Local setup

One file that runs on your own computer, with the cost template beside it. No account, no connection, and nothing leaves the machine.

You need: any computer with a web browser, and Excel or Google Sheets for the cost template. No installer.

1 Download the local kit

On rdbase.ca, in the Local row, choose **Download everything**. Unzip `RDBASE-local-tools.zip`. Inside are three files:

FILE	WHAT IT IS
`rdbase-workbench-offline.html`	The technical record: objectives, the uncertainty and its variables, and experiments by tax year.
`RDBASE-cost-template.xlsx`	The cost template, for Excel or Google Sheets.
`README.txt`	These steps in short form.

2 Open the workbench

Double-click `rdbase-workbench-offline.html`. It opens in the browser you already have and works with no connection.

3 Answer the company questions

Legal name, fiscal year end, field of technology and key investigators. They are asked once and can be changed later.

4 Record the project

Work through the three screens: **Objectives** against benchmarks, **Uncertainties** with their key variables, and **Experiments** by tax year. The Claim readiness panel lists what is still missing. Number the project with the two digits of the year the work began, then a sequence, for example **2601**.

5 Save your claim file

Your entries are kept in the browser as you type. Press **Save to a file** to keep a copy you control, and **Open a file** to bring it back. The file holds one project; save a separate file for each.

6 Attach the costs

Open `RDBASE-cost-template.xlsx`, start on the **Read me** sheet, and use the same project numbers on the **Projects** sheet.

7 Send it for review

Send the saved claim file and the cost template to your SR&ED preparer.

Optional: a local AI model

The file records and checks on its own. A model running on the same machine can add the questioning and drafting without an account. That installer is still in development; this is the hardware it will need. All models are Apache 2.0 licensed.

MODEL	DOWNLOAD	MINIMUM RAM	RUNS ON
Gemma 4 E2B, small	1.3 GB	4 GB	Any laptop; Android flagship from 2022
Gemma 4 E4B, small+	2.5 GB	6 GB, 8 GB better	Any laptop; Android flagship from 2023
Gemma 4 12B, large	7.4 GB	16 GB	Computer only
Gemma 4 26B, largest	15.6 GB	32 GB	Workstation only

How Local differs from Mobile. The Local version does not include the guidance assistant, the projects list, prior-art ranking, file attachments or Send for review. Use the Mobile version for those.

What the tools do not do. They record and check. They do not decide eligibility, give tax advice or file anything; a qualified preparer reviews and signs the claim. Free to use for your own claims and your clients' claims; not for repackaging or redistribution.