

The banner features the Sungard logo on a black background, followed by the text 'RELIUS ADMINISTRATION' and 'Solutions for retirement services' on a blue background, and a decorative vertical bar of colored lines on the right.

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RELIUS ADMINISTRATION
Solutions for retirement services

***Relius Administration
Version 20.0 (and higher) Component
Installation and Configuration***

June 23, 2015

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Attention Technology Consultants!

If you are unfamiliar with the end-user specific Relius implementation and environment (or if your systems have a relatively large or complex configuration such as WAN, Web, or VRU), please contact Relius Technology at (800) 326-7235, Option 3, before proceeding. Relius Technology can arrange a brief conference call to provide important details regarding each user's unique operational environment and details regarding the Relius installation and upgrade process. This will help ensure your deployment efforts are successful and efficient. We can also schedule priority telephone support during or after business hours to maximize the time you spend on any Relius project. It is important to note that failure to fully meet the prescribed hardware requirements, deployment methods, or closely follow the installation documents and upgrade steps could result in installation problems, unnecessary downtime, and possible end-user data loss.

1 Overview

Please read the entire document before beginning. **This document covers the installation of third-party components used with Relius Administration 20.0 and higher.** If you are unclear about this installation, please contact Relius Technology Support at 1-800-326-7235, option 3.

Scope

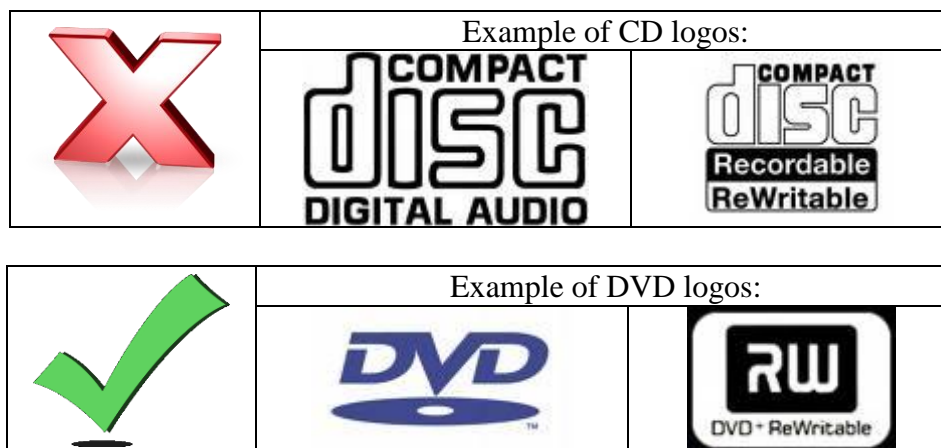
The installation of Relius Administration 20.0 is divided into three parts: database, component, and workstation installations. This document covers the component installation. Both upgrades and new installations must follow the procedures detailed herein for a successful implementation of Relius Administration 20.0.

The component installation is available on DVD. This DVD must be installed before Relius Administration 20.0. Do not install this DVD until you have downloaded RA 20.0 and are ready to install it. This DVD supersedes previous Component installations. Once the components are in place, the RA 20.0 workstation (or Web/VRU) installation can then be run.

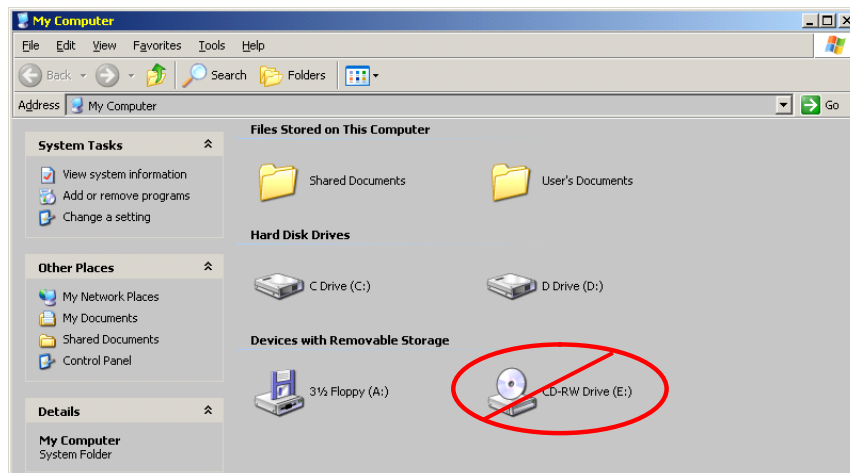
The Component installation must be run on Relius Administration workstations (including Terminal Servers and Agent Machines), Web Servers, and Voice Response Units, where applicable. It will not run on your database server.

Disk Format

Because of the limitations of space on data CDs, the Relius Administration Components are now delivered on a data DVD. If your optical drive only has the CD logos on it, you may not have a DVD drive available on your system.



Another way to verify is by opening Windows Explorer and checking the type of optical drive you have (eject whatever disk may be loaded). If “DVD” is not specifically in the name of the drive, you may not have a DVD drive. The picture below indicates a CD drive, not a DVD drive.



System Requirements

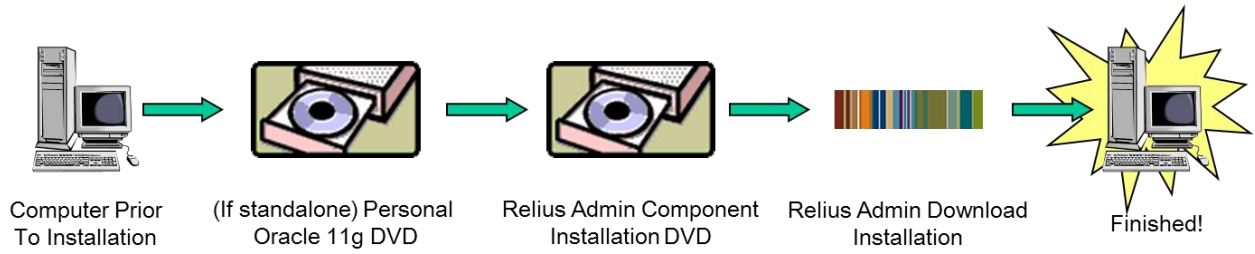
The Component DVD will not install to systems that do not meet the minimum requirements, detailed on our web site (<http://www.relius.net/support/Technology.aspx>). Systems that fall between the minimum and recommended standards will receive a warning message, stating that clients should consider upgrading or replacing their systems soon. Units that meet or exceed the recommended standards will not receive any notices.

Process

The installation of Relius Administration 20.0 involves the following basic procedures:

- 1) **Read and understand this document and the accompanying Relius Administration 20.0 Update document.**
- 2) Ensure your database has been properly exported and backed up. Standalone systems must have their Personal Oracle database setup and running at version 11g prior to installing the Component DVD.
- 3) Install Personal Oracle 11g (for standalone systems). Existing standalone systems running Relius Administration 17.0 or higher will not need to install Oracle, as the correct version of Personal Oracle is already present and configured. New standalone systems that do not yet have Personal Oracle installed before the Component DVD will be configured for a networked database. Recovering from this scenario is time-consuming and usually requires the assistance of Relius Technology Support.
- 4) Install the Relius Administration Component DVD. **(This installation.)**
- 5) Install Relius Administration 20.0, running update scripts against database if necessary.

6) Set up additional workstations (if necessary).



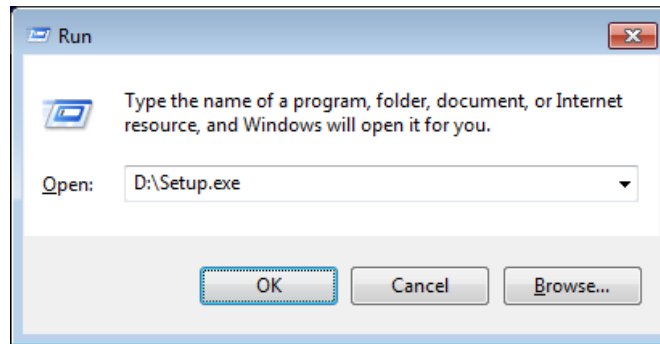
2 Preliminary Steps

In most cases where an update of an existing Relius Administration workstation is performed and Windows Update is regularly run, many of these components will already be properly installed and not updated by this process.

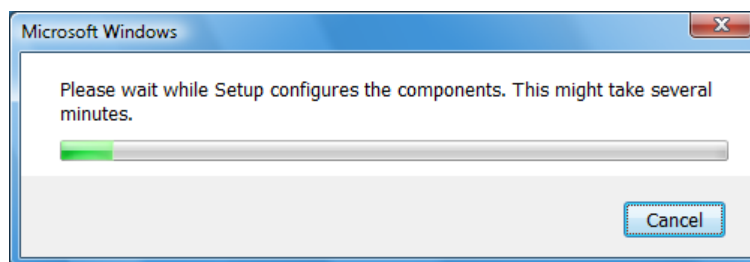
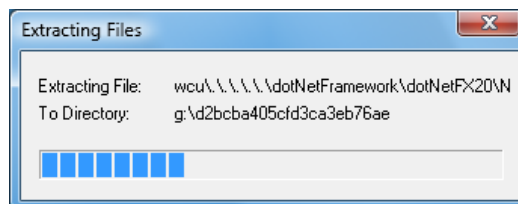
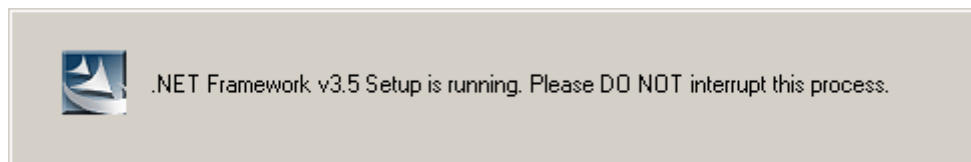
Pre-installation Notes:

- a) The installation process takes approximately **1** hour to complete, depending on the number of components being installed and the speed of your workstation. For example, if the Oracle client is already installed on a workstation where Microsoft.NET is up-to-date, the Oracle client and .NET installations will be skipped, saving a considerable amount of time.
 - b) Many support files will be installed to the “System” directory, normally C:\Windows\System32 or C:\Windows\SysWOW64.
 - c) Removing or disabling your default C\$ share may cause the Oracle Client installation to fail. Temporarily restore the share before proceeding.
 - d) Review the Relius Administration 20.0 system requirements located on our web site (<http://www.relius.net/support/Technology.aspx>). **Do not** proceed with the update if your environment does not meet the minimum system requirements.
 - e) Any components that are already installed and properly configured on your system will be skipped during this procedure.
 - f) The Windows Administrator (or a user with equivalent local Administrator rights) **must** run the installation.
 - g) This installation assumes that it will be run from a local DVD drive. Before running the installation from a network resource, please read Appendix A.
- 2.1 Temporarily disable all virus protection. **Some editions of Norton Internet Security 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.**
 - 2.2 **Standalone** systems require the Personal Oracle 11g database be installed prior to the Component DVD. Failure to install Personal Oracle before the Components will result in the Oracle Client being installed. Systems using networked databases require the Oracle 11g Client, which will be installed and configured with this installation.
 - 2.3 Close any open programs that may access your Relius Administration system.

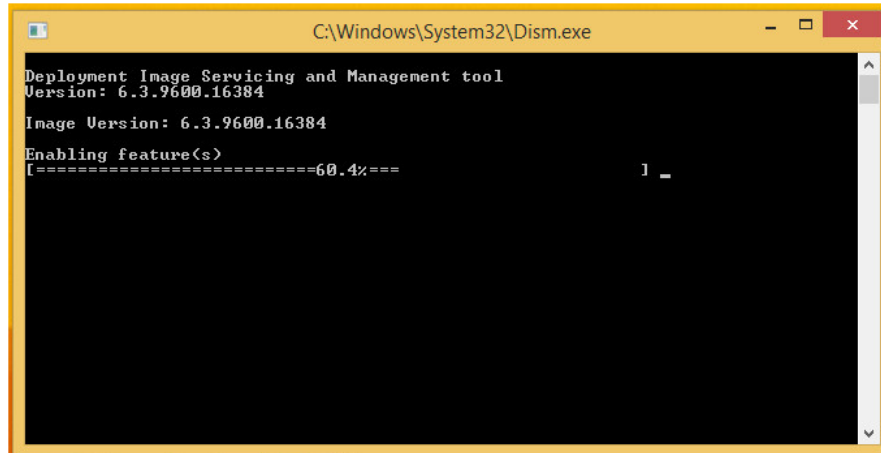
- 2.4 Existing Web systems at version 18.0 or higher will most likely skip all the components and complete the installation quickly. This is normal and expected, as all required components for 20.0 should already be present on a working 18.0 Web system.
- 2.5 Insert the “Relius Administration Component DVD for Workstations” into your DVD-ROM drive. Click *Start*, then *Run* and type **D:\Setup.exe** in the command box (where D: is your DVD-ROM drive), then click *OK*.



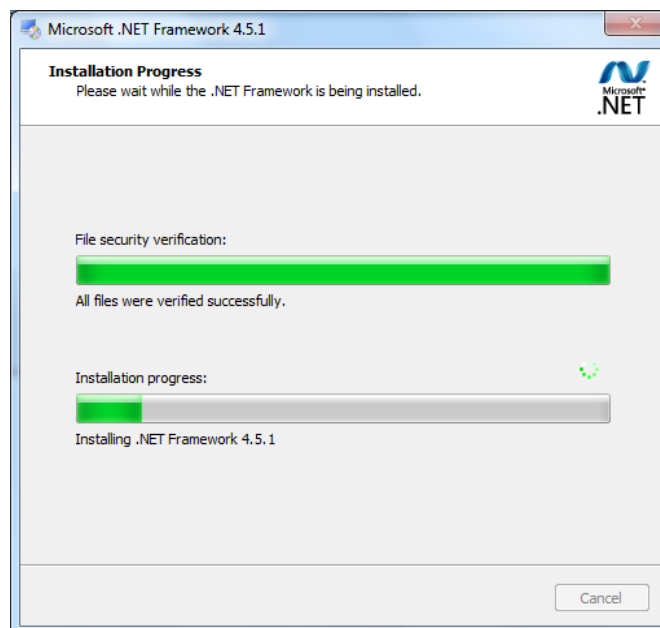
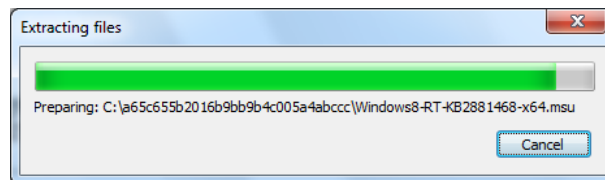
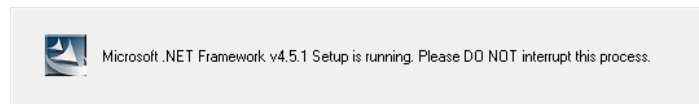
- 2.6 Next Microsoft .NET 3.5 SP1 will install if not already present.



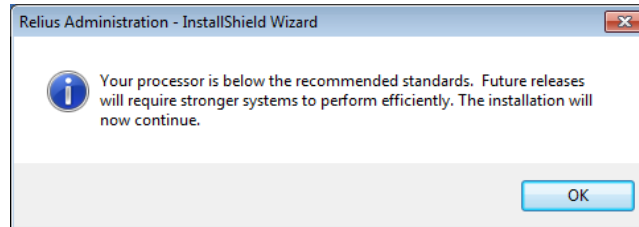
2.7 **Special Note for Windows 8 (& Server 2012) and Higher Systems:** If not already installed and configured, Microsoft .Net 3.5 SP1 will be set up through a command prompt method. The example below is normal and expected. It will close when finished and resume the installation.



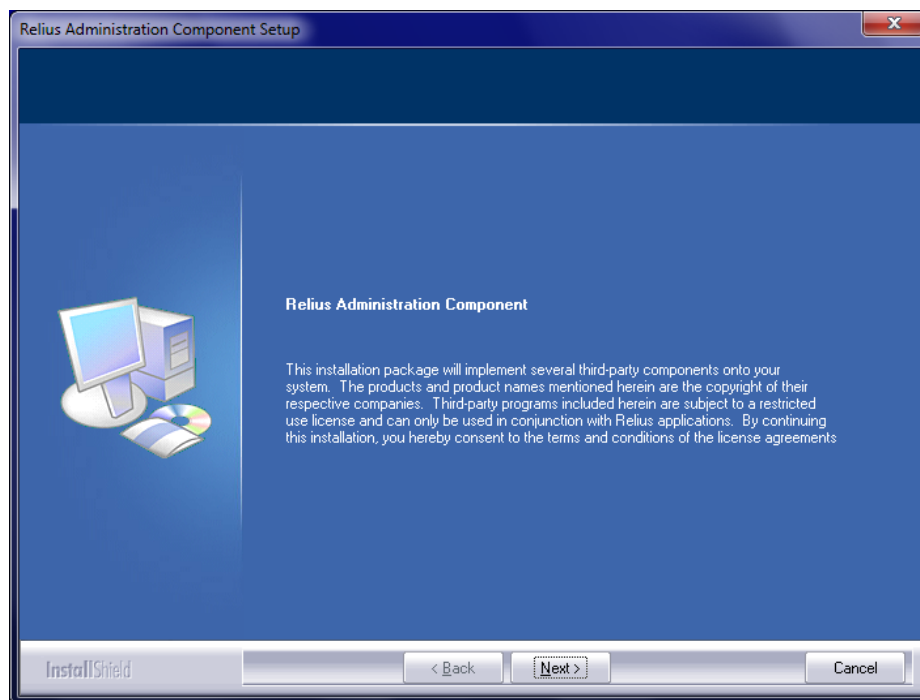
2.8 Microsoft .NET 4.5 SP1 will install if not already present.



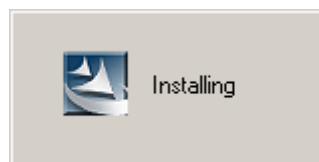
- 2.9 If your system does not meet the recommended hardware standards, you will receive a message encouraging you to upgrade or replace your equipment in the near future. Systems that fall short of the minimum hardware standards will not allow the installation to continue.



- 2.10 At the “Welcome” screen, click *Next*.



- 2.11 A preliminary set of files will be copied to your system.



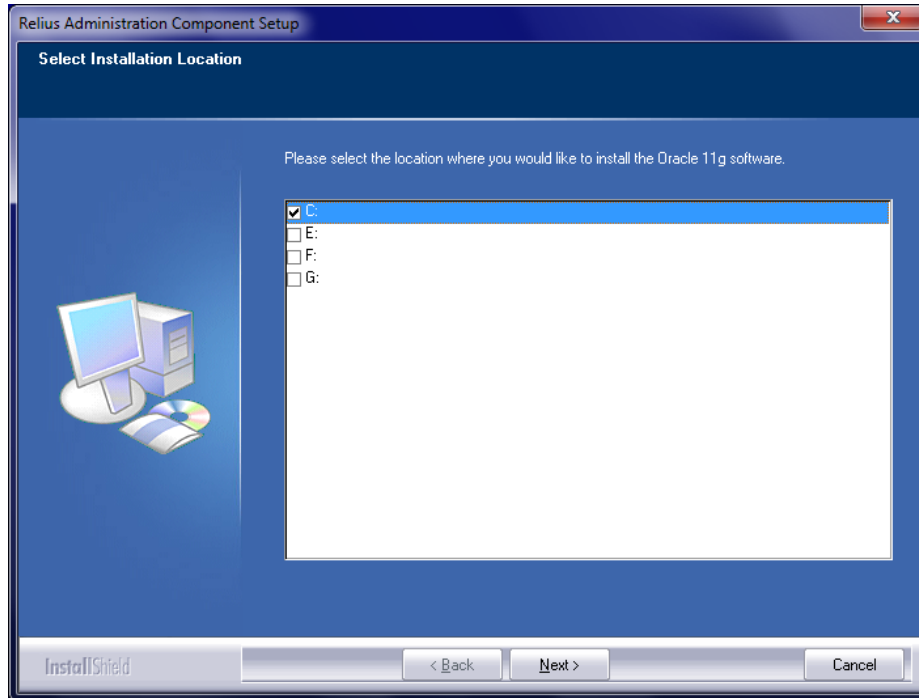
- 2.12 On some systems, the Microsoft Distributed Transaction Coordinator will be stopped and restarted during the Component Installation.



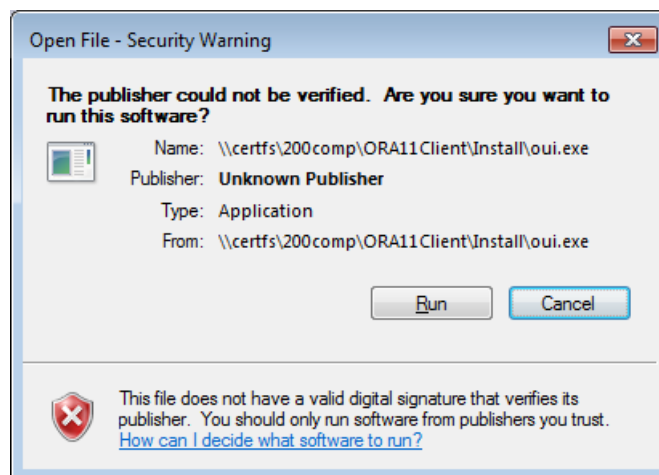
3 Installing the Oracle Client

Systems with Personal Oracle 11g already installed will skip this Section.

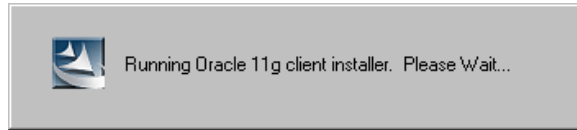
- 3.1 You will be prompted for the location of the Oracle Client. Only the local hard drives with enough space will be displayed. If only one drive with enough free space exists, this screen will not appear.



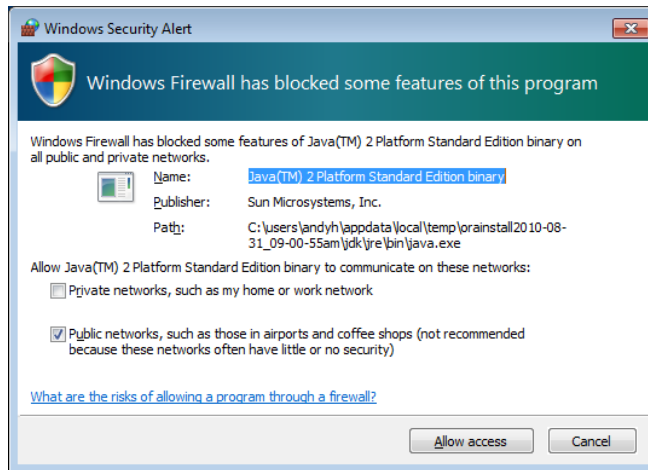
- 3.2 If running from a networked drive (see Appendix A), you may be prompted to launch the Oracle 11g Client Installation. Click *Run*.



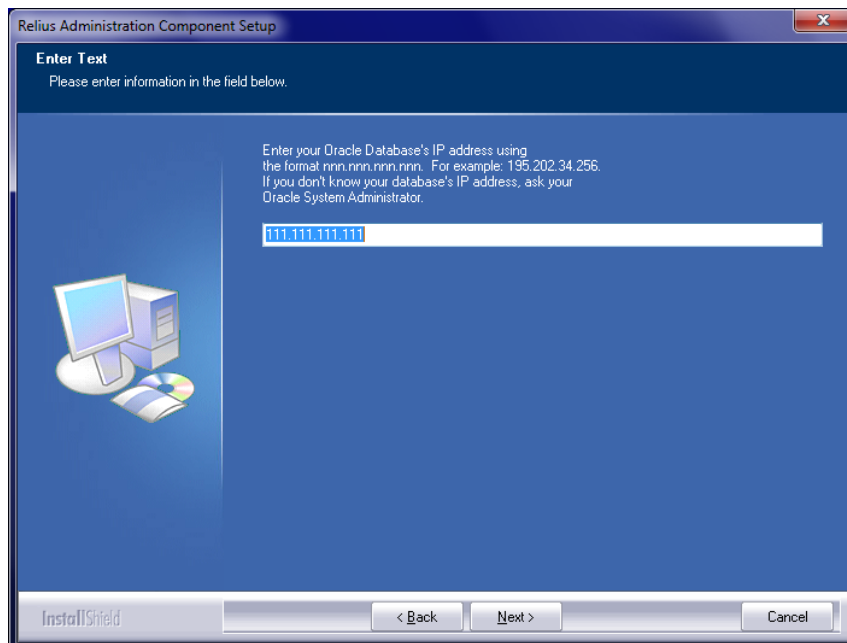
- 3.3 The Oracle Client will begin installing automatically. There is no indication when the installation is finished until the banner shown below disappears. On slower systems, this component may take up to 20 minutes. Do not interrupt the process.



- 3.4 If prompted by a “Windows Security Alert,” choose “Allow” or “Unblock.” This screen may present itself in the background. Use the <ALT> + <Tab> key combination or click the flashing item on your taskbar to switch to this window.



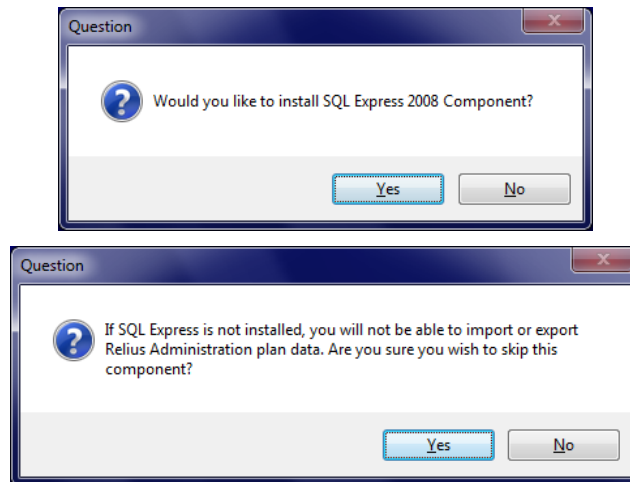
- 3.5 New installations will be prompted for the IP address of your Oracle Database Server. Enter the IP address (or server name if DNS/WINS is configured on your network) provided by your Oracle System Administrator or Network Administrator and click *Next*.



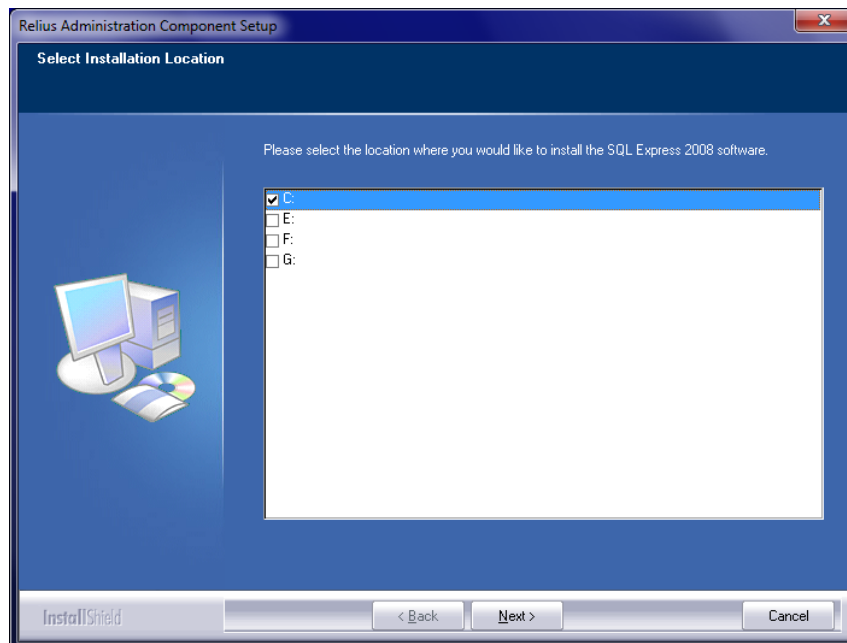
4 Installing SQL Server Express

Systems with earlier editions of SQL Server will not be uninstalled, in case clients use it for other purposes. This Section does not apply to Web or VRU servers.

- 4.1 You will be given the option to install or skip Microsoft SQL Server Express 2008 R2 SP1 on systems where it is not already installed. This database program is used for importing and exporting of plan-specific data within Relius Administration. It is not necessary for all computers, but any systems that do not have it will not be able to import or export plan data.



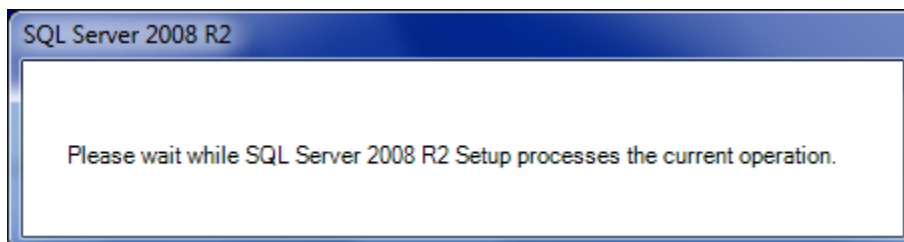
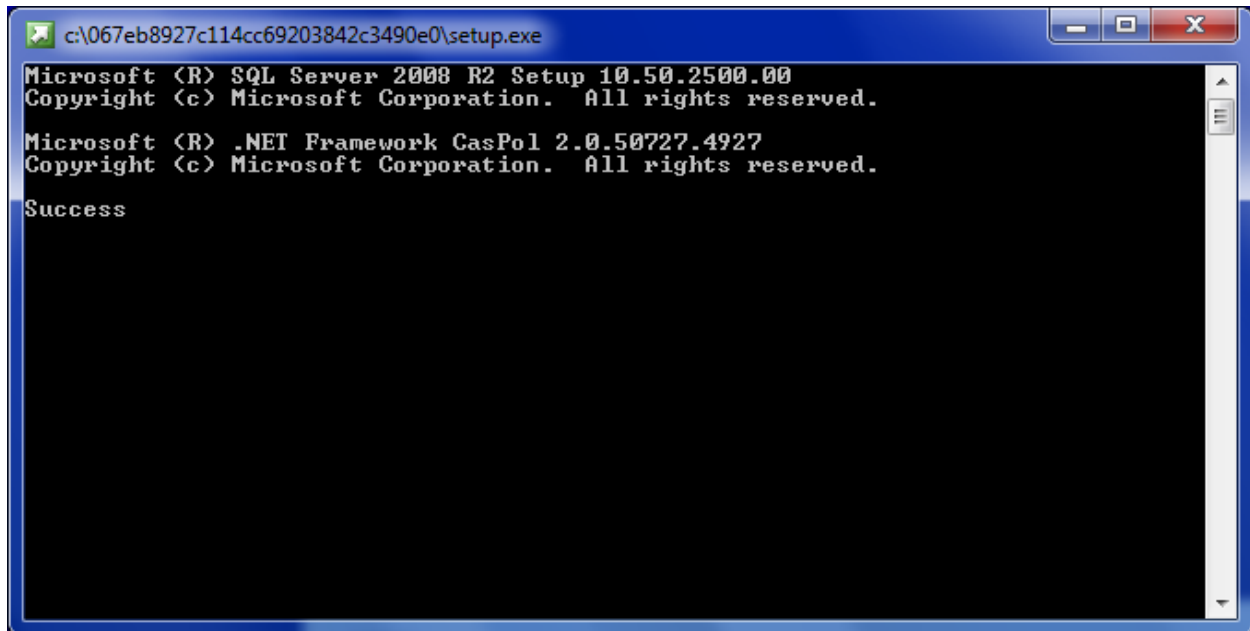
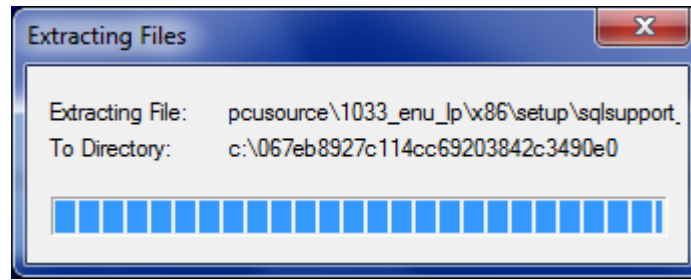
- 4.2 If you chose to install SQL Express, you will be prompted for the location if more than one local drive with enough space exists.

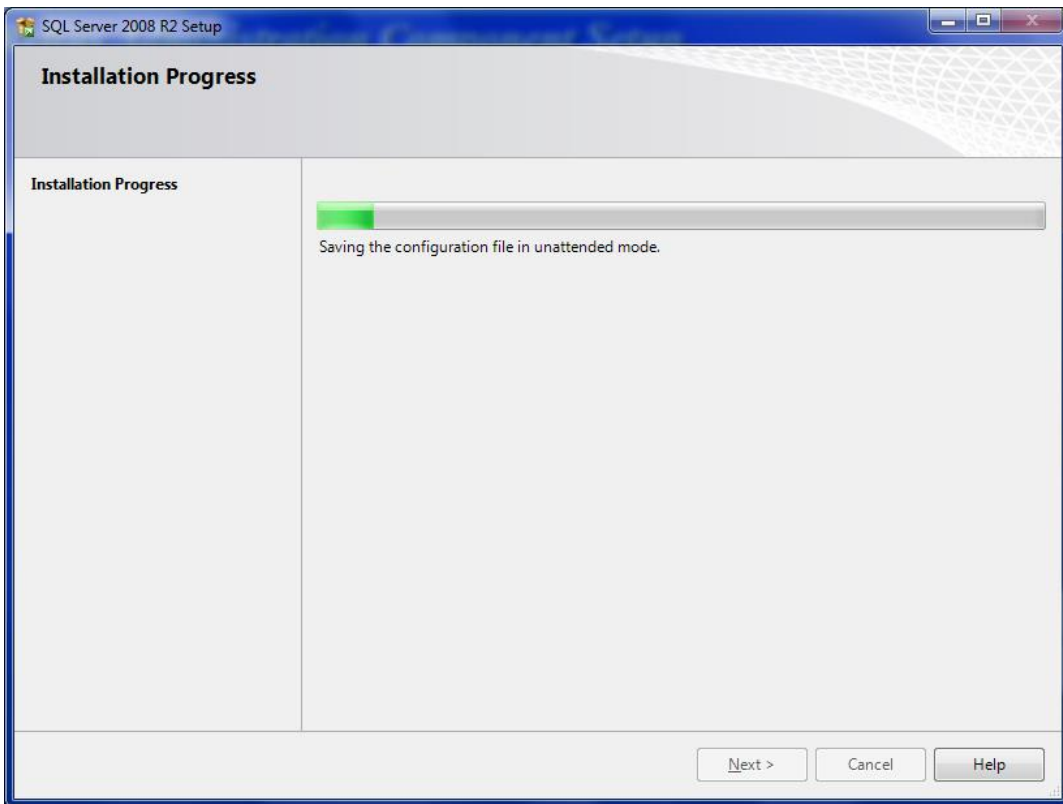
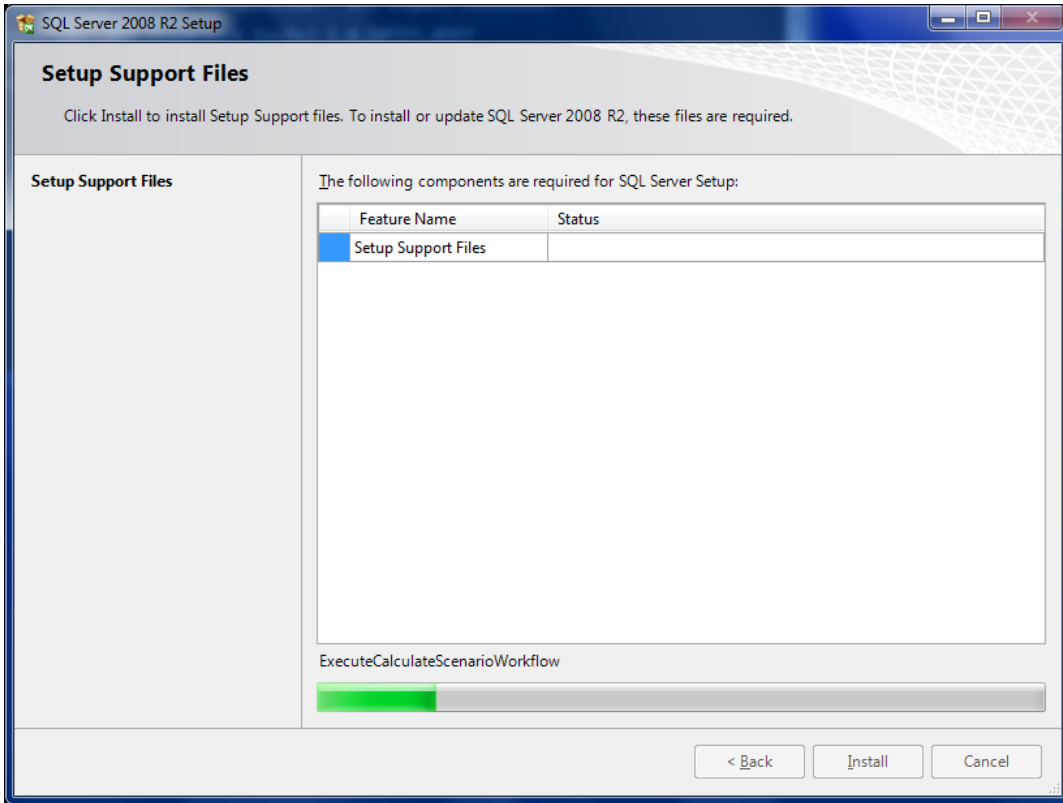


- 4.3 Microsoft SQL Express will then extract and install. During this process, several screens will appear and vanish, a sampling of which are shown below. This is expected. Do not interrupt the process, as it may take several minutes to complete.



Microsoft SQL Express 2008 Setup is running. This will take several minutes. Please DO NOT interrupt this process.

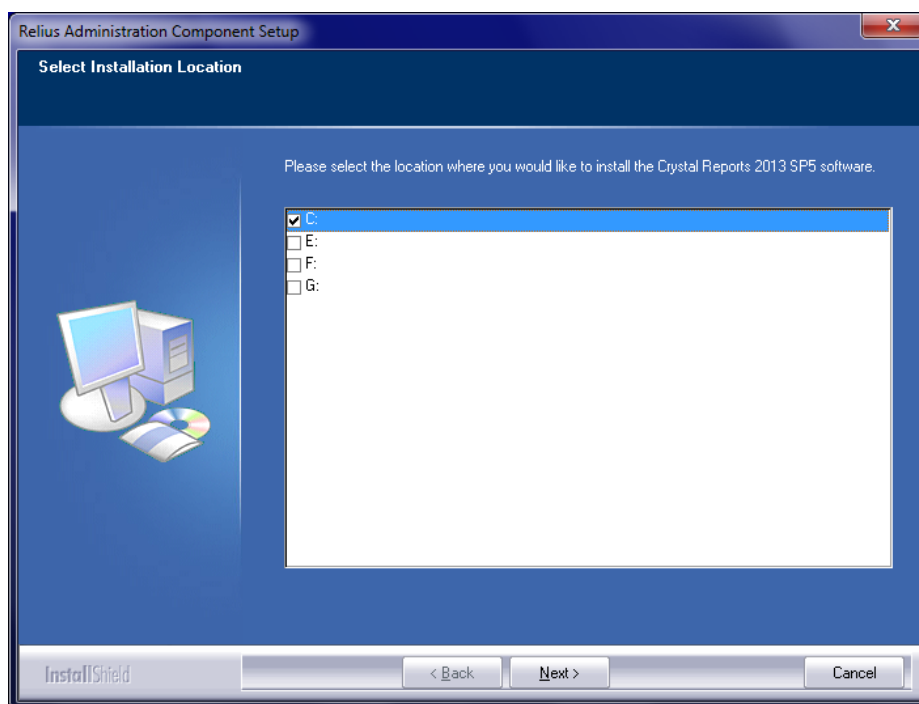




5 Installing Crystal Reports

The Crystal Report Writer and Crystal Runtime Engine for .Net will be the final components installed. If your system has an earlier version of Crystal Reports (such as version 2008 supplied by SunGard Relius for use with earlier versions of Relius Administration), those versions will remain intact and will function without error despite the presence of version 2013. The Crystal Reports installation does not apply to Web or VRU servers.

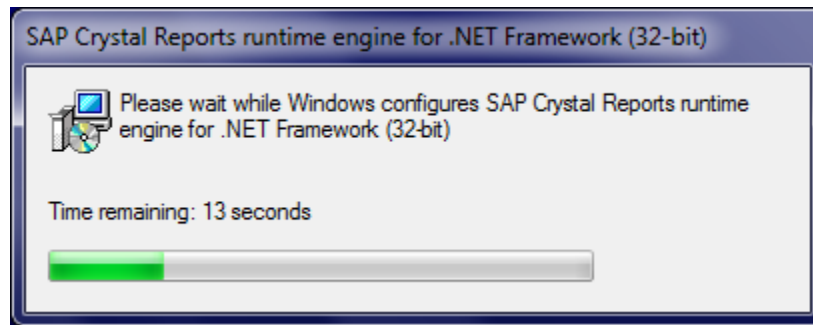
- 5.1 You will be prompted for the location of Crystal Reports 2013 if more than one local drive with enough space is on your system.



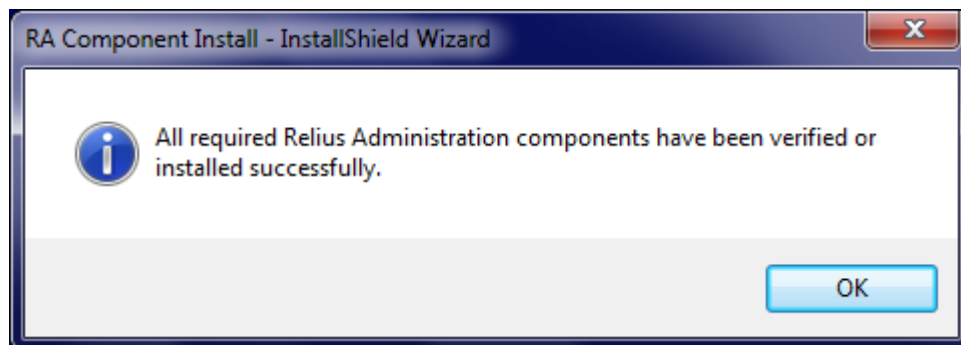
- 5.2 **Installing Crystal Reports may take as long as 45 to 60 minutes. Do not interrupt the process.** There will be no indication that the installation is running except the small banner shown below.



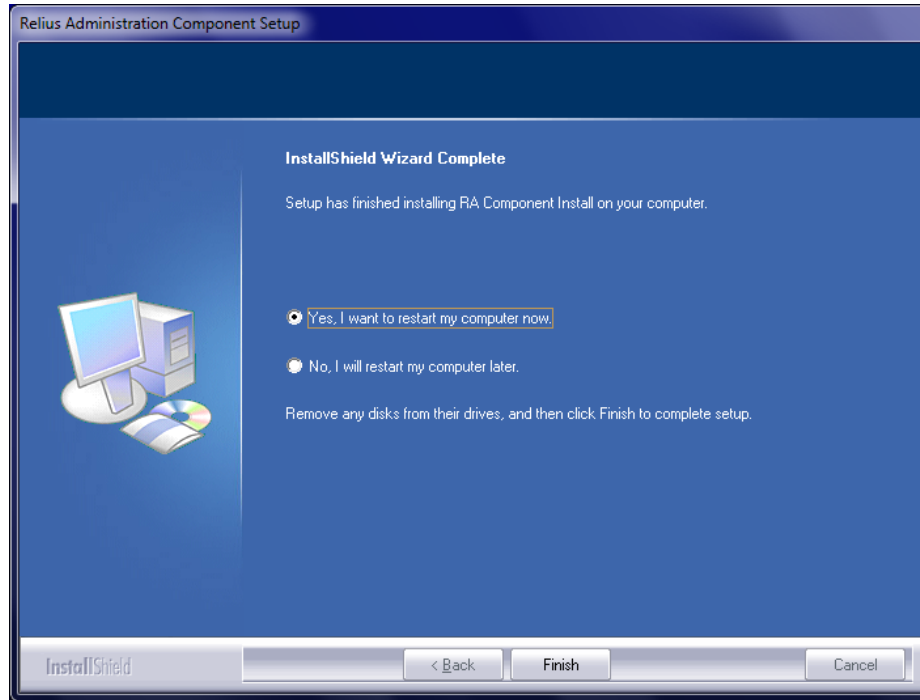
- 5.3 The Crystal Runtime Engine will now install. The status screen can sometimes appear in the background. Click the flashing item on your taskbar or use the <ALT> + <Tab> key combination to switch to that window.



- 5.4 When the installation has finished, a final check will be completed to ensure all components are properly installed and configured. When that has returned successfully, you will see the screen below.



- 5.5 If prompted to restart, be sure **“Yes, I want to restart my computer now”** is selected, and click *Finish*. Leave the Component DVD in the drive until after you have completely restarted the computer and logged back on. This is to ensure any components that required a restart have finished installing and configuring.

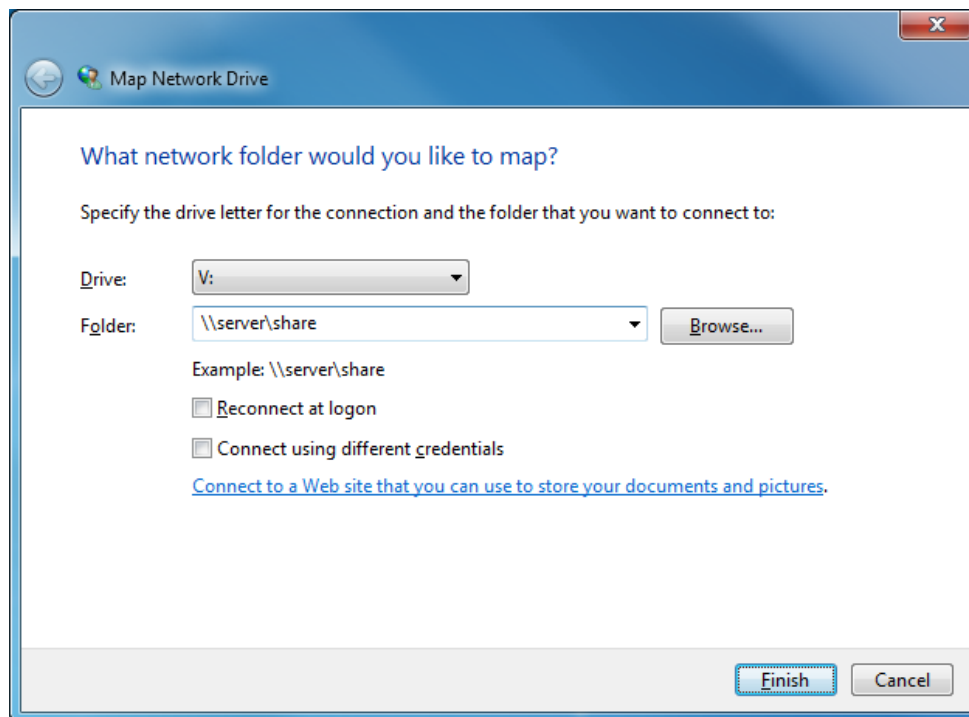


- 5.6 Repeat the process of installing the Relius Components on each workstation, beginning with Step 2.1.

Appendix A Installing from a Network Resource

The Relius Administration Component DVD can be installed from a network resource. Due to the size of the component installation, and the possible lack of DVD drives on existing systems, SunGard Relius recognizes the need to install from a shared network drive. However, the following steps must be taken to ensure a smooth installation.

- A.1 Copy the entire DVD to a separate folder on your file server (e.g., RA200Comp).
- A.2 On the file server, create a share and allow the necessary users to access the folder and all its files. Rights to “Write” and “Full Control” are not necessary.
- A.3 From the workstation within Windows Explorer, click *Tools / Map Network Drive*. Enter the information accordingly. Be sure the user has the ability to reconnect whenever logging back on. This share **must** be map-rooted (setup.exe at the “root” of the network drive letter), or the installation will fail.



- A.4 Run the installation from the newly mapped drive as if it were a DVD drive.
- A.5 When the installation is complete and all necessary components are installed, the mapped drive can be disconnected.

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