LaborKey
Version 4.0

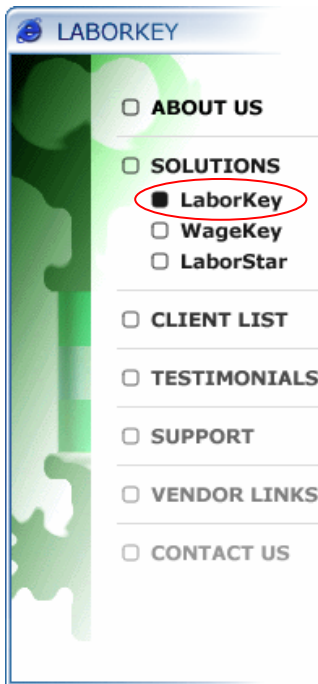## Installation Guide

4.01a
FEB 2007

Install LaborKey Software

Activate LaborKey Service

Create LaborKey User Accounts

Install LaborKey on Multiple Stations

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Step 1 – *download LaborKey setup files*

LABORKEY

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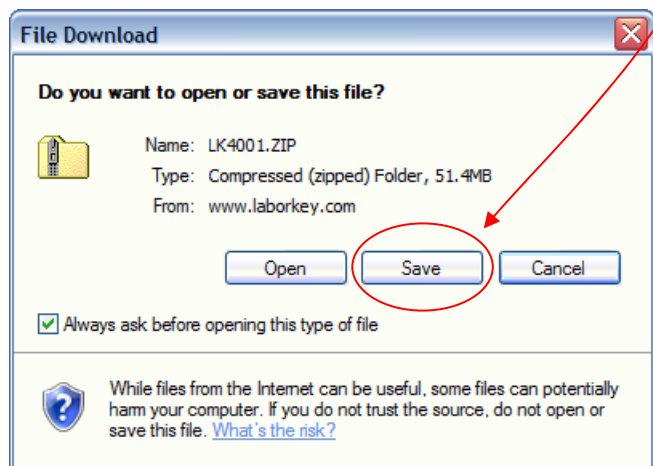- ☐ TESTIMONIALS
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Open an internet browser, such as Internet Explorer.

Proceed to www.laborkey.com. When the LaborKey website appears, you should see a menu as illustrated to the left. Select the menu option **LaborKey**. On the web page which appears, you should see the option:
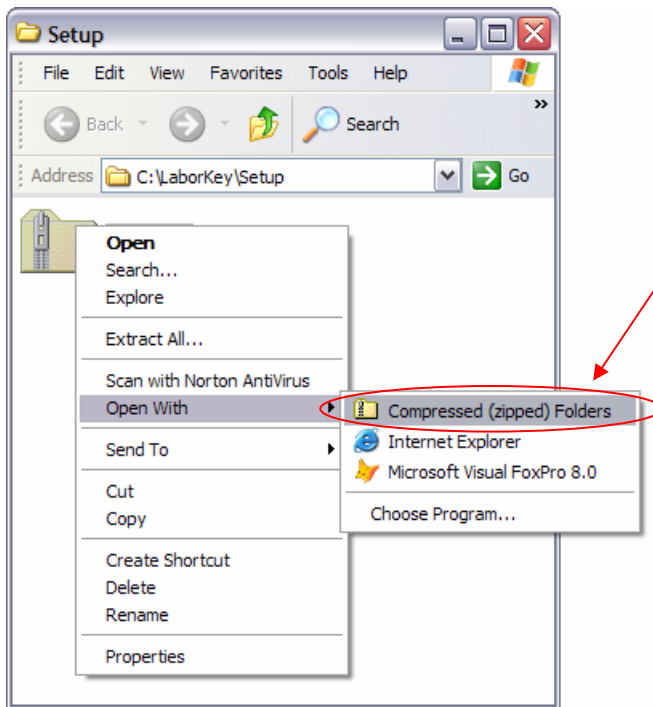
"The most current LaborKey setup files can be downloaded here ..."

Click the link labeled "downloaded" to begin downloading a compressed LaborKey setup file. You will be prompted to either **Open**, **Save**, or **Cancel** the file download, as illustrated below. Click the **Save** button, and make sure you remember where you save the compressed setup file.

Important: *If you wish to install LaborKey on multiple computer stations on a shared network, save the compressed setup file to a directory accessible to all computer stations which will have LaborKey installed.*

File Download

Do you want to open or save this file?

    Name: LK4001.ZIP
    Type: Compressed (zipped) Folder, 51.4MB
    From: www.laborkey.com

[Open]   [Save]   [Cancel]

☑ Always ask before opening this type of file

While files from the Internet can be useful, some files can potentially harm your computer. If you do not trust the source, do not open or save this file. What's the risk?

Step 2 – *extract LaborKey setup files*

After the compressed setup file is finished downloading, right-click on the compressed file to open a shortcut menu with options as illustrated to the left. In the illustration, the option **Open With ▶ Compressed Folders** is selected. Your Windows environment might not have this option for extracting files. The following are options which might be available in your Windows environment:

- **Open With ▶ Compressed Folders**
- **WinZip ▶ Extract to archive**
- **WinZip ▶ Extract to folder**
- **PKZip ▶ Extract to archive**
- **Extract All …**

If you do not see any of these options in the shortcut menu, then you probably need to download a compression (zip) utility. *(Do NOT install software without first talking with your network administrator!)* There are a number of excellent zip utilities available that have good Help systems and supporting Web sites, including the following: **PentaZip**, **PicoZip**, **PKZip**, **PowerArchiver**, **Stuffit**, and **WinZip**. If you are not sure which utility to use, most programs offer a 30-day limited period where you can download and try the utility for free.

Extract (or "unzip" or "decompress") the contents of the compressed setup file to an appropriate directory – typically the same directory where you saved the compressed setup file. If you will be installing LaborKey on multiple computer stations, extract the contents to a directory accessible to all computer stations which will have LaborKey installed.

Ask you network administrator for assistance if needed.

After extracting the contents of the compressed file, make sure that you can find the **four** extracted files as illustrated to the right.
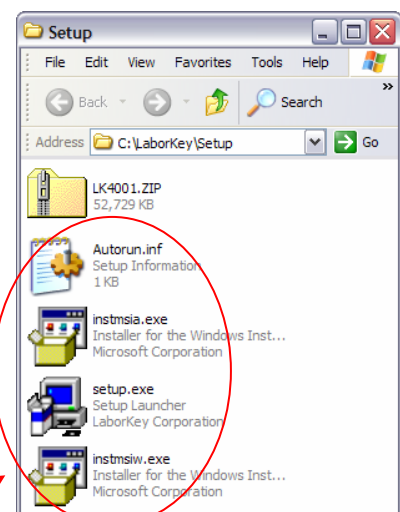
Step 3 – *install LaborKey software*
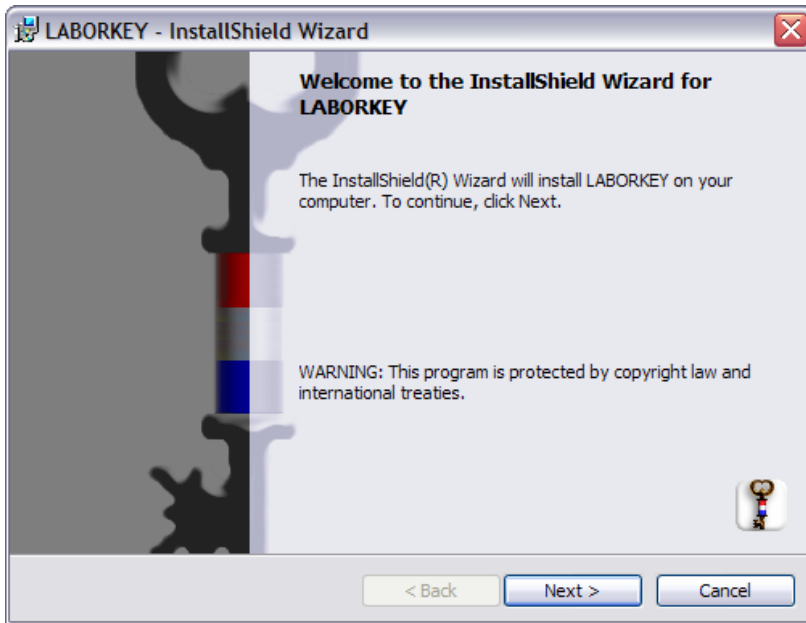
Double-click the extracted file **setup.exe**, which is illustrated at the bottom of page 4.

The dialog illustrated to the left should appear. Click the button **Next >** to install LaborKey software. When the installation is completed, click the button **Finish**.

If the installation is successful, a **"LaborKey 4"** shortcut icon should appear both on the desktop and on the start menu under **All Programs**.

LaborKey 4
(desktop icon)

LaborKey 4
(start menu icon)

*Note: If these shortcuts do not appear, or if you believe for any reason that the software did not install properly, then proceed to the **Add or Remove Programs** wizard in the Windows **Control Panel**, and click the **Remove** button under LABORKEY. Then reinstall the software per the instructions at the top of Step 3 above. If you ever experience problems when opening LaborKey software, it is completely safe to uninstall LaborKey software and reinstall the software in this manner. When uninstalling LaborKey, NO data or configuration information are lost.*

Step 4 *– run LaborKey software*

To run LaborKey software, double-click the **"LaborKey 4"** shortcut icon on the desktop or on the start menu under **All Programs**.

LaborKey 4
(desktop icon)

  LaborKey 4
(start menu icon)
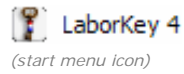
Step 5 – *select data directory & "base state"*

The first time you run LaborKey, or if the directory containing the LaborKey database files is ever moved or deleted, the **LABORKEY CONFIGURATION WIZARD** screen appears as illustrated below. This screen is necessary because the software cannot open if it does not know where to find the LaborKey database.

Under Step #1, click the **SELECT** button to select the directory where you would like the LaborKey database to be located. If LaborKey will be installed on multiple work stations, you should choose a data directory accessible to all LaborKey installations over the network. If you would like this LaborKey installation to access an existing LaborKey database, select the existing LaborKey data directory.
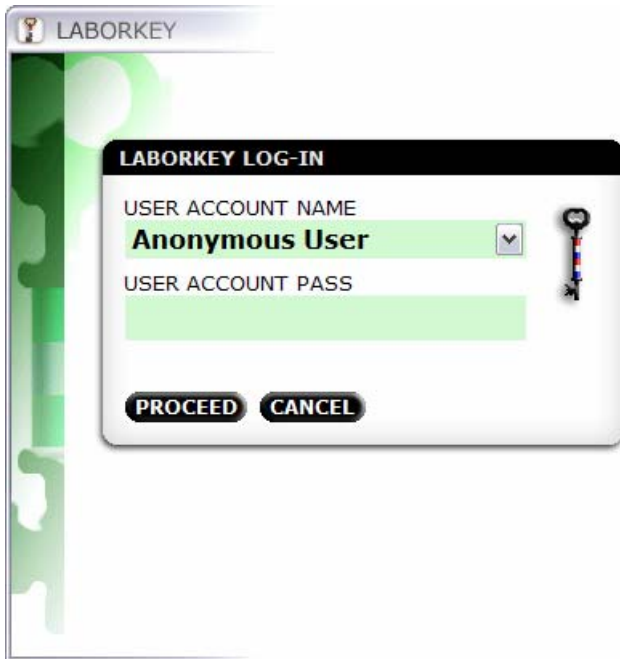
Note: If you select an existing data directory, and if another installation of LaborKey which accesses this same data directory has already been fully activated, then you can click PROCEED after selecting the data directory, and this installation is finished. Otherwise, continue following the instructions on the following page.

Under Step #2, select the **BASE STATE** which makes most sense for you. This would be the state where you conduct the most political activity.

Under Step #3, select the type of member id field you will be using. It is usually preferable to select **"MEMBER ID"**, even if the local member id field is actually a social security number. A social security number can be mapped to the member id field. *(Eventually all labor organizations should convert to non-ssn id systems.)*

Click the **PROCEED** button when these three steps are completed. The **LABORKEY LOG-IN** screen will appear. *(See Step 6 on the following page.)*

Step 6 – *log in to LaborKey*

Until user accounts are created (see Step 8), the **LABORKEY LOG-IN** screen displays **"Anonymous User"** as the default and only available user account name.

To log in, type **"YEK"** for temporary administrative level access. Administrative level access is required for Step 8 – creating LaborKey user accounts. Logging in with the password "KEY" would also provide access, but only with basic access privileges, which would not be adequate for these instructions. After real user accounts will be created in Step 8, the temporary passwords "YEK" and "KEY" will no longer provide access.

Step 7 – *select & activate service options*

Until service plan options are selected, submitted, and activated from this illustrated **CONFIGURATION – service plan** screen, this screen will appear every time you log in to LaborKey. At a minimum, you must activate the first option – **LaborKey software** (freeware …). Otherwise, you will not be permitted to access other LaborKey features.

First provide **BILLING ACCOUNT INFORMATION** at the bottom left. Only items flagged with a red asterisk are required. If only the freeware option (LaborKey software) is selected on the right, and if no other service is requested from LaborKey Corporation, you will not be billed.

Select the service plan options you would like to activate in the **SERVICE PLAN OPTIONS** module. For more information about the various service plan options, click **PREVIEW** or **PRINT** to produce a document which summarizes all the service plan options in detail. *(This document is for your reference only, and it reflects the terms you will need to agree to electronically. LaborKey Corporation does not keep paper service plans or signed contracts on file for standard LaborKey services.)*

When you are satisfied with the service plan option selections, fees, and minimum periods, click the **AGREE, SUBMIT, & ACTIVATE** button to review terms, agree to terms and fees, submit this information to LaborKey Corporation, and activate the services selected.

LaborKey "END USER AGREEMENT"

LABORKEY END USER AGREEMENT

01) SERVICE FEES

Fees for LaborKey's standard data services are summarized on the LaborKey "service plan" screen. The end user (client), whether an individual or an organization, understands that by agreeing to, activating, and submitting service plan option selections from the "service plan" screen, the user is accepting responsibility for service plan fees for the minimum periods specified on the screen. Service fees will be invoiced each month, typically on the 10th of the month.

02) SUPPORT FEES

LaborKey representatives will certainly answer brief questions by phone or email at no charge. The support fees listed below will apply for additional support. Keep in mind that it is often impossible for LaborKey to assist by performing data management tasks on behalf of users. When possible, LaborKey will schedule assistance, and the following support fees will apply. Support fees will be included on the monthly invoice for service fees.

- hourly fee for phone support: $80
- hourly fee for data synchronization config.: $80
- hourly fee for data processing work: $120
- flat fee for remote web-based connection: $45
 (this fee applies if a LaborKey representative determines that
 a web-based session is the most appropriate means of support,
 and if the support is not related to "errors" in the software code)

03) VOTER REGISTRATION DATA PREPARATION FEES

In most states, clients are responsible for securing updated copies of their statewide voter registration files and forwarding them to LaborKey Corporation for integration into the LaborKey system. LaborKey standardizes, cleanses, and integrates

◉ I have not read the END USER AGREEMENT above, I do not understand it, or I do not agree to the terms contained therein.
○ I have read the END USER AGREEMENT above, I understand it, and I agree to the terms contained therein.

Print "END USER AGREEMENT" PROCEED CANCEL

Clicking the **AGREE, SUBMIT, & ACTIVATE** button opens the **LABORKEY END USER AGREEMENT** screen illustrated above. You can print a copy of the terms of the agreement for your records by clicking the **Print "END USER AGREEMENT"** button. After you have read either the scrollable text on the screen or a printed copy, and when you are ready to agree to the terms of the agreement, (1) select the second radio button option indicating you have read and agree to the terms, and then (2) click the **PROCEED** button to finalize the agreement and submit the information to LaborKey Corporation. Make sure you are connected to the internet before clicking **PROCEED**.

Note: If your firewall(s), network security, internet security, or spyware protection software prevents LaborKey software from accessing LaborKey's remote secure server in Washington D.C., you might need to reconfigure your protective software services to allow connections to an FTP server address range of 66.151.111.1 - 66.151.111.255. Contact your network administrator for assistance. LaborKey software connects up to the FTP server very briefly when opened to detect for updates, and FTP connections are required for various features which require resources off the FTP server. LaborKey Corporation absolutely cannot log in and access the local membership database.

If you have selected to activate **"Basic"** LaborKey service, LaborKey Corporation will need to activate your access to the voter file data remotely, because this data might be protected by third-party data agreements, and voter file access

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permissions must be verified for the protection of the clients who have secured the voter files by signing restrictive contracts with third-party vendors. (Read the **END USER AGREEMENT**, for much more detailed information.) To expedite activation of full **"Basic"** LaborKey service, email LaborKey Corporation at support@laborkey.com. Include the words "laborkey" and "activation" in the email subject line, and include your organization name and primary contact name in the message. Service should be fully activated within a day, usually within a couple hours.

The remaining steps in this Installation Guide are not impacted by the remote activation of any service; feel free to continue.

Step 8 – *create LaborKey user accounts*
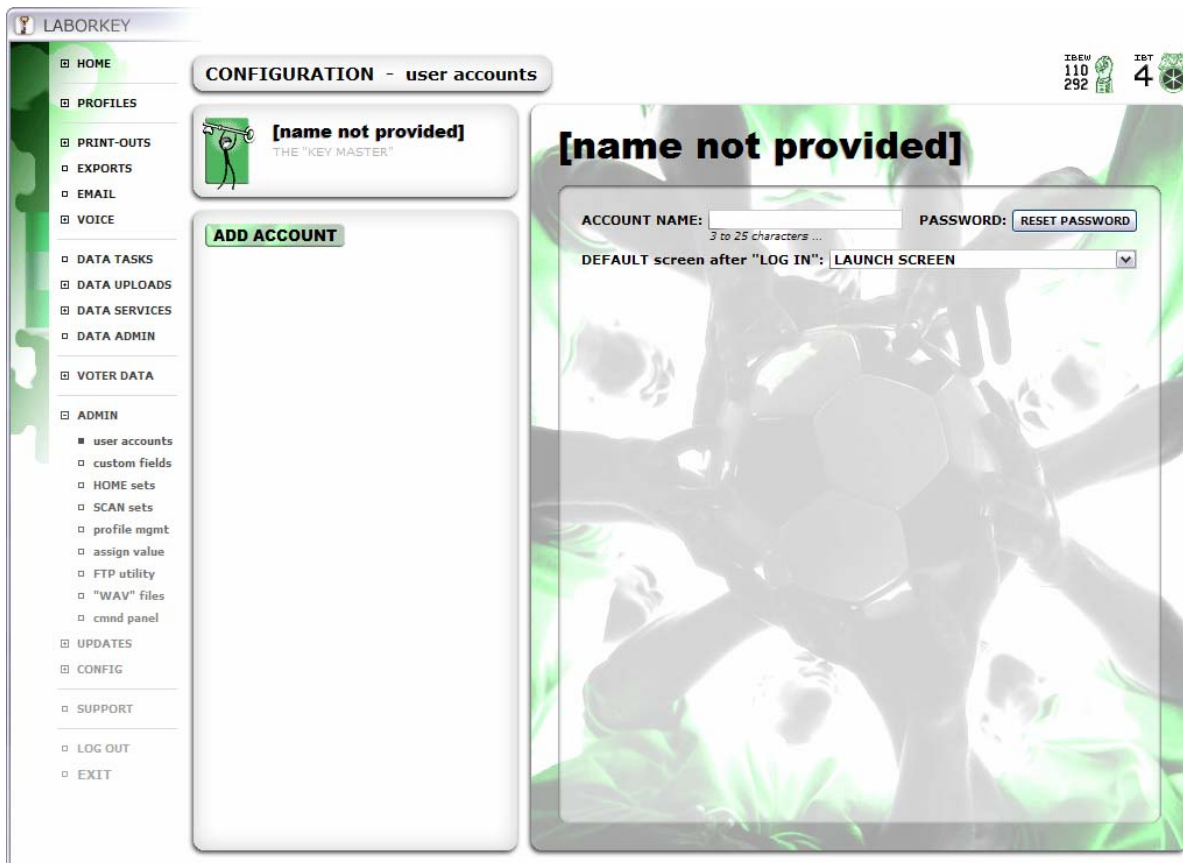
You must still be logged with the password **"YEK"** to create the initial LaborKey user accounts in this step. If user accounts have already been created for the LaborKey data directory selected in Step 5, then you must be logged in with your administrative password if you would wish to add, modify, or delete user accounts.

This screen is accessed by selecting the **user accounts** option under the **ADMIN** item on the LaborKey menu. Initially, if no user accounts have been created, the screen will appear as illustrated above, with no user accounts displayed under the **ADD ACCOUNT** button on the left.

Initially, when you arrive at this screen, the "KEY MASTER"© is selected at the top left. The KEY MASTER is not actually a user account. Whoever logs in with the KEY MASTER password has full access to all activated features in the software, and only this person can see this screen and control the other user accounts. Also, the KEY MASTER's account name does not appear in the **LABORKEY LOG-IN** screen as an option, because this person might need to assist multiple users, logging in to multiple computer stations, and it would be impractical to have to always select the user account name on each station. When the KEY MASTER password is entered in

the log-in screen, the displayed user account name is disregarded by the software. For all other user accounts, the software remembers who last logged in on a particular computer station, and the prior logged user account name is displayed by default. *(The term "KEY MASTER" is a by-product of the graphic of the person holding the key combined with a peculiar sense of humor of the programmer. You can refer to this person as the administrator if you prefer.)*

The only options displayed on the right side of the screen for the KEY MASTER are the account name, password, and the initial default screen (the screen to initially appear when logging in to LaborKey). Provide all three. ***Important!*** *You must remember the KEY MASTER password, because if any other user forgets their password, the KEY MASTER password will be required to reset the user's password.*

After completing the information for the KEY MASTER, click the **ADD ACCOUNT** button to add the first user account. Options for the user account will display on the right side of the screen. In the illustration below, user account information for "John Smith" has been specified. And the buttons **APPLY ACCOUNT** and **CANCEL ACCOUNT** are displayed at the bottom.
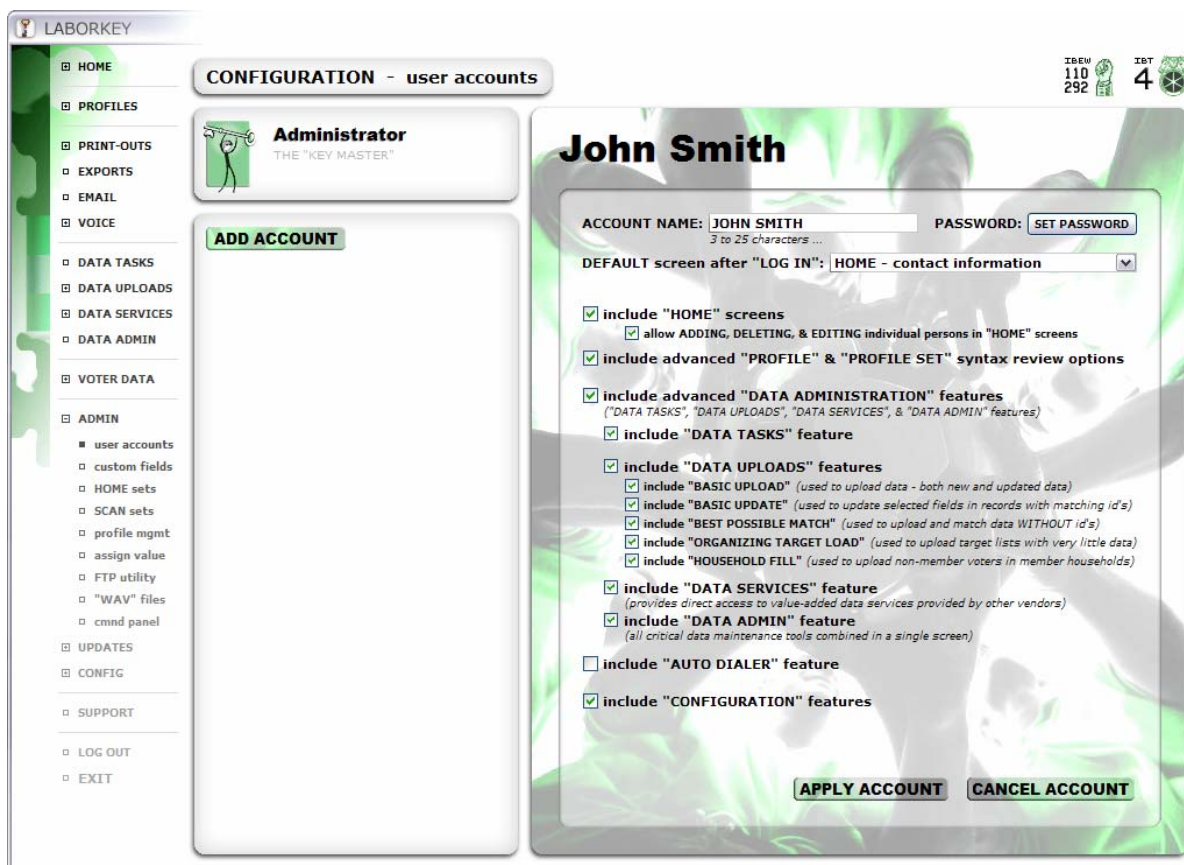
In the following illustration, the "John Smith" user account has been applied by clicking the **APPLY ACCOUNT** button, and a "Jane Doe" user account has been added by repeating the same steps. There is no limit to the number of user accounts which can be added. All user accounts are displayed on the left side of the screen in alphabetical order. Accounts (or the KEY MASTER) can be selected to be reviewed, modified, or deleted by clicking on the listings on the left.
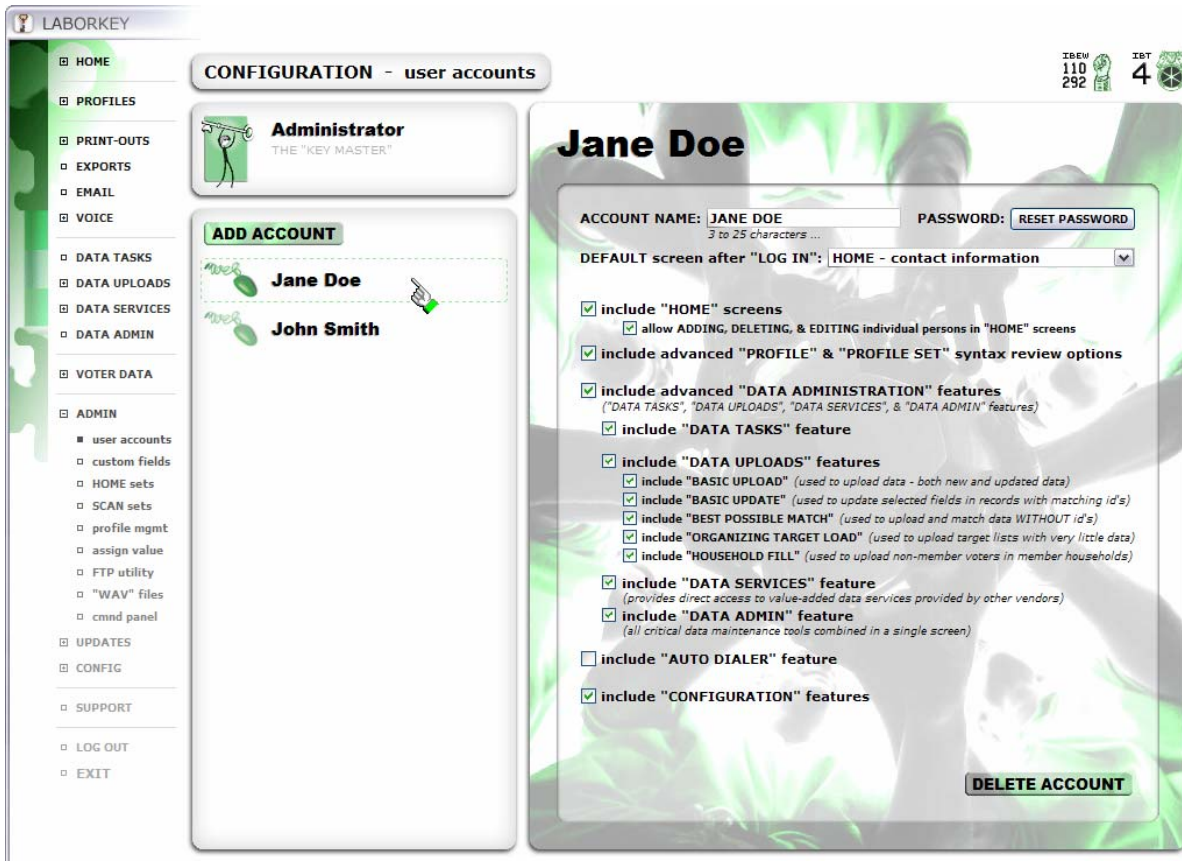
With time, additional settings/options will be provided for individual user accounts, administrative features will be added for monitoring user accounts, and users will soon have the ability to track their own selection profiles and personalize more of the LaborKey experience. Therefore, it would be worthwhile to add individual user accounts for the most regular users of the software. However, any number of persons can log in to the same user account profile at the same time, and so categorical user accounts can be used as well. For instance, a single simple user account for volunteers would be much more practical than setting up individual user accounts for each volunteer.

Step 9 – *exit LaborKey and log back in*
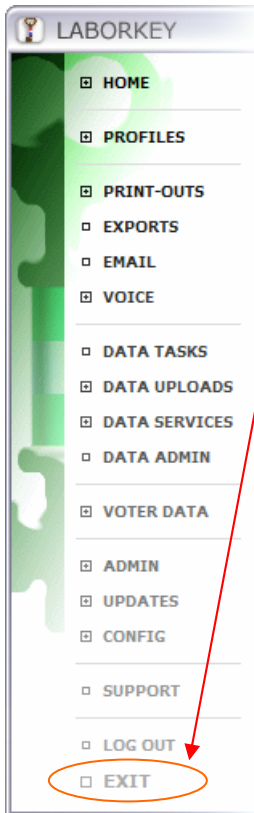
In order for the selected service activations (see Step 7) to take effect, you need to exit LaborKey software and log back in. Click the **EXIT** item in the LaborKey menu to exit the software.

Double-click the **"LaborKey 4"** shortcut icon on either the desktop or in the **All Programs** submenu of the start menu to reopen LaborKey software (see also Step 4).

The **LABORKEY LOG-IN** screen will appear. It may appear as illustrated in Step 6, or it may appear as a custom log-in screen for your particular labor union profile, such as the custom SEIU log-in screen illustrated below.

Select a user account from the **USER ACCOUNT NAME** dropdown, and then enter the **USER ACCOUNT PASS** and click the **PROCEED** button to enter LaborKey software.

You are finished with this LaborKey installation!
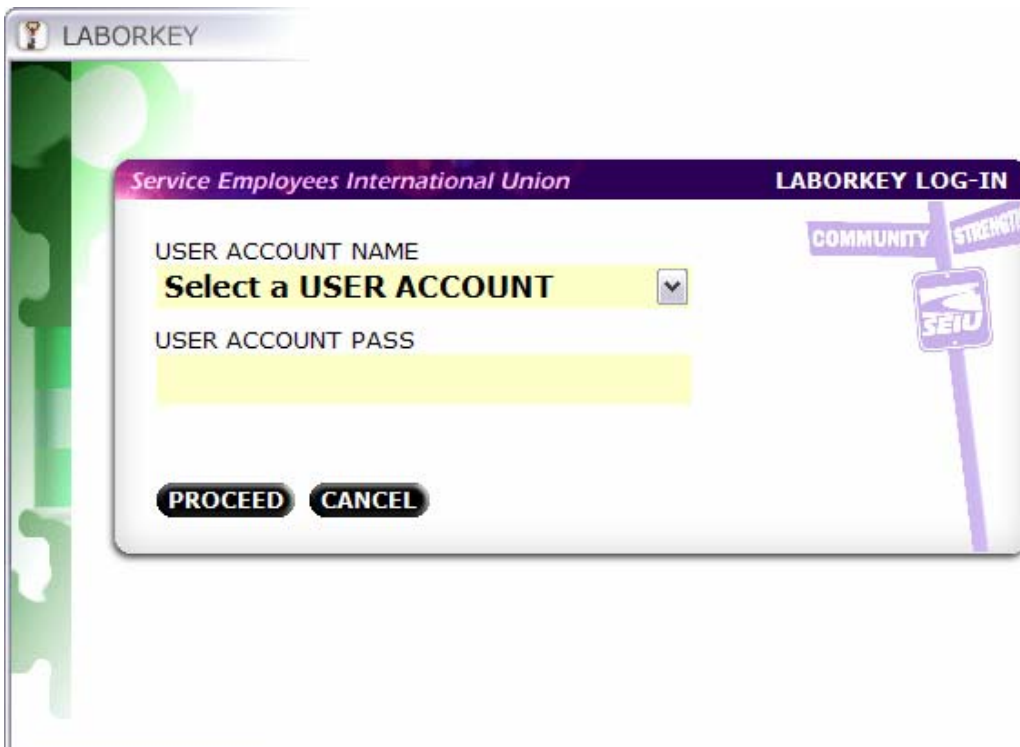
Step 10 – *install LaborKey on add'l stations*

After LaborKey has been installed and prepared on one station, it is very simple to install LaborKey on additional stations, unless the additional stations will be accessing different LaborKey data directories. If additional stations will be accessing different LaborKey data directories, you will need to follow Step 1 through Step 9 all over again for the first LaborKey station accessing each LaborKey data directory, and Step 10 (this page) does not apply.

If you would like to install an additional LaborKey station which will access the same data directory as is accessed by another installed and prepared installation (steps 1 through 9), then follow these steps:

a) install LaborKey software on an additional station *(per Step 3 of this guide)*,

b) run the installed LaborKey software *(per Step 4 of this guide)*, and

c) select the data directory in the **LABORKEY CONFIGURATION WIZARD** *(per Step 5 of this guide – only the 1ˢᵗ page of Step 5)*.

If step **(c)** above is impossible because the LaborKey data directory is not accessible over the network, you must move the LaborKey data directory to an accessible location, and then continue with step **(c)** above. You will also need to follow step **(c)** above for any existing LaborKey installations which were pointing to the data directory which was moved. ***Note:*** *This is the process for migrating a LaborKey data directory to another location.*

You are finished with this installation guide!