Relata

Administrator's Guide

Version 1.0

Copyright Notice

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INSTALLING RELATA

Congratulations on choosing **Relata** for yourself or your organization.

Please ensure that you have obtained a license key for use with **Relata** before continuing. If you have not obtained a license key for **Relata**, please visit http://www.relata.com/ and request a temporary license or purchase a permanent license. A temporary license expires in 14 days, after which point you must purchase a permanent license.

Pre-installation Checklist

Before installing **Relata**, ensure you have the following software installed on your server:

- Apache 1.3.x or 2.x (http://www.apache.org)
- PHP 4.1.0 or better (http://www.php.net)
- MySQL 3.x or 4.x (http://www.mysql.com)
- phpMyAdmin (http://www.phpmyadmin.net) -- optional

If you have purchased **Relata** and chose the remote installation option, please complete the *Relata Installation Agreement* and fax it back to our office. We will contact you with a date and time for your **Relata** installation. Also, if you do not know how to install Apache, PHP or MySQL, we recommend that you choose our remote installation option.

Windows users: please download and install EasyPHP 1.8 from the following URL: http://www.easyphp.org/telechargements.php3

EasyPHP 1.8 contains Apache 1.3.33, PHP 4.3.10, MySQL 4.1.9 and phpMyAdmin 2.6.1. EasyPHP does not have to be installed if you already have Apache, PHP and MySQL installed on your Windows server. However, this guide assumes that you have EasyPHP 1.8 installed (in C:\Program Files\EasyPHP1-8) if you are installing **Relata** on a Windows server.

Linux users: this guide assumes that you have Red Hat Linux, RHEL, or Fedora installed. Instructions for other Linux distributions may vary.

This guide assumes basic Windows or Linux skills.

Extracting Relata

Once you've got Relata downloaded, you'll need to extract the download to your web server.

Linux:

Extract the **Relata** archive to your web root. e*g. /var/www/html/relata*
Extract using *tar -zxvf relata-X.X.tar.gz*; where *X.X* is the version number.

Windows:

Extract the **Relata** archive to the following path using WinZip or a similar tool:
C:\Program Files\EasyPHP1-8\www\relata

Checking the System Configuration

We recommend that you run the *Relata Installation Helper* on your system. It is located in the *install* folder of the **Relata** installation and is called *installhelper.php*. You can start the *Relata Installation Helper* by opening your web browser and then browsing to the following URL: *http://www.yourhost.com/relata/install/installhelper.php*. Of course, *www.yourhost.com* should be replaced with your web host.

Once the page loads, you will be presented with a page similar to the following:

Relata Installation Helper v1.0 - Page 1

Operating System:	Linux
Path to php.ini:	/usr/local/lib/php.ini
PHP Version:	4.4.1 (Major Version: 4.4)
PHP Safe Mode:	Off
PHP Session Support:	Enabled
PHP MySQL Support:	Enabled
PHP Register Globals:	Off
PHP SMTP Host:	localhost. Ensure mail server is running.
Path to sendmail:	/usr/sbin/sendmail -t -i
PHP Extensions Directory:	/usr/local/lib/php/extensions
ionCube Loader:	Installed
Relata License Present:	Yes
PHP File Uploads:	On (Required for Relata File Manager)
PHP Upload Max Filesize:	10M (Required for Relata File Manager)
PHP Post Max Size:	100M (Required for Relata File Manager)
config.inc.php Writable:	Yes
Path to config.inc.php:	/www/htdocs/avinesh/relata-1.1/config.inc.php
Relata Installation URL:	http://sb1.rm7.net/avinesh/relata-1.1/
'upload' directory writable:	Yes (Required by Relata File Manager)

If any item is in a red font color, then it should be corrected before continuing. If any changes are made to your system configuration, refresh the *Relata Installation Helper* in your browser so that you are viewing the most current version. Once all changes are acceptable, the **Continue** button will be clickable.

We recommend printing out the output from the first page of the *Relata Installation Helper*, as certain items will be useful for the **Relata** installation, should you wish to perform all the required steps manually. Alternatively, use the *Relata Installation Helper* to set up **Relata** on your system in minutes!

Requesting a Relata License

Before **Relata** can run on your server, a server data block must be created and sent to the *Relata Support* team. The server data block essentially contains the following information: the domain name of the server (if any), network adapters in the server, the MAC addresses associated with each and also the IP address associated with each network adapter. Once we receive the server data block, we will issue you a temporary **Relata** license, which will expire in 14 days. Once you purchase **Relata**, you can overwrite the existing **Relata** license with the new, permanent license.

You can run the server data block creation tool from within the *Relata Installation Helper,* or by opening your web browser and then browsing to the following URL:
http://www.yourhost.com/relata/install/datablock.php.
Of course, *www.yourhost.com* should be replaced with your web host.

Once the page loads, you will be presented with a page similar to the following:

This tool generates a block of encrypted data, which contains the following information:
- Server name (eg. www.yourhost.com)
- Server IP address (eg. 192.168.1.2)
- The MAC address of the primary network adapter (eg. A1:B2:C3:D4:E5:F6)
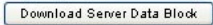- The primary network adapter name (eg. eth0)

We are only interested in the server name, IP address and MAC address. They will be used to generate a Relata license for your server.

1. **Dumping server data block:**

< START >
------ SERVER ADAPTER DATA -----
95819X4T8zLbQ/k9ILy3aqAkKDSEy9uQ
ChYCRF0nZxV1bf+XpKdPgS+FUWBmC2C1
VkmaBYznyVGynri=

< END >

2. **Please click here to e-mail us the server data block**.
Alternatively, highlight and e-mail support@relata.com the code between < START > and < END >, or e-mail us 'server.txt' (see point 3).
3. Click [Download Server Data Block] to download the server data block to your computer.
4. We will issue you a Relata license file upon receipt of the server data block.
5. We will contact you if the server data block contains multiple network adapters; otherwise, please specify the MAC address of the network adapter your web server uses.

Thank you for choosing Relata!

We prefer that you send us *server.txt* attached to an e-mail message, but the server data block can be transmitted via e-mail in the body of the e-mail. All contents are automatically encrypted for security.

Installing the ionCube Loader

Relata is encoded using proprietary ionCube technology. In order for **Relata** to run on your server, the ionCube PHP loaders must be installed. Although the ionCube loaders can be dynamically loaded by **Relata** for Linux installations, we recommend that you install the ionCube loaders on your system permanently (can be removed later, if needed) for optimal performance. Under safe-mode PHP (or if PHP dynamic loading is disabled) or Windows, you *must* install the ionCube loader permanently.

Installing the ionCube loader for your PHP version and operating system does not affect any other PHP software that is installed. PHP scripts encoded with ionCube technology are automatically detected and processed by the ionCube Loader. Other PHP scripts are processed normally.

Windows users: Please ensure that EasyPHP is running. There should be an 'e' with a blinking red dot in your Windows system tray, near the system time. If not, try starting EasyPHP by clicking *Start*, *All Programs*, *EasyPHP* and then *EasyPHP*.

Step 1 – Determine the path to php.ini

Linux:

From the *Relata Installation Helper*, note the path immediately after *Path to php.ini*. In our example, it's */usr/local/lib/php.ini*

Windows:
php.ini will be located in the following directory: *C:\Program Files\EasyPHP1-8\php*

Step 2 – Determine the version of PHP installed

Linux:

From the *Relata Installation Helper*, note the text immediately after *PHP Version* and *PHP Extensions Directory*. In our example, the PHP version is *4.4.1*. We are only interested in the major version: *4.4*. In our example, the path to the PHP extensions directory is: */usr/local/lib/php/extensions*

Windows:

If you are running EasyPHP 1.8, the version of PHP installed is *4.3.10* and the path to the extensions folder is *C:\Program Files\EasyPHP1-8\php\extensions*. We are only interested in the first two digits: 4.3.

Step 3 – Install the ionCube Loaders

For your convenience, we have bundled the ionCube loaders for Linux (x86 32-bit) and Windows in the **Relata** archive. They are located in the *ioncube* folder.

Alternatively, you can browse to http://www.ioncube.com/loaders.php and download the correct ionCube loaders for your operating system.

Copy the loaders in the *ioncube* folder (or from the downloaded archive) to the PHP extensions directory:

Linux:

Change into the directory containing the ionCube loaders.
 # cd /www/htdocs/relata/ioncube

Now copy the ionCube loaders to the PHP extensions directory:
*# cp * /usr/local/lib/php/extensions/*

Windows:

Browse into the directory where you extracted **Relata**, and then double-click on the *ioncube* folder. Select all the files in the *ioncube* folder and copy them to your PHP extensions folder:
C:\Program Files\EasyPHP1-8\php\extensions

Note: The *Relata Installation Helper* will indicate the exact filename of the ionCube loader that Relata requires.

Step 4 – Edit php.ini

Linux:

Type the following at a shell prompt:
 # vi /usr/local/lib/php.ini

/usr/local/lib should be replaced with the path to php.ini on your system (as determined in a previous step).

Windows:

i. Double-click on the EasyPHP icon in your system tray.
ii. Click the 'e' immediately to the left of the Apache button.
iii. Click *Configuration* and then *PHP*. php.ini should load in NotePad.

2. Scroll down and find the section called **Dynamic Extensions**.

Linux:

Scroll down by holding down *Control* and *F* on your keyboard, simultaneously. If you scroll too far forward, scroll back by holding down the *Control* and *B* keys simultaneously.

Press *i* on your keyboard to enter Insert mode, and this line into the file on a separate line (may vary – see output from *Relata Installation Helper* for the exact filename the ionCube loader requires):

zend_extension = /path/to/ioncube_loader_lin_4.4.so

Replace */path/to* with your PHP extensions directory. eg. */usr/lib/php4*
Replace *4.4* with the major version of PHP installed on your server.

Windows:

zend_extension_ts = "C:/Program Files/EasyPHP1-8/php/extensions/ioncube_loader_win_4.3.dll"

Be careful in entering the slashes – PHP expects UNIX-style forward-slashes. The exact file the system requires will be reported by the *Relata Installation Helper*.

Linux:

Exit your text editor. In vi, press *Esc* on your keyboard, then type a colon (*:*), followed by the characters *wq*. These commands tell the vi editor to write the file and then exit.

Windows:

Save the file using **File** and then **Save**, and then close NotePad.

Step 5 – Restart your web server

Restart your web server to ensure that the ionCube loader extension was loaded.

Linux:

 # service httpd restart

Windows:

1. Ensure that EasyPHP is running and in focus.
2. Click *Apache* and then select *Stop*.
3. Click *Apache* and then select *Start*.

Step 6 – Test the installation

Load your web browser and enter the URL to the *Relata Installation Helper*.

eg. *http://www.yourhost.com/relata/install//installhelper.php*

The text immediately beside *ioncube Loader* should now read *Installed*. If it doesn't read *Installed¸* you may need to verify that the ionCube loaders were copied to the PHP extensions

directory correctly and that the ionCube loader installed matches the version of PHP on your system. If you are going to use dynamic loading, ensure the ionCube loaders reside in the *ioncube* sub-folder of directory where you extracted **Relata**.

If you need additional help, contact our support team using the contact form on our web site (http://www.relata.com/). Include the version of the operating system you are running and also the version of PHP on your server. It's best to copy and paste the output from the *Relata Installation Helper* so nothing important is missing for us to diagnose the problem.

CONFIGURING RELATA

Once the ionCube loaders have been installed (or dynamically loaded) successfully on your system, you can start configuring **Relata**.

Note: If you like shortcuts, execute the *Relata Installation Helper* in the *install* directory. It will perform all of the following for you automatically, with some minor user intervention!

Creating the Relata Database and Tables

Ensure that MySQL has been installed on your server. To make database administration easier, optionally install phpMyAdmin (http://www.phpmyadmin.net).

Step 1 – Set up the MySQL db, host and user tables

We need to set up the MySQL db, host and user tables to allow secure access to the **Relata** database. This step is not mandatory. However, to secure your **Relata** installation, we highly recommend that you follow the instructions below.

Linux:

Type the following at a shell prompt:

 # mysql -u root -p mysql
Enter password: *******

root is a super-user account that has access to MySQL. The *-p* option tells MySQL to prompt for a password. If no password is set (default, but bad security), omit the *-p.*

At the mysql> prompt, enter the following (alternatively, use the SQL files located in the *scripts* sub-directory of the *install* directory – see Step 3 for syntax):

INSERT INTO `db` (`Host` , `Db` , `User` , `Select_priv` , `Insert_priv` , `Update_priv` , `Delete_priv` , `Create_priv` , `Drop_priv` , `Grant_priv` , `References_priv` , `Index_priv` , `Alter_priv`) VALUES ('localhost', 'relata', 'relata', 'Y', 'Y', 'Y', 'Y', 'N', 'N', 'N', 'N', 'N', 'N');

Next, enter the following query (only necessary for non-local installations):

INSERT INTO `host` (`Host` , `Db` , `Select_priv` , `Insert_priv` , `Update_priv` , `Delete_priv` , `Create_priv` , `Drop_priv` , `Grant_priv` , `References_priv` , `Index_priv` , `Alter_priv`) VALUES ('localhost', 'relata', 'N', 'N', 'N', 'N', 'N', 'N', 'N', 'N', 'N', 'N');

Finally, enter the following:

INSERT INTO `user` (`Host` , `User` , `Password` , `Select_priv` , `Insert_priv` , `Update_priv` , `Delete_priv` , `Create_priv` , `Drop_priv` , `Reload_priv` , `Shutdown_priv` , `Process_priv` , `File_priv` , `Grant_priv` , `References_priv` , `Index_priv` , `Alter_priv`) VALUES ('localhost', 'relata', PASSWORD('password') , 'N', 'N', 'N', 'N', 'N', 'N', 'N', 'N', 'N', 'N', 'N', 'N', 'N', 'N');
** Change the password! -- ^ (it must be in single quotes)

Windows:

1. Ensure EasyPHP is running and in focus.
2. Click the 'e' immediately to the left of the *Apache* button.
3. Click *Manage Database*, immediately beside the phpMyAdmin graphic.
4. The phpMyAdmin interface to MySQL should start.

Ensure that the *mysql* database is selected in the left drop-down menu and then click on the *SQL* image.
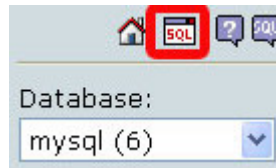
A new page will open with a text input field, which will allow you to execute SQL queries on the *mysql* database.

Enter all *three* (hint: copy and paste) SQL queries in the text input field and click *Go*. Alternatively, see Step 3 of this guide on how to make the necessary changes by uploading the *.sql files in the *install/scripts* directory.

INSERT INTO `db` (`Host` , `Db` , `User` , `Select_priv` , `Insert_priv` , `Update_priv` , `Delete_priv` , `Create_priv` , `Drop_priv` , `Grant_priv` , `References_priv` , `Index_priv` , `Alter_priv`) VALUES ('localhost', 'relata', 'relata', 'Y', 'Y', 'Y', 'Y', 'N', 'N', 'N', 'N', 'N', 'N');

The following statement is only required for non-local installs:
INSERT INTO `host` (`Host` , `Db` , `Select_priv` , `Insert_priv` , `Update_priv` , `Delete_priv` , `Create_priv` , `Drop_priv` , `Grant_priv` , `References_priv` , `Index_priv` , `Alter_priv` , `Create_tmp_table_priv` , `Lock_tables_priv`) VALUES ('%', 'relata', 'N', 'N', 'N', 'N', 'N', 'N', 'N', 'N', 'N', 'N', 'N', 'N');

INSERT INTO `user` (`Host` , `User` , `Password` , `Select_priv` , `Insert_priv` , `Update_priv` , `Delete_priv` , `Create_priv` , `Drop_priv` , `Reload_priv` , `Shutdown_priv` , `Process_priv` , `File_priv` , `Grant_priv` , `References_priv` , `Index_priv` , `Alter_priv`) VALUES ('localhost', 'relata', PASSWORD('password') , 'N', 'N', 'N', 'N', 'N', 'N', 'N', 'N', 'N', 'N', 'N', 'N', 'N', 'N');
** Change the password! --^ (it must be in single quotes)

Remember to replace *password* (with single quotes) with the password you wish to secure your **Relata** installation with. The password will be used in **Relata's** *config.inc.php* file to connect to the **Relata** database.

Step 2 – Create the Relata database

Linux:

Type the following at a shell prompt:
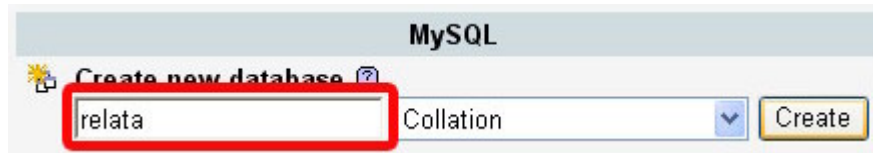*# mysqladmin –u root –p create relata*
Enter password: *******

root is a super-user account that has access to MySQL. The *-p* option tells MySQL to prompt for a password. If no password is set (default, but bad security), omit the *-p*.

Windows:

Start the EasyPHP interface and then click on the 'e' immediately beside the *Apache* button. Click on the *Home* icon beside the *SQL* icon on the left-hand frame.

In the *Create new database* field, enter the database name that you want **Relata** to use. Click *Create*.

Step 3 – Create the Relata tables

Linux:

Type the following at a shell prompt:

 # mysql –u root –p relata < relata.sql
Enter password: *******

root is a super-user account that has access to MySQL. The *-p* option tells MySQL to prompt for a password. If no password is set (default, but bad security), omit the *-p*. The *< relata.sql* portion tells MySQL to read the SQL queries from the *relata.sql* file.

Windows:

Ensure that the *relata* database is selected in the left drop-down menu.

Click on the *SQL* tab in the right-hand frame. Browse for the path to *relata.sql* – the file should be in the *scripts* sub-directory in the *install* directory in the path that **Relata** was extracted. Click *Go* and wait a few seconds while the **Relata** tables are created.

Editing config.inc.php

Note: If you like shortcuts, execute the *Relata Installation Helper* in the *install* directory. It will perform all of the following for you automatically, with some minor user intervention!

Step 1 – Determine the path to your Relata installation

Linux:

Change into the directory where **Relata** resides. See the output from the *Relata Installation Helper* to determine the directory.

eg.
 # cd /var/www/html/relata

Windows:

Change into the directory where **Relata** resides.

The path where you installed **Relata** should be: *C:\Program Files\EasyPHP1-8\www\relata*

Step 2 – Open config.inc.php

We will need to change some settings in *config.inc.php*

Linux:

Ensure that *config.inc.php* in is the current directory:

 # ls config.inc.php

If you don't see *config.inc.php* in the output, you are not in the correct directory.

Next, load *config.inc.php* in your favorite text editor:

 # vi config.inc.php

Windows:

Double-click on *config.inc.php* and select it to open (*Open With*) with a Windows text editor (eg. Wordpad).

Step 3 – Make some changes to config.inc.php

We need to configure a number of settings, starting at the top of the file.

i. Specify external **Relata** URL and SMTP host.

```
$web_dir = "http://www.yourhost.com/relata/";
```

Specify the external path from which **Relata** will be accessible. You can obtain this directory from the *Relata Installation Helper*. It will follow *Relata Installation URL*.

```
$smtphost = "localhost";
```

Specify the location of the mail server (Linux: usually localhost). Windows users: change to your ISP's SMTP server: mail.yourhost.com

ii. Modify the database settings

```
$db_name = "relata";
$db_host = "localhost";
$db_username = "relata";
$db_password = "yourpassword";
```

For $db_name, specify the name of the **Relata** database: "*relata*"

For $db_host, specify where the **Relata** database resides. For an installation where the web server and MySQL server are on one computer, specify: *"localhost"*. Otherwise, specify the hostname or IP address of the MySQL server. If your MySQL server resides on a port other than 3306, enter a colon followed by the port number (eg. :3701)

For $db_username, specify which MySQL user has access to the **Relata** database: *"relata"*

For $db_password, specify the password associated with the MySQL user: *"password"*

iii. Modify support settings

```
$support_module = "on";
$relata_support = "Relata Support";
$relata_contact = "support@relata.com";
$admin_contact = "your@emailaddress.com";
```

For *$support_module*, you can set it to *"on"* or *"off"*. Your users will be able to use the **Relata** support module to contact our support team via e-mail. You can also set this up to contact your company's help desk for common questions, who can in turn contact us for technical questions. Setting it to *"off"*, will prevent the support module from appearing in the **Relata** toolbar.

For *$relata_support*, you can set it to "Relata Support" or to "Help Desk" or your name.

For *$relata_contact*, you can leave this as-is to direct all support inquiries from your users to the **Relata** support team. Otherwise, you can specify the e-mail address for your help desk.

For *$admin_contact*, you can set this to the e-mail address of the **Relata** administrator, usually the individual in charge of deploying **Relata**. A copy of every **Relata** account will be sent to the specified e-mail address for backup purposes (or in the event that a user doesn't receive a username/temporary password). **Relata** e-mails for new accounts will appear to come from the specified e-mail (and also set as the reply-to address).

iv. Enable / Disable Relata modules

```
// ** Relata Lite
$contact_module      = "on";
$activity_module     = "on";
$groupemail_module   = "on";
$notes_module        = "on";

// ** Relata Pro
$account_module      = "on";
$outcomes_module     = "on";
$logs_module         = "on";
```

*// ** Relata Enterprise*
$km_module   = "on";
$fm_module   = "on";
$upload_dir = "/var/www/html/relata/upload/";

The above modules are controlled by the **Relata** license that you purchased. You can disable a module from displaying in the **Relata** toolbar by setting it to *"off"*.

Linux:

The upload directory should be the path to your **Relata** installation, with *upload* appended to the end: */var/www/html/relata/upload/*

The trailing backslash (/) must be present.

Windows:

The upload directory should be the path to your **Relata** installation, with *upload* appended to the end: *C:/Program Files/EasyPHP1-8/www/relata/upload/*

The trailing backslash (/) must be present.

v. Enable / Disable Global Modules

$resync_module   = "off";
$msgs_module   = "on";
$stats_module   = "on";
$backup_module   = "on";

Global modules are not governed by your **Relata** license and can be enabled or disabled as you please. For example, to prevent the **Resync** module from being displayed in the **Relata** toolbar, set it to *"off"*.

Step 4 – Save changes to config.inc.php

Linux:

Using vi: press *Esc* on your keyboard, followed by a colon (:) and then the characters *wq*

Windows:

Save the file by clicking **File** and then **Save**, and then close the text editor.

Step 5 – Test Relata installation

Load the **Relata** URL in your browser. Eg. *http://www.yourhost.com/relata/*

You will be presented with the **Relata** login page:

If you don't get presented with the **Relata** login page, double-check the value you specified for *$web_dir*.

CREATING A RELATA ACCOUNT MANAGER

Relata should be installed and configured on your system before continuing.

Step 1 – Open your web browser and go to the Relata sign-up URL

Open your browser and type in the path to your **Relata** installation. Append *signup* to the end of the URL and press enter. For example: *http://www.yourhost.com/relata/signup/.* You should be presented with the *Create Relata Account Manager* page:

Create Relata Account Manager

The Relata Account Manager can login to Relata and create new users. Account Managers can be created for each department or unit in your organization.

This directory ('signup') should be protected with a password to prevent users from creating their own Relata accounts. You may even delete the /signup directory after you have created a Relata Account Manager account.

Enter Your Personal Information

First Name:	
Last Name:	
E-mail:	
Confirm E-mail:	

Please enter your department name (eg. Sales):

Department Name:

[Continue]

☐ I accept the end-user license agreement

Enter your first name and then your last name. Next, enter your e-mail address and then type it again for confirmation.

The e-mail address is where your temporary **Relata** password will be e-mailed. You will be able to change your temporary password upon logging into **Relata** for the first time. Also, enter your department name or simply enter your name if you don't have a department or are using **Relata** for personal use.

Read the end-user license agreement and click *I accept the end-user license agreement.* Finally, click *Continue* to continue on to Step 2.

Enter a username for your **Relata** account.

Your username can contain alphanumeric characters, but it cannot contain extended characters or spaces.

You can also choose populate your **Relata** account with sample data. If you wish to do so, check *Populate the database with sample data (recommended)*.

Click *Continue* to proceed with creating your **Relata** account.

If the **Relata** username you have selected has been taken, you will be presented with the following page:

If your **Relata** username is available, you will be presented with the following page for a few moments while your **Relata** account is created:

Once your **Relata** account is ready, you will be presented with the following page:

Click *Continue* to continue to the **Relata** login page. Check your e-mail for your temporary **Relata** password. Once you login to **Relata**, you will be prompted to change your temporary password.

Remember to secure the *signup* and *install* folders with a password (see Apache's htaccess documentation) or remove them completely (after archiving them) if no other **Relata** Account Managers will be created.

See the *Relata User Guide* for instructions on creating **Relata** users under your account. You will be able to login to **Relata** and view your users' productivity, as well various reports and statistics.

USING RESYNC WITH RELATA

Before continuing, ensure you have downloaded *Resync (Relata Edition)*. The *Relata Edition* of *Resync* is a special version designed for *Relata Lite*, *Relata Pro* and *Relata Enterprise*. Other versions of *Resync* that you may have downloaded in the past will not work. If you are using *Relata Online*, remember to download *Relata.dat* from the *Downloads* section of the **Relata** web site.

Once you have downloaded *Resync (Relata Edition)*, it should be installed on your system. It can be launched via the *Resync (Relata Edition)* icon on your desktop.

Once *Resync (Relata Edition)* is launched, you will be presented with the following window:
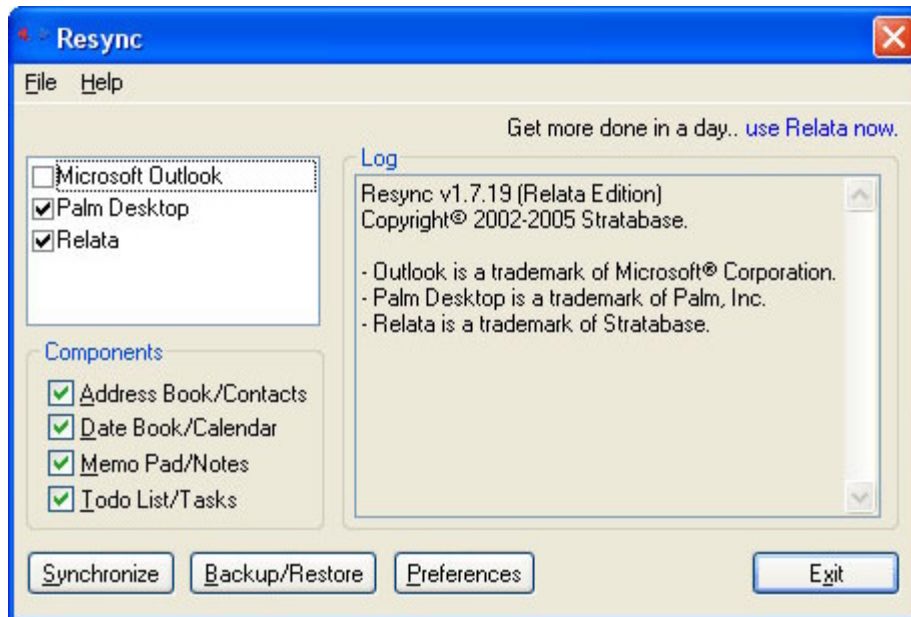
The main window consists of four panels.

The left top-most panel contains the names of applications that **Relata** can be synchronized with. For example, to synchronize **Relata** with Palm Desktop, select *Relata* and *Palm Desktop*.

Note: Only Palm Desktop 4.01 and 4.1 SP3 are supported, and Microsoft Outlook versions 2000 through 2003 SP1 are supported.

The left middle panel contains the names of components that you can synchronize against. The Address Book synchronizes with the **Relata** Contact Manager, the Date Book and Todo List components synchronize with the **Relata** Activity Manager, and Memo Pad synchronizes with **Relata** Notes.

The right-most panel is the *Log* panel, which displays output messages from the application.

The bottom-most panel contains four buttons: *Synchronize*, *Backup/Restore*, *Preferences* and *Exit*. All of the aforementioned features are documented in the included help file. This section only focuses on setting up the **Relata** plug-in for use with **Relata**.

Configuring the Relata Preferences

To begin configuring the **Relata** preferences, double-click *Relata* in the left top-most *Resync* panel.
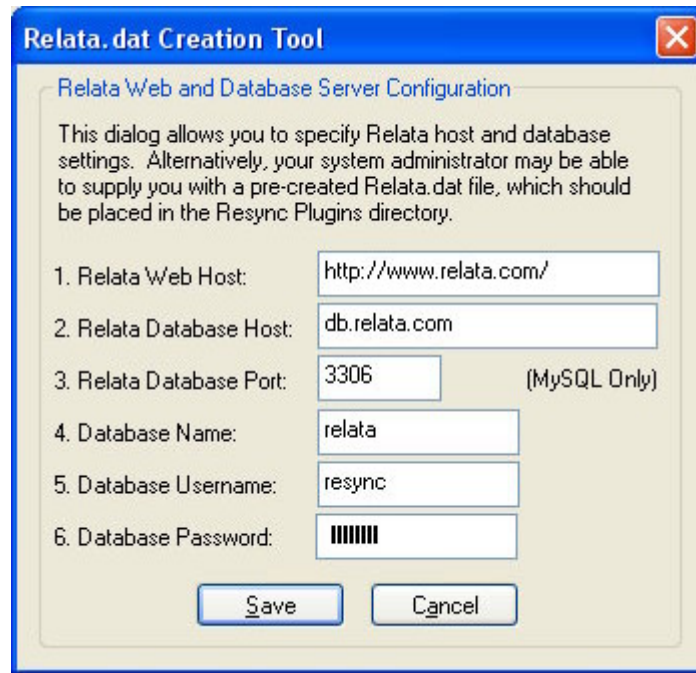
The *Relata Preferences* panel should appear (covers the *Log* panel):
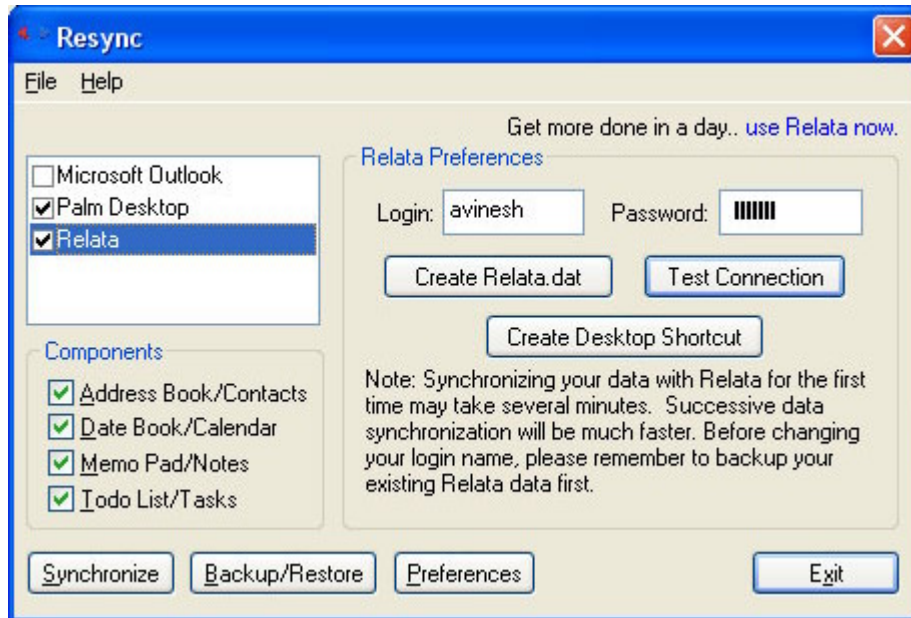
From the *Relata Preferences* panel, you can specify your **Relata** login settings, create the R*elata.dat* file necessary to connect to the **Relata** database server, create a desktop shortcut to **Relata** and also test the connectivity between your machine and the **Relata** database server.

Creating the Relata Server Configuration File

Click *Create Relata.dat* to launch the *Relata.dat Creation Tool.* You will be presented with the following window:

From the *Relata.dat Creation Tool* window, you will need to specify several settings in order for *Resync* to connect to the **Relata** database server. Settings are stored in encrypted form, in *Relata.dat.*

Note: If you are creating *Relata.dat* for a co-worker, it must reside in the *Resync plugins* folder (eg. *C:\Program Files\Stratabase\Resync\Plugins* – default folder) once you are done creating it.

The *Relata Web Host* is the external URL from which **Relata** is accessible. This should be the same value as what was set for *$web_dir* in *config.inc.php.* It is also the hostname that is used by the *Create Desktop Shortcut* button.

The *Relata Database Host* is the host on which the **Relata** database resides.

The *Relata Database Port* should be set to 3306, which is the default MySQL port.

Note: Port 3306 should also be open on the server's firewall to permit communication with external clients running *Resync.* Otherwise, all attempts to connect to the **Relata** database server from *Resync* will fail. The MySQL *host* table will also need to be updated with a new statement that reflects which hostnames are allowed to connect to the MySQL server. See the *Allowing Remote Access to the Relata Database* section for more details.

The *Database Name* is the name of the **Relata** database on the **Relata** database server.

The *Database Username* is the username required to connect to the **Relata** database from an external client running *Resync.*

The *Database Password* is the password that is required to connect to the **Relata** database from an external client running *Resync*. This should not be blank and should be up to 16 alphanumeric characters.

Click *Save* to write the settings to *Relata.dat*. If a co-worker unintentionally accesses the *Relata.dat Creation Tool*, they can click *Cancel* to leave the existing settings as-is. For security, the *Relata.dat Creation Tool* will pre-populate the fields with the default values each time it is loaded (but not overwrite or save them unless *Save* is clicked).

Testing the Relata Preferences

Once *Relata.dat* has been created, the **Relata** login and password can be entered in the *Relata Preferences* panel.

Click *Test Connection* to test the connection between a client PC and the **Relata** database server. It may take several seconds to connect.
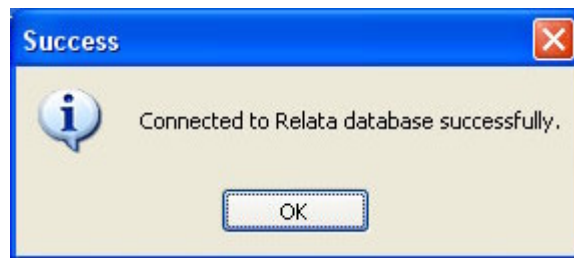
If you see the above window, *Resync* has successfully connected to the **Relata** database. If not, check your *Relata.dat* configuration and also ensure that port 3306 is open for inbound and outbound TCP traffic on your **Relata** database server.

For more information on using *Resync* with **Relata**, please see the *Relata User Guide*.

Allowing Remote Access to the Relata Database

In order for remote users to access the **Relata** database, a couple of **MySQL** tables need to be updated. See the section called *Creating the Relata Database and Tables* for information on accessing the MySQL interface from the command-line or via phpMyAdmin.

Note: The *Relata Installation Helper* can make all of the following changes automatically.

Updating the *db* table

The MySQL *db* table needs to be updated with the following SQL query:

INSERT INTO `db` VALUES ('%', 'relata', 'relata', 'Y', 'Y', 'Y', 'Y', 'N', 'N', 'N', 'N', 'N', 'N');

The first parameter denotes that any host may access the **Relata** database. For security, individual hostnames *are* recommended, but may become cumbersome with hundreds of hosts.

The second parameter denotes that the **Relata** database is called *relata*. Change this to name you gave the **Relata** database (*Relata.dat: Database Name*).

The third parameter is the username (*Relata.dat: Database Username*) that is required to connect to the **Relata** database.

Updating the *host* table

The MySQL *host* table needs to be updated with the following SQL query:

INSERT INTO `host` VALUES ('%', 'relata', 'N', 'N', 'N', 'N', 'N', 'N', 'N', 'N', 'N', 'N');

The first parameter denotes that any host may *not* access the **Relata** database *by default*. The rule set in the *db* table permits access *only* if the correct username and password are supplied.

The second parameter denotes that the **Relata** database is called *relata*. Change this to name you gave the **Relata** database (*Relata.dat: Database Name*).

Updating the *user* table

The MySQL *user* table needs to be updated with the following SQL query:

INSERT INTO `user` VALUES ('%', 'relata', password('password'), 'N', 'N', 'N', 'N', 'N', 'N', 'N', 'N', 'N', 'N', 'N', 'N', 'N', 'N');

The first parameter denotes that any host may access the database *server*, provided they have the correct username and password. Otherwise, they are denied access.

The second parameter is the username (*Relata.dat: Database Username*) that is required to connect to the **Relata** database.

The third parameter is the password (*Relata.dat: Database Password*) that is required to connect to the **Relata** database. Replace *'password'* with the password you choose (single quotes are required). The password will be stored in encrypted form.

Finally, ensure that your network administrator has opened port 3306 on your organization's firewall to allow incoming and outgoing TCP access to the **Relata** database server.