

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

Version 19.1 Web/VRU/CSR Upgrade Installation and Configuration

October 28, 2014

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1 Overview

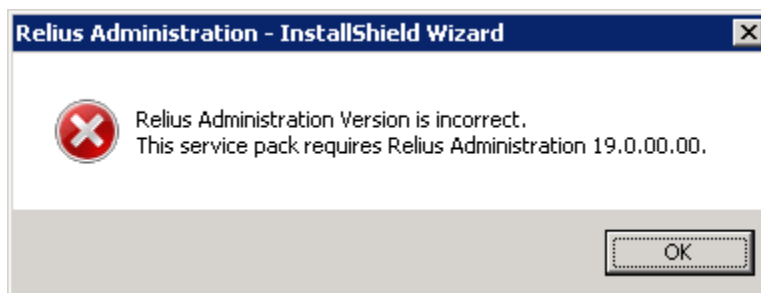
This document covers upgrading the Relius Administration 19.0 VRU, Web, and CSR Servers to Relius Administration 19.1. To install Relius Administration 19.1 on a workstation, please refer to the Relius Administration 19.1 Installation and Configuration document. All references to the Voice Response Units powered by Edify will be hereinafter called VRU. All references to the Internet Server will be hereinafter called Web. All references to the Customer Service Representative module will be hereinafter called CSR. Only those modules for which you are licensed will be activated.

The installation of the RA Web/VRU/CSR Service Pack involves the following basic procedures:

- 1) **Read and understand the entire document** before beginning.
- 2) Ensure Relius Administration 19.1 is installed and fully functional at each workstation and the databases have been successfully upgraded.
- 3) Ensure RA Web/VRU/CSR and all related components required to properly function are installed on your servers.
- 4) Ensure your database has been properly exported and backed up.
- 5) Install the Web/VRU/CSR Service Pack, including running upgraded scripts against databases.
- 6) Test the Web/VRU/CSR systems.

Important Note

If you are using the Relius Administration Web, VRU, or CSR modules, you must already be running the latest release of Relius Administration before applying this release. This means that your workstations and database must already be running Relius Administration 19.1, upgraded from Relius Administration 19.0. In addition, your WEB, VRU, and CSR servers must also already have 19.0 installed.



IMPORTANT! There are no new VRU programs contained within this release. It is not necessary that you run this installation on your VRU Server. If you do choose to run it, there will be no impact to your VRU and the installation will complete very quickly.

2 Installation and Environment Considerations

2.1 Installation Methods

This Service Pack is only available via download from SunGard's support web site (<http://www.relius.net/support/loginform.asp>). Downloading the Service Pack to a local drive is recommended and supported. Other methods of installing ("push" or "ghost" technology, Z.E.N. Works, Zip Drives, etc.) are not supported or recommended.

If a network drive is used to load the Service Pack, it must be mapped with a drive letter assigned. Running the installation from a network drive accessed by browsing with Network Neighborhood will **fail**.

2.2 Software fixes via Internet

Fixes, support files, and upgraded documents will be generally distributed via the Internet at <http://www.relius.net/support/loginform.asp>. Users must have Internet capability to receive these fixes. Visit our web site (<http://www.relius.net/support/subscribe.asp>) and click "*Subscribe*" to receive notification of new fixes by e-mail. SunGard does not send patches and upgrades through the mail. SunGard strongly urges that all users subscribe to this service.

2.3 Virus Scanners

Although SunGard 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. Norton's "Script Blocking" option can cause problems on web servers. Clients using Norton with Script Blocking turned on should test the functionality of RA Web application to determine whether script blocking is affecting our Active Server Pages.

Certain versions of the Anti-Virus programs also install a Web Filter or Web Security. If this option is set too high it can cause serious connectivity errors and web lockups for your clients. The Web Filters or Web Security portions of the files are not supported because they emulate a firewall environment. Software firewalls are not supported by SunGard and should be disabled during installation. If the security settings are too high, the web server may not work correctly. Exercise caution when implementing this manner of security.

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.

2.4 Windows Server Considerations

Windows Server 2008 R2, 2012, and 2012R2 (Web, Standard, and Enterprise Editions) are supported for Web and CSR.

The local Administrator must run the installation. SunGard requires the use of the default local Administrator. For more information, please call Technology Support.

The Relius Administration Web/VRU/CSR Server cannot be configured as a primary or backup domain controller (PDC or BDC). It must be a member server of a workgroup or domain. If the server is configured as a PDC or BDC, the Web/VRU/CSR products will not correctly install, configure, or function. The only solution in these circumstances is to format the server and re-install the operating system and Relius Administration products.

2.5 Upgrading from a Previous Version

The only version from which you can run this Service Pack is Relius Administration 19.0 or later Web/VRU/CSR. If your system is at an earlier version, you must first upgrade your server to RA 19.0.

2.6 Hardware and Software Requirements

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

- **Web:** 32-bit Windows 2008 (Standard or Enterprise Edition) with Service Pack 2 may be used for the Web Server.
- **Web:** 64-bit Windows Server 2008 (Standard or Enterprise Edition) with Service Pack 2, Windows Server 2008 R2 with Service Pack 1, and Windows Server 2012 and 2012 R2 may be used for the Web Server.
- **VRU:** 32-bit Windows Server 2003 with Service Pack 2 or higher.
- TCP/IP Network Protocol with a static IP address on the database server.
- Internet Information Services must be installed and set up (Web/CSR).
- Edify 10.0 must be installed on VRU servers.
- Minimum video resolution of 800 x 600 with 256 colors.

Note: **Web systems running Windows Server 2003 are no longer supported.** VRUs will still be supported for the foreseeable future. SunGard Relius is investigating VRU systems that will run on more recent operating systems.

2.7 64-Bit Platforms

With the exception of VRU systems, Relius Administration is now supported on 64-Bit systems. Contact Relius Technology Support for further information.

2.8 Firewall and DMZ Considerations

Clients need their Internet environment to be as secure as possible. Although SunGard recommends the use of firewalls and other security measures, SunGard cannot assist clients in the implementation and maintenance of such technology.

Firewalls should not be of the software variety. This is due to software firewalls being less secured than hardware firewalls. Hardware firewalls are more secure but require more knowledge of the system in setting up the connectivity and ports.

By default, a hardware firewall is set up and installed between the client trying to access your website and the web server itself. In this case, the only ports that should be “opened” on the Hardware Firewall should be port(s) 80 or 8080, as well as 443. These ports are the default web ports for networks worldwide. Opening these ports will only allow data to pass through these ports when clients access the web site.

DMZ environments are complicated to design and implement and therefore are NOT supported by SunGard.

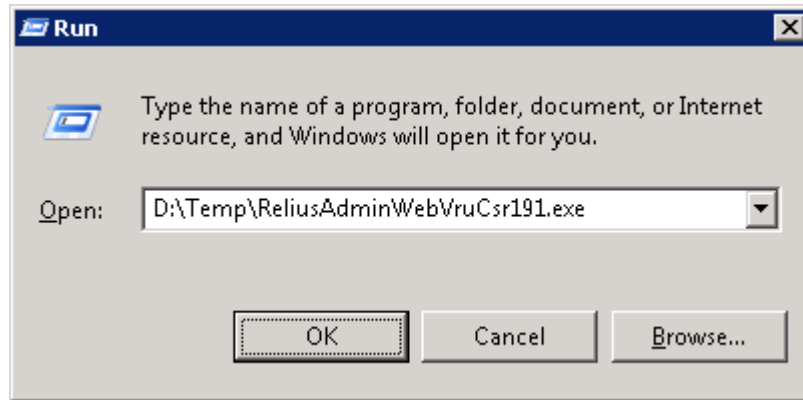
In a DMZ environment, the firewall is between the Web Server and the Database Server on your network. Due to Oracle working on random ports, there are potential connection issues with this setup. Contact your firewall vendor regarding Oracle connectivity through the firewall. For more information or questions about configuring this type of connection, please contact Relius Administration Technology Support at 1-800-326-7235.

3 Performing the RA 19.1 Web/VRU/CSR Upgrade

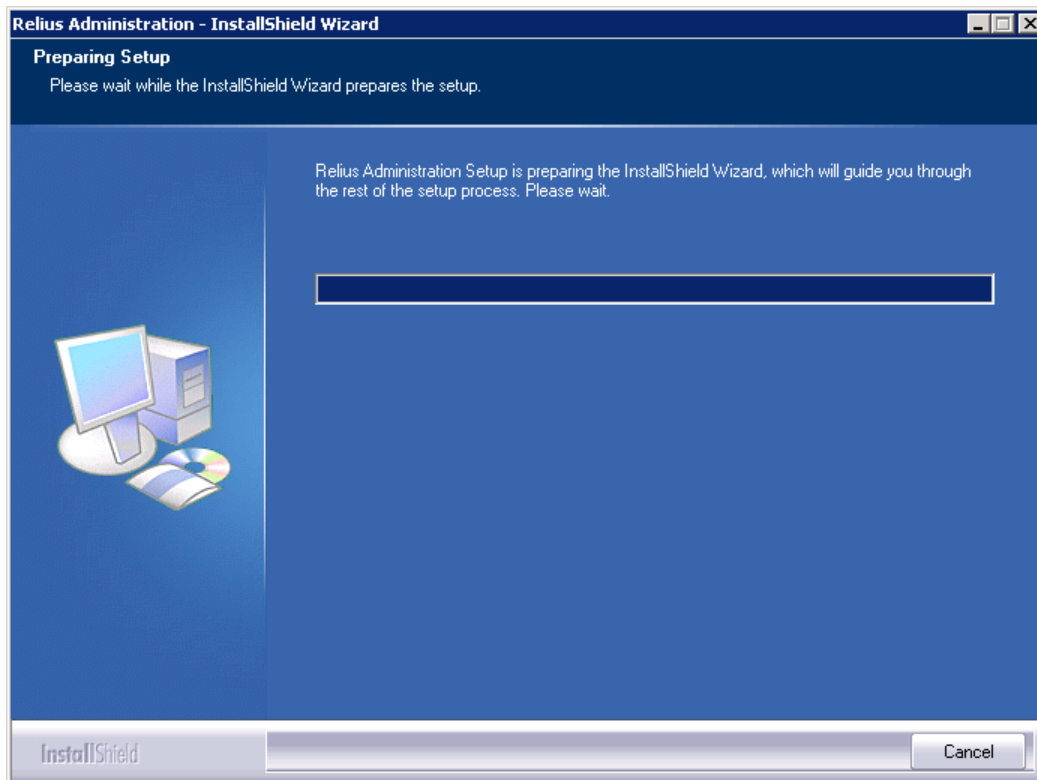
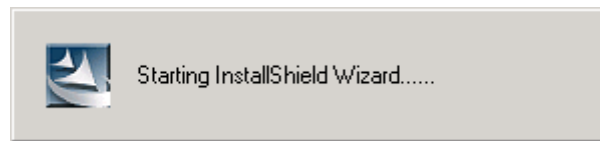
Pre-installation Notes:

- a) This installation is valid Windows Server 2008, 2008 R2, 2012, and 2012 R2 (Standard, or Enterprise Edition, 32-bit or 64-bit) for Web/CSR Servers and Windows Server 2003 (32-bit edition of Standard or Enterprise) for VRU Servers. Any other operating system (such as Web or Datacenter edition) is not valid or supported.
 - b) Relius Administration 19.1 must be installed and fully functional (including database upgrade scripts) at each workstation before beginning this installation.
 - c) Be sure no screen saver will become active during the installation. If a screen saver is to be used after the installation, the default “logon” and the “blank” screen savers use the fewest resources on the server.
 - d) The installation process takes approximately 1 hour to complete. The process of upgrading the databases may take longer, depending on the amount of data in the databases.
 - e) Ensure you have a valid backup of your server(s) and a valid database export before proceeding. SunGard cannot be held responsible for the integrity of your data or servers.
 - f) Unless otherwise noted, all activity is conducted from the Web or VRU server(s) being upgraded.
- 3.1 Download the self-extracting installation program from the SunGard Relius FTP Site (<http://www.relius.net/support/loginform.asp>) and copy it to an easily accessed location. *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.

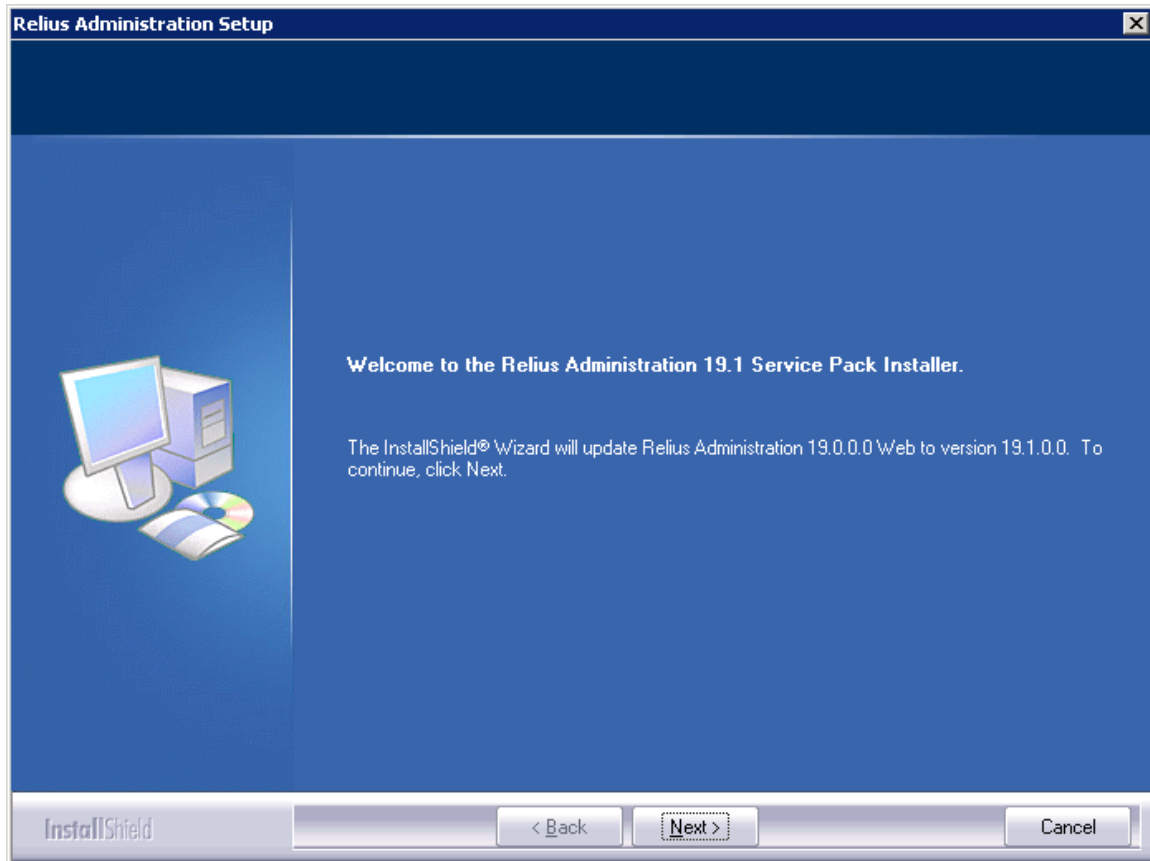
- 3.5 **Ensure all users are disconnected from the system, including workstations, Web, VRU, and STP agents.**
- 3.6 Click *Start*, then *Run* and type **D:\Temp\ReliusAdminWebVruCsr191.exe** in the command box, then click *OK*.



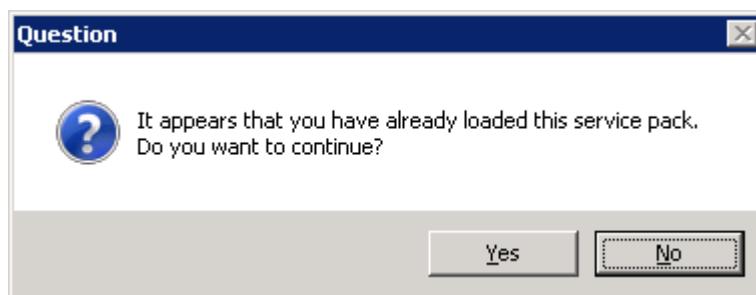
- 3.7 Because this installation is a self-extracting executable, several files will extract and copy to temporary locations for the installation process.



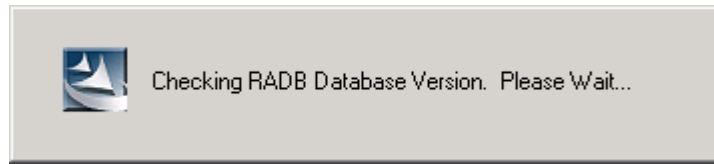
- 3.8 The Relius Administration 19.1 Web/VRU/CSR Installation “Welcome” screen appears. **Some systems may place the installation screens in the background. Click the flashing icon on your taskbar or use <Alt> + <Tab> to bring the installation to the foreground.** Please note that all other open programs should be closed at this time. Click *Next* to continue.



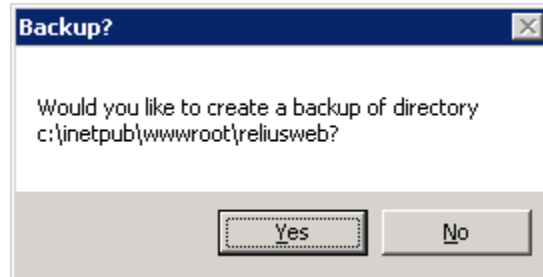
- 3.9 If you have already installed this Service Pack, you will be prompted to continue. There is usually no harm in continuing, but it is not always necessary. Special circumstances may dictate reapplying this upgrade, such as troubleshooting and maintenance, or at the recommendation of Support.



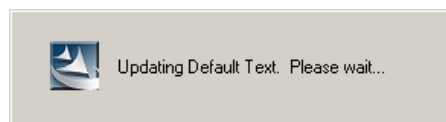
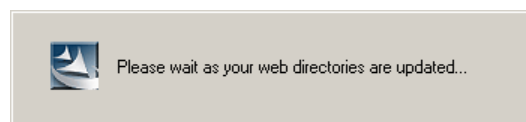
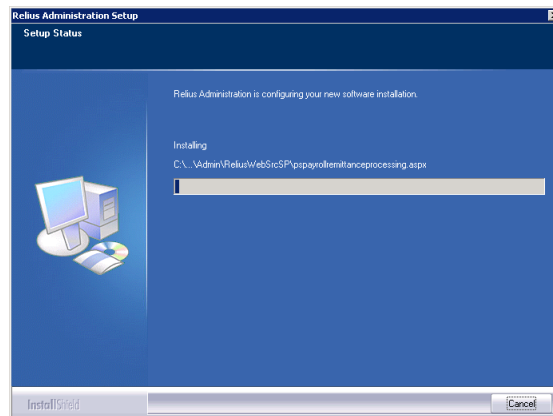
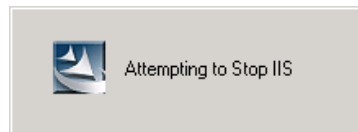
3.10 The installation will first check the level of your database.



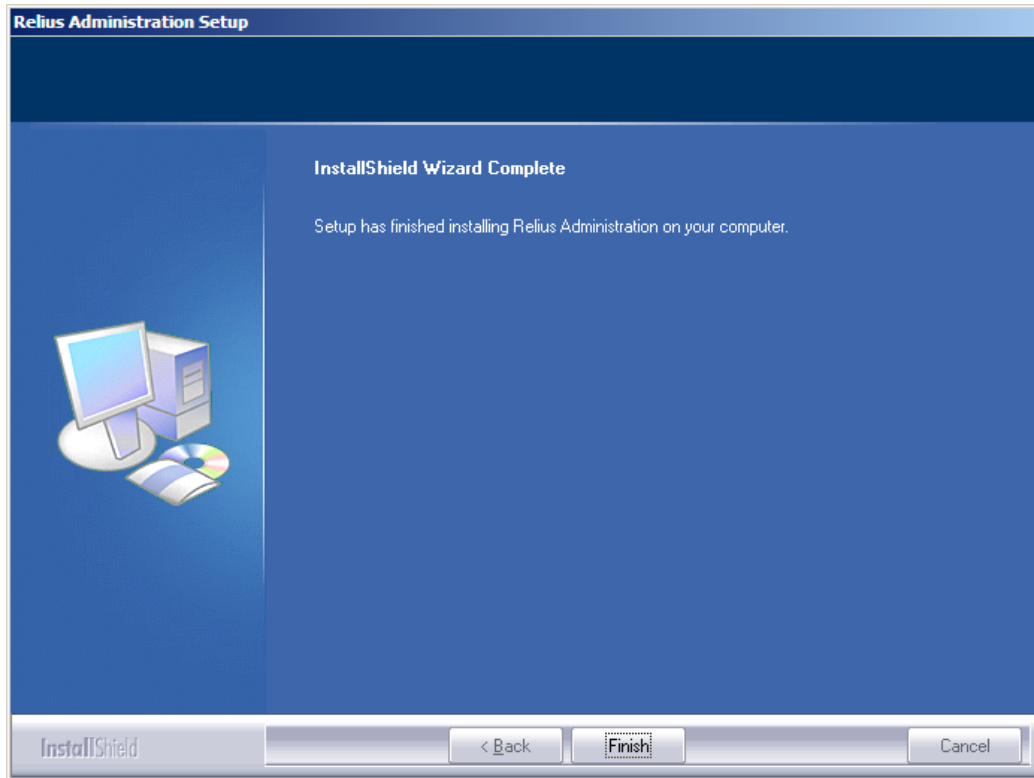
3.11 While the Web program files are being copied, the installation program will prompt you to back up your Web files. If you answered "Yes," a backup directory will be created within C:\Program Files\Relius\Admin, where all your current files will be backed up.



3.12 Next, the installation will back up any necessary files, uninstall "packages," copy files, install "packages," and restart some services. Some screens will be different than what is displayed in these instructions, depending on the servers being upgraded.



- 3.13 The installation is complete. This is the final screen you will see. If prompted to reboot, **select “Yes, I want to restart my computer now” and click *Finish***. Because some components provided by Microsoft were updated (and you may have stopped some services before beginning), you may need to reboot the computer.



- 3.14 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.

Note: There are no new VRU programs contained within this release. It is not necessary that you run this installation on your VRU Server. If you do choose to run it, there will be no impact to your VRU and the installation will complete very quickly.

4 Testing the Servers

- 4.1 From a Relius Administration 19.1 workstation, open Relius Administration and enable your plans, participants, and plan sponsors (if applicable) to access your web server. Setting up plans must be completed. For more help with Relius Administration, click *Help / About* or press the <F1> key from anywhere within the program.
- 4.2 If not already installed, all workstations that will access the CSR module need to have Microsoft Internet Explorer 9.0 or higher installed.
- 4.3 Log on to the Web/CSR Server using the URL assigned to it (i.e., <http://yourweb/reliusweb/> or <http://yourweb/racsrweb/>) or call your VRU. Enter a test UserID and Password. For troubleshooting, please call Support at 1-800-326-7235, Option 3.

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