SUNGARD

RELIUS ADMINISTRATION Solutions for retirement services

Relius Administration Version 20.0 Web/VRU/CSR Installation and Configuration

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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

This document covers new installations and upgrading the Relius Administration 19.0 (or higher) VRU, Web, and CSR Servers to Relius Administration 20.0. To install Relius Administration 20.0 on a workstation, please refer to the Relius Administration 20.0 Installation and Configuration document. All references to the Relius Administration 20.0 Voice Response Units powered by Edify will be hereinafter called RA VRU. All references to the Relius Administration 20.0 Internet Server will be hereinafter called RA Web. All references to the Relius Administration 20.0 Customer Service Representative module will be hereinafter called RA CSR.

Only those modules for which you are licensed will be activated.

Relius Administration Web/VRU is a universal installation that can be used to update an earlier version (version 19.0 or higher) or configure a new server.

- If updating an existing server, it must already be running Relius Administration 19.0 or higher before beginning. Prior to running this installation, the databases and workstations must already be updated to version 20.0.
- If installing on a new server, Oracle 11g Client, included in the Relius Administration Component DVD, should be installed before installing Relius Administration 20.0.

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

- 1) Read and understand the entire document before beginning.
- 2) Ensure Relius Administration 20.0 is installed and fully functional at each workstation and the databases have been successfully upgraded.
- 3) Ensure the Relius Administration Component DVD is installed on your servers.
- Ensure your database has been properly exported and backed up. 4)
- Ensure all users, agents, and Web/VRU participants are not accessing the system. 5)
- Install Web/VRU/CSR. 6)
- 7) Configure and test the Web/VRU/CSR systems.



Server Prior To Installation

Installation DVD

Download Installation

2 Installation and Environment Considerations

2.1 Installation Methods

The Component DVD **must** still be installed to your servers before beginning this update.

Relius Administration 20.0 Web/VRU/CSR is only available via download from the SunGard Relius support web site (<u>http://www.relius.net/Support/Technology.aspx</u>). Downloading the installation to a local drive is recommended and supported. Other methods of installing (installing directly from the SunGard Relius web site, "push" or "ghost" technology, Z.E.N. Works, Zip Drives, etc.) are not supported or recommended.

If a network drive is used to install, 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 updated documents will be generally distributed via the Internet at <u>http://www.relius.net/</u>. Users must have Internet capability to receive these fixes. Visit our web site and click *"Subscribe"* to receive notification of new fixes by e-mail. SunGard Relius does not send patches and updates through the mail. SunGard Relius strongly urges that all users 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. 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 Relius 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.

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.

2.4 Windows Server Considerations

Web/CSR: Windows Server 2008 R2, 2012, and 2012 R2 (Standard and Enterprise Editions) are now the only supported version for Web and CSR.

ASP.NET: Ensure the ASP.NET Role service must be installed and enabled on your web server before attempting this installation.

VRU: Windows Server 2008 R2 Standard Edition is now the only supported version for the VRU running Edify 13.

The Windows Server local Administrator must run the installation. SunGard Relius 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. It must be a member server of a workgroup or domain. If the server is configured as a domain controller, 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 64-Bit Platforms

Relius Administration Web 20.0 is now supported on 64-bit platforms.

2.6 Upgrading from a Previous Version

The only version from which you can run this installation 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.

2.7 Firewall and DMZ Considerations

Clients need their Internet environment to be as secure as possible. Although SunGard Relius recommends the use of firewalls and other security measures, SunGard Relius 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 setup and installed between the client trying to access your website and the web server itself. In this case, the only port that should be "opened" on the Hardware Firewall should be port(s) 80 or 8080. These ports are the default web ports for networks worldwide. Opening port 443 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 Relius. You may use them, but you must configure and manage them yourself.

In a DMZ environment, the firewall is between the Web Server and the Database Server on your network. The firewall must support Oracle Port Redirection. For more information, please contact Relius Administration Technology Support at 1-800-326-7235.

2.8 Hardware and Software Requirements

All hardware requirements are specified on our web site (http://www.relius.net/Support/Technology.aspx).

- Web: Windows Server 2008 R2 (Standard or Enterprise Edition) with Service Pack 1 and Windows Server 2012 and 2012 R2 may be used for the Web Server.
- VRU: Windows Server 2008 R2 Standard Edition with Service Pack 1 or higher.
- TCP/IP Network Protocol for multi-user systems. The database server must have a static IP address.
- Internet Information Services must be installed and set up (Web/CSR).
- Edify Voice Interactive Platform (EVIP) 13.0 must be installed on VRU servers.
- Minimum video resolution of 1024 x 768 with 256 colors.

Note: Windows Server 2003 is no longer supported.

2.9 Edify Security Considerations

Once Edify is properly installed and configured, you must not change the "machine name" of your Edify server or the password of the user that installed Edify. Edify's Electronic Workforce Administrator depends on a consistent "machine name" and UserID/Password configuration to run properly.

2.10 VRU Installation Considerations

VRU systems are now only supported on Windows Server 2008 R2 running Edify 13. If you have not yet obtained your new Edify software, please contact Relius Technology Support before beginning this installation.

2.11 Relius Web / VRU Accounts

Prior to this installation, each system will require a "Relius" user. This user must have local administrative privileges. It can be a local user or a domain account. For the purposes of these instructions, the Web account will be referred to as Web_User, and the VRU account will be referred to as iviAdmin. Once you are ready to run the installations, ensure that you have successfully logged on as these users.

2.12 Earlier versions of Internet Explorer

Due to enhancements made to our Web product, users will no longer be able to access the Relius Web sites with versions of Internet Explorer that are earlier than version 8. If a system accesses the site with IE 6 or IE7, they will receive a message similar to the one below.



3 Setting Up a Web Server

A special authentication will need to take place before installing and setting up Relius Administration Web. Failure to follow these steps closely will result in errors in the configuration of Relius Web sites.

- 3.1 Create a "Relius Web" user account. This account can be either a local user or a domain account, but it must have local administrative privileges on the server. For purposes of these instructions, the name of the user will be "Web_User."
- 3.2 Internet Information Services (IIS) must first be installed and configured. If IIS is not already assigned, follow these steps:
 - Log on as a user with local administrative privileges.
 - Open Windows Server Manager (*Start | Programs | Administrative Tools | Server Manager*).
 - If the system is not established with Web Server (IIS) as a role, install the Web Server **Role, including IIS 6 Management Compatibility** (restart may be required).
 - Ensure that the role services are assigned as components in the IIS Role:
 - o ASP.Net
 - HTTP Activation
 - HTTP Non-Activation
 - WCF Services (with HTTP Activation)
 - Add the Microsoft.Net 3.5 and 4.5 features within Server Manager (where appropriate).
 - Within IIS, add the following service handlers:
 - o Svc-ISAPI-2.0
 - o Svc-ISAPI-2.0-64
 - Svc-ISAPI-4.0_32bit
 - Svc-ISAPI-4.0_64bit
 - Install the Relius Admin Components.
- 3.3 Open the IIS Manager console by either browsing the "tree" of server roles or *Start / Programs / Administrative Tools / Internet Information Services (IIS) Manager.*
- 3.4 Select the local host in the "Connections" pane. This will open the IIS "Home" configuration page.

Nation Services (II	5) Manager	
G S € CERT2008R2VWEB	•	🖬 🖾 🔂 I 🕢 🗸
<u>F</u> ile <u>V</u> iew <u>H</u> elp		
Connections	CERT2008R2VWEB Home	Actions Manage Server
CERT2008R2VWEB (CERT2008R	Filter:	 Restart Start Stop
H	🗈 😓 🖪 🙆	View Application Pools

- 3.5 Double-click *Authentication*.
- 3.6 If ASP.NET Impersonation is disabled, right-click it and enable it. After it is enabled, right-click ASP.NET Impersonation and click "*Edit*…"



3.7 Choose "*Specific User*," then "*Set*," and enter a user name with local Administrative privileges.

Edit ASP.NET Impersonation Settings	<u>?</u> ×
Identity to impersonate:	
• Specific user:	
Web_User	<u>S</u> et
C Authenticated user	
OK	Cancel

3.8 You will also need the password for this user. Note that if the password expires or is changed that anywhere this user was established must be set to the new password.

Set Credentials	? ×
User name:	
Web_User	
Password:	
•••••	
Confirm password:	
•••••	
OK Cancel	

3.9 Click OK. Note: if the password ever changes for this user, these steps will have to be repeated.

	의즈
Identity to impersonate:	
• Specific user:	
Web_User Set	
O Authenticated user	
OK Cancel	

3.10 During the installation, an Application Pool named ReliusWeb will be created. However, on Windows Server 2012 and Server 2012 R2, this Application Pool needs to be created before the installation. In the Application Pools window, click *Add Application Pool*....



3.11 Type ReliusWeb in the Name field. Ensure the other settings match what is shown below and click *OK*.

Add Application Pool
<u>N</u> ame:
ReliusWeb
.NET <u>F</u> ramework version:
.NET Framework v4.0.30319
Managed pipeline mode:
Integrated 💌
Start application pool immediately
OK Cancel

3.12 Click the newly created ReliusWeb application pool, and then choose "Advanced Settings..." to make the next set of changes.

📲 Internet Information Services (IIS) Manager				
CO CERT2008R2VWEB > Application Pools				
<u>File View H</u> elp				
Connections	Application Pools This page lets you view and manage the list of applica on the server. Application pools are associated with we processes, contain one or more applications, and pro- isolation among different applications. Filter: ASP.NET V4.0 Started V4.0 ASP.NET V4.0 Started V4.0 Classic .NET App Started V4.0 Classic .NET App Started V4.0 RelusWeb Started V4.0 TellusWeb Started V4.0 Classic .NET App	Actions Actions Add Application Pool Set Application Pool Set Application Pool Start Application Pool Start Stop Application Pool Start Stop Application Pool Start Classic Integrated Inte	ol I Defaults Tasks Pool	
(Coo)			1.::	

3.13 Change "Enable 32-Bit Applications" to **True**. Then change the "Identity" field.

	anced Settings	1	?
Ξ	(General)		
	.NET Framework Version	v4.0	
	Enable 32-Bit Applications	True	
	Managed Pipeline Mode	Integrated	
I	Name	ReliusWeb	
ľ	Queue Length	1000	
	Start Automatically	True	
Ξ	СРО		
	Limit	0	
	Limit Action	NoAction	
	Limit Interval (minutes)	5	
	Processor Affinity Enabled	False	
	Processor Affinity Mask	4294967295	
Ξ	Process Model		
	Identity	Web_User	
	Idle Time-out (minutes)	20	
	Load User Profile	False	
	Maximum Worker Processes	1	
	Ping Enabled	True	
	Ping Maximum Response Time (second	90	
	Ping Period (seconds)	30	
	Shutdown Time Limit (seconds)	90	
		00	-

3.14 Choose "Custom account," click the **Set** button, and enter the credentials for "Web_User."

Application Pool Identity	<u>?×</u>	Set Credentials
Built-in account: ApplicationPoolIdentity Gustom account: Web_User	<u>y</u>	User name: Web_User Password: Confirm password:
OK	Cancel	OK Cancel

3.15 An additional setting needs to be added. In upcoming releases of Relius Administration Web, the product will be using embedded operating system fonts. In IIS, expand the "tree" and click **Default Web Site**. Then, double-click **Mime Types** under IIS.

1 Internet Information Services (115) Manager	
Image: Cert 2008R2VWEB → Sites → Default Web Site →	🖸 🖾 🔛 🔛 🖬
Elle View Help	
Connections Default Web Site Home	Actions
	Open Feature
Start Page	🔉 Explore
Application Pools	Edit Permissions
E - Conces	Edit Site
	Basic Settings
	View Applications
Authentication Compression Default Directory Error Pages	View Virtual Directories
Document Browsing	Manage Web Site
	🕏 Restart
Handler HTTP ISAPI Filters Logging MIME Types	Start
Mappings Respo	Stop
	Browse Web Site
Modules Output Request SSL Settings	Advanced Settings
Caching Filtering	Configure
Management	Limits
	Help
	Online Help
Features View	
Ready	¶.:

3.16 On the right side of the MIME Types window, click Add...

Ne Internet Information Services (IIS) Manager				
CERT200	3R2VWEB ▶ Sites ▶ Def	ault Web Site 🕨		📃 🖸 🛛 🖓 I 🖉 🗸
<u>File View H</u> elp				
Connections Connections Start Page CRT2008R2WEB (CER CRT2008R2WEB (CER CRT208R2WEB (CER	WIME Type Use this feature to mana- that are served as static Group by: No Grouping Extension ▲ .323 .aaf .aca .accdb .accdb .accdb .accde .accdb .accde .accdt .aff .aif .asd .asd .asf .asd .asf .asd .asf .asf .aif .aif .aif .aif .aif .aif .aif .asf .asf .asf .aif .aif .aif .aif .aif .asf	pes ge the list of file name e files by the Web server. <u>MIME Type</u> text/h323 application/octet-st application/msaccess application/msaccess application/msaccess application/nternet application/nternet application/nternet application/nternet application/ctet-st audio/aiff audio/aiff audio/aiff application/cctet-st text/plain video/x-ms-asf application/cctet-st text/plain video/x-ms-asf	Interited Inherited	Actions Add W Help Online Help
Configuration: 'Default Web Site'	web.config			• 1 .:

3.17 You will be prompted to enter new MIME information. In the "File name extension:" field, type ".woff" (without the quotation marks). In the "MIME type:" field, enter "application/x-woff" (without the quotation marks). Click **OK** when finished.

Add MIME Type		<u>?</u> ×
File name <u>e</u> xtension:		
	OK	Cancel

3.18 Your screen should now look like the one you see below. Close IIS.

📲 Internet Information Services (IIS) Manager			
CERT2008F	22VWEB ► Sites ► Default Web Site ►) 🖾 🖄 I 🕡 🗝	
File View Help			
Die Den Geb			
Connections	MIME Types	Actions	
💐 🗄 🖾 😺		Add	
CERT2008R2VWEB (CER	Use this feature to manage the list of file name extensions and associated content types that are served as static files by the Web server.	Edit X Remove	
Sites	Group by: No Grouping	Help	
🗄 🏀 Default Web Site	Extension MIME Type Entry Type	Online Help	
⊡ ⊡ aspnet_dien	.wmd application/x-ms-wmd Inherited	on the help	
	.wmf application/x-msmet Inherited		
	.wml text/vnd.wap.wml Inherited		
	.wmlc application/vnd.wa Inherited		
	.wmls text/vnd.wap.wmls Inherited		
	.wmlsc application/vnd.wa Inherited		
	.wmp video/x-ms-wmp Inherited		
	.wmv video/x-ms-wmv Inherited		
	.wmx video/x-ms-wmx Inherited		
	application/x-ms-winz and the		
	.woff application/x-woff Local		
	.wps		
	.wri application/x-mswrite Inherited		
	.wrl x-world/x-vrml Inherited		
	.wrz x-world/x-vrml Inherited		
	.wsdl text/xml Inherited		
	.wvx video/x-ms-wvx Inherited		
	.x application/directx Inherited		
	.xaf x-world/x-vrml Inherited		
	Features View		
Configuration: 'Default Web Site' w	eb.config	¶.:	

3.19 Once these settings are complete, run the Relius Administration Component and Web installations **logged on as the authenticated "Web User"** according to the installation and configuration instructions. The settings will propagate to the web sites that will henceforth be created.

Special notes regarding migrating to a new server from an existing one:

Generally, all customized text and layout are stored in the Oracle database. When a Web installation is run, the DefaultText.XML file is imported into the default text stored in the database. The custom text is not changed. That can only be done from a Relius Administration workstation.

In testing Relius Web installations, certification servers have from three to five sites, each with different colors and some with custom "login graphics." The custom text continues to carry forward while the default text is imported into each site. At no time is a client's custom text affected. Here are the tested areas, specifically spelled out:

- \Graphics\Login folder original files are replaced to ensure that they are carried forward and not overwritten by the graphics supplied by SunGard Relius. However, when migrating to a new server, these files will have to be manually copied to the new server.
- **Colors** each site that is set to a different color scheme than the default will have to be set in a new server, as this change is made at the web server and not the workstation.
- **Custom text** sites that have customized text are identified within the Relius Administration front end by showing up in the customization tool as RED in the tree. Therefore, custom text is not affected as it is stored in the database.

If a client has either failed to migrate their custom graphics when moving to a new server or if they have made changes to their text, any customization will appear to have been "lost."

SunGard Relius strongly encourages you to export your database with each new release before proceeding. As a precaution, you can also export your custom text from the Relius Administration workstation before upgrading from one version to the next.

4 **Performing the Relius Administration 20.0 Web/VRU/CSR** Installation

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 2008 R2 Standard or Enterprise for VRU Servers. Any other operating system (such as Web or Datacenter edition) is not valid or supported.
- b) Relius Administration 20.0 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 Relius cannot be held responsible for the integrity of your data or servers.
- f) Unless otherwise noted, all activity is conducted from the server(s) being upgraded.
- 4.1 Ensure you have run the Relius Administration Component Install DVD.Download the self-extracting installation program from the SunGard Relius FTP Site (<u>http://www.relius.net/</u>) and copy it to an easily accessed location, preferably a local drive on each server. *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.
- 4.3 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.
- 4.4 Re-start the computer. Windows or other programs may have locked some files that need to be overwritten during the upgrade process.
- 4.5 Web Servers: IIS must be running for a successful installation.

- 4.6 **VRU Servers:** Open Control Panel. Double click "Services." If Electronic Workforce is not started, start the service before running the installation. **Edify must be "up" for a successful installation.**
- 4.7 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.

4.8 Click *Start*, then *Run* and type **D:\Temp\ReliusAdminWebVruCsr20.exe** in the command box, then click *OK*.

🖅 Run	×
	Type the name of a program, folder, document, or Internet resource, and Windows will open it for you.
Open:	D:\Temp\ReliusAdminWebVruCsr20.exe
	OK Cancel <u>B</u> rowse

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



4.10 The Relius Administration 20.0 Web/VRU/CSR Installation "Welcome" screen appears. Click *Next* to continue. Upgrade installations will skip to Step 4.16.



4.11 New installations will prompt for the ClientID. Enter the six-character ClientID provided by SunGard Relius and click *Next*.



4.12 New installations will be prompted for the location of the program files. The default is C:\Program Files (x86)\Relius\Admin for 64-bit systems. When you have entered your desired path, click *Next*.



4.13 New web installations will be prompted for the path of the first web site that will be created. The default is C:\InetPub\WWWRoot\ReliusWeb.



4.14 New web installations will be prompted for the virtual directory name of the first web site that will be created. The default is ReliusWeb.



- 4.15 New installations for Web will skip to Step 5.1. New installations for VRU will skip to Step 6.1.
- 4.16 If you have already installed this release, 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 update, such as troubleshooting and maintenance, or at the recommendation of Support.



4.17 At this point, the installation will proceed according to your server's configuration. Web installations continue with Section 5. VRU installations continue with Section 6.

5 Web/CSR Installation Specifics

5.1 Internet Information Services will stop automatically. Windows may take some time to stop IIS under the installation. Do not interrupt the process.



5.2 Files will copy to your server.



5.3 **Servers upgrading from version 19.0 or higher:** Before each web site directory is updated, you will be asked to back it up. SunGard Relius encourages a backup of each directory to preserve any customization that may need to be restored.



Steps 5.4 through 5.8 are for new installations. Upgrade users should skip forward to Step 5.9.

5.4 You will be prompted to select an Application Pool. The default is ReliusWeb. You must use the "Web_User" account that was generated in Section 3. Be sure to enter the username and password precisely and click *Save Identity*. Then click *Select* after the identity was properly saved.

🛃 Applicat	ion Pool		
Pools:	ReliusWeb	_	<u>N</u> ew
Impersor Usernam Password If using a be format	ation Identity	ame should Save <u>I</u>	dentity
	Status	X	
	Identity saved		
	ОК		

5.5 New installations will be prompted for the location and name of the first web site. The fields will be populated with the location and name you were prompted for in Steps 4.13 and 4.14. When finished, click *Create Virtual Directory*.

🔡 Configure Virtu		
Virtual Dir Alias	ReliusWeb	
Directory	C:\inetpub\wwwroot\ReliusWeb	Browse
Create Virtual	Directory	

5.6 Please note that with the enhanced security measures taking place at version 20.0, you will need to set your database connection strings. For each database on each web site, you will be required to set the "Administrator's" user name (default sysadm) and password, as well as the "User's" user name (default pngwin) and password. When you have entered each user name and password, you should test the connection. When all connections are successful, you may click *OK* to resume configuration.

🗙 Connection Info				×
Database name:	RADB			
Database alias:	RADB			
	Username	Password		
Administrator:			Test	
User:		•••••	Test	
Enter administrator and user connection information and test the connection. Press OK to create connection.				
		<u>O</u> K	<u>C</u> ancel	

5.7 You may be prompted for the web site's URL. The format should be http://<name of server>/<virtual directory name>. Click *Save*.

🛃 Website URL		
Enter internal URL:	http://localhost/reliusweb	
		<u>S</u> ave

5.8 If no default text exists for that particular web site (or it is outdated), you will be prompted to import new text. Click *Yes*. If you are licensed for multilingual web, you may be prompted a second time.

English Default Text Import	X
The English default text in the database appears to be older than the one available for this web site. Would you like to import English default text at this time?	
<u>Y</u> es <u>N</u> o	

5.9 Relius Administration Web/CSR 20.0 will configure its settings and update the applications.



5.10 Important note for upgraded systems: If your Web server is using the "default" application pool, you will receive this warning. The default is not properly configured to run the Relius Admin Web application. See Appendix A for instructions on changing the application pool of existing sites.



5.11 When finished, you may need to reboot the server. Be certain that "Yes, I want to restart my computer now" is selected. Click Finish. Continue with Section 7.



6 VRU Installation Specifics

Note: Before this installation can continue, Edify VRUs will need to be configured with EVIP 13. Refer to the EVIP 13 Preparation document for more information.

6.1 Existing Edify applications will first uninstall.



6.2 Files will copy to your server.

Relius Administration Setup		×
Setup Status		
	Relius Administration is configuring your new software installation.	
	Installing C:\ewfapps\Fund Rate\agent.jdx	
InstallShield	Cancel	

6.3 Relius Administration 20.0 VRU will configure its settings.



6.4 The new Edify applications will install, configure, and submit job requests. You may see "DOS" windows flash in the background. This is normal and expected. Do not interrupt.



6.5 When finished, you may need to reboot the server. Be certain that "Yes, I want to restart *my computer now*" is selected. Click *Finish*. Continue with Section 7.

Relius Administration Setup	
	InstallShield Wizard Complete Setup has finished installing Relius Administration on your computer.
	 Yes, I want to restart my computer now. No, I will restart my computer later. Remove any disks from their drives, and then click Finish to complete setup.
InstallShield	< Back Finish Cancel

7 Setting Up Initial Web Configurations

Most of the Steps in this Section are intended for first-time setup on a Web server. Upgraded systems will only need to verify their settings.

After installing Relius Administration 20.0 Web/CSR, you will need to initialize the options, which are now stored in the database. The "Web Options" and "Web Utilities" files no longer exist on Web servers.

- 7.1 If action was taken in Step 4.3, restore the icons or shortcuts that were temporarily removed. Restart any services that were temporarily set to "Manual" and if necessary place them back in "Automatic" mode.
- 7.2 To configure your settings, Click *Start | Programs | Relius | Admin | Web Configuration*. Your Configuration program will look like what you see below. **Note: This program will run "as administrator."**

🗙 Web Configuration		
<u>File</u> <u>W</u> eb Site		
E- Applications c:\inetpub\wwwroot\reliusweb		
	Directory C. viretpub www.ool. veilusweb	
	URL: http://localhost/reliusweb	
	Version: 20.0 0 Web site: default web site	
	Virtual directory: reliusweb	
	Application pool: ReliusWeb	<u>C</u> onfigure
	Redirect SSL	Build
	Database Database name: RADB Set Debug settings Debug directory: Debug ID: View application objects ReliusConnect det	Browse
	Support user ID: quanweb0548	
	Reports	
	Root report directory: Browse	Reports

- 7.3 To review or change the settings of a site, choose one of the "Applications" listed on the left side of the Configuration window.
- 7.4 To create an additional web site, click *File | New | Web Site* to create one. Choose the location of your web site files and click *OK*. The default for Web is C:\InetPub\WWWRoot\Reliusweb.

Br	owse For Folder	×
		-
	AdminScripts	
	🕀 📗 custerr	
	🕀 🎒 history	
	🕀 퉲 logs	
	🕀 퉲 temp	
	🗆 퉬 www.root	
	🕀 퉬 aspnet_dient	
	🗉 퉲 ReliusWeb	
	🖂 📙 Orade	
	Make New Folder OK Cano	e

7.5 You will be prompted to select an Application Pool. The default is ReliusWeb. You must use the "Web_User" account that was generated in Section 3. Be sure to enter the username and password precisely and click *Save Identity*. Then click *Select*.

	Application Pool	<u>_ </u>
	Pools: ReliusWeb	<u>N</u> ew
Γ	Impersonation Identity	
	Username:	
	Password:	
	If using a domain account, username should be formatted domain\username	untity.
	Save Ine	anuty
		Cancel

7.6 New installations will be prompted for the location and name of the first web site. Ideally, the virtual directory name should match the physical directory name. For example, ReliusWeb and C:\InetPub\WWWRoot\Reliusweb. When finished, click *Create Virtual Directory*.

🔛 Configure Virt	ual Directory	
Virtual Dir Alias	ReliusWeb	
Directory	C:\inetpub\www.root\ReliusWeb	Browse
Create Virtua	I Directory	
		li.

7.7 Please note that with the enhanced security measures taking place at version 20.0, you will need to set your database connection strings. For each database on each web site, you will be required to set the "Administrator's" user name (default sysadm) and password, as well as the "User's" user name (default pngwin) and password. When you have entered each user name and password, you should test the connection. When all connections are successful, you may click *OK* to resume configuration.

🗙 Connection Info				x
Database name:	RADB			
Database alias:	RADB			
	Username	Password		
Administrator:			Test	
User:			Test	
Enter administrator ar connection. Press O	nd user connecti K to create conne	on information and t ection.	test the	
		<u>O</u> K	<u>C</u> ancel	

7.8 You may be prompted for the web site's URL. The format should be http://<name of server>/<virtual directory name>. Click *Save*.

🖶 Website URL		
Enter internal URL:	http://localhost/reliusweb	
		<u>S</u> ave

7.9 If no default text exists for that particular web site (or it is outdated), you will be prompted to import new text. Click *Yes*. If you are licensed for multilingual web, you may be prompted a second time.

English Default Text Import	×
The English default text in the database appears to be older than the one available for this web site. Would you like to import English default text at this time?	
<u></u>	

- 7.10 Make the changes appropriate to your particular settings. Each description must be unique. Be sure to include a full address in the URL field.
- 7.11 Click *File / Save*.



7.12 Repeat this process for each "Application" on each Web server.

8 Setting Up Security Profiles and Web Settings

The Steps in this Section will need to be followed by both upgrade and new systems. Security profiles in Relius Administration are constantly fine-tuned. Therefore, you will need to adjust or verify your profiles. The default for new and adjusted profiles is "No Access." To enable a user for certain modules, you must adjust the security profiles.

All tasks in this Section must be performed at a Relius Administration workstation.

8.1 Open Relius Administration and sign on as a user with rights to System Administration. From the main menu, click *Utilities | System Administration | System Administrator Update*.

🖳 System Administrator Update						
File Edit View Help						
CitivePlans Ucensing Security Profiles B System Users	Plan ID	\$ Year End Date	\$ Plan Name	\$ Program	\$ User Name	\$

8.2 From the System Administration menu, click the "Security Profiles" tree. Double click the profile you wish to edit. Change the level of security (specifically, checking "Customer Service Module," "VRU Options," "Web Menu Customization," "Web Messages Customization," "Web Options," and any other settings you deem appropriate for that profile) to your desired settings and click *Modify*. Repeat this process for each security profile you wish to change.

Profile name: 1		
View only:		
Function	Level	
System Administration	Full access	·
System ID Changes	Full access	
Table Entry	Full access	
Transaction Approval	Full access 🗸 🗸	
Transaction Entry	Full access	
Transaction Posting	Full access	
Transaction Reversal	Without audit - No trade restrictions	
Trust Processing	Full access	
Trust Specifications	Full access	
User Defined Field Labels	Full access	
Vested Balance Calc Basis - User Modifiable	Yes	
Voice/Web Setup	Full access	
Voice/Web Maintenance	Full access	
VRU Options	Full access	
w/eb Database Utilities	Full access	
Web Menu Customization	Full access	
Web Messages Customization	Full access	
Web Options	Full access	
Web Screen Style Customization	View only No access	
Web Text Customization		•

8.3 From the Relius Administration Main Menu, click *Utilities | VRU / Web Administration | Web Options*. Select the site you want to edit from the drop-down and click *Load*.



8.4 Make any necessary changes to your site. Be sure to click *Save* to retain your changes.

Web Options	
Web Display Security Transaction History Payroll R	emittance Mobile and Relius Connect
Setup Web site timeout (minutes): Demo ID for web: 121030303 Demo password: 0303	 Use Straight Through Processing Disable login Allow only specified file types to be uploaded via the web
Maximum upload file size in kilobytes: 0 Number of logins before clearing state tables: 20 Use application memory	GIF.JPG.JPEG.TIFF.TIF.BMF Edit File Types Allow only specified file types for claim attachments to be uploaded via the web
Show multilingual options	GIF,JPG,JPEG,TIFF,TIF,BMF Edit <u>File Types</u>
Disabled login text The system is currently down for maintenance. Please	e check back later.
Web site options.xml file loaded.	4 7
Select site: reliusweb	✓ Load Help Save Exit

8.5 **Special note for mobile web usage: If you are using Mobile Web and Relius Connect features, you must enable it at the workstation level.** There is no longer the need to change the CONFIG files on the web server. On the "Mobile and Relius Connect" tab, select your options and click *Save*.

Relius	Connect Configuration		
🔽 E	nable WEBBINFILES Service		
	Кеу	Value	
1	Employee list (rows)	10000	
2	Employee data (rows)	10000	
3	Custom table selection (rows)	10000	
4	Transaction list (rows)	10000	
5	Transaction history (rows)	10000	
6	Trade history (rows)	10000	
7	Payment history (rows)	10000	
8	Participant web data (rows)	10000	
9	Fee data (rows)	10000	
10	ReportWriter data (rows)	10000	
11	Compliance test data (rows)	10000	
.12	sould de searcheanna	10000	
•			•

8.6 To change your custom text, click *Utilities | VRU / Web Administration | Web Customization | Text/Language* from the Relius Administration Main Menu. You will be asked to choose which site's custom text you wish to edit.

🖳 Se	elect Web Site			X
Sele	ect web site:			
	Description	Virtual Directo	Web Site	URL 🔺
	3	3	DEFAULT WEB SITE	http://localhost/3
	1	1	DEFAULT WEB SITE	http://certweb/1
	reliusweb	RELIUSWEB	DEFAULT WEB SITE	http://certweb2008/reliuswe
	2	2	DEFAULT WEB SITE	http://certweb/2
	racsrweb	RACSRWEB	DEFAULT WEB SITE	http://certweb/racsrweb
•				Þ
				<u>S</u> elect <u>C</u> ancel

8.7 Using "tree branch" browsing, select the text you wish to customize. When you have finished, click *File | Save*, then *File | Exit*.

istom Plan Default	Current site: http://certweb2008/reliusweb	Bastan Count Bastan All
Contribution Information	Current plan: None selected	Restore Current Restore All
Contributions	Eul province when applicable	
Contributions - Deferral Calculator	Full preview when applicable Show section location	
Create Form		
Create Report		
CSR Call History	Your Web Site Text	
CSR Close Call		
庄 CSR Login		
E CSR Quick View		
Data Validation Center		
Delete Web/VRU Transactions		
DER Process Upload		
Direct Deposit		
Dividend Pass-through		
Edit Dependents		
Edit Personal Information		
Ee Search		, , , , , , , , , , , , , , , , , , ,
Enrollment Steps		
Enrollment Steps - Beneficiaries	Your Web Site Text	
Enrollment Steps - Contributions		
- Enrollment Steps - Dependents		
Enrollment Steps - Elections		
+ Enrollment Steps - Personal Info.		
- General ASP Messages		
ACCESSBLOCKED1		
- ACCESSBLOCKED2		
BANNEROVERRIDE		
COPYRIGHTNOTICE		
DEMOUSERALERT		
EMPLOYERNOACCESS		
LEFTBANNERLOGO		
LOGINFAILED		
NOPLANS		
REPOSTALERT		
RIGHTBANNERLOGO		
SESSIONCLEARED		
TIMEOUT		
WEBSITETITLE		
H- General Information		
4 11		

8.8 You can change your "Logo" on the top of your web site by adjusting the settings in *Custom Text | General ASP Messages | LeftBannerLogo*. To eliminate the logo on the right, adjust the settings in *Custom Text | General ASP Messages | LeftBannerLogo* and change the file name listed therein to transparent.gif.

9 Special Instructions for Web Servers Running DVC

Relius Administration Data Validation Center (DVC) will not function when accessed via a Web server that does not have SSL installed. While this is not something that should impact a production system, there is the potential for this to be an issue with test servers and sites.

Warning: This information is only required for test installations where SSL is not installed. These modifications should not be made to a productions web site.

- 9.1. Locate the Web.Config file on the Web Server. Default is C:\InetPub\WWWRoot\ReliusWeb\Web.Config.
- 9.2. Open the file in Notepad or other text editor (Note: You will need to run it "as administrator" to be able to save the file after making appropriate edits).
- 9.3. Edit the file to remove the highlighted lines:

<services>

<endpoint address="webHttp" behaviorConfiguration="webHttp"
binding="webHttpBinding" bindingConfiguration="webHttpBinding1"
contract="Relius.Admin.Web.WebServices.DVC.IInterface" />

<endpoint address="webHttps" behaviorConfiguration="webHttp"
binding="webHttpBinding" bindingConfiguration="webHttpBinding3"
contract="Relius.Admin.Web.WebServices.DVC.IInterface" />

</service>

<endpoint address="webHttp" behaviorConfiguration="webHttp"
binding="webHttpBinding" bindingConfiguration="webHttpBinding2"
contract="Relius.Admin.Web.WebServices.DVC.IDVCUpload" />

<endpoint address="webHttps" behaviorConfiguration="webHttp"
binding="webHttpBinding" bindingConfiguration="webHttpBinding4"
contract="Relius.Admin.Web.WebServices.DVC.IDVCUpload" />

</service>

9.4. Repeat these steps for any additional test sites on the same test server.

10 Special Instructions for VRUs Running VOIP

Due to the voice file formats used for VRU systems running Voice over IP (VOIP), a different "job" will need to be manually installed to record and play back custom voice clips.

- 10.1 Download the specialized VOIP job (QtechVOIP.ecb) from our web site to your hard drive. For the purposes of this document, **E:\Temp** will be used.
- 🎊 Workforce Administrator Eile Edit View Tools Favorites Window Help D 🔏 🛍 🖻 🐛 🖓 🂸 L 🖻 🐹 🖴 📍 CiscolCMSS B Electronic Workforce 💶 🗆 🎽 Application Obje... 💶 🗖 🗙 AgentSS0 COMSS0 CTCLIENTSS DatabaseSS0 ImageS + -8 题 **%** 给 STATUS UP STATUS STATUS UP STATUS STATUS DISABLEI STATUS Acct Menu Answei ALERT: ALERT: ALERT: ALERT: ALERT: ALERT: # Availat 4 # Availat # Availat 4 # Availat Π # Availat n # Availat 鑰 鑰 # In Use ¥ In Use In Use # In Use In Use # In Use 🔳 _____ # Down # Down # Down 0 #Down 0 # Down # Down 0 0 0 0 R NTDLLSS NTDLLSS WEBSSO SOAPClientSS0 TELEPHONYSS0 NTCommandSS Terminal AP INDUSS SOAPClientSSO TELEPHONYSSO Terminal Application Object Folders Balances CEB P 獪 쏊 STATUS STATUS STATUS STATUS STATUS STATUS UP ALERT: ALERT: ALERT: ALERT: ALERT: ALERT: Confirmation Contribution: Application Object rolders Core Application Deve Relius # Avai 8 ≇ In Use # In Us 鑰 鑰 # Down # Down # Down # Down E 💼 Toolboxes Does Clip Exis Elections 🚓 System Toolbox System is currently UP 鑰 쏊 Subsystem \ 🔊 💪 🛃 🎖 🗸 + -Resource Summary -Fund Rate Gen Info # In Calls **ail** Total # Lines # Down Lines 쏊 獪 0 0 Config Editor Get Balance Data Loans ही # Out Calls Total # In Calls Total # Out Calls 鑰 뛂 DB Access п n п Menu **A** Av Out Call Time (sec) Av In Call Time (sec) v In Answer Time (sec 籀 Job Viewer n nnn 0 Operator Xfer Pin Change # Eax Sent # Eax Received 獪 獪 Log Viewe n 0 QTECH Message Transfer Counter **ail** 獪 쏊 Resource Name INLINE.000_8 INLINE.001_8 INLINE.002_8 INLINE.003_8
 Resource State
 Last Action Time

 Online
 06/18/2015 1:59:26 PM

 Online
 06/18/2015 1:59:26 PM
 Reports ApplicationObject; JobID; TrnID; . Withdray Transfers **all** Online Online Online LINE.000_8 06/18/2015 1:59:26 PM Workforce LINE.001_8 LINE.002_8 06/18/2015 1:59:26 PM 06/18/2015 1:59:26 PM Annlicati... • F • Local node For Help, press F1
- 10.2 With Edify "up," open the "Relius" application object window.

10.3 Right click the "QTECH Message" job and choose "Courtesy Uninstall."



- 10.4 When the little "man" has been removed from the job, right click it again, and choose "Delete." The corresponding desk and chair will disappear.
- 10.5 From the Edify main menu, click *Tools / Restore Application*. You will be prompted for the location of the downloaded file. Double-click it.

Open Edify archive					×
Computer	★ Data (E:) ★ Temp ★	•	🖌 🚱 Search Temp		2
Organize 🔻 New folder				-	
🛧 Eavorites	Name	Date modified 👻	Туре	Size	
Nesktop	QTechVOIP.ecb	4/28/2015 1:15 PM	ECB File	473	КВ
📕 Downloads	I Old Stuff	6/18/2015 2:06 PM	File folder		
📃 Recent Places) SelfReg	2/24/2015 2:25 PM	File folder		
🚍 Libraries					
Documents					
🌙 Music					
E Pictures					
Videos					
Computer					
Local Disk (C;)					
👝 Data (E:)					
C on RELJAXLTANE					
P D on RELJAXLTANE					
File <u>n</u>	ame:		Edify archives (*.ecb)	-
			<u>O</u> pen	Car	ncel

10.6 In the "Restore Application" window, click the top check box, and then click Restore.

Restore application - E:\Temp\QT	ech¥0	IP.ecb		
	Ver.	Rev.	Last modified	
🖃 🗹 🕤 All applications				
•			•	
Applications Additional fil	es	Mess	ages	
Check All				
Archive description:				-
			<u> </u>	1
			-	1
Application destination directory —				-
C:\ewfapps\			•	
Hestore with file path				
🗖 No prompts	Destau		Canad Hala	1
	nestore		Caricei Help	1

10.7 When the application has been successfully restored, click Close.

store application -	E:\Temp\QTeo	h¥OIP.e	cb	
QTECH Message] QTECH Message] RECH Message] RECH Message] Restored [Relus] QT	hrases:/Default// hrases:/Default// hrases:/Default// hrases:/Default// hrases:/Default// hrases:/Default// hrases:/Default// hrases:/Default// hrases:/Default// hrases:/Default// hrases:/Default// hrases:/Default// hrases:/Default// hrases:/Default// hrases:/Default//	TCore\D TCore\D TCore\D TCore\D TCore\D TCore\D TCore\D TCore\D TCore\D TCore\D TCore\D TCore\D phrase.wr [Relius] (efault_MX10. efault_MX11. efault_MX12. efault_MX2.w efault_MX2.w efault_MX3.w efault_MX4.w efault_MX4.w efault_MX6.w efault_MX5.w efault_MX8.w efault_MX8.w efault_MX8.w	Way Away Away Away Away Away Away Away Aw
Restore completed a	t 06/18/2015 2:0	9:46 PM		
Applications	Additional files	Me	ssages	
<u>Check All</u> <u>U</u> nch	eck All			
Archive description:				
				A
				V
Application destination	n directory			
U:\ewfapps\				<u> </u>
Additional file destina	tion directory			
N				
Hestore with hie p	ath			
No prompts			·····	
Erompto	<u>B</u> e	estre	Close	Help

10.8 Right click the newly restored QTECH Message job and choose "Install." The "man" will appear at the desk.



10.9 You will now be able to record and play custom voice clips.

11 Testing the Servers

11.1 Workstations accessing CSR must have Microsoft Internet Explorer 8.0 or higher. Please note that earlier versions of Internet Explorer are no longer supported.



11.2 Web servers can now be set to use the same "site" for both Web and CSR – <u>http://yourweb/reliusweb/csr.aspx</u>. You may have to adjust IIS at the Web Server by adding Csr.aspx to the ReliusWeb Virtual Directory's settings and placing it second only to Default.aspx.

RELIUSWEB Properties	? ×			
Virtual Directory Documents Directory Security HTTP Headers Custom Errors				
Enable default content page				
default.aspx Add Csr.aspx default.asp default.htm Remove Default.aspx				
Move <u>Up</u> Mo <u>v</u> e Down				
Enable document footer				
Append an HTML formatted footer to every document your Web server returns.				
Browse				
OK Cancel Apply Help				

11.3 Log on to the Web/CSR Server using the URL assigned to it (i.e., <u>http://yourweb/reliusweb/</u>) or call your VRU. Enter a test UserID and Password. For troubleshooting, please call Support at 1-800-326-7235, Option 3.

Note: If during Participant or Plan Sponsor web login an error is given (e.g., "An error occurred on the server"), open Web Options from a Relius Administration workstation, uncheck "use application memory," save your settings, re-check "use application memory," and save the settings once more.

11.4 Special note regarding Intranet addresses: If you are accessing your Web or CSR site via Intranet (internal corporate internet), you may receive an error requiring Internet Explorer 8 or higher – even when IE8 or higher is already running. To remedy this, double-click the "Local Intranet" piece of the status bar of IE. Click the "Sites" button. Uncheck all boxes. Hit OK. Refresh the page.



Appendix A Adjusting Application Pools

A.1 Open Relius Web Configuration (*Start | Programs | Relius | Admin | Web Configuration*). If your system is using the "default" application pool (identified below), you will need to change the settings.

🗙 Web Configuration				-D×
<u>F</u> ile <u>W</u> eb Site				
Applications	Description:	racsrweb		
c:\inetpub\wwwroot\2	Directory	c:\inetpub\wwwroot\racsrweb		
c:\inetpub\wwwroot\racsrweb	URL:	http://localhost/racsrweb		
	Version:	18.0 0.0 Web site:	default web site	
		Virtual directory:	acsrweb	
		Application pool:	DefaultAppPool	<u>C</u> onfigure

A.2 Click "Configure." Change the drop-down from DefaultAppPool to ReliusWeb (or the Application Pool you established in Section 3). Enter the "web user" account credentials. Then click "Save Identity."

Application Pool	Application Pool
Pools: DefaultAppPool <u>N</u> ew	Pools: ReliusWeb
Impersonation Identity Username: Password: If using a domain account, username should be formatted domain\username Save Identity	Impersonation Identity Username: web_user Password: If using a domain account, username should be formatted domain\username
<u>S</u> elect <u>Cancel</u>	Select Cancel

A.3 After the Identity has been saved, click "Select." Then, from the main menu, click *File* / *Save*. Repeat these steps for each web site that is using DefaultAppPool.



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