

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. To the right of the blue section is a vertical bar with multiple colored stripes.

SUNGARD

RELIUS ADMINISTRATION
Solutions for retirement services

Relius Administration
Version 20.0
Installation and Configuration

June 24, 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 Relius Administration 20.0.** If you are unclear about this installation, please contact Support at 1-800-326-7235, option 3.

ReliusAdmin20.exe is a universal workstation installation that can be used to update an earlier version of Relius Administration (version 19.0 or higher) or configure a new workstation.

If updating an **existing Standalone** workstation it must already be running:

- Relius Administration 19.x
- Personal Oracle 11g
- Relius Administration 20.0 Component DVD

If updating an **existing Networked** workstation it must already be running:

- Relius Administration 19.x
- Relius Administration 20.0 Component DVD

If installing on a **new Standalone** workstation, you will install (in this order):

- Personal Oracle 11g
- Relius Administration 20.0 Component DVD

If installing on a **new Networked** workstation, you will install:

- Relius Administration 20.0 Component DVD. (Note: The Oracle 11g Client is included in the Component installation; users running the standalone edition must install Personal Oracle before the Component installation.)

If workstations are to be updated from previous versions of Relius Administration, they **must** be running Relius Administration 19.0 (or greater) before installing this release. Running the 20.0 Release Update on a workstation with Relius Administration 18.x or earlier will cause the installation to fail.

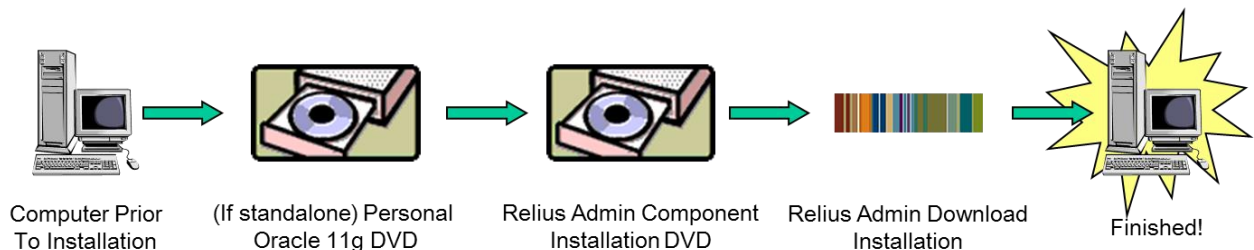
Note: All networked systems must be connecting to a database server running Oracle 11g (11.2.0.1 or higher). Otherwise the installation will halt.

The installation program will detect your database level before making any changes. If the database is not at 19.0 or higher, the installation will inform you and terminate. Relius Administration 20.0 includes post-installation fixes and patches for Relius Administration 19.x, which means that this release is cumulative from 19.x, and it includes all “patched” files and scripts leading up to version 20.0. There is no need to install RA 19.0 fixes or any of the subsequent updates (RA190SP01.exe, etc.) before running this update. Web/VRU clients, please read Step 2.10 regarding your upgrades.

This installation will run via self-extracting installation program. Simply double-click the downloaded file and follow the on-screen prompts, detailed herein. If necessary, the database will be updated through a script-running process, files will be copied to their appropriate location, and the system will finalize the settings necessary to run the updated release. Do not run the installation directly from our Internet site, as this will cause the installation to fail.

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

- 1) **Read and understand this document.**
- 2) Ensure all standalone workstations have the Personal Oracle 11g software and database properly installed and configured.
- 3) Ensure all workstations have the Relius Administration Component Installation DVD properly installed and configured. Relius Administration 20.0 will not install until all third-party components are in place.
- 4) Ensure your database has been properly exported and backed up.
- 5) Ensure all users, including workstations, agent machines, and participants on Web and VRU, are not accessing the system.
- 6) Install Relius Administration 20.0, running update scripts against database.
- 7) Set up additional workstations (if necessary).



2 Installation and Environment Considerations

2.1 Installation Methods

Relius Administration 20.0 is available via download from the SunGard Relius FTP Site (<http://www.relius.net/>). 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. 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 Update vs. New Installations

There is only one installation for both scenarios:

- The installation will determine the workstation’s version level before proceeding. If the version is at 19.0 or higher, the installation will proceed, including a check on the database level. If the database level is between 19.0 and 20.0, all necessary database update scripts will run.
- If a workstation has never had Relius Administration installed to it, the installation will neither detect nor run scripts against your database. It is strongly advised that the initial installation in your environment be run from a workstation that is already in service, not a new workstation that you are adding to your environment. Important logging information will be saved to this workstation.

All installations require the Relius Administration Component DVD to be installed and configured prior to installing Relius Administration 20.0 if not already run.

2.3 64-Bit Platforms

Relius Administration is now supported on x64 systems for workstations, Terminal Servers, Web systems, agent machines, and Voice Response Units. Oracle 11g Database Servers are supported only on x64 systems.

2.4 Software fixes via Internet

Fixes, support files, and updated documentation are distributed via the web at <http://www.relius.net/>. 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*” to receive notification of new fixes by e-mail. SunGard Relius no longer sends patches, updates, and update documentation through the mail, and we strongly urge all users to subscribe to this service.

2.5 Personal Oracle 11g Considerations

After re-booting your PO11g system, the database may take an extra minute or two to start, causing the operating system to take extra time to initialize. This is normal. Personal Oracle 11g sets up as a Windows “service” and is starting after initial logon like most other services. To verify whether it is fully started, open Services (normally, *Start / Programs / Administrative Tools / Computer Management*, then expand *Services and Applications* and click *Services*). Review the list for the entry **OracleServiceRADB** to see if the status is Starting, Started, or Stopped.

2.6 Unsupported Operating Systems

For a list of supported operating systems and configurations, see our web site (<http://www.relius.net/Support/Technology.aspx>). 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 Vista, and Windows Server 2003 are no longer supported.**

2.7 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.

2.8 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.

2.9 Security Considerations

Responsibility for support of problems and issues related to Relius Administration 20.0 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 Relius cannot guarantee that Relius Administration 20.0 will install or operate properly on any given locked-down security configuration. Relius Administration 20.0 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.

2.10 Important Notes Regarding Web and CSR

If you are using the Relius Administration Web or CSR modules, you must already be running Relius Administration **19.0** or later, including workstations, database, Web and CSR. If your systems are not yet running 19.0 or later, installing RA20.0 to the workstations may cause additional delays and downtime. 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.

2.11 Hardware and Software Requirements

- All hardware requirements are specified on our web site (<http://www.relius.net/Support/Technology.aspx>).
- The following Operating Systems are supported:
 - Windows 8/8.1
 - Windows 7 with Service Pack 1
- The following terminal server systems are supported:
 - Windows Server 2012 R2
 - Windows Server 2012
 - Windows Server 2008 R2 with Service Pack 1
 - Windows Server 2008 with Service Pack 2
- 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.
- Minimum video resolution of 1024 x 768 with 256 colors.
- SunGard Relius intends to support Windows 10 as soon as possible. Please check with us periodically for the most current status of product support.

2.12 Important Notes Regarding VRU

All VRU systems must be running the latest version of Edify, EVIP 13.0, on Windows Server 2008 r2.

3 Performing the Relius Administration 20.0 Update Installation

Pre-installation Notes:

- a) This installation is valid for the 32-bit and 64-bit editions of Windows 7, 8, and 8.1, and Windows Server 2008, 2008 R2, 2012, and 2012 R2 Terminal Services (if the use of Relius Administration on Terminal Services is properly licensed by SunGard Relius). 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 Windows Terminal Services: **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) 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.
- d) Relius Administration 20.0 installs many of its support files in the “System” directory, normally C:\WINDOWS\SYSTEM32 or C:\Windows\SysWOW64 for x64 systems.
- e) The installation process may take approximately **2 hours** to complete. The process of updating the database, though always dependent on the amount and type of data, is relatively quick compared to previous releases. In testing the release at SunGard Relius, even very large databases (whose exports exceed 25 GB) have taken less than 1 hour complete.
- f) 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.
- g) **Ensure you have a valid backup and database export of your system before beginning the update. Before beginning, you must READ and AGREE TO the following:**

In performing this update procedure, I – the software end user or individual intending to perform the software update – understand, acknowledge, and agree that this update program will make substantial necessary changes to my database to make it compatible with version 20.0. 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 Relius.

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 Relius is not responsible for performing my data backup, nor is SunGard Relius 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 Relius – 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 Relius-provided software product or service.

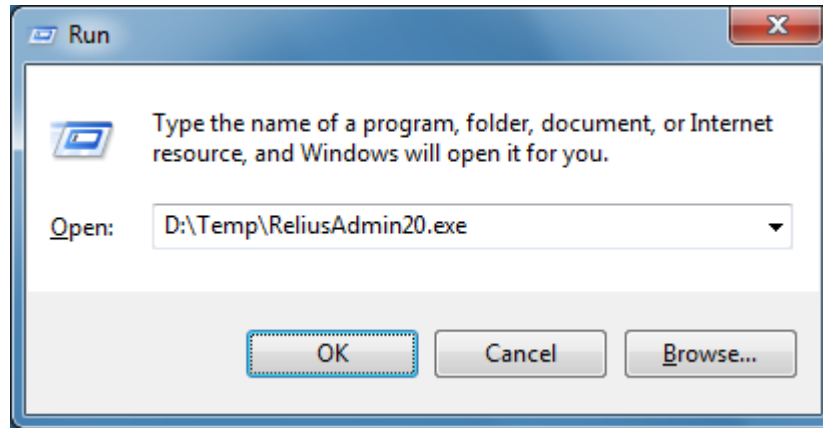
I understand and agree to the above. Use of this release indicates my acceptance of the terms above. If I do not agree with the terms above, I will not perform this update and will contact SunGard Relius for assistance.

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

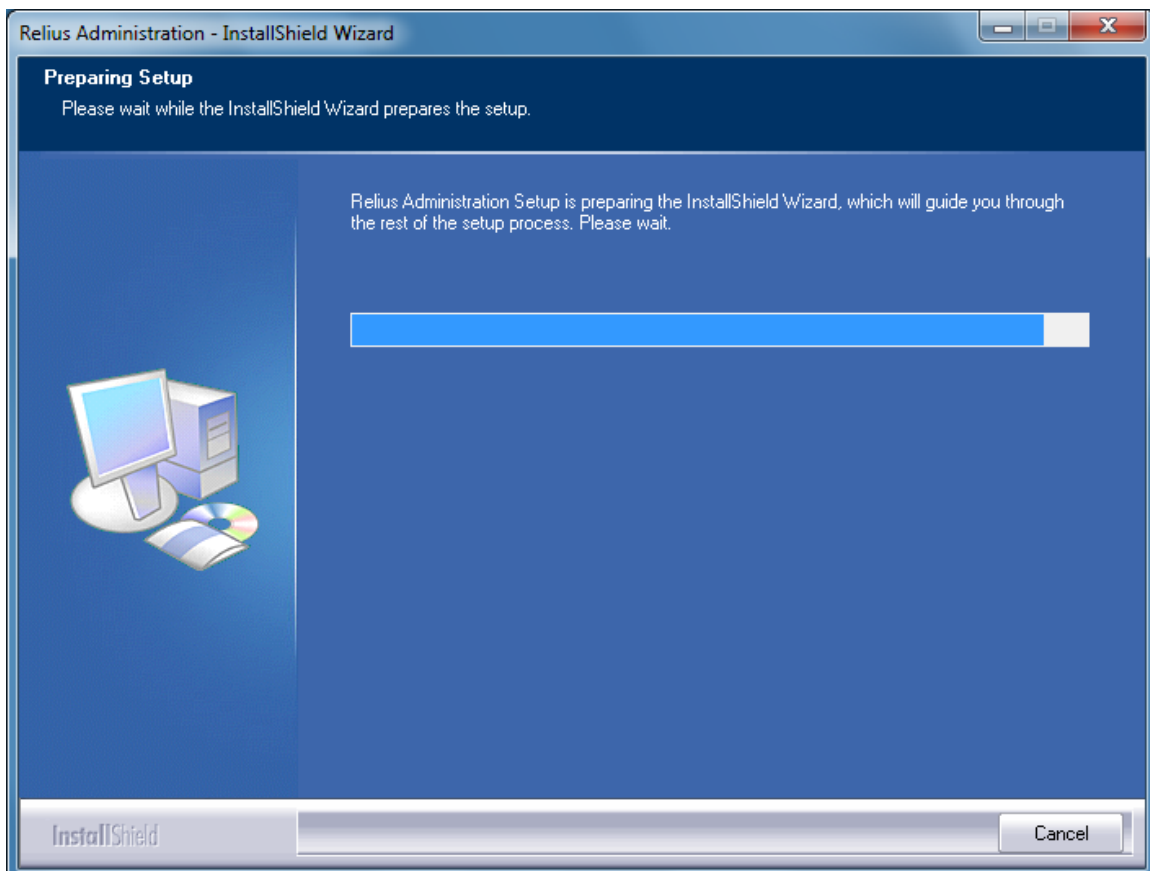
Unless otherwise noted, all activities contained herein must be directly conducted at a Relius Administration workstation.

- 3.1 If a new installation, ensure you have run the Relius Administration Component Install DVD. Standalone systems will also need the Personal Oracle 11g Database installed before the Components.
- 3.2 Download the self-extracting installation program (ReliusAdmin18.exe) from the SunGard Relius Web Site (<http://www.relius.net/>) and copy it to an easily accessed location, preferably a local drive. *In these instructions, D:\Temp will be used.* Check the installation after download to see if it appears to be “blocked” by the browser and unblock it before attempting to run the installation. Note: Attempting to run the installation directly from the SunGard Relius web site will fail.
- 3.3 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.
- 3.4 Re-start the computer. Windows or other programs may have locked some files that need to be overwritten during the update process.
- 3.5 Temporarily disable all virus protection.

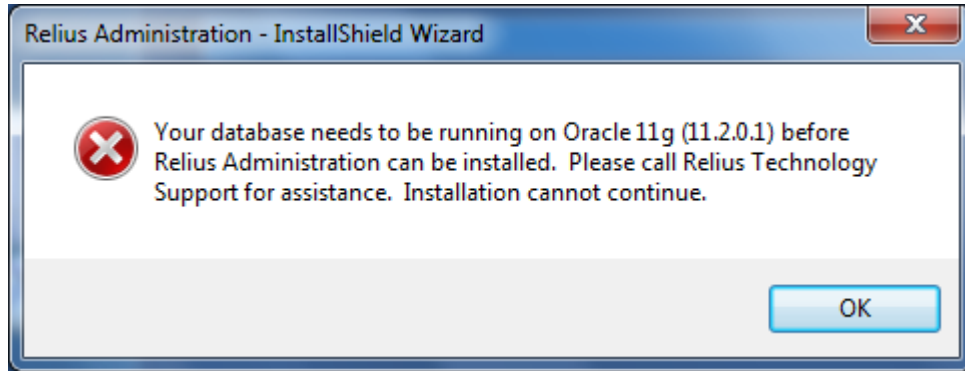
- 3.6 Click *Start*, then *Run* and type **D:\Temp\ReliusAdmin20.exe** in the command box, then click *OK*.



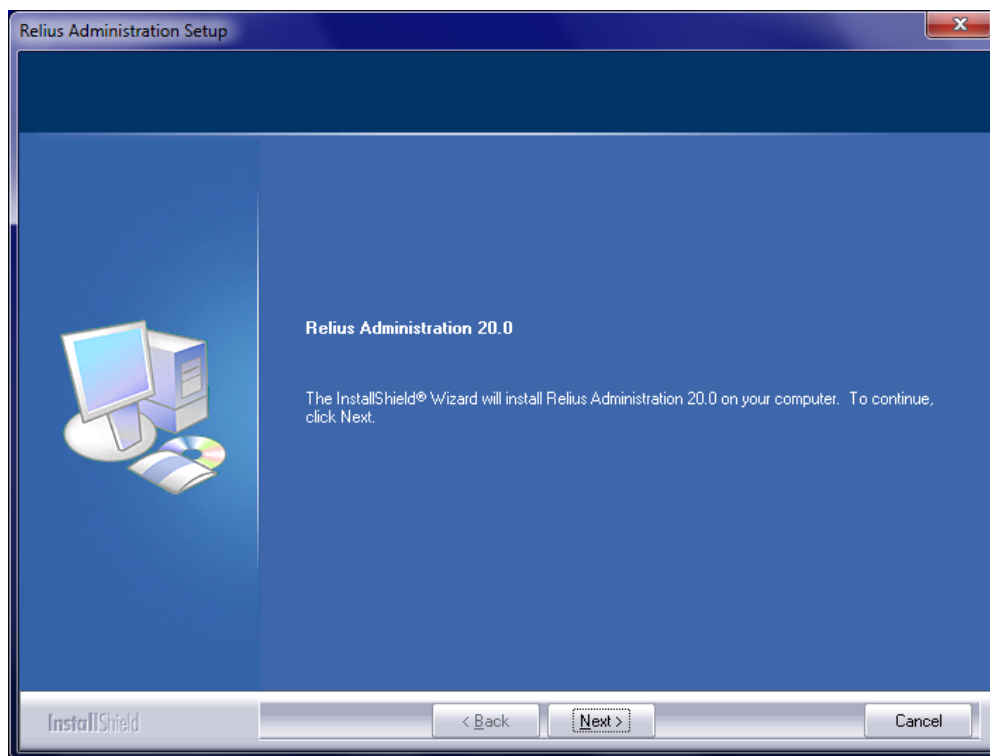
- 3.7 Because this installation is a self-extracting executable, several files will extract and copy to temporary locations for the installation process.



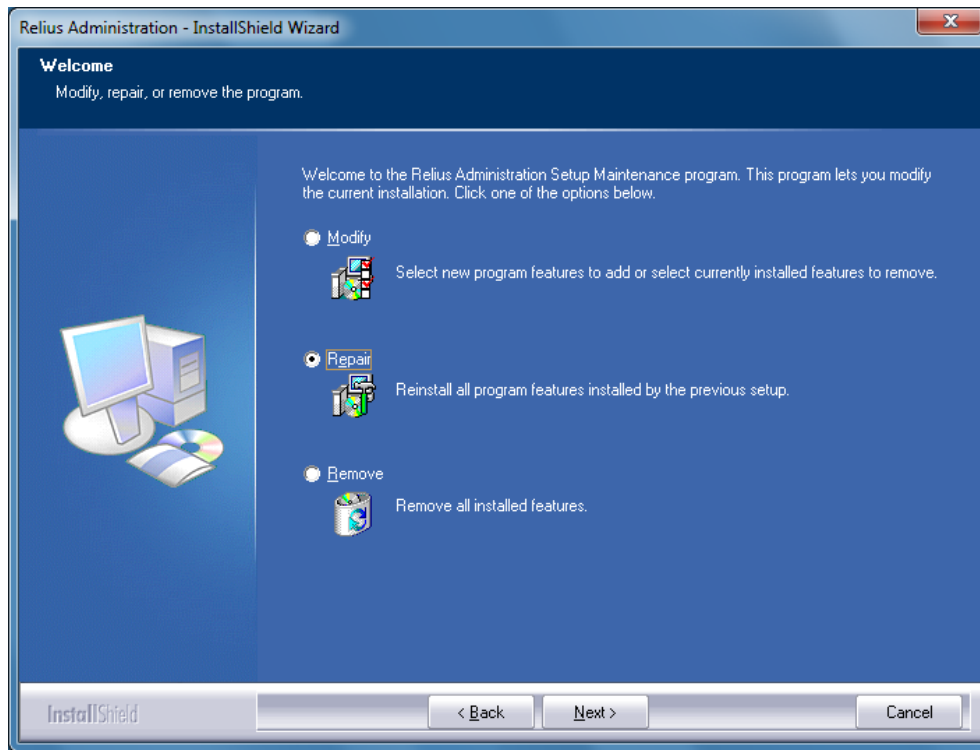
- 3.8 **Networked systems only:** If your database server is below Oracle version 11g, you will receive this message. Earlier versions of Relius Administration Oracle database servers are no longer supported. You must migrate your database to Oracle 11g server before proceeding. Contact Technology Support for assistance.



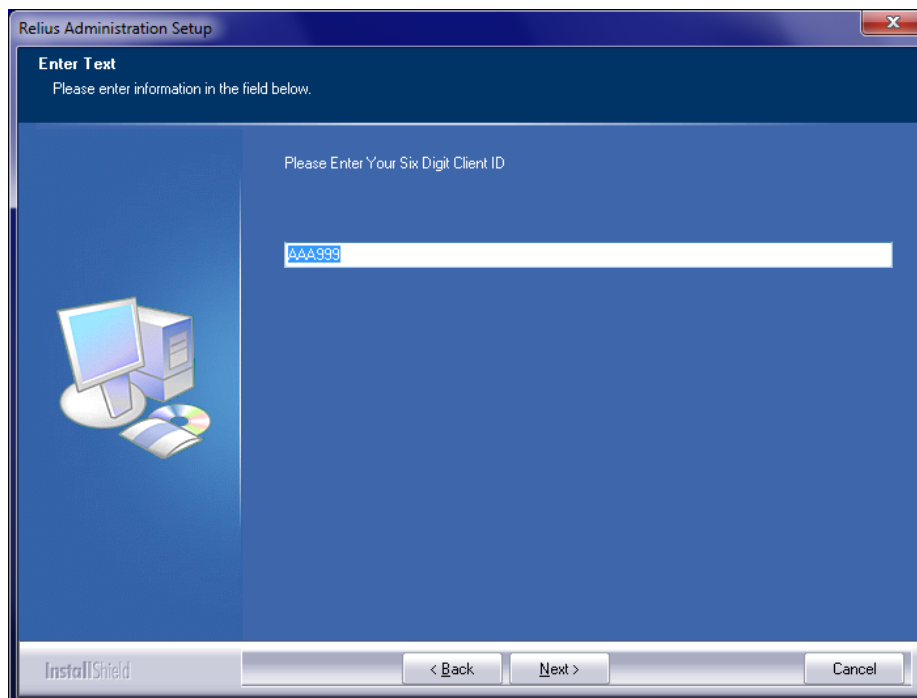
- 3.9 The Relius Administration 20.0 Setup “Welcome” screen appears. Please note that all open programs need to be closed at this time. Click *Next* to continue.



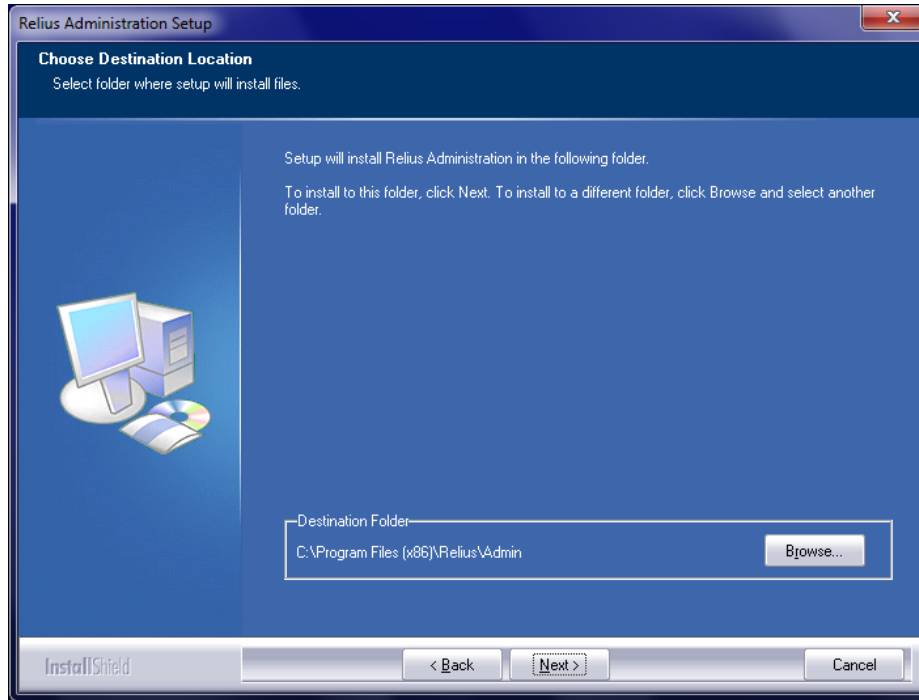
- 3.10 If you already installed this Release, you will be prompted to continue. There is no harm in reinstalling. If given the choices “*Modify*,” “*Repair*,” or “*Remove*,” you should choose “*Repair*.”



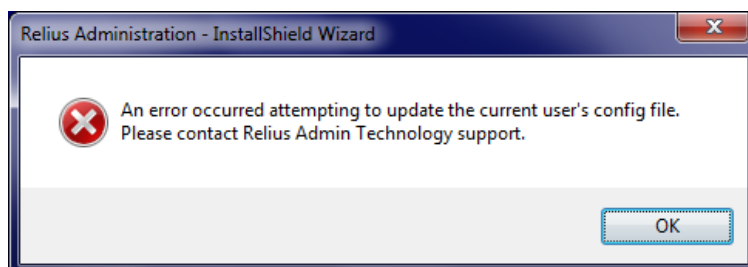
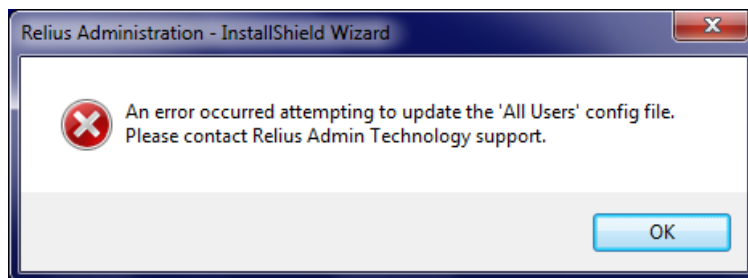
- 3.11 New systems will be prompted for the Client ID. Enter it in the correct format (AAA###) and click *Next* to continue.



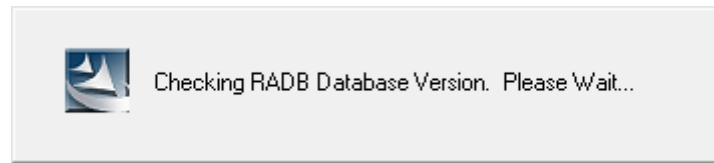
- 3.12 New systems will also require a location for the program files. The default is already entered. To change it, click *Browse*. When satisfied with the location, click *Next* to continue. If installing to a 64-bit system, do not install Relius Administration to C:\Program Files\Relius\Admin. Relius Administration is a 32-bit program that must run under the “x86” banner. The recommended 64-bit location is **C:\Program Files (x86)\Relius\Admin**.



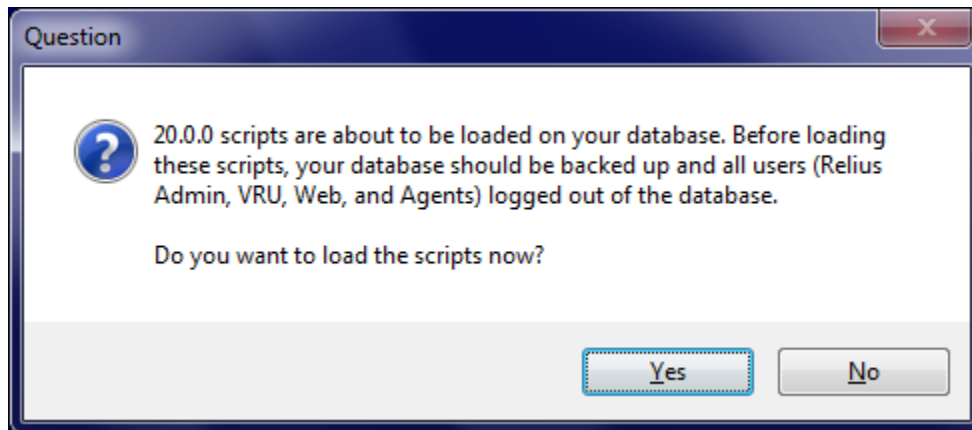
- 3.13 If your system is to be upgraded but the Windows user running the upgrade has never logged to Relius Administration (i.e., the system or domain administrator instead of the everyday user), you may receive the messages below. These messages are expected. Click OK to continue.



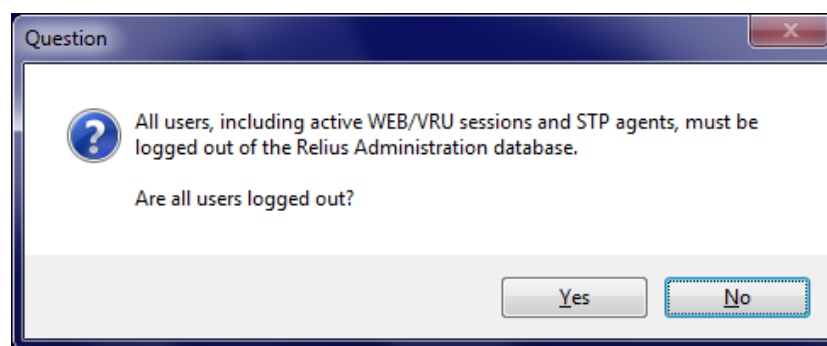
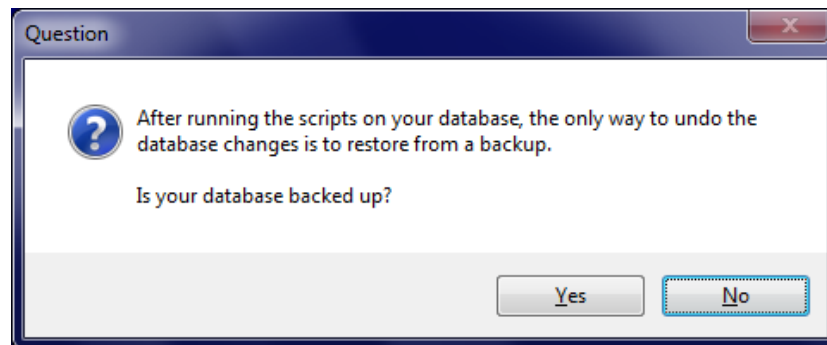
3.14 The installation will then check the level of your database.



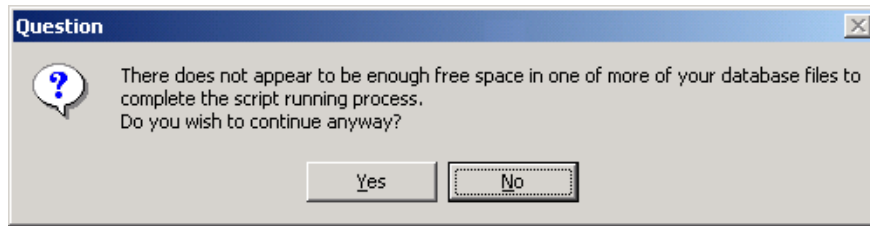
3.15 If not previously run, database update scripts will need to be run against your database.



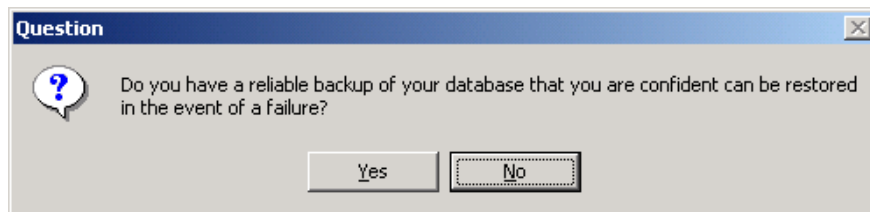
3.16 You will be prompted to ensure your database is backed up and all users are disconnected from the system.



- 3.17 If your database does not have sufficient table space to run the updated scripts, you will be prompted if you wish to continue. The best option is to select *No* and call Relius Administration Technology Support to have your database resized.

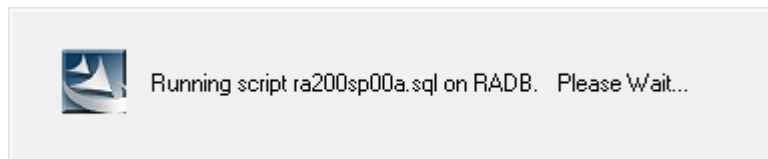


- 3.18 If you decide to proceed, you will be asked if your database is sufficiently backed up and whether you are confident it will be properly restored if the update fails. If you click *No*, you will be advised to call support. If you click *Yes*, the installation will proceed, but your chance of failure is higher than if you would call support first.

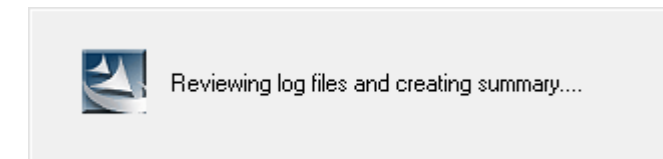


Note: If your database upgrade fails, you will be required to restore your most recent backup or export.

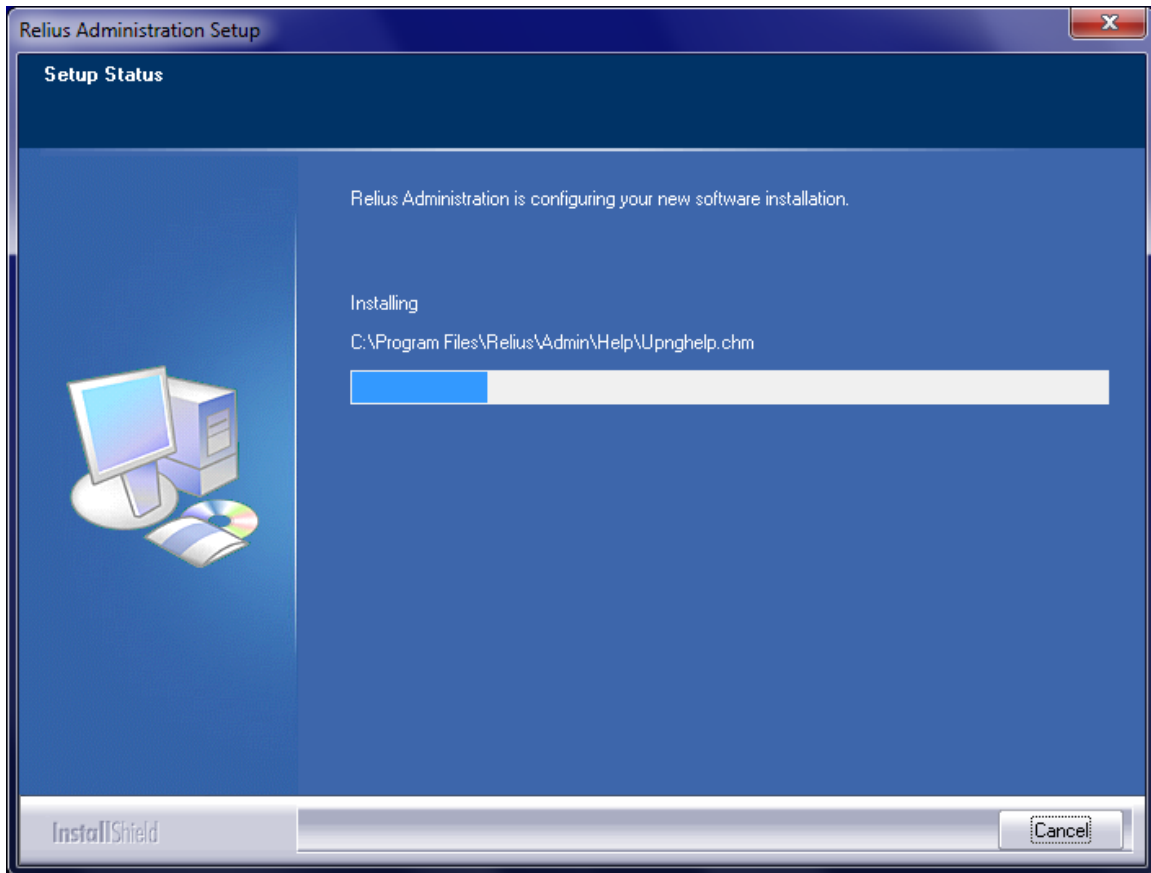
- 3.19 Your database will have all necessary scripts run against it to bring it to version 20.0.



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



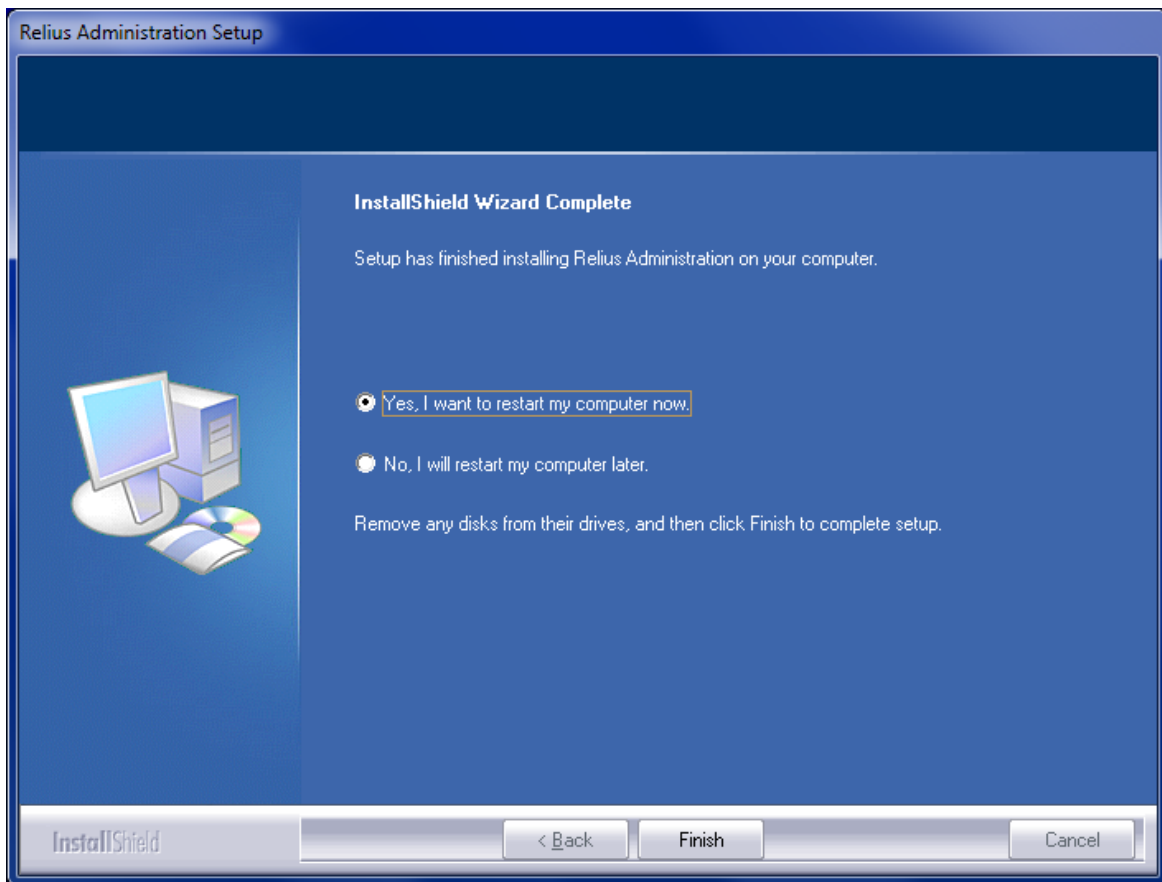
3.21 The installation will then copy and register the new Relius Administration 20.0 files.



3.22 Additional settings and configuration changes will take place near the end of the installation.



- 3.23 The last screen will look like the one below. 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.

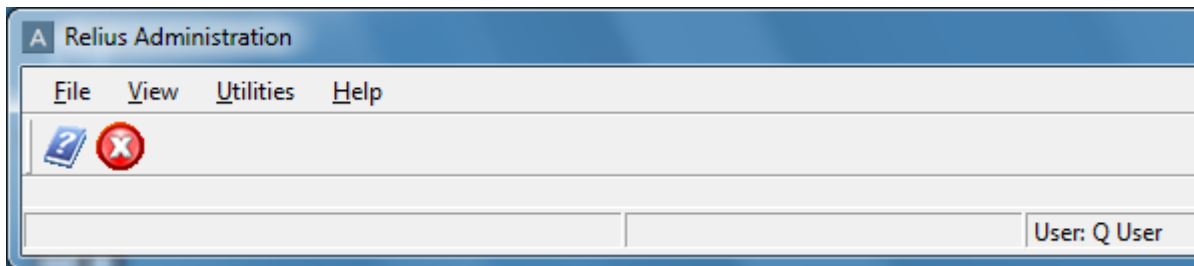
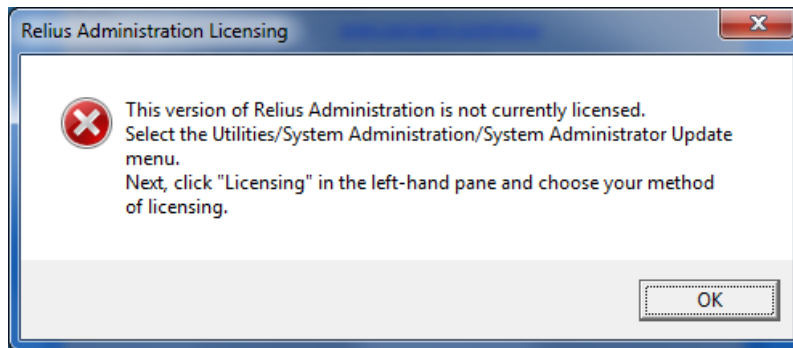


- 3.24 If action was taken in Step 3.3, restore the icons or shortcuts that were temporarily removed from the **StartUp** group or folder. Restart any services (including virus scanning) that were temporarily set to “Manual” and – if necessary – place them back in “Automatic” mode.

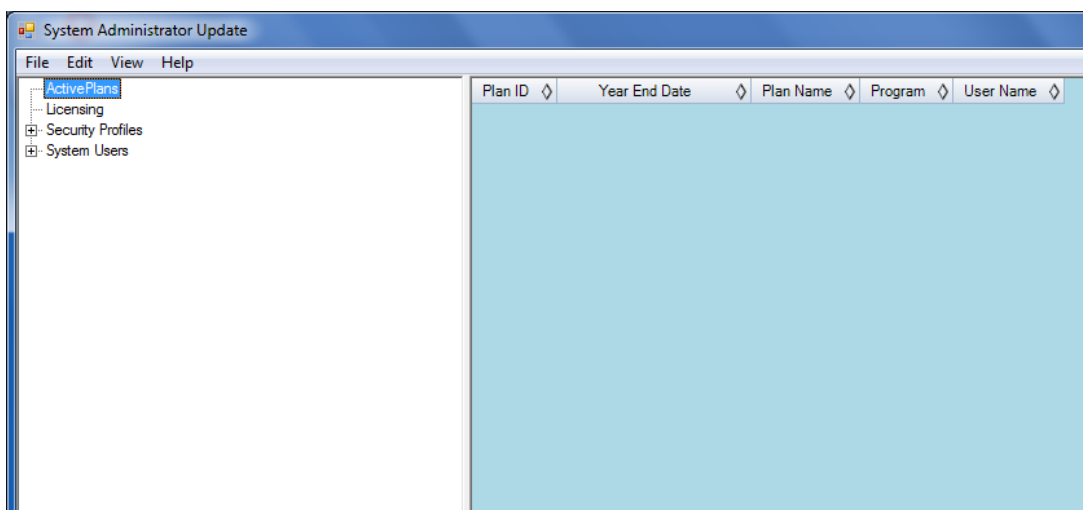
4 Licensing Relius Administration

Licensing for Relius Administration **must be renewed** at version 20.0. Multi-User systems need to re-license only the first workstation. Each Single-User system must be re-licensed individually.

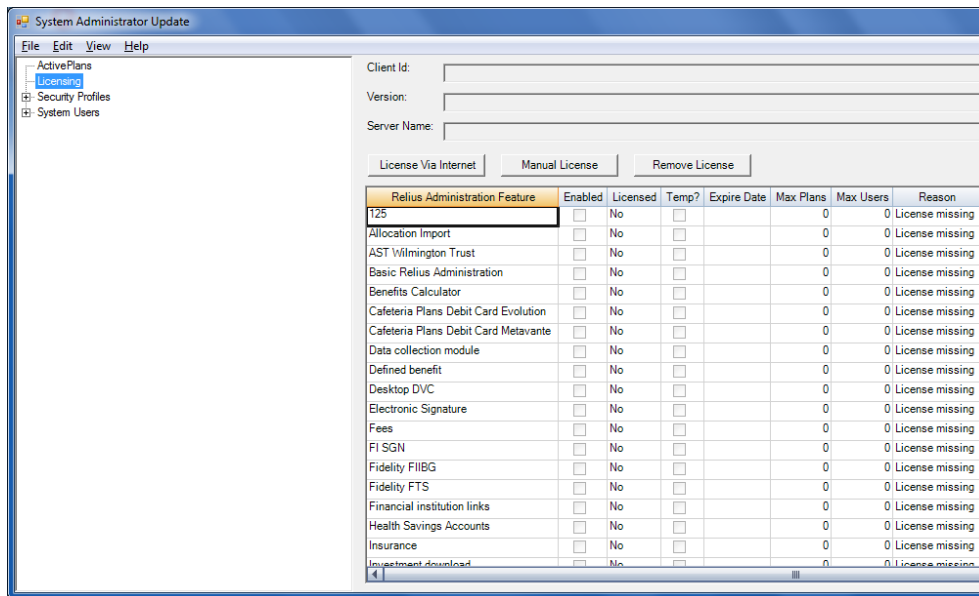
- 4.1 Open Relius Administration and sign on as the System Administrator or a user with the System Administrator's rights. You should receive the message above. Click *OK*. Your Relius Administration Main Menu will look like the image below.



- 4.2 From the main menu, click *Utilities / System Administration / System Administrator Update*.



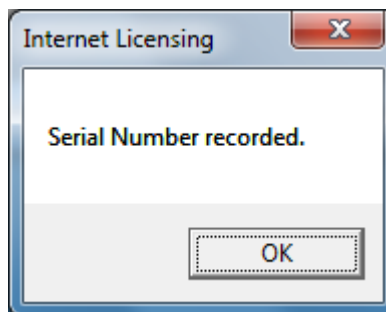
- 4.3 On the left side of the window, click “Licensing” to show the modules your account allows.



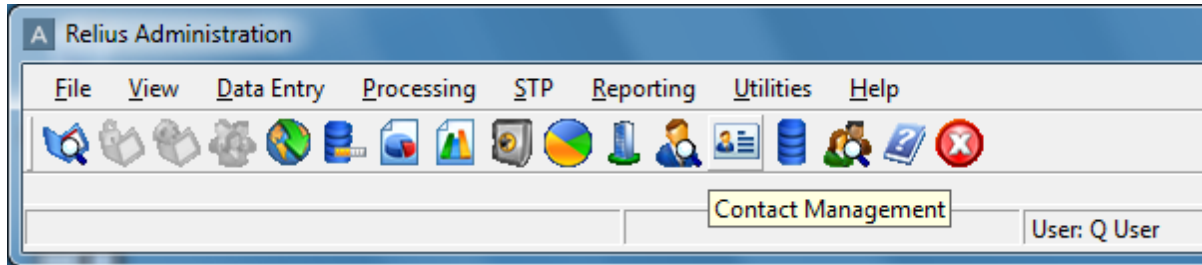
- 4.4 Click the *License Via Internet* button. Enter the password that is linked to you ClientID to access Relius support website, not your company’s individual users’ passwords.



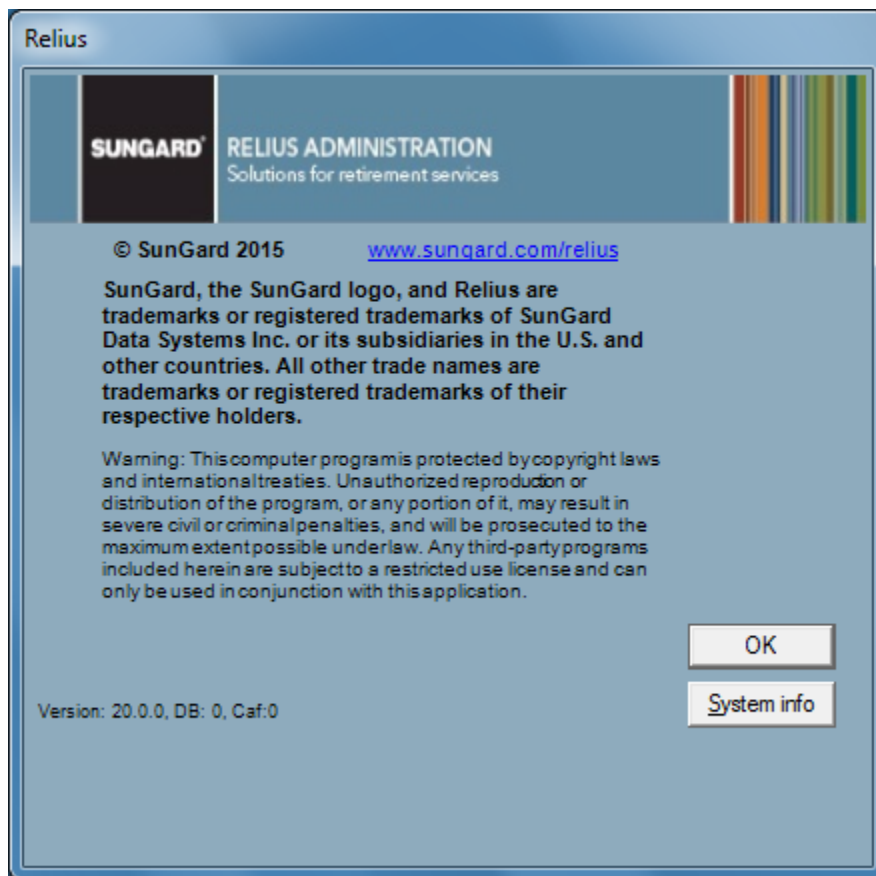
- 4.5 You should receive the message shown below. Exit Relius Administration.



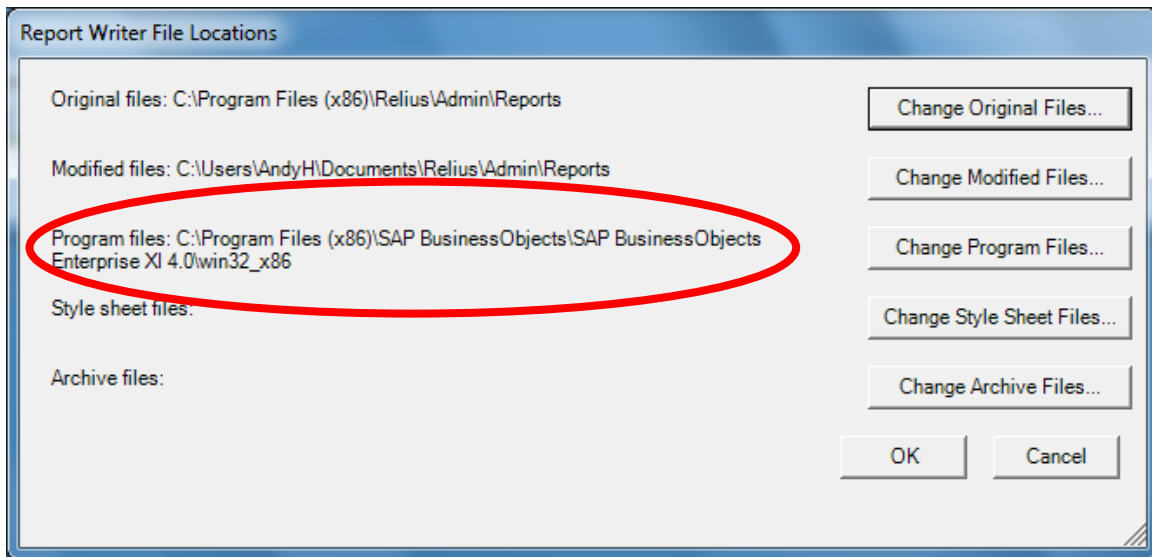
- 4.6 Re-open Relius Administration and sign on as a standard user. You should see all eight (8) menu options: *File, View, Data Entry, Processing, STP, Reporting, Utilities, and Help*. Relius Administration Help Documentation (by hitting the <F1> key from the main Relius Administration menu) provides further details.



- 4.7 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.
- 4.8 Multi-User systems need to re-license only the first workstation. Each Single-User system must be re-licensed individually.
- 4.9 You can verify the version and service pack level by clicking *Help / About* and reviewing the contents of the “About” screen. The version should state “Version: 20.0.0.”



- 4.10 From the main Relius Administration menu, click *Utilities / System Administration / Report Writer File Locations*. Verify that the “Program Files” are set to **C:\Program Files (x86)\SAP BusinessObjects\SAP BusinessObjects Enterprise XI 4.0\win32_x86** (assuming C: is the drive where Crystal 2013 was installed during the component installation). If your custom reports are to be shared with other users, you may wish to change the “Modified files” location to a mapped network drive that is shared among other users. Click *OK*.



If no other applications on your workstations are using the previous versions of Crystal (8.5, 10.0, or 2013), you are free to uninstall it. However, there is no harm in leaving it installed. Crystal 2013, 2008, 10.0, and Crystal 8.5 coexist without error.

Repeat the process of installing this update on each workstation, beginning with Step 3.2. 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 updated, so steps 3.14 through 3.19 will be ignored. **Single-user (PO11g) databases will run the scripts against each database.**

Appendix A System Requirements

Complete requirements are on our web site (<http://www.relius.net/Support/Technology.aspx>). Since system requirements vary from client to client and technology is constantly evolving, please visit the web site prior to purchasing or upgrading any equipment.

Printers

Most Windows-compatible laser printers will work. SunGard Relius highly recommends the Hewlett Packard LaserJet Series III printers or newer. These printers are fully supported by Windows, Novell, and most all other software available on the market. For plans with large numbers of participants you will need to consider printer duty cycle, print speed, turnaround times, etc. Printers that fail after Relius Administration is installed or updated may need their drivers updated or adjusted. Check with the manufacturer of your printer to see if there is an updated or compatible driver available for download. For printing large reports, SunGard Relius recommends top-of-the-line workstations with extra RAM and higher-speed processors.

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