

***Relius Documents PC  
Version 6.0  
Installation and Configuration***

***March 20, 2008***

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## 1 Overview

A new, consolidated instruction manual has been compiled for you. This document covers both new installations and upgrades from Relius Documents PC 4.0 or higher. Additionally, the instructions contained in this document are used for standalone and networked workstations.

The installations of the RDPC language packs and database server are detailed in separate documentation.

The installation of RDPC 6.0 consists of the following basic procedures:

- 1) Read and understand the entire document.
- 2) Back up your system and database.
- 3) Install and configure RDPC 6.0.
- 4) Convert your existing database or create a new, blank database.
- 5) License the RDPC system.

### **Important Notice**

Beginning with Relius Documents PC version 6.0, the application will install to the local hard drive of each workstation. Users who connect to a networked database and centrally located Document Storage Area will still connect to their networked data, but the program files will be installed locally to the workstations.

“Network Setup” will no longer exist. Instead, additional workstations will install RDPC using the same installation file as the initial (Admin) workstation. Additionally, program updates must be applied to each workstation.

## 2 Installation and Environment Considerations

Some Considerations have changed since the last major release of Relius Documents. Please pay special attention to those marked as “**NEW**” or “**Updated**.”

### 2.1 Hardware Requirements & Supported Operating Systems

All hardware requirements are specified on our web site ([http://www.relius.net/support/qt\\_technology.aspx](http://www.relius.net/support/qt_technology.aspx)). Once you are logged on to the support site, click the “Documents 6.0 Hardware Requirements” link.

The only supported operating systems for RDPC workstations are Windows 2000 Professional with Service Pack 4 or higher and Windows XP Home or Professional with Service Pack 2 or higher. (Network systems: Windows Server 2003 with Service Pack 1 and Windows 2000 Server with Service Pack 4 are supported for hosting your RDPC networked database.) All other operating systems will cause the installation to fail. SunGard Relius cannot guarantee “workaround” scenarios for workstations, regardless of whether they work in the short term.

### 2.2 **Updated** -- Upgrade Times

Because of the type of update being run on your database for this release, the update of your system may take much longer than traditionally expected. The installation process usually takes approximately **1 hour** or less to complete. In testing the release at SunGard Relius, very large databases requiring upgrades have taken 1 ½ hours to complete. Due to the nature of this upgrade, the conversion process will take significantly more time than in previous upgrades. Some systems may possibly take up to several hours, depending on environment variables, such as database size, the speed and capacity of the database servers and workstations, and the number and size of files in the DP\_Data directory. However, once the networked database is updated, the subsequent workstations will take much less time.

### 2.3 **NEW** -- Internet Licensing System

SunGard Relius has implemented a more convenient method for licensing your Relius Documents system. Now, licensing is available via your Internet connection. When the installation is complete, you will be prompted to license the system. Follow the steps outlined in Section 4 of this document. Now, whenever a new or updated module is provided, you can relicense via the Internet instead of having to call Relius Documents Support.

Please note that licensing must be repeated for each standalone system, but only once for a networked database since licensing is now stored in the database.

## 2.4 NEW -- Licensing Wide-Area Networks

Licensing your Relius Documents system on a Windows Terminal Server or ICA Citrix Server is now fully supported. Clients who wish to purchase a WAN license must contact their Relius Documents Sales representative.

## 2.5 NEW -- Program File Location

The standalone installation of RDPC will default to C:\Program Files\Relius\Docs. Networked systems will have their program files installed to a local drive. These systems must ensure that the location of their DP\_Data folder (hereinafter referred to as the Document Storage Area) is set to a network drive and path consistently mapped across the enterprise so the same drive letter and path will be available to all users. SunGard Relius strongly recommends allowing the defaults to remain in place.

## 2.6 NEW -- Microsoft Word 2003 SP3

Service Pack 3 of Microsoft Word 2003 may cause intermittent issues when generating documents within all versions of Relius Documents. SunGard Relius development is exploring a workaround and possible solutions. Until then, you may wish to use SP2 only at this time.

## 2.7 Installation Methods

RDPC is only available via download from the SunGard Relius web site. Downloading the file to a local hard drive is recommended and supported. Other methods of installing (network volumes, “push” or “ghost” technology, Z.E.N. Works, Zip Drives, etc.) are not supported or recommended. If a network drive is used to install the software, it must be mapped with a drive letter assigned. Dial-up clients need to contact Relius Technology Support before attempting a download.

## 2.8 Software fixes and documents via Internet

Fixes, support files, language updates, and updated documentation are distributed via the web at <http://www.relius.net/support/loginform.aspx>. Users must have Internet capability to receive these updates. Once you have logged on, click the “Technology” link to browse the list of available material. You can click “*Subscribe*” (<http://www.relius.net/support/subscribe.aspx>) to receive notification of new fixes by e-mail. SunGard no longer sends patches, updates, notifications, and update documentation through the mail, and we strongly urge all users to subscribe to this service.

## 2.9 Virtual Environments

The use of virtual environments and connections, such as Microsoft Virtual Server or VMWare, are not officially supported by SunGard Relius. If a virtual environment is detected, the installation will abort. For additional technical information regarding this topic, please contact Relius Technology at 1-800-326-7235.

## 2.10 Hidden File Extensions

Some systems experience certain difficulties when file extensions are hidden within the Windows Operating System. If you encounter this problem, click *Tools | Folder Options* in Windows Explorer. Select the “View” tab and uncheck “*Hide extensions for known file types.*”



## 2.11 Virus Scanners

Although SunGard Relius does not endorse, support, or recommend any particular method, virus protection is encouraged on servers and workstations. The two most popular are Symantec's Norton Anti-Virus and McAfee VirusScan by Network Associates. You should update your virus definition files regularly. Some virus scanners – if active during the installation – can interfere with a successful installation. Symptoms include an error message stating that a file cannot be overwritten. Temporarily disable virus scanning before starting the installer. Clients using Norton with Script Blocking turned on should test the functionality of RDPC to determine whether script blocking is affecting the application.

Please note: NOD32 by ESET has been reported as problematic with RDPC.

## 2.12 Security Considerations

Responsibility for support of problems and issues related to RDPC running in a locked-down security configuration is that of the end user. Certain circumstances may require billing on a time and material basis for troubleshooting. SunGard Relius cannot guarantee that RDPC will install or operate properly on any given locked-down security configuration. RDPC is certified and supported only when run on the default Windows security settings. The local Windows Administrator (or a user with equivalent Administrator rights) **must** run the installation.

### 2.13 Software Considerations

Microsoft .NET 2.0 is included in this installation. More information on Microsoft .NET can be obtained from Microsoft Windows update (<http://www.windowsupdate.com/>).

If not already installed, Microsoft Windows Installer 3.1 will also be placed on your systems to allow for a smooth installation of RDPC.

### 2.14 Networked Database Server Information

Clients using a networked environment will be required to use one of three varieties of Microsoft SQL: SQL Server Express (Default), SQL Server 2000, or SQL Server 2005. SunGard Relius provides clients with SQL Server Express, as well as instructions on the installation and maintenance of SQL Express systems. The other two editions of Microsoft SQL are the responsibility of the clients. Contact Relius Technology Support before installing SQL Server 2000 or 2005.

#### Important Backup Considerations

Because of the change in database architecture and document storage with RDPC, SunGard Relius strongly urges you to back up your system before beginning this update. In the unlikely event that the update should fail, data recovery may be difficult if you neglected to back up your database and your program files, especially the DP\_Data directory. Backups are the sole responsibility of each client; at no point can SunGard Relius accept responsibility for ensuring your data is backed up.

**It is still important that your Document Storage Area, including the DP\_Data, directory be regularly backed up after converting to Relius Documents 6.0.** If DP\_Data is destroyed, you will have to rebuild you projects to create any needed documents.

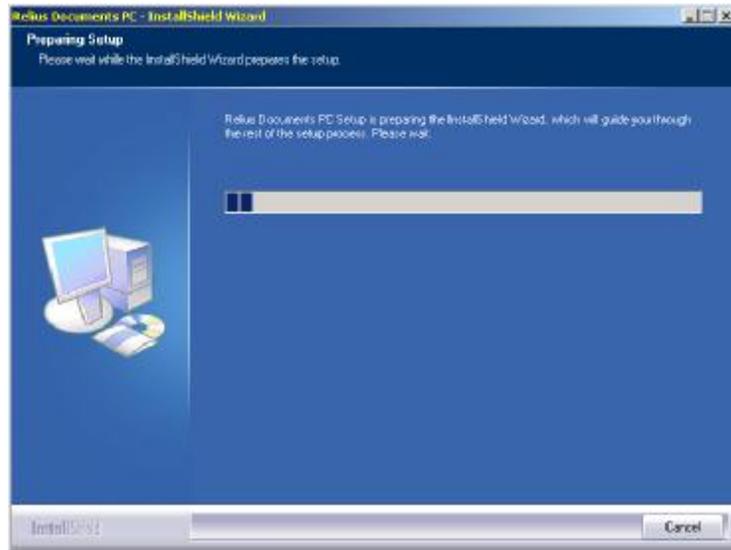
### 3 Performing the RDPC Installation

#### Pre-Installation Notes:

- a) Be sure no screen saver will become active during the installation. SunGard discourages the use of screen savers whenever running RDPC or its Installer.
  - b) The installation process takes approximately **1 hour** or less to complete. Some systems may possibly take up to several hours, depending on environment variables, such as database size and the number and size of “answer” files in the Data Storage Area, commonly referred to as the location of the DP\_Data, Link, and LIB directories.
  - c) Review the RDPC system requirements located on our web site ([http://www.relius.net/support/qt\\_technology.aspx](http://www.relius.net/support/qt_technology.aspx)). **Do not** proceed with the update if your environment does not meet the minimum system requirements.
- 3.1 Remove any icons or shortcuts from the **StartUp** folder. Services (such as real-time virus scanning) that may impede or interfere with the installation should be stopped and set to “Manual” before proceeding.
- Additionally, programs that are set to launch when Windows is started can also be specified in C:\WINDOWS\WIN.INI. Please **edit** this file using Notepad. Temporarily **remark** the entries **RUN=** and **LOAD=** by placing a semi-colon (“;”) in front of the line (if programs are specified), then **Save** and **Exit** the WIN.INI file. Example of remark:
- ```
;RUN=EXAMPLE.EXE
```
- 3.2 Re-start the computer. Windows or other programs may have locked some files that need to be overwritten during the update process.
- 3.3 Temporarily disable all virus protection.
- 3.4 Download the RDPC 6.0 Installation from the SunGard Relius web site (<http://www.relius.net/Support/Loginform.aspx>) and copy it to a temporary location on your workstation, such as D:\Temp. Do not “run” the install directly from the Internet. Download it first.
- 3.5 Click *Start | Run*, then type in **D:\Temp\RDPCv60Setup.exe** (where D:\Temp is the location of your downloaded file), and click *OK*.



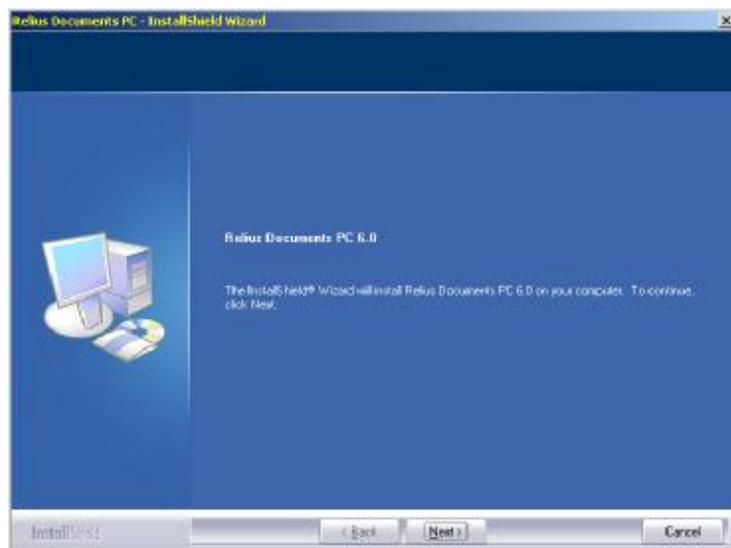
3.6 The installation program will copy the necessary temporary files.



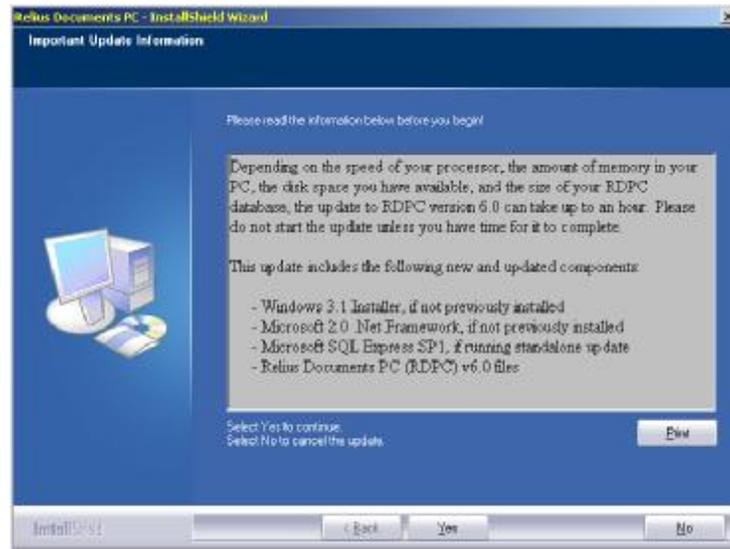
3.7 If installing to a network operating system, such as Windows Server 2003, you will receive this message. This installation must be run from Windows 2000 Pro or Windows XP only. For information about installing RDPC to a terminal server, please contact Relius Technology Support. Clients already approved for Terminal Services should not see this message.



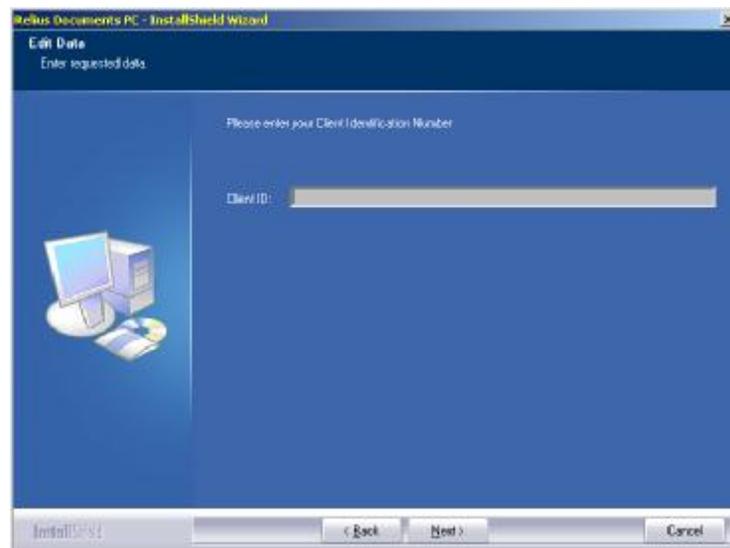
3.8 At the "Welcome" screen, click *Next*.



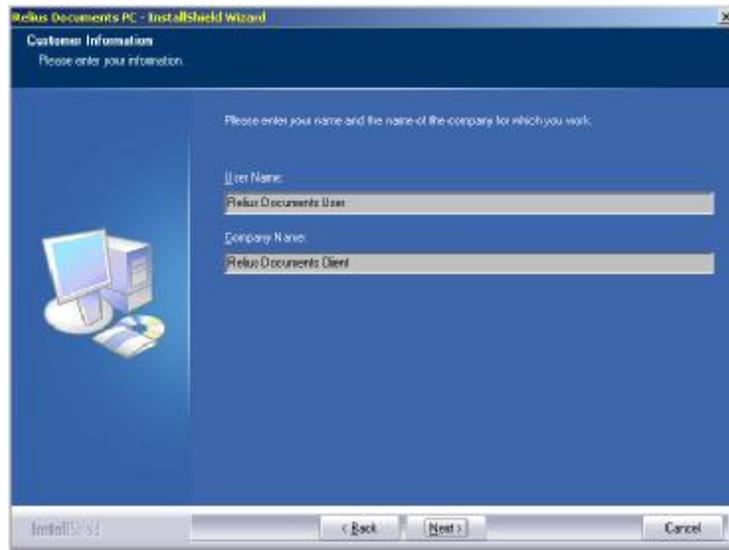
- 3.9 The “Important Update/Install Information” screen will inform you of the programs that will be installed or updated. When you are ready to proceed, click *Yes*.



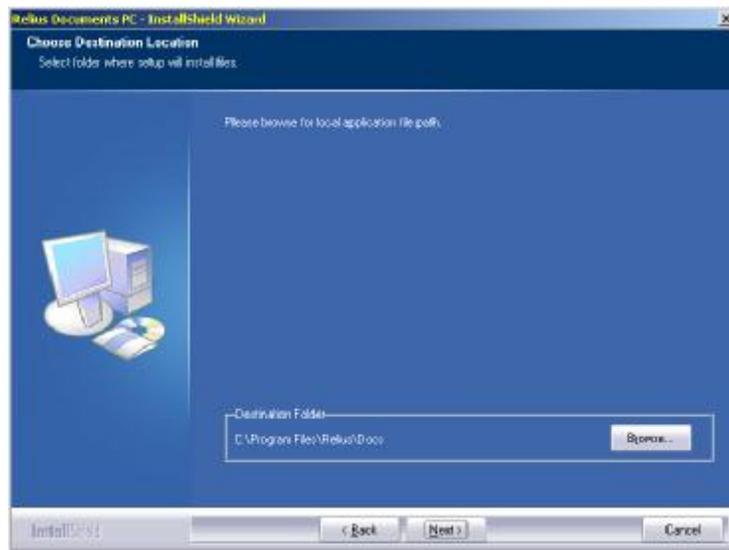
- 3.10 New installations of RDPC will see the next several screens. Enter your six-digit numerical Client ID provided by SunGard and click *Next*. Systems being upgraded will not see some of these screens.



3.11 Enter or confirm your user name and company name. Click *Next* to continue.



3.12 You will be prompted for the local path where the RDPC program files will be installed. This location **must** reside on a local disk. From this point, most upgrade installations will skip to Step 3.28.

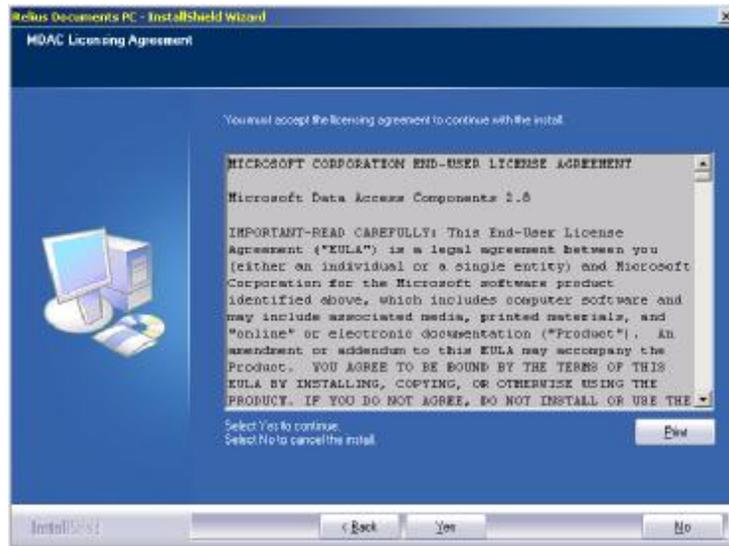


3.13 If not already installed, the Microsoft Windows Installer 3.1 will install.

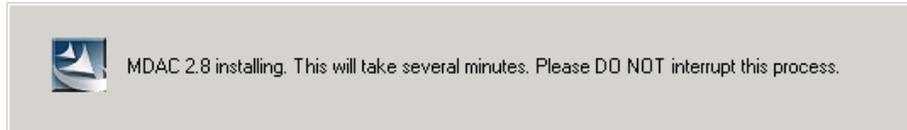


Microsoft Windows Installer 3.1 is running. This will take several minutes. Please DO NOT interrupt this process.

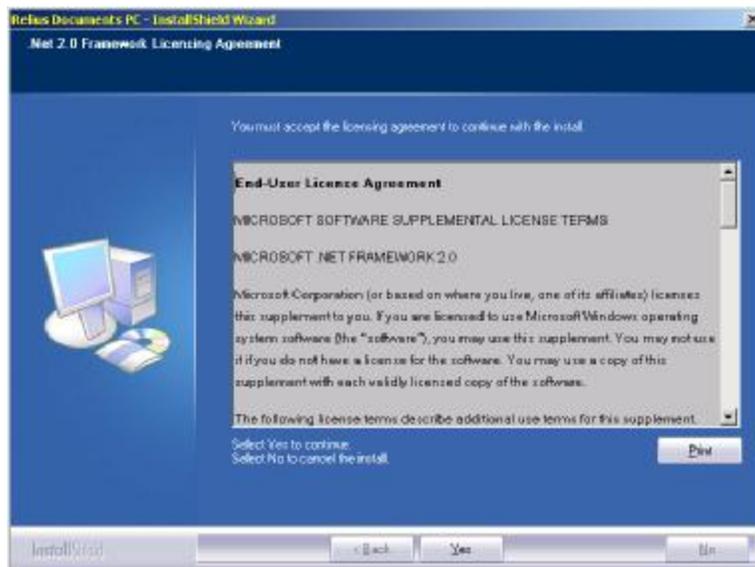
- 3.14 If not already installed, you will need to read and agree to the End-User License Agreements for Microsoft Data Access Components 2.8 (SP1). Click *Yes* when you are ready.



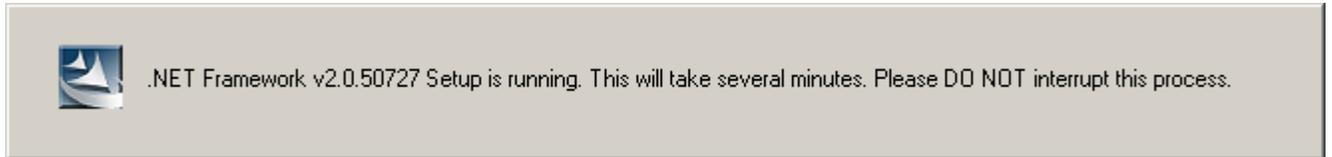
- 3.15 MDAC will then install automatically. Do not interrupt. (On slower systems, the message below might not appear in the foreground. Use <Alt> + <Tab> to view the message.)



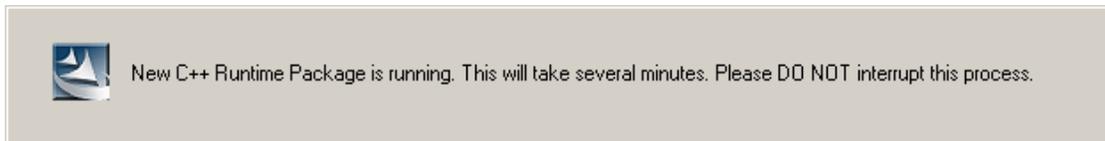
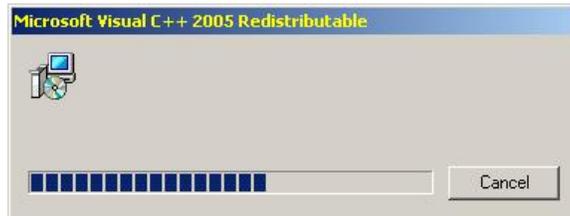
- 3.16 If not already installed, Microsoft .NET 2.0 requires that you read and agree to the End-User License Agreement. Once you have read the entire text, click *Yes* to continue.



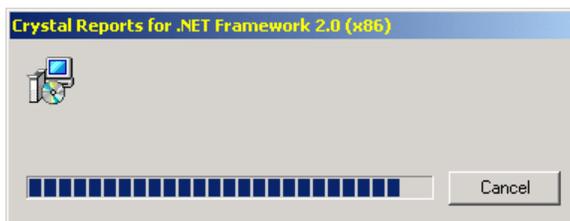
3.17 The installation of .NET will proceed without any further intervention. This process may take several minutes. Do not interrupt the process.



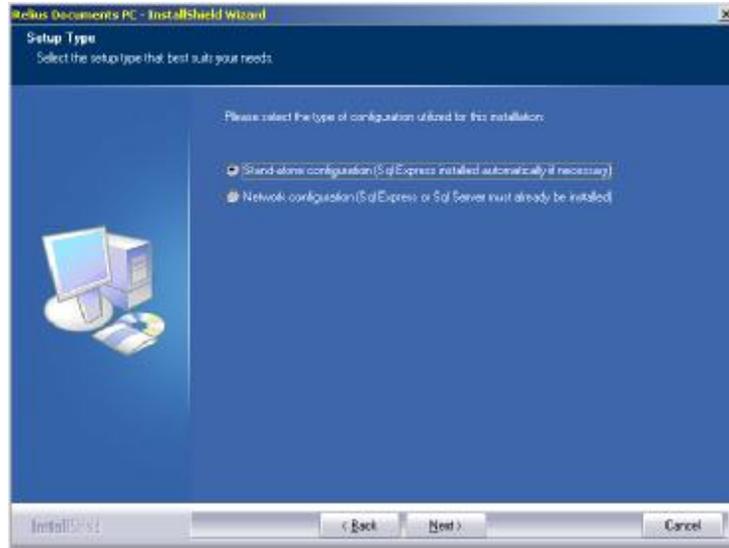
3.18 Next, Microsoft C++ "Runtime" Package will install. Do not interrupt.



3.19 Crystal Reports for .NET will install. Do not interrupt.



- 3.20 Choose the type of installation for your environment. A stand-alone system stores the database and program files on the local drive of a single computer. A “network” configuration connects to a database on a database server, either using SQL Express provided by SunGard Relius or your own license of SQL Server, installed separately.



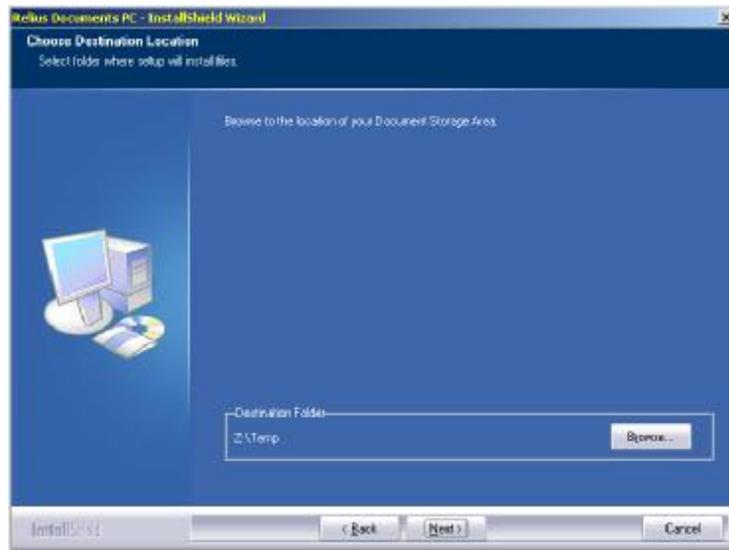
- 3.21 If installing to a networked database environment, you will be asked if your database server has been properly installed and configured. Be certain that the database is ready before proceeding. Failure to do so will cause the workstation installation to fail.



- 3.22 New networked systems will be prompted for the location of the “Document Storage Area.” A “central setup” file will be created during the initial installation to the first computer.



- 3.23 The default path is the root of the C: drive. However, please set the path to your identically mapped network environment. For purposes of this document, **Z:\Temp** will be used.



- 3.24 Your “DP\_Data folder cannot be chosen.



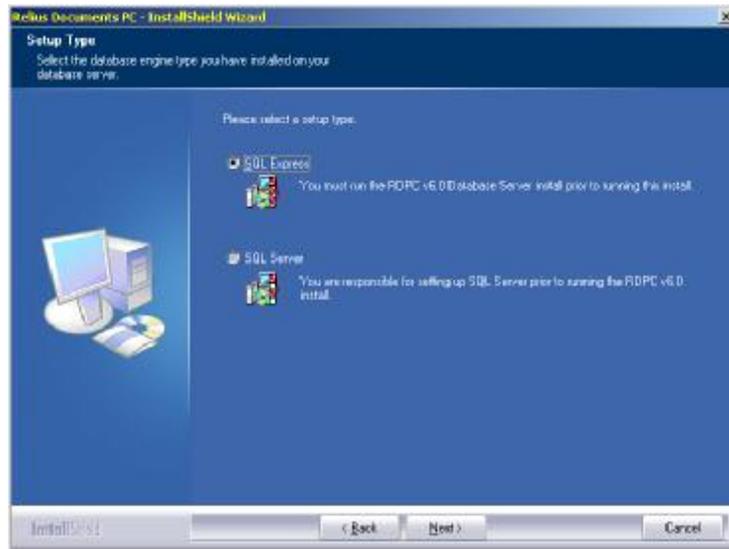
- 3.25 You will be prompted to confirm the location of your Document Storage Area.



- 3.26 The first networked system will receive this message. Subsequent installations will use the settings contained in the file to mirror the first one (and will skip to Step 3.27). **Therefore, the answers provided during the first install must be accurate.** Once this setting is chosen, it should not be changed without contacting Relius Technology Support.

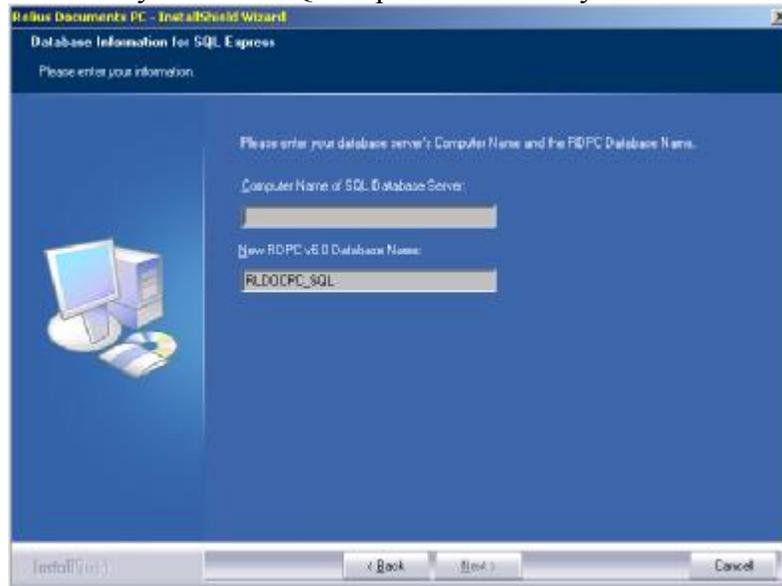


- 3.27 If installing to a networked database environment, choose which type of database server will house your database.

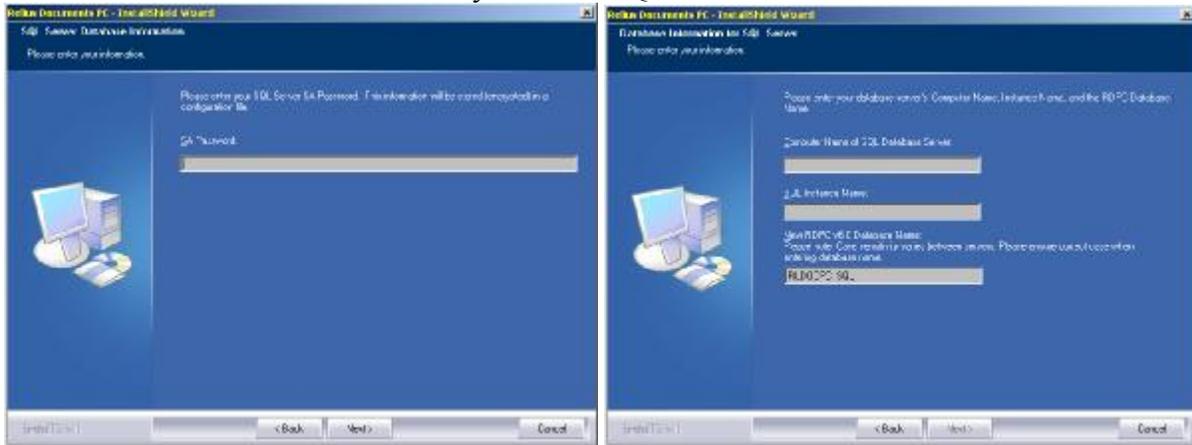


- 3.28 After choosing the database type, enter the appropriate information for connecting to your database server. **Please note: Case-sensitivity varies between servers. SunGard Relius recommends all uppercase for the server and database name. However, you must ensure correct case when entering the password.** SQL Express is provided by SunGard Relius under a separate installation. SQL Server is for advanced or enterprise clients.

If you chose SQL Express or “Locally stored”



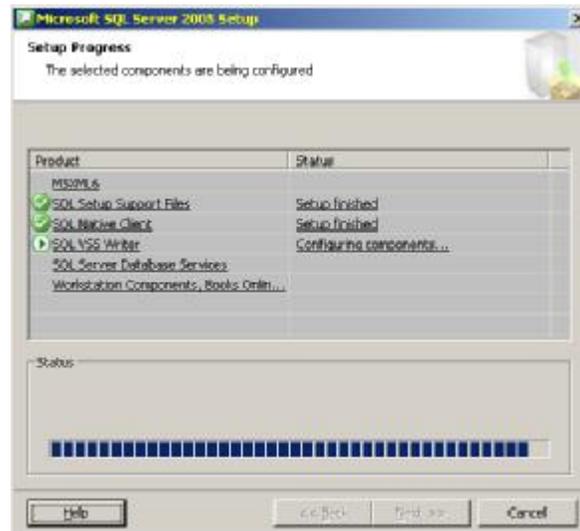
## If you chose SQL Server



- 3.29 MSSQL Express installation will begin without intervention on new standalone systems. This process may take several minutes. Do not interrupt.



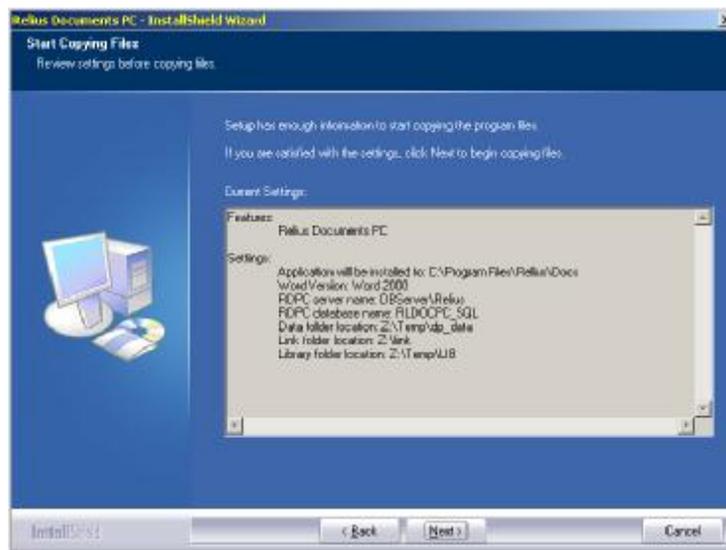
Microsoft SQL Express Setup is running. This will take several minutes. Please DO NOT interrupt this process.



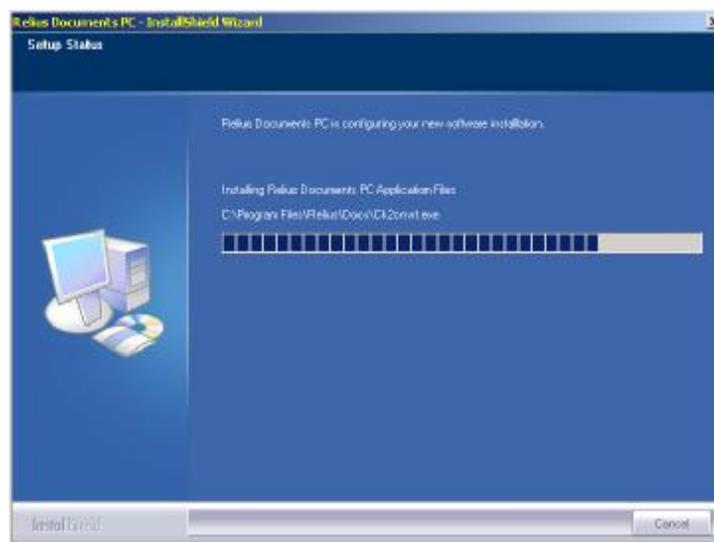
3.30 The SQL Server Native client will install. Do not interrupt.



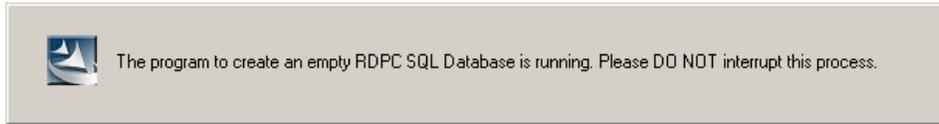
3.31 You will need to confirm your installation settings before proceeding. Any desired changes must be made before clicking *Next* on this screen.



3.32 Program files will be copied to your workstation and configuration files will be updated. Do not interrupt.



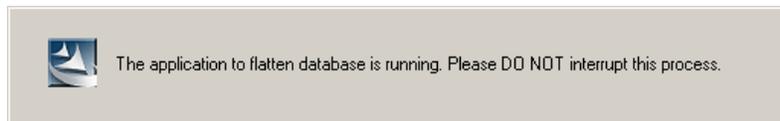
3.33 New systems will receive a starter database, ready for use.



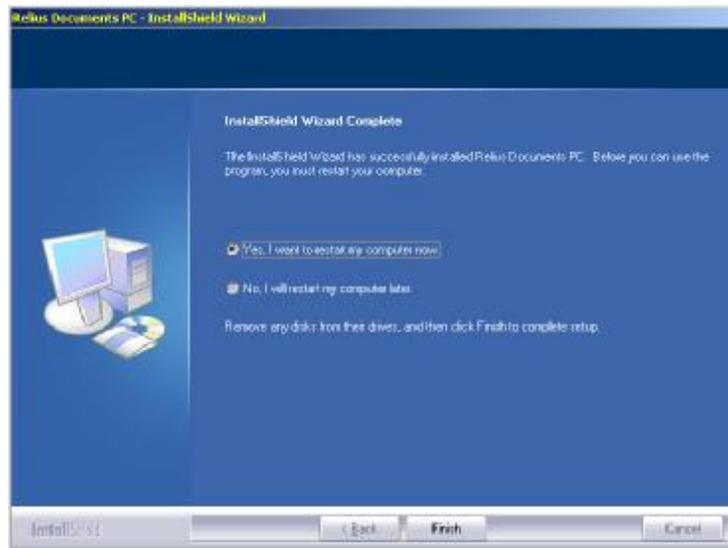
3.34 Upgrades will convert their database. If your database is at RDPC version 4.x, the RDPC version 5.0 scripts will run first followed immediately by the RDPC version 6.0 scripts.



3.35 Additional conversion steps will then be taken. This process, called “Flattening,” may take quite some time. **Do not interrupt the process.**



- 3.36 When the installation is finished, you will be prompted to restart your workstation. **Be sure “Yes, I want to restart my computer now” is chosen and click *Finish*.** Your workstation will shut down all applications and restart. **Do not** interrupt the process.



- 3.37 If action was taken in Step 3.1, restore the icons or shortcuts that were temporarily removed from the **StartUp** group or folder and remove the remark from the **RUN=** and **LOAD=** statements from WIN.INI. Restart any services that were temporarily set to “Manual” and – if necessary – place them back in “Automatic” mode.
- 3.38 Any shortcuts for RDPC 4.x / 5.x that were manually created or edited, such as those placed on the users’ desktop must be edited or removed, as program file names and locations may have been changed.
- 3.39 Review the logs that were generated by the installation, specifically, C:\Windows\ReliusLogs\Docs\ReliusInstallDetail.log
- 3.40 After finishing all configurations and system settings, proceed to all other workstations, following the appropriate Steps outlined in this Section. Networked databases will only be updated or created once. All standalone systems will be updated or created during each workstation’s installation.

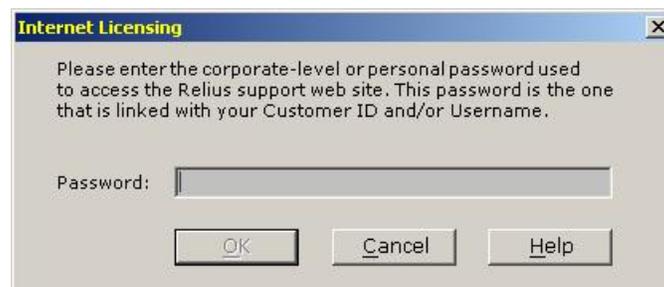
## 4 Licensing and Connecting to Your Database

Once the installation is complete, there are several steps that need to be taken before you can access RDPC. This Section is intended for new installations to confirm successful connections to new databases. Upgraded systems do not need to follow the Steps in this Section.

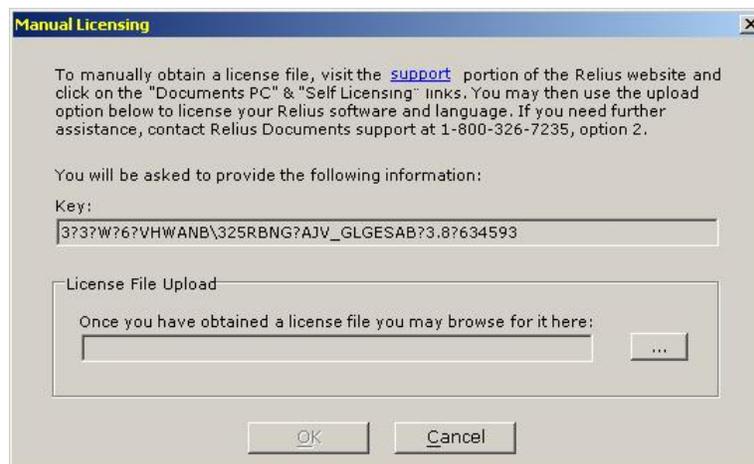
- 4.1 Click *Start | Programs | Relius | Documents | RD Admin Utility*. This program allows you to change user information, verify licensing, and set program file and database locations.
- 4.2 If your system is not yet licensed, you will receive the following message.



- 4.3 If you choose Internet License, you will be prompted for your corporate level or personal password.



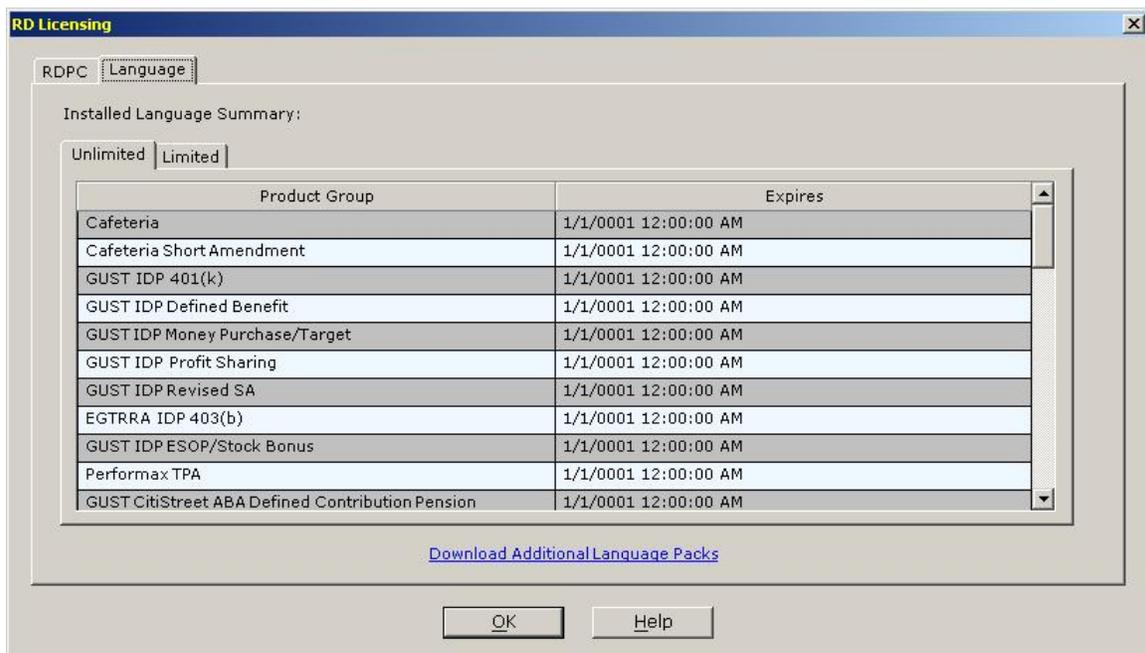
- 4.4 If you choose Manual License, you must first click the link in the Manual Licensing box (example below) to retrieve your licensing file. Follow the on-screen prompts.



4.5 When licensing is complete, you will receive this message:



4.6 From there, you will be able to verify your licensing or download additional language packs.



4.7 Add, delete, or edit the appropriate users within your system. Exit the utility when finished.

4.8 Click *Start | Programs | Relius | Documents | RD System Update*. This program imports languages into your database. See Section 6 for more information.

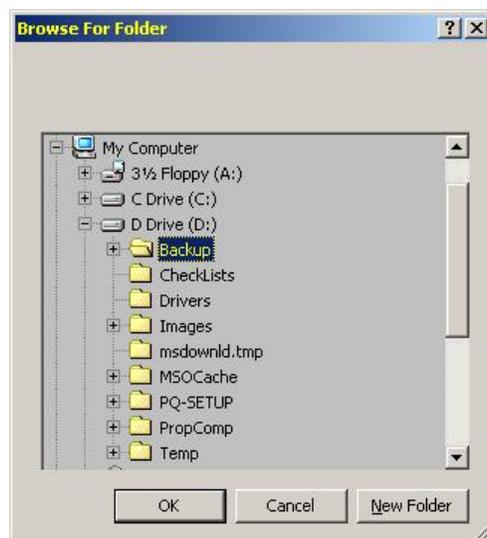
## 5 Database Maintenance

The Steps in this Section are intended for use by Standalone clients only. SQL Express Server users should refer to the RDPC SQL Express Instructions. Microsoft SQL Server users should consult the documentation that came with their software. SunGard Relius has provided a new utility that will enable full database exports for the purposes of backup and security.

5.1 Click *Start | Programs | Relius | Documents | RD Database Maintenance*.



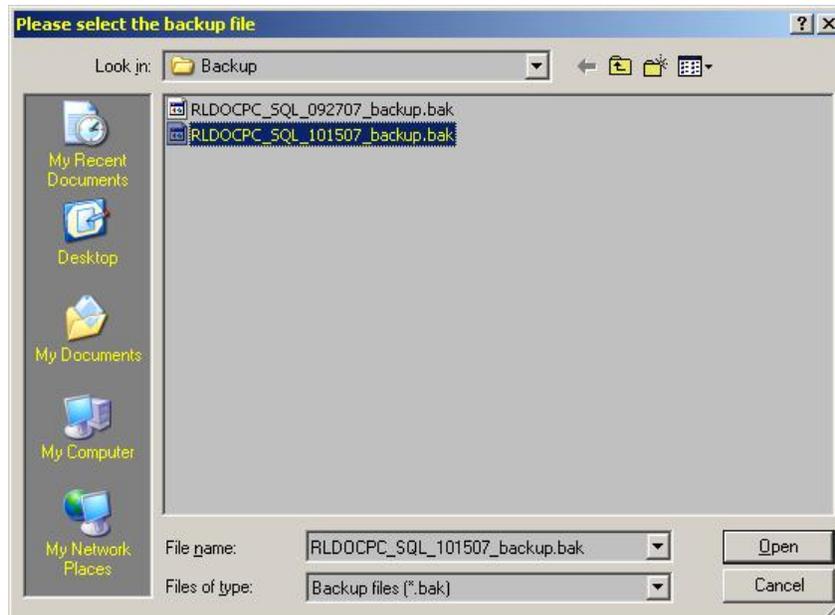
5.2 Verify your information, then enter or browse to your backup folder (e.g., D:\Backup). Click *File | Save Settings* to store any changes you have made.



- 5.3 Click *Activity* | *Backup*. Wait for the message telling you of a successful backup. The file format is as follows: DatabaseName\_Date\_backup.bak. Therefore, if a database were backed up from a database named RLDOCPC\_SQL on October 15, 2007, the backup file would be named RLDOCPC\_SQL\_101507\_backup.bak. Use this information to locate and archive your data. When finished, make a backup copy of the \DP\_Data directory where RDPG is installed to the workstation.



- 5.4 To restore a backed up database, click *Activity* | *Restore*.

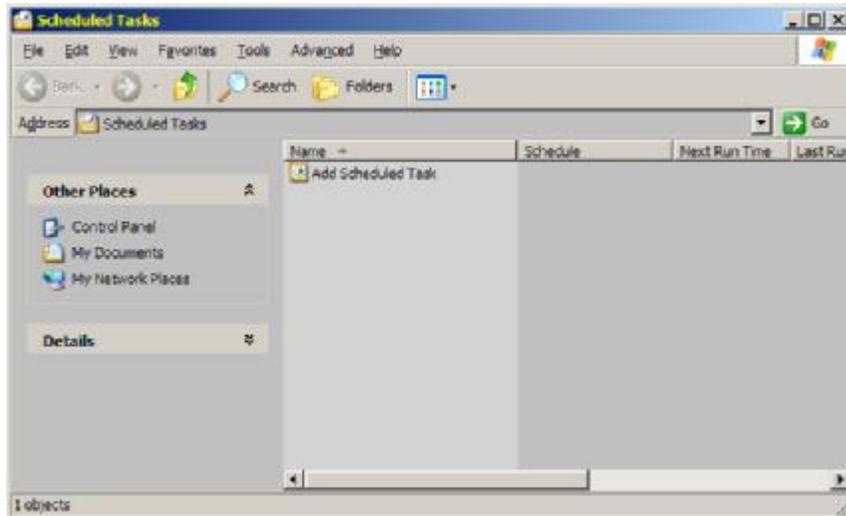


- 5.5 Click *Activity* | *Check Database* to verify your database is on-line and ready for use.



**Please note:** The following Steps can only be performed at a standalone workstation or the SQL Server Express database server (provided by SunGard Relius). SQL Server 2000 or SQL Server 2005 systems must use the backup procedures provided by Microsoft. Do not perform these tasks until you have completed the previous Steps in this Section.

- 5.6 The backup process can be automated by adding an automation “switch” to a command line placed in the Windows Scheduler. Open *Scheduled Tasks* within Control Panel and double-click *Add Scheduled Task*.



- 5.7 When prompted for the program file, scroll down the list and click “RD Database Maintenance.” Then click *Next*.



- 5.8 Select the frequency of your automated process. When you are prompted for a username and password, you must enter a user that has local Administrator rights so the task can run properly. The password must match what that user must enter to log into the operating system.



- 5.9 At the final entry, be sure to check the “Advanced” feature. You must edit the advanced properties to make the program function automatically. See next step.



- 5.10 Edit the “Run” field by adding the switch “\backup” (include a space between the command and the switch). The “switch” must be a backslash. For example:

```
C:\Program Files\Relius\Docs\DBUtility.exe \backup
```



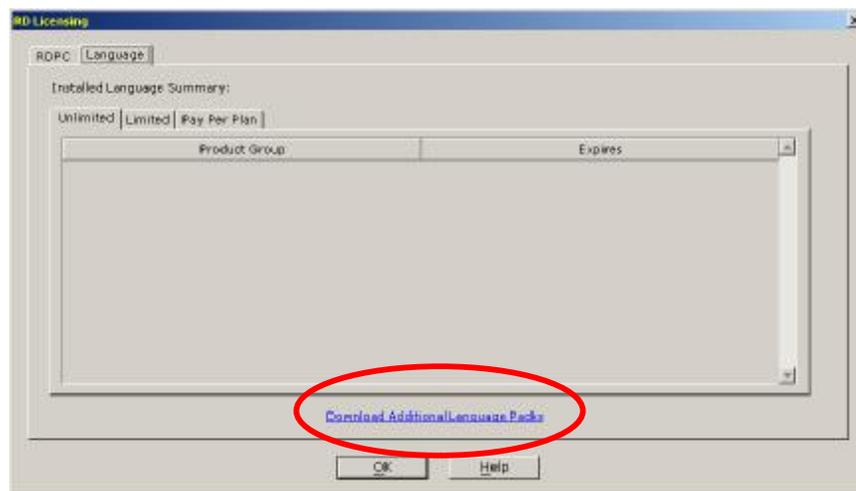
- 5.11 You may be prompted to re-enter the username and password. When finished, test the automated backup to verify proper function and location. If you do not receive a message stating the backup was successful, recheck your parameters and try again.



## 6 Adding Language and Amendment Packs

Language Packs are located on the SunGard Relius Web site. Your Welcome Letter should advise you on which language packs are licensed for your use. If you are using “custom language,” please contact your Support Representative for information regarding language updates.

Within the RDAdmin utility, click *Licensing* | *Verify Licensing*, and then click the “Language” tab. The link provided at the bottom of the screen will open your web browser to the SunGard Relius Support site.



Once you have successfully logged in, you will be directed to the RDPC Support page. Scroll down to the area that lists the available language packs. Refer to the “RDPC Language Pack Installation and Configuration” document for detailed instructions.

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Amendment Packs are now available. The Amendment Pack will only function properly if installed after completing the Relius Documents PC v6.0 installation. If an Amendment Pack was installed while at Relius Documents PC v4.1.2, that Amendment Pack will need to be re-installed after installing the Relius Documents PC v6.0.

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