

***Relius Documents PC
Version 6.1
Installation and Configuration***

August 19, 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 6.0 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 6.1 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 6.1.
- 4) Convert your database.

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). 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 **1/2 hour** or less to complete. However, very large databases may take 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 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 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.

2.7 Software fixes and documents via Internet

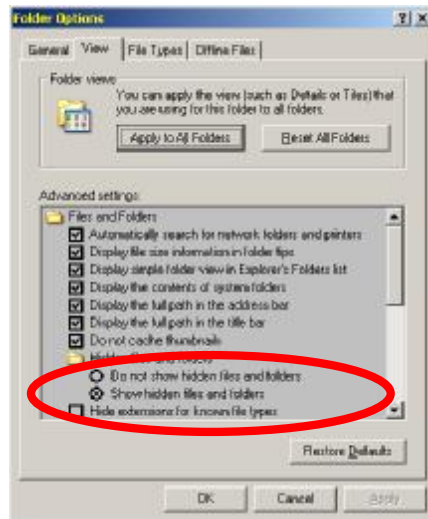
Fixes, support files, language updates, and updated documentation are distributed via the web at <http://www.relius.net/support/loginform.aspx>. Users must have Internet capability to receive these updates. Once you have logged on, click the “Technology” link to browse the list of available material. 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.

2.8 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.

2.9 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.*”



2.10 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.

2.11 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.

2.12 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.

2.13 Multiple Database Upgrade Information

If your Relius Documents environment is configured for more than one database/system, the installation is now designed to update all of them during the initial installation. If environment has multiple databases, the user will see a summary screen that lists each of the databases/systems detected. By default, all databases will be selected for upgrade. For further information, or if you prefer to prevent one or more database from being upgraded, please call Relius Technology Support

Important Backup Considerations

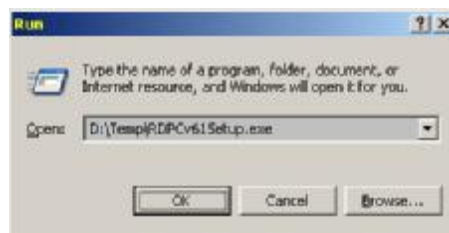
Because of the change in database architecture and document storage with RDPC, SunGard Relius strongly urges you to back up your system before beginning this update. In the unlikely event that the update should fail, data recovery may be difficult if you neglected to back up your database and your program 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 6.1. If DP_Data is destroyed, you will have to rebuild you projects to create any needed documents.

3 Performing the RDPC Installation

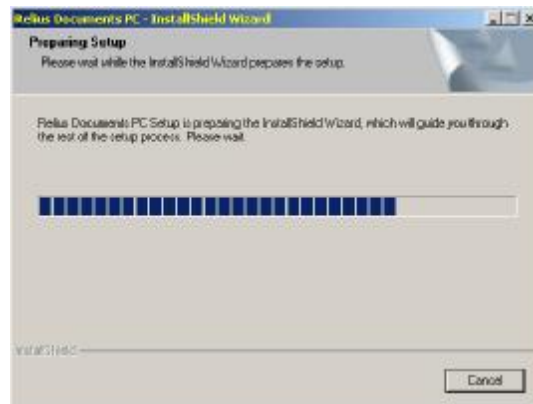
Pre-Installation Notes:

- 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). **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 6.1 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\RDPCv61Setup.exe** (where D:\Temp is the location of your downloaded file), and click *OK*.





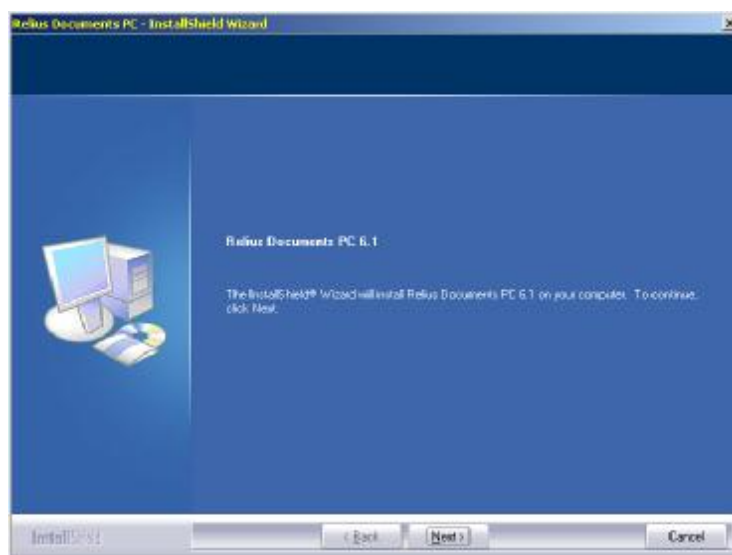
3.6 The installation program will copy the necessary temporary files.



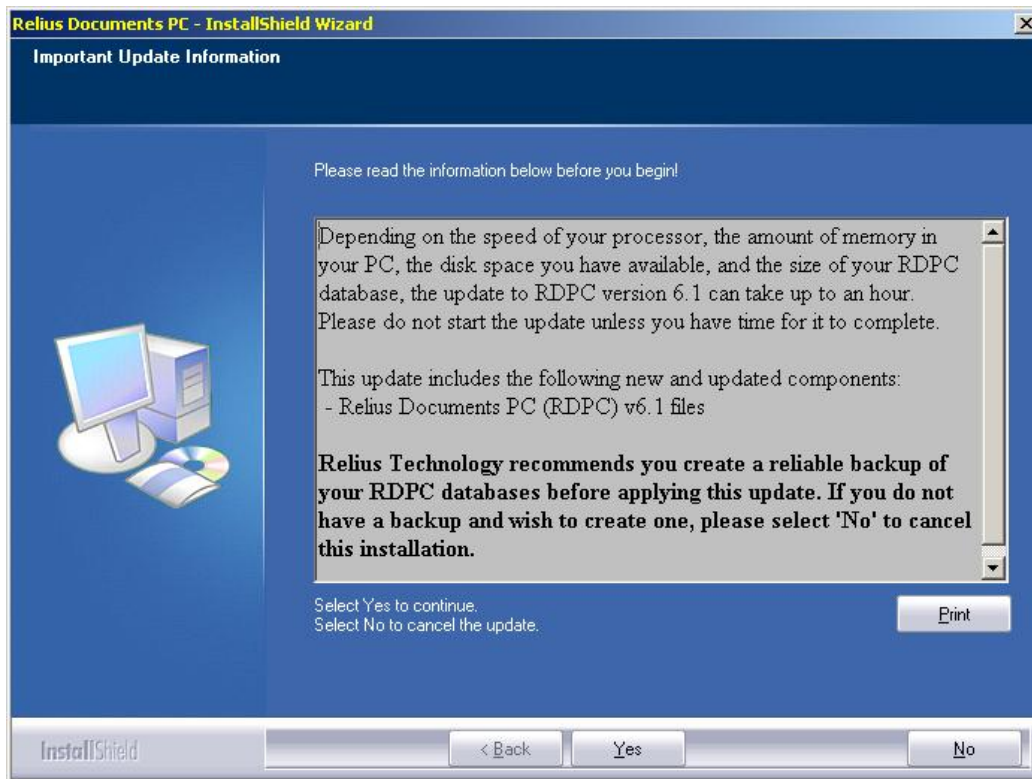
3.7 If installing to a network operating system, such as Windows Server 2003, you will receive this message. This installation must be run from Windows 2000 Pro or Windows XP only. For information about installing RDPC to a terminal server, please contact Relius Technology Support. Clients already approved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



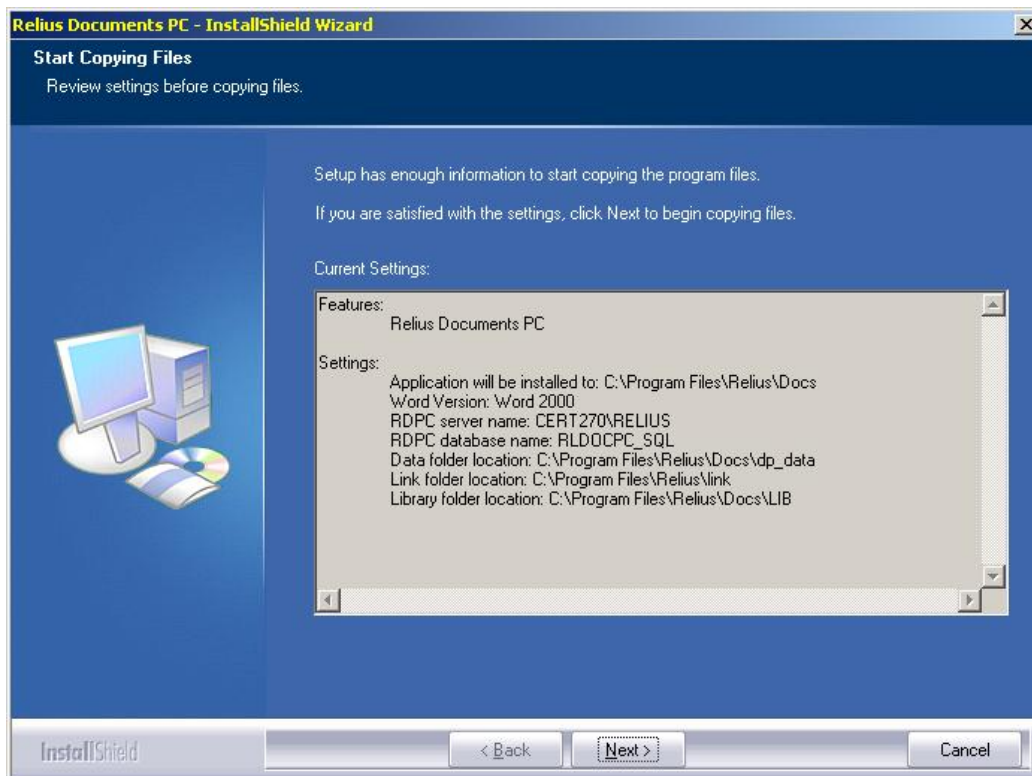
3.8 At the "Welcome" screen, click *Next*.



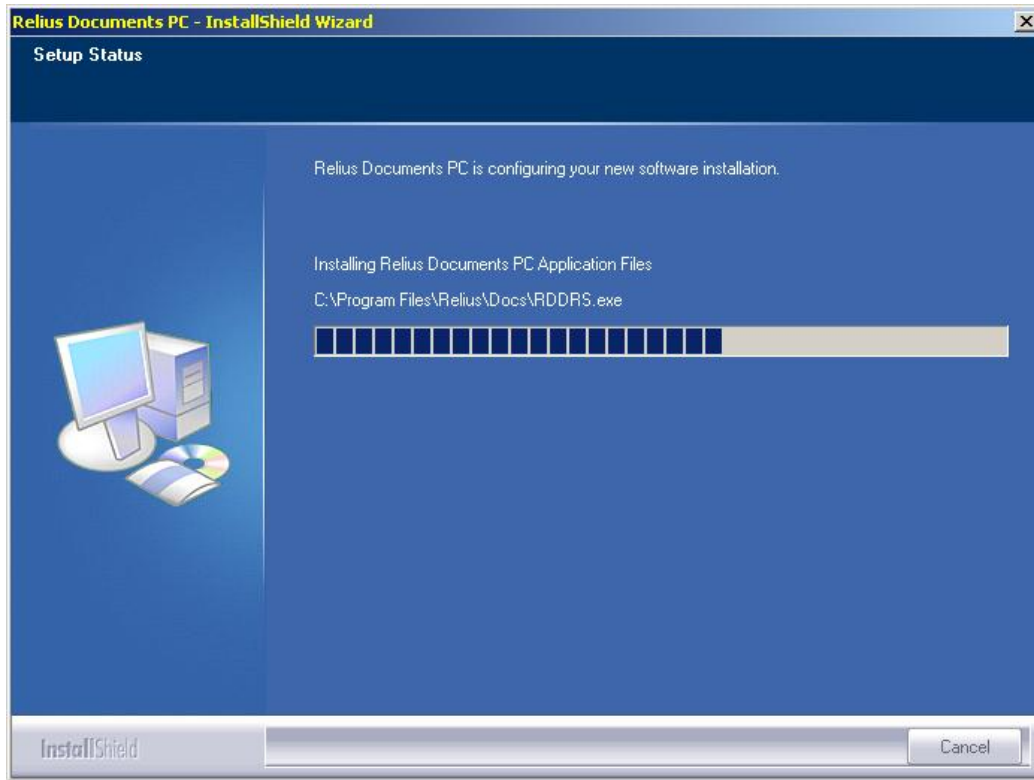
3.9 You will be prompted to begin the installation. Click *Next*.



3.10 After confirming your features and settings, click *Next*.



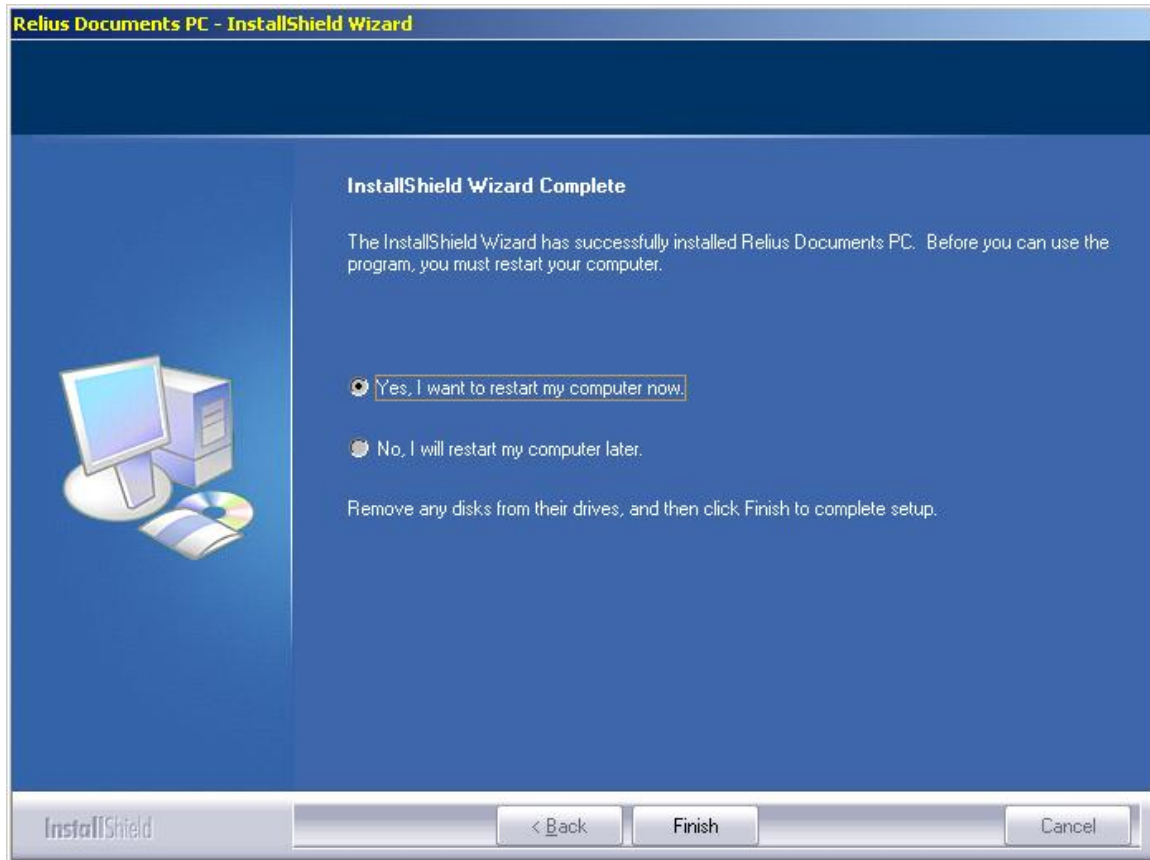
3.11 Files will begin copying.



3.12 The first networked system -- and each standalone system -- will receive the following messages that the database upgrade scripts are running against the database. This process may take several minutes. Do not interrupt.



- 3.13 When the installation is finished, you may be prompted to restart your workstation. If prompted, **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.



- 3.14 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.
- 3.15 Review the logs that were generated by the installation, specifically, C:\Windows\ReliusLogs\Docs\ReliusInstallDetail.log
- 3.16 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 once. All standalone systems will be updated during each workstation’s installation.

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