be installed. Next you will be asked where you'd like to install Relatia Time and Billing. Choose a directory on your local hard drive. Finally, the setup program will copy all files to the appropriate destination. You may be asked to reboot if certain support files were updated.

2. Login to GoldMine® as a user with Master rights ( not the user: MASTER ). Leave GoldMine running in a normal window on the screen (do not minimize it).
3. From the Windows Start menu, click on Programs - Relatia TB - Relatia TB Install
4. You will be notified that no registry settings were found and that Relatia Time and Billing will create them. You will also be asked to ensure that GoldMine® is displaying the contact record of your company. If your database does not have a contact record for your company, please create one at this time. This information is needed to display your company's name on reports and charge summaries. The next dialog box will offer to modify the current GoldMine database. These

modifications will allow the full capabilities of Relatia Time and Billing to become available. The modifications are accomplished through the use of GoldMine's synchronization facility and will have no effect on it's day to day use. However, please be aware that the database will be automatically rebuilt following this step and could take a substantial amount of time to complete depending on the size of your database and the equipment available. This step can be skipped and performed at a later time. However, this step is critical and must be performed to allow Relatia Time and Billing to function correctly. Finally, Relatia Time and Billing will announce that first-time installation is complete.

5. Close GoldMine. Run GoldMine® again, logging in as the same user as above. You will now find two new entries on the GoldMine® Tools menu: 'Add Labor/Expenses' and 'Billing Report'. Choose 'Billing Report' to complete setup. Relatia Time and Billing will detect that you have not entered your license code(s) and key(s) and will ask you for them. Please enter these exactly: note that only the digits 0-9 and the letters A-F are used. (If you are evaluating the product, you may leave both fields blank to create a 16-day, 1-user demo license.) Next you will be asked to login. The dialog box will show the user currently logged into GoldMine. Be sure to enter that user's GoldMine password. (You won't be asked for this again.) Relatia Time and Billing should open up on the Billing Report window. This user may now use Relatia Time and Billing from this workstation. If this user is a member of the GoldMine user group Relatia\_Managers, now is a good time to set the System Options. Choose File - Options - System Settings to configure the way labor is calculated for your company. If you are uncertain which options to take, start by checking all the boxes as a minimum.
6. Synchronize GoldMine® with all the other workstations on which you plan to run Relatia Time and Billing BEFORE you

install them. The master license codes you entered above will be synced and available to these workstations and you will not need to enter them again.

### **All subsequent workstations:**

Since you have synced the license codes and options to the remaining workstations, some of the previously encountered dialogs will not appear. Those values will now be pulled from the database. It's a good practice to sync each remote workstation BEFORE you install Relatia Time and Billing and again AFTER you've successfully installed.

Once again, ensure that the minimum software requirements have been met (see above).

1. Run the Relatia Time and Billing self-extracting executable (it's called RTBInstall.exe). Choose a temporary location where you'd like to save the setup files. These should be saved on your local hard drive, not a network resource. Choose 'Finish'. When the files are successfully extracted, it will launch the setup program. If certain operating system files are not installed or up-to-date, the setup program will install or update them and ask you to reboot. After rebooting you will need to launch the setup program again from the temporary directory you chose above (or run RTBInstall again).

In setup you will be asked to read and accept the license agreement. You must agree for the software to be installed. Next you will be asked where you'd like to install Relatia Time and Billing. Choose a directory on your local hard drive. Finally, the setup program will copy all files to the appropriate destination. You may be asked to reboot if certain support files were updated.

2. Login to GoldMine® as the user of this workstation.
3. From the Windows Start menu, click on Programs - Relatia TB - Relatia TB Install

4. You will be notified that no registry settings were found and that Relatia Time and Billing will create them. Relatia Time and Billing will announce that first-time installation is complete.
5. Close GoldMine. Run GoldMine® again, logging in as the same user as above. You will now find two new entries on the GoldMine® Tools menu: 'Add Labor/Expenses' and 'Billing Report'. Choose 'Billing Report' to complete setup. Next you will be asked to login. The dialog box will show the user currently logged into GoldMine. Be sure to enter that user's GoldMine password. (You won't be asked for this again.) The program should open up on the Billing Report window. This user may now use Relatia Time and Billing from this workstation.
6. Synchronize GoldMine® with the main database (if this is a remote user).

## Post-Installation Checklist:

### Following successful installation -

- If you skipped the opportunity to allow Relatia Time and Billing to modify your database, that can be done now by manually synchronizing the transfer set located in the installation directory. If you wish to make these changes manually: add a custom field UBLGRT named 'Billing Rate' of type numeric length=6 and decimal=2. (a database rebuild will be required), then create a custom screen under the Fields tab so that you can enter and edit this field (see your GoldMine documentation for details on creating a custom screen or adding a custom field to the database, or consult your GoldMine reseller for assistance). Finally, add three user groups to GoldMine: Relatia\_Managers, Relatia\_Accounting and Relatia\_Users.
- Populate the GoldMine user groups to allow access to sensitive areas of Relatia Time and Billing. To the group Relatia\_Accounting, add the GoldMine user(s) who will be performing the billing process (i.e. running the Post to DB process). To the group Relatia\_Managers, add the user(s) who will have access to the Resource Maintenance, Charge Code Maintenance, System Settings, Reports and Metrics Console. Some of this information is sensitive and should only be seen by management and/or human resources since it may reveal employee salaries or company profitability figures.
- Configure the System Settings to allow Relatia Time and Billing to properly calculate labor duration and rates. These are found in Billing Report - File - Options - System Settings. Only users which are members of the GoldMine user group Relatia\_Managers will be able to save the changes made here. See a detailed discussion of each option found here in a later section of the online help.

- Enter Resource cost and labor billing goal for each employee who will be submitting labor. It is important not to overlook this step. A detailed discussion of this feature can be found in the online help. Resource Cost may be found in Billing Report - File - Options - Resource Maint. Only users which are members of the GoldMine user group Relatia\_Managers will be able to enter this option. It is very important that a Resource Cost record is created for each user who submits labor. Failing to do so will cause a fatal error to occur when the labor records for that userid are processed by Post To DB. If you are not interested in the accuracy of the Metrics Console report, then you may enter dummy values for these userids. The best value for this purpose is "1.00" not "0.00" in each of the three fields.
- Create Custom Charge Codes to accurately reflect your business's diverse pricing methods. This is an advanced feature which allows additional flexibility in specifying a labor rate over those found in the System Settings. Both methods can be used simultaneously (and were designed to do so). See a detailed discussion of this feature in the online help. Custom Charge Codes can be found in Billing Report - File - Options - Charge Code Maint. Only users which are members of the GoldMine user group Relatia\_Managers will be able to enter this option.
- **MOST IMPORTANTLY** - enter your Global and (if needed) per client rates in the UBLGRT field. The record which you designated during installation as your company's contact record (the Licensed Company) will hold the value for the Global billing rate, while the per client rate is specified in the UBLGRT field of each client. The rate that applies to a particular labor charge is then dependent on the selections made in System Settings. In order to edit this field, you must have created this custom field and a custom screen to allow access to it as discussed above (these are created for you by our sync set). (see the discussion under Administering Relatia Time and Billing in the online help.)

- Allow security (users' settings) to synchronize to remote users. Only users which are members of the GoldMine user group Relatia\_Managers or Relatia\_Accounting will be able to access certain restricted areas of Relatia Time and Billing.
- The synchronization preference for each user should be set to a default path that includes the TMPLINKS directory and the "Retrieve Documents Into" setting must be set to "Default Path". Remote users should reference the TMPLINKS directory beneath where GoldMine is installed (usually C:\Program Files\Goldmine\Tmplinks), while networked users should all share the same path to a common TMPLINKS directory (most likely a share on your GoldMine server). Failure to set these options as described could result in some users being unable to retrieve Charge Summaries as linked documents.
- If you've made any of the changes listed above, be sure to synchronize everyone to bring them up-to-date.

