



File Transfer Protocol Anonymous Upload Procedures

October 27, 2008

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1 Overview

This document covers only the transfer of electronic information (files) to SunGard Relius support via File Transfer Protocol (FTP Upload).

Uploading information to SunGard Relius involves the following basic procedures:

- 1) **Read and understand the entire document** before beginning.
- 2) Install and configure compression software.
- 3) Connect to the SunGard Relius FTP site.
- 4) Transfer the file.
- 5) Inform support of the file's arrival.

2 Installation and Environment Considerations

2.1 Compression Software

If you do not already have file compression software, you can download an evaluation of WinZip 9 from <http://www.winzip.com/>. The program is considered “Shareware” and requires payment if you choose to continue using it. WinZip 9 allows for compressing large files and enhanced security features.

2.2 File Encryption

If you are sending sensitive information, such as participant data, plans, or other records that would compromise the privacy of others, SunGard Relius requires that it be encrypted before sending. WinZip 9 offers up to 256-bit encryption as part of its basic package. In all cases, encryption and password protection are encouraged.

2.3 Password Considerations

Passwords assigned to uploaded files should be pre-determined or provided under separate cover (fax/e-mail) as soon as the file is fully transferred. Passwords should be as secure as possible, using any combination of lower case letters, upper case letters, numbers, and symbols. For example, instead of using the password “present,” you should mix it up by using “pR3\$ent.”

2.4 Transfer Rates

Whenever possible, clients should always upload files directly from the local hard drive using high-speed connections. If a file is on a CD or network drive, it should be copied locally first. Additionally, dial-up connections can be disconnected without warning and cause the partially uploaded file to be corrupted.

2.5 Internet Explorer 7 Considerations

A new security feature restricts the way users view FTP sites. By default, once you have accessed the page, it is still viewed as an internet page instead of a file folder. Before uploading your file and after logging on, you may have to click *Tools | Open FTP Site in Windows Explorer* to properly view the site.

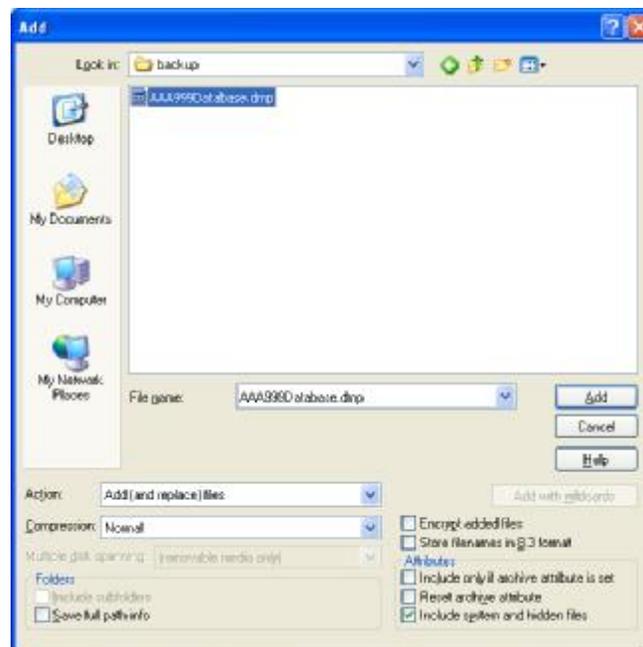
3 Preparing the Files for Transfer

This Section assumes you will be using WinZip 9. If you are using other file-compression software, please see the instructions included with it for information on compression and encryption.

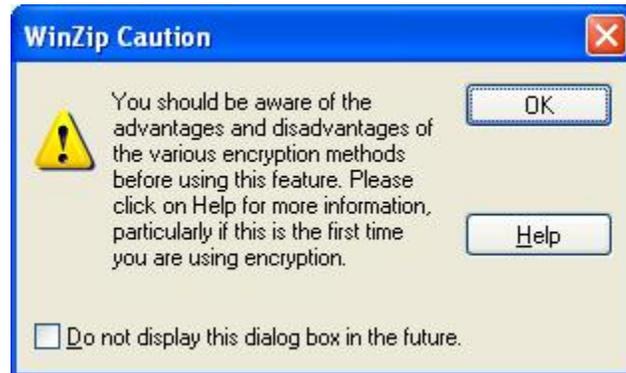
- 3.1 If WinZip (or other file-compression software) is not already installed on your computer, download it from <http://www.winzip.com/> and install it to the computer that will upload the file.
- 3.2 Open WinZip and create a new file (*File | New Archive*). Save the file to a location that will be easy to recall during the upload process, such as C:\QtTemp. The file should bear your Client ID and a ZIP extension. For example: AAA999DataBase.ZIP.



- 3.3 Add your files.



- 3.4 To encrypt your file, click *Actions* | *Encrypt*. If you need more information about encryption, click the **Help** button. Otherwise, click **OK**.



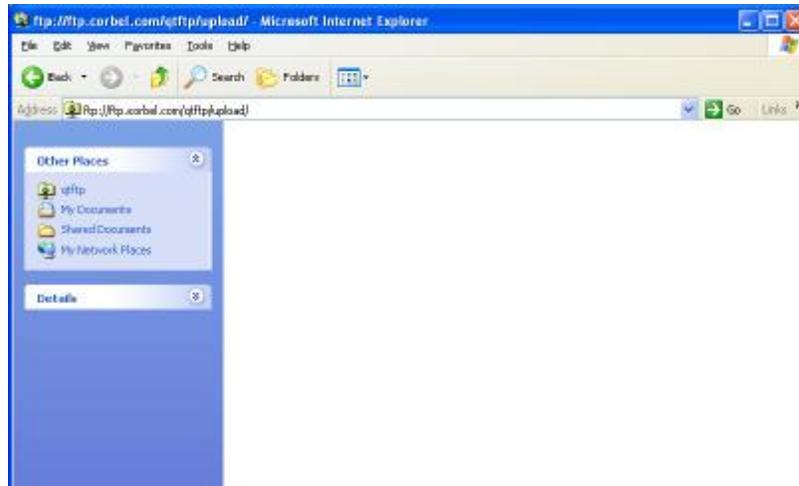
- 3.5 Enter and confirm your password, then choose your type of encryption. Click **OK** when ready. Close the WinZip program.



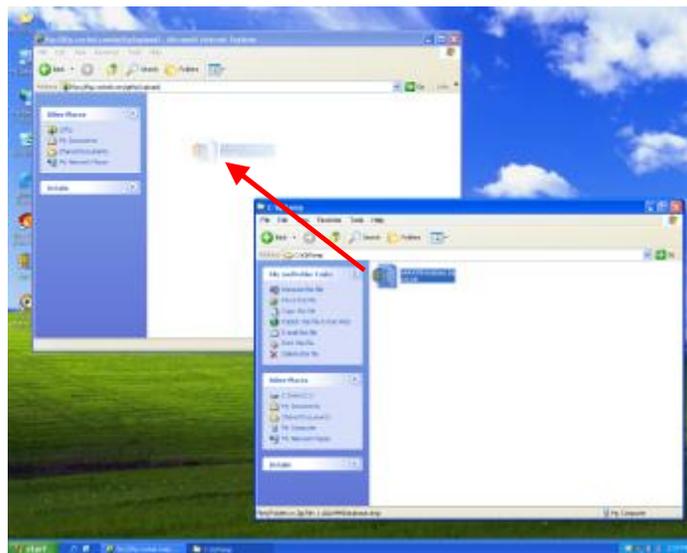
4 Connecting and Transferring the Files

This Section assumes you will be using the latest version of Microsoft Internet Explorer. Some browsers may not allow anonymous FTP uploading. For information on uploading using other browsers, consult their individual help files.

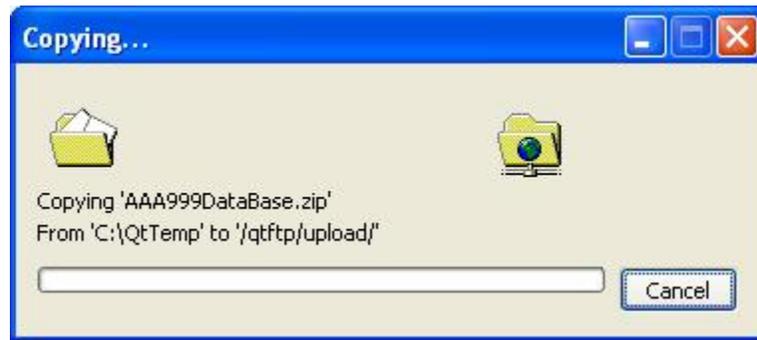
- 4.1 Open Internet Explorer and access <ftp://ftp.relius.net/qtftp/upload/>.



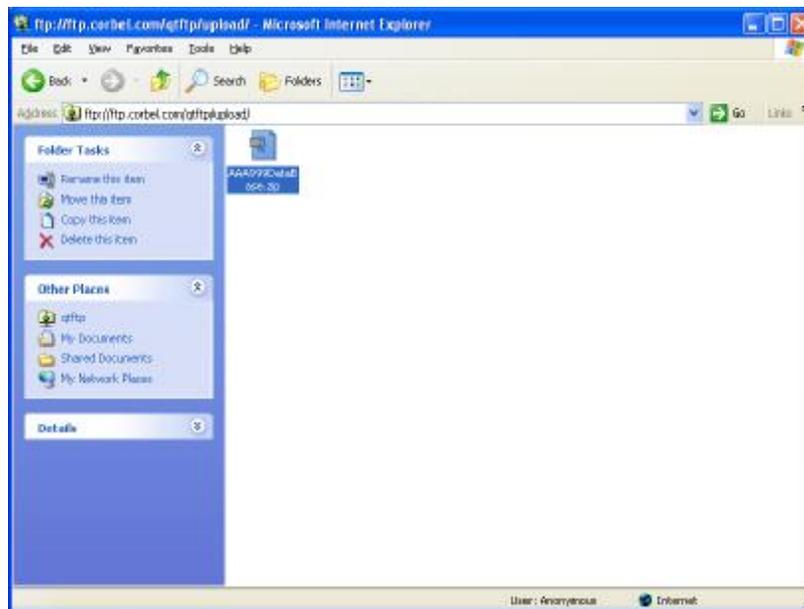
- 4.2 Note for Internet Explorer 7 Users: After logging on, you may have to click *Tools | Open FTP Site in Windows Explorer* to view the site. This is a new security feature in IE 7.
- 4.3 Open Windows Explorer and locate the ZIP file you plan to upload.
- 4.4 Drag the file (or copy and paste) into the Internet Explorer window that is logged onto the Relius FTP site.



4.5 The file should start copying. Do not interrupt the process.



4.6 When finished, you should see your file in the window. Close the browser and notify your support representative that the file is ready for their use.



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