

The logo features the word "SUNGARD" in white on a black background, followed by "RELIUS ADMINISTRATION" and "Solutions for retirement services" in white on a blue background. To the right is a vertical bar with multiple colored stripes.

SUNGARD

RELIUS ADMINISTRATION
Solutions for retirement services

***Relius Administration
Version 19.1 Upgrade
Installation and Configuration***

October 28, 2014

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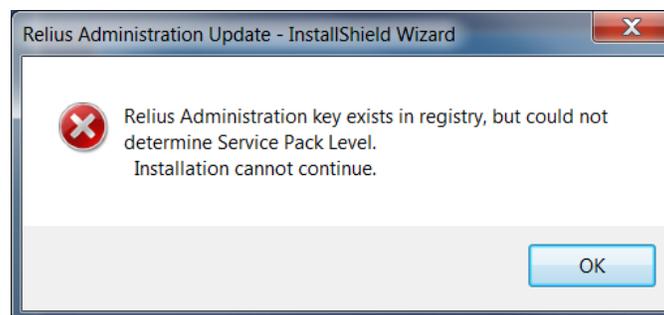
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1 Overview

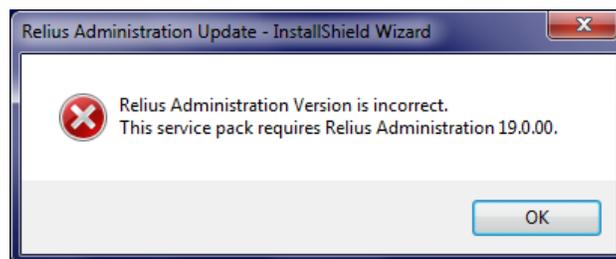
Please read the entire document before beginning. **This document covers the installation of Relius Administration 19.1 upgrade from Relius Administration 19.0 or later, which must be installed and fully functional before proceeding.** If you are unclear about this installation, please contact Support at 1-800-326-7235, option 3.

Your workstations and database **must** be running Relius Administration 19.0 (or greater) before installing this release. Running the 19.1 Release Upgrade without 19.x installed first will cause the installation to fail. Web/VRU clients, please read Step 2.10 regarding your upgrades.

If you see the message below, that means your workstation has not been configured with Relius Administration 19.0. Version 19.1 is an upgrade and not a full installation; you must install 19.0 before running the 19.1 installation.



If you see the message below, your current workstation has Relius Administration, but it is not at version 19.0 or higher. You must upgrade your workstation to version 19.0 before proceeding.



Release Upgrades are installed via self-extracting installation program. Simply double-click the downloaded file and follow the on-screen prompts, detailed herein. The database will be upgraded through a script-running process, files will be copied to their appropriate location, and the system will finalize the settings necessary to run the upgraded release. A reboot of each workstation may be required at the completion of the installation.

The installation of Relius Administration 19.1 involves the following basic procedures:

- 1) **Read and understand this document.**
- 2) Ensure all workstations have Relius Administration 19.0 or later properly installed and configured.
- 3) Ensure your database has been properly exported and backed up.
- 4) Install Relius Administration 19.1 and all components, running upgrade scripts against database.
- 5) Set up additional workstations (if necessary).

2 Installation and Environment Considerations

2.1 Installation Methods

Relius Administration 19.1 is available via download from the SunGard FTP Site (<http://www.relius.net/support/loginform.asp>). Each workstation will require access to the downloaded file, preferably a local drive. If a network drive is used to install the software, it must be mapped with a drive letter assigned. Running the Relius Administration 19.1 setup from a network drive accessed by browsing with Network Neighborhood will **fail**. Other methods of installing (installing directly from the SunGard Relius web site, “push” or “ghost” technology, Z.E.N. Works, Zip Drives, etc.) are neither supported nor recommended.

2.2 Software fixes via Internet

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

2.3 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 Relius Administration to determine whether script blocking is affecting the application.

Some editions of Norton Internet Security and Symantec Endpoint Protection have generated “False Positive” results when installing Relius Administration products. If you are running Norton Internet Security, it is imperative that you temporarily disable it while running Relius installations. If you are running Symantec Endpoint Protection, be sure you have the most up-to-date software installed.

2.4 Databases in ArchiveLogMode

Clients with large databases in ArchiveLogMode may consider temporarily shutting off archiving prior to updating the database. Failure to do so could jeopardize available disk space as archive files are constantly being written. An additional consideration is the extra processing time needed to both update the database and generate log files. Please call Relius Technology Support to discuss in more detail.

2.5 Security Considerations

Responsibility for support of problems and issues related to Relius Administration 19.1 running in a user-restricted security configuration is that of the end user. Certain circumstances may require billing on a time and material basis. SunGard cannot guarantee that Relius Administration 19.1 will install or operate properly on any given locked-down security configuration. Relius Administration 19.1 is certified and supported only when run on the default Windows user security settings.

The Windows Administrator (or a user with equivalent local Administrator rights) **must** run the installation.

2.6 Unsupported Operating Systems

The following operating systems are not supported:

- Windows 3.1
- Windows 3.11
- Windows 95
- Windows NT
- Windows 98
- Windows ME
- Windows 2000
- Windows XP
- Windows Server 2003
- Windows Vista
- Windows Server 2008 (non-R2)

For a list of supported operating systems and configurations, see our web site (http://www.relius.net/support/qt_technology.asp). Operating systems must be installed to the local hard drive of each workstation. Diskless workstations and operating systems that run from the network are **not** supported. For additional technical information regarding this topic, please contact Relius Administration Technology. **Windows XP, Windows Server 2003, Windows Vista, and Windows Server 2008 (non-R2) are no longer supported.**

2.7 64-Bit Platforms

Relius Administration is now supported on x64 systems for workstations, Terminal Servers, Web systems, and agent machines. Voice Response is not supported on x64. Oracle 11g Database Servers are supported only on x64 systems.

2.8 Hardware and Software Requirements

All hardware requirements are specified on our web site (http://www.relius.net/support/qt_technology.asp).

- Windows 8.1, Windows 8, Windows 7. For Terminal Server systems, Windows Server 2008 R2, and Windows Server 2012.
- Personal Oracle 11g or Oracle Client 11g pre-installed.
- Appropriate printer driver (HP LaserJet III or greater).
- TCP/IP Network Protocol for multi-user systems. TCP/IP must have a static IP address on the database server.
- Video resolution requirements for this release change to a minimum of 1024 x 768.

2.9 Upgrade Order of Installation

Your workstations and database must be running Relius Administration 19.0 (or greater) before installing this release. Running the 19.1 installation without 19.0 installed first will cause the installation to fail.

2.10 Important Notes Regarding Web, VRU, and CSR

If you are using the Relius Administration Web, VRU, or CSR modules, you must already be running Relius Administration 19.0 or later. This means that your workstations and database must already be running Relius Administration 19.0. In addition, your Web, VRU, and CSR servers must also already have 19.0 installed. Please note that the workstation and Web/VRU/CSR releases and service packs must be run incrementally. If you have not run these upgrades incrementally or if you have run them out of order, Technology Support will need to assist you. This may cause additional delays and downtime when updating to 19.1. If you have not already installed 19.0 or if you are unsure about the version you are currently running, please contact Technology Support for assistance.

3 Performing the Relius Administration 19.1 Upgrade Installation

Pre-installation Notes:

- a) This installation is valid for Windows 7, Windows 8, Windows 8.1, and Windows Server 2008 R2/2012 with Terminal Services (if the use of Relius Administration on Terminal Services is properly licensed by SunGard). All references to “Windows,” unless otherwise noted, are also valid for the above named operating systems.

Special Note for clients licensed by SunGard to run Relius Administration on Terminal Servers: **The program must be installed at the server console as the Administrator, not remotely connected using client software.**

- b) Run Scandisk (also known as “Analyze”) to check the integrity of your hard drive and have any problems resolved before installing this release.
- c) From the main menu in Relius Administration, click *Utilities / System Administration / Temporary Table Maintenance*. This will “clean” your database of temporary and report tables, which may speed up your database upgrade.
- d) Be sure no screen saver will become active during the installation. SunGard discourages the use of screen savers whenever running Relius Administration or its Installer.
- e) Relius Administration 19.1 installs many of its support files in the “System” directory, normally C:\WINDOWS\SYSTEM32 (or C:\Windows\SysWow64 on 64-bit systems).
- f) The installation process takes approximately **15 minutes** to complete on smaller databases, and **up to two hours** on larger databases. The process of updating the database may take longer, depending on the amount of data in the database. In testing the release at SunGard, larger databases have taken up to 3 hours to complete. Subsequent installations to workstations on a multi-user database will only take a few minutes.
- g) Review the Relius Administration system requirements located on our web site (http://www.relius.net/support/qt_technology.asp). **Do not** proceed with the upgrade if your environment does not meet the minimum system requirements.

- h) **Ensure you have a valid backup and database export of your system before beginning the upgrade. Before beginning, you must READ and AGREE TO the following:**

In performing this upgrade procedure, I – the software end user or individual intending to perform the software upgrade – understand, acknowledge, and agree that this upgrade program will make substantial necessary changes to my database to make it compatible with version 19.1. There is a potential for the changes not to occur correctly, due to a variety of factors, many of which are out of the control of SunGard.

I understand that valid, restorable database backups are vital in order to recover from a situation where, for whatever reason, the database modification fails to occur successfully. Restorable backups are necessary to ensure that I can restore my system to its present state. I agree that SunGard is not responsible for performing my data backup, nor is SunGard responsible for setting up, monitoring, or warranting proper operation, backup, or restorability of data from said backup system. I agree that I – the end user, not SunGard – am fully responsible for the backup of data, for the integrity of backed-up data, and the restorability of backed-up data. I also agree that I am fully responsible for any consequences stemming from an inability to properly restore data, regardless of the reason or circumstance the restoration was made necessary originally, including software error or software fault attributable to the SunGard -provided software product or service.

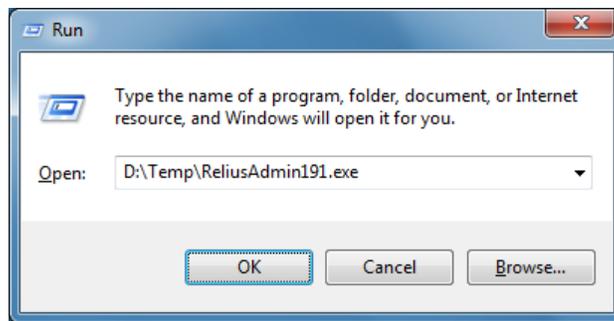
I understand and agree to the above. Use of this release indicates my acceptance of the terms above. If I do not agree with the terms above, I will not perform this upgrade and will contact SunGard for assistance.

This message is not intended to alarm but rather to reinforce the importance of backing up Relius Administration plan data. If the upgrade is performed without valid backups AND something goes wrong during the upgrade process, there is potential to lose some or all of the Relius Administration plan data contained in the Oracle database.

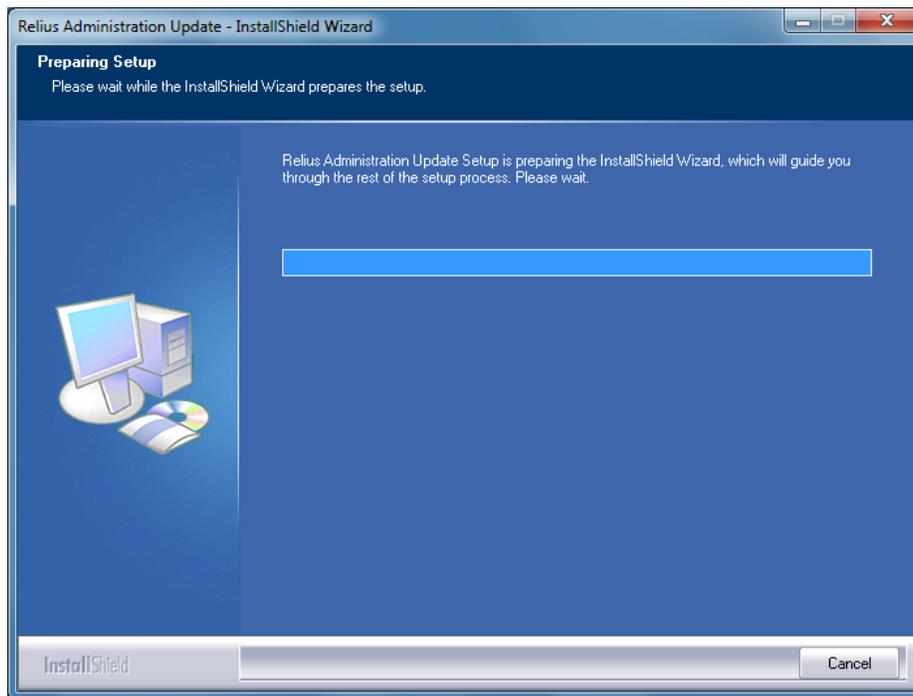
Unless otherwise noted, all activities contained herein must be directly conducted at a Relius Administration workstation.

- 3.1 Download the self-extracting installation program (ReliusAdmin191.exe) from the SunGard Relius FTP Site (<http://www.relius.net/support/loginform.asp>) and copy it to an easily accessed location, preferably a local drive. *In these instructions, D:\Temp will be used.*

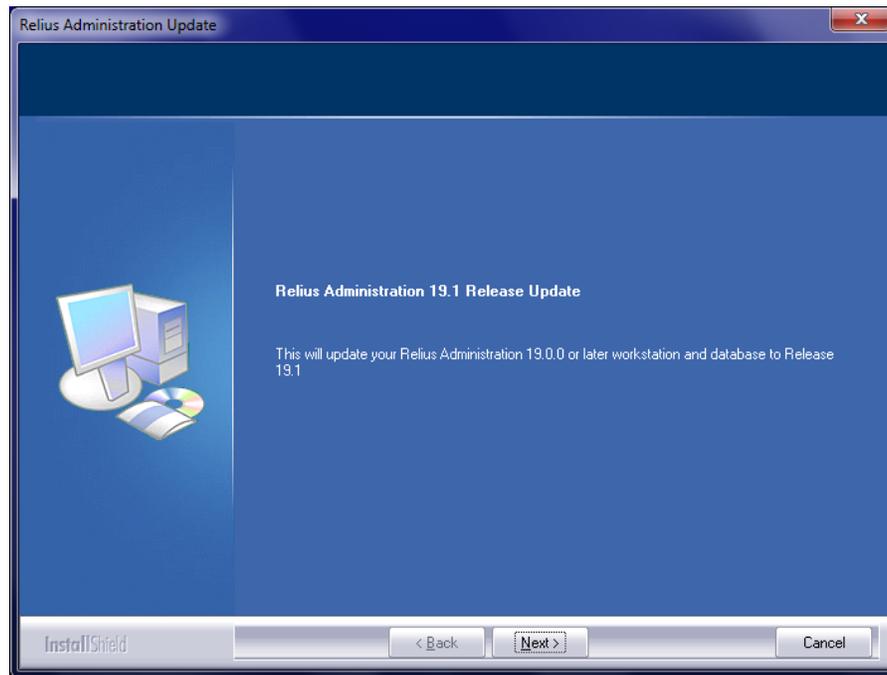
- 3.2 Remove any icons or shortcuts from the **StartUp** folder. Services (such as real-time virus scanning) that may impede or interfere with the installation should be stopped and set to “Manual” before proceeding.
- 3.3 Re-start the computer. Windows or other programs may have locked some files that need to be overwritten during the upgrade process.
- 3.4 Temporarily disable all virus protection.
- 3.5 Ensure all users are disconnected from the system, including workstations, Web, VRU, and STP agents.**
- 3.6 Click *Start*, then *Run* and type **D:\Temp\ReliusAdmin191.exe** in the command box, then click *OK*.



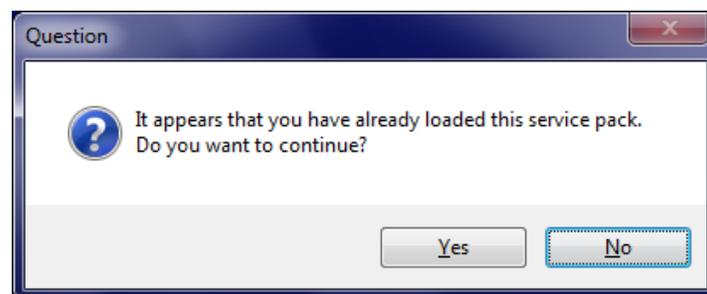
- 3.7 Because this installation is a self-extracting executable, several files will extract and copy to temporary locations for the installation process.



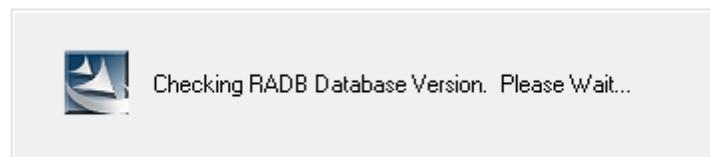
- 3.8 The Relius Administration 19.1 Setup “Welcome” screen appears. Please note that all open programs need to be closed at this time. Click *Next* to continue.



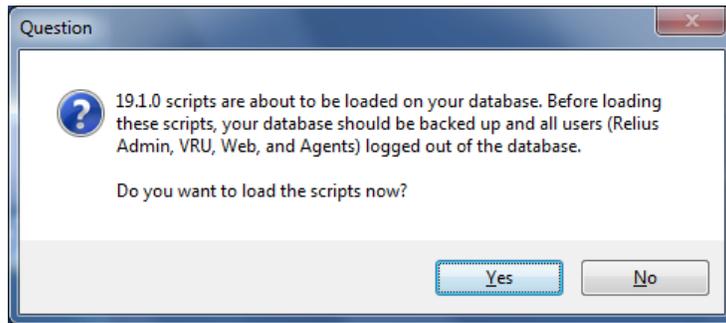
- 3.9 If you already installed this Release, you will be prompted to continue. There is no harm in clicking “Yes.”



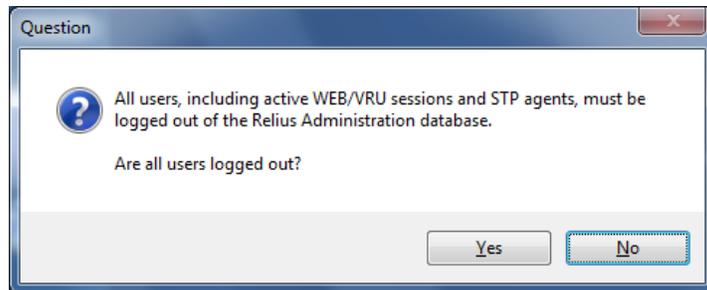
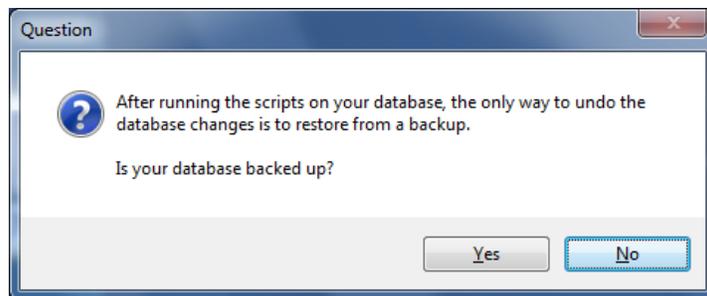
- 3.10 The installation will then check the level of your database.



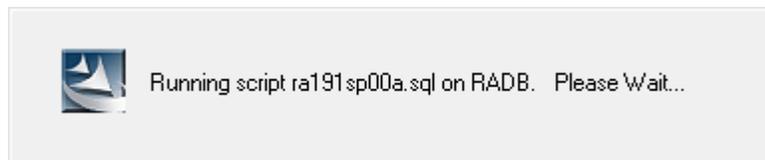
3.11 If not previously run, database upgrade scripts will need to be run against your database.



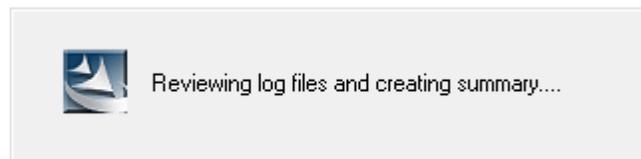
3.12 You will be prompted to ensure your database is backed up and all users are disconnected from the system.



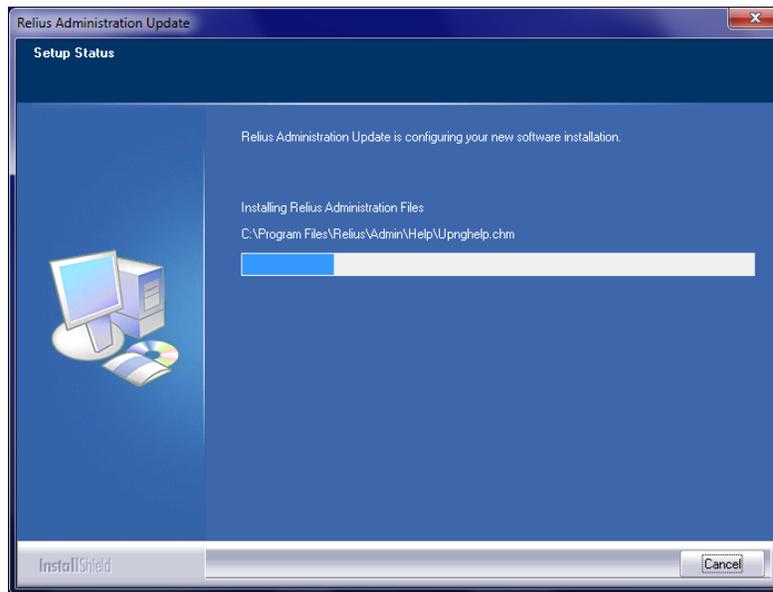
3.13 Your database will have all necessary scripts run against it to bring it to version 19.1.



3.14 When the scripts have successfully run, a summary log file will be generated.



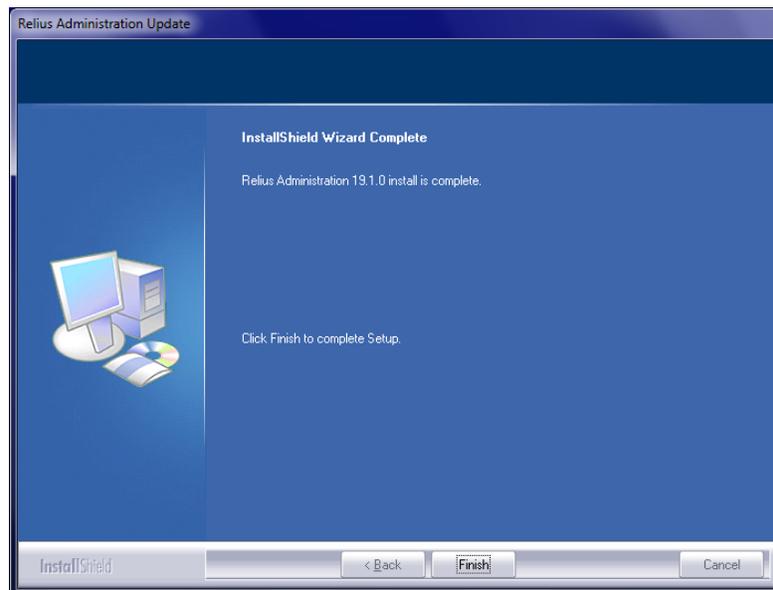
3.15 The installation will then copy and register the new Relius Administration 19.1 files.



3.16 Other settings will be configured and converted to properly run in the new environment.



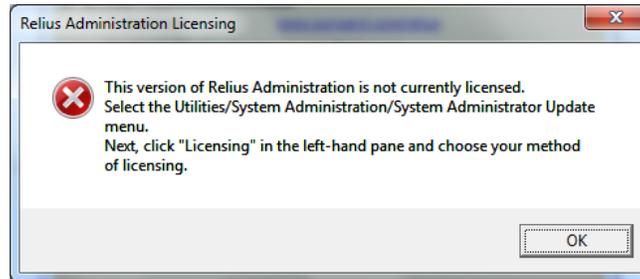
3.17 The final screen will look like the one below. You will be prompted to reboot. **Be sure “Yes, I want to restart my computer now” is chosen and click Finish.** Your workstation will shut down all applications and restart. **Do not** interrupt the process.



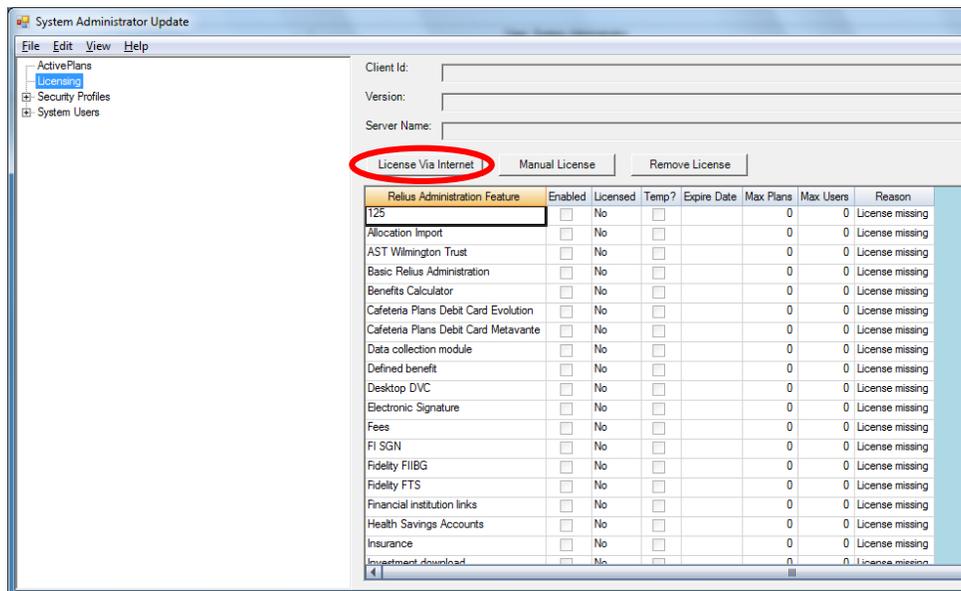
3.18 If action was taken in Step 3.2, restore the icons or shortcuts that were temporarily removed from the **StartUp** group or folder. Restart any services that were temporarily set to “Manual” and – if necessary – place them back in “Automatic” mode.

4 Licensing Relius Administration

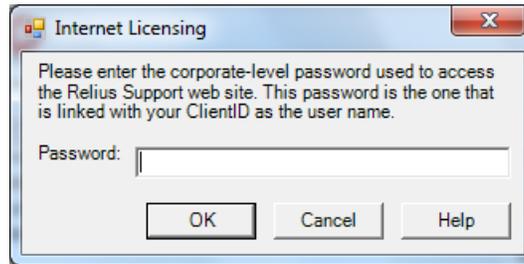
Licensing for Relius Administration **must be renewed** at version 19.1. Licensing is stored in the database. Multi-User systems need to re-license only the first workstation. Each Single-User system must be re-licensed individually.



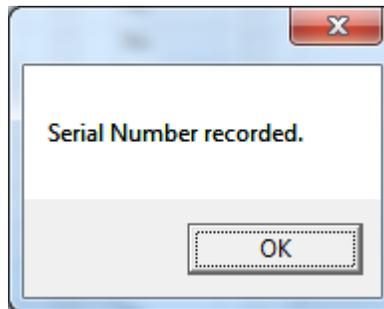
- 4.1 Open Relius Administration and sign on as the System Administrator or a user with the System Administrator's rights. You should receive the message above. Click *OK*.
- 4.2 From the main menu, click *Utilities / System Administration / System Administrator Update*. From the System Administration menu, click the *License Via Internet* button.



- 4.3 Enter the password used to access Relius support website. **The password is case-sensitive.**



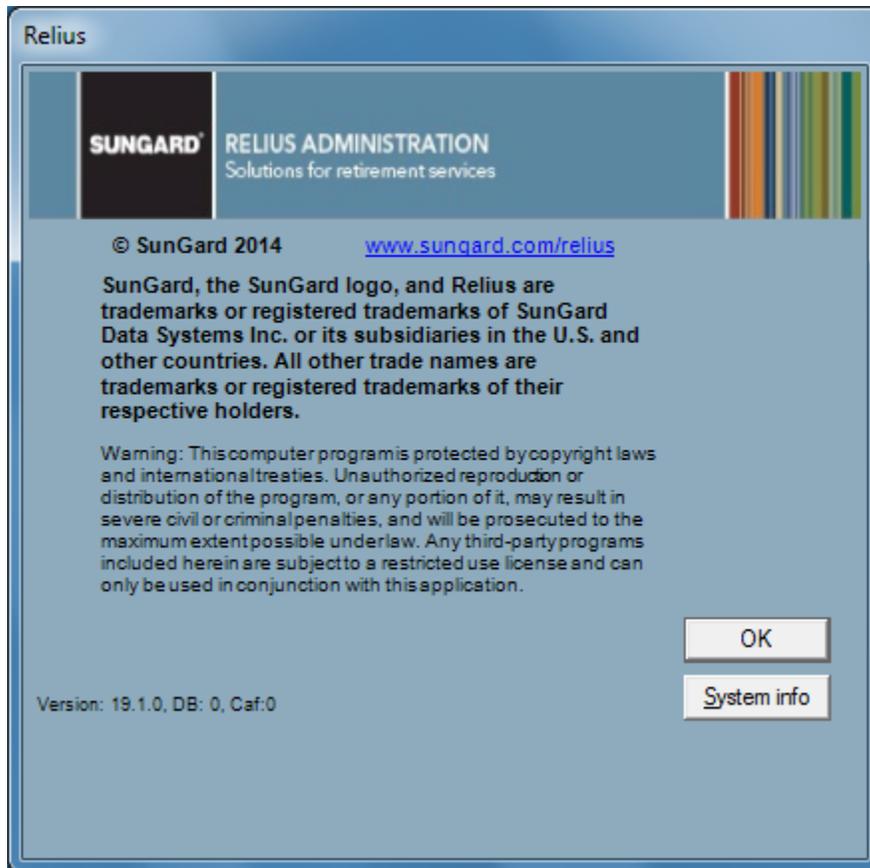
- 4.4 You should receive the message shown below. Exit Relius Administration. If you do not have Internet access or licensing via the Internet fails, click *Licensing / Manual Licensing* and call Relius Administration Support for a code.



- 4.5 Re-open Relius Administration and sign on as a standard user. You should see all eight (8) menu options: *File, View, Data Entry, Processing, STP, Reporting, Utilities, and Help.*



- 4.6 Multi-User systems need to re-license only the first workstation. Each Single-User system must be re-licensed individually. You can verify the version and service pack level by clicking *Help / About* and reviewing the contents of the “About” screen.



Repeat the process of installing this upgrade on each workstation, beginning with Step 3.1. Since scripts will need to only be run the first time on a multi-user database, they will not be re-run. The installation program will detect that the database has already been upgraded, so steps 3.10 through 3.14 will be ignored. **Single-user (PO11g) databases will require the scripts to be run against each database.**

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